

A photograph of two women jogging on a paved path in a park-like setting. Both women are wearing face coverings: the woman on the left has a grey one, and the woman on the right has a purple one. They are both wearing athletic gear, including long-sleeved tops and leggings. The woman on the right is also carrying a red jacket tied around her waist and holding a smartphone. The background shows trees and a grassy area. In the top left corner, there are diagonal teal and blue graphic elements.

Navigating the pandemic: understanding human behaviors and where we're headed

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How brands can help consumers navigate the path to restoration

Read more about the coronavirus continuum, and what the path back to normal might look like.

An Ipsos Point of View by

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As the coronavirus pandemic continues to play out, an information gap is becoming increasingly evident. Governments are tracking the disease with case reports and economic models. But that lacks an understanding of people and behavior—their psychological journey. Without understanding the consumer mindset, leaders risk underestimating how their strategies and actions will shape how people will react now and in the future. This is true for brands, as well.

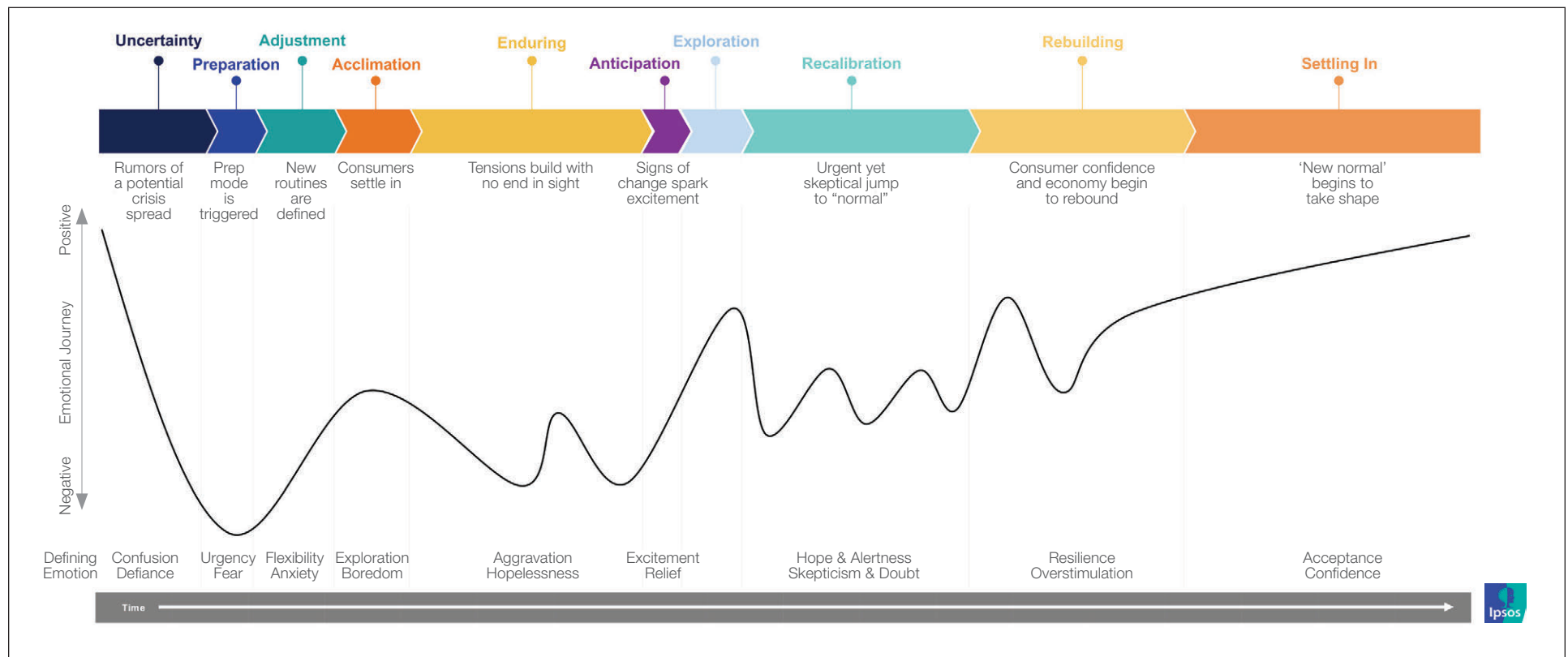
How do we map the events occurring to the actions people take to the way they are feeling and ultimately how they will act? It's clear that we're only in the initial climb of the emotional rollercoaster that will be our world during COVID-19. What is not yet clear is how the rest of the ride will look and how people will pull through it. In other words, what will be their pandemic adaptability and how can brands better anticipate their needs?

The Ipsos Pandemic Adaptability Continuum (IPAC)

We've developed the Ipsos Pandemic Adaptability Continuum as a staging model of consumer changes to map how people are dealing with COVID-19, and to predict where we're headed from lockdown to recovery. It's a guide to understand and anticipate how consumers will feel at each phase of the crisis, and how they're likely to behave.

That could allow companies to develop and time their creative and communications strategies—and innovations—as they plan to engage with customers at different phases of the pandemic.

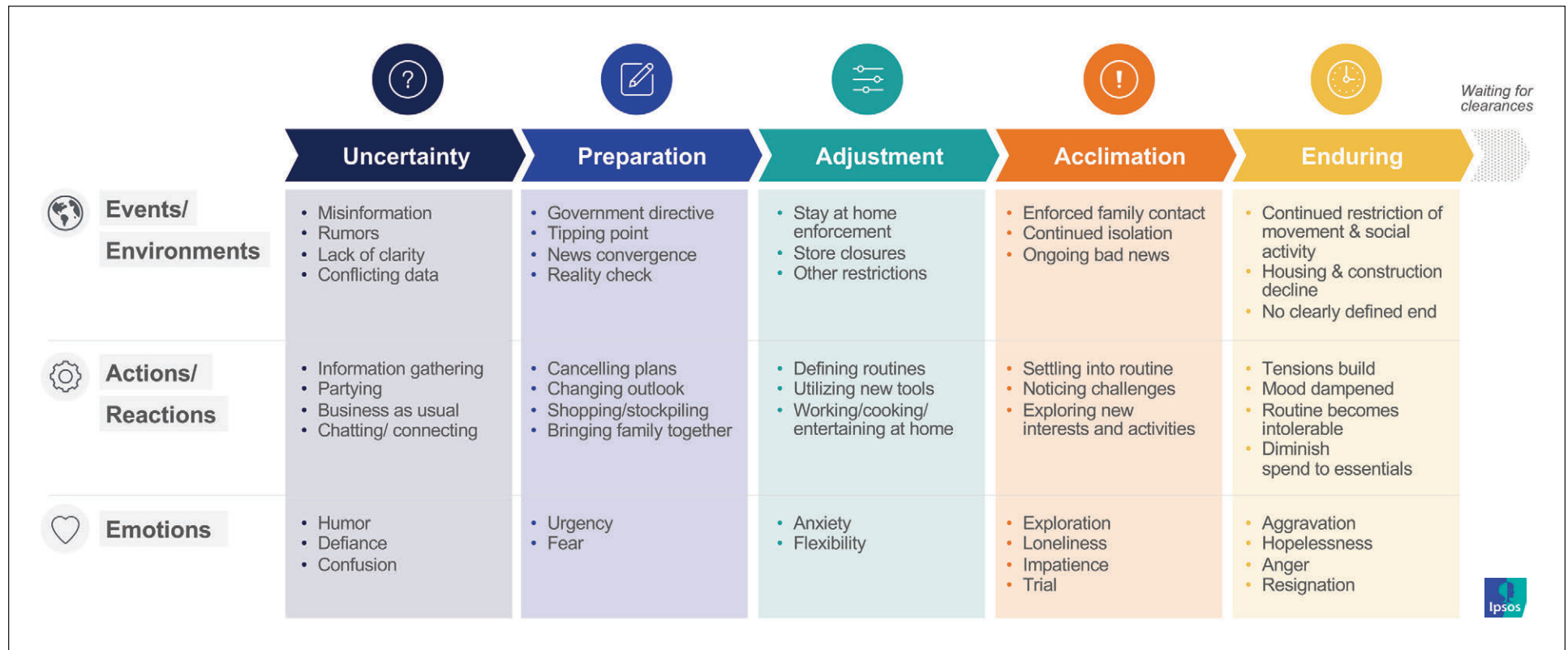
Figure 1: The Ipsos Pandemic Adaptability Continuum (IPAC)



To develop the IPAC model, we used our own qualitative and quantitative research in countries that have been through the initial phases. We combined this with existing psychological and recovery models including the five stages of grief and the WHO pandemic phases to project the future.

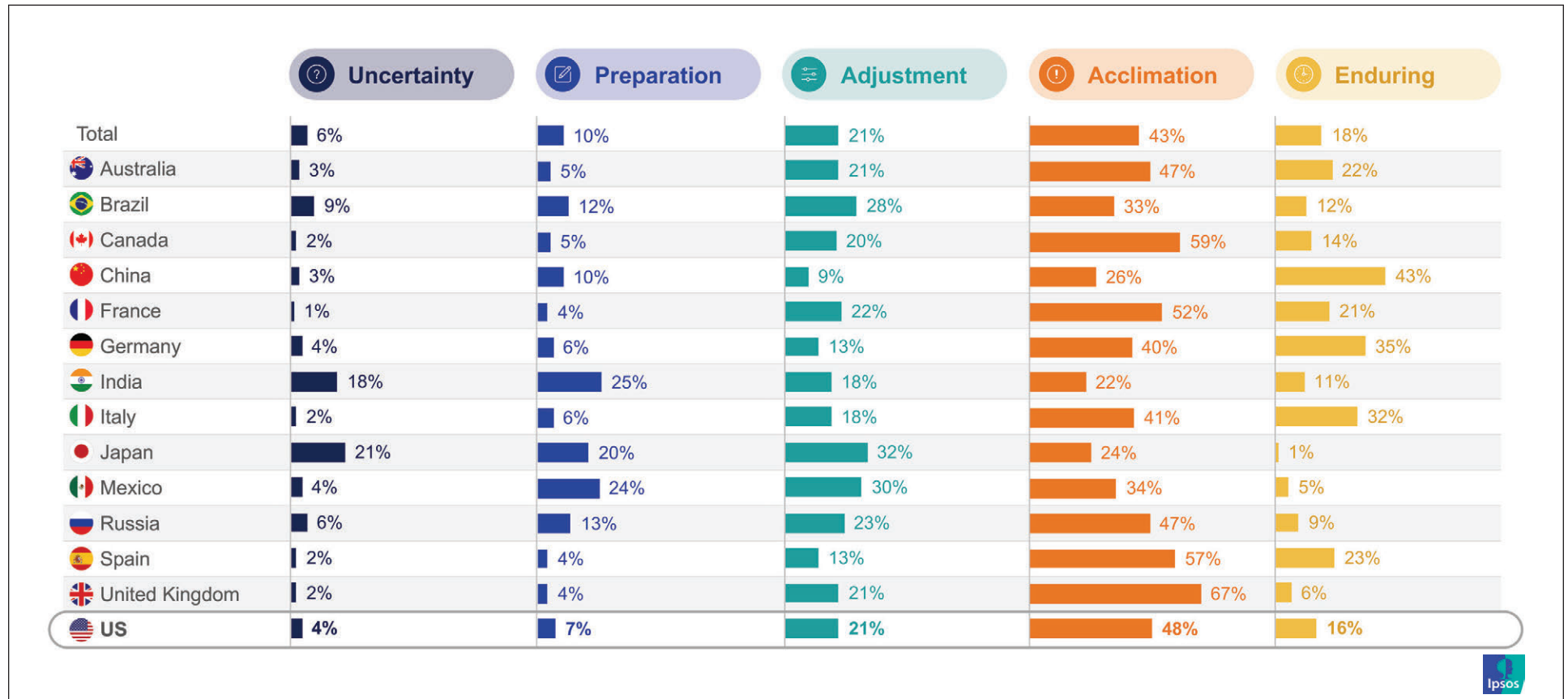
Take a look: Here's what happens in each stage. It includes the environment within the country, the actions people will take in response to the environment, and the range of emotions that people will feel in that phase.

Figure 2: Current IPAC phase details based on in-market findings



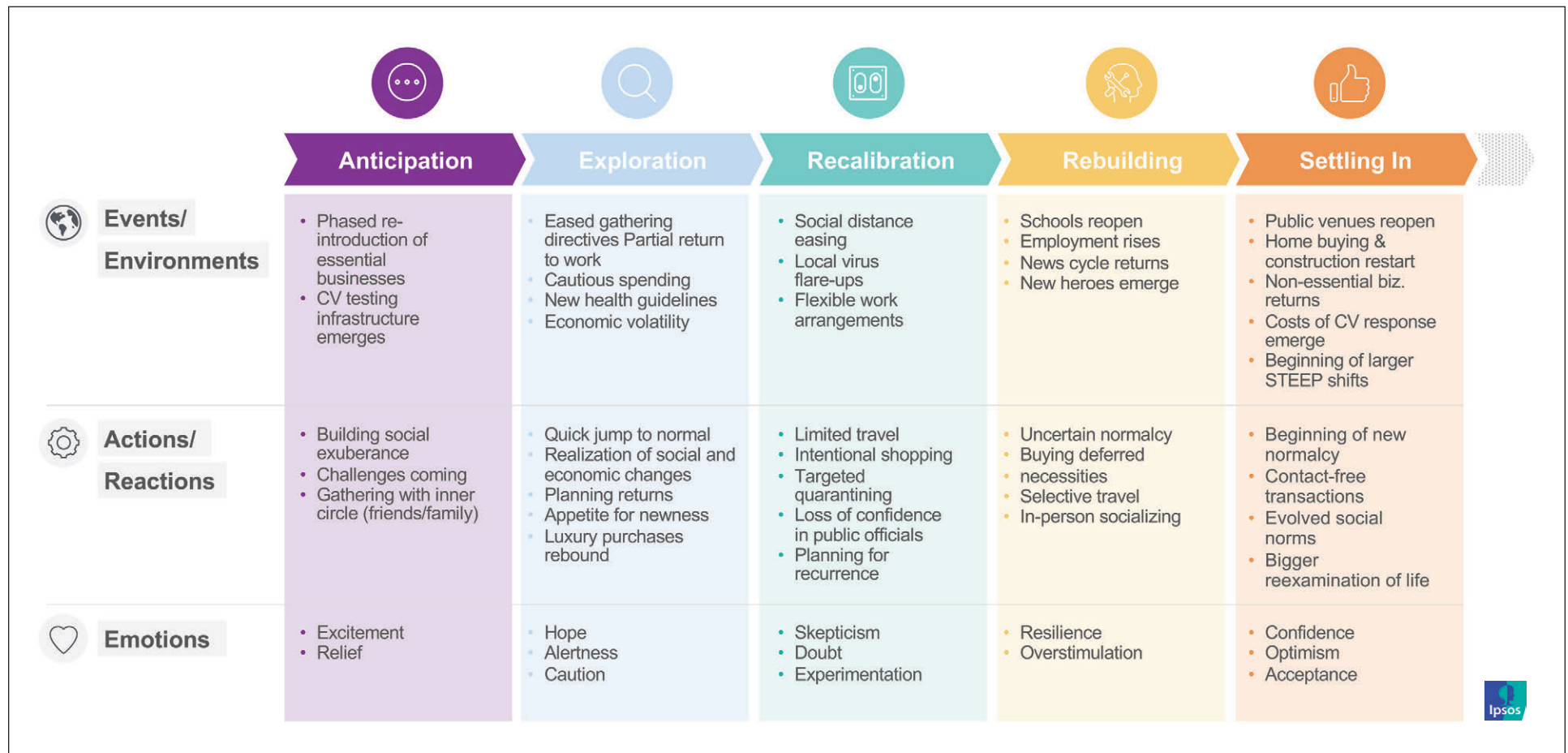
So far, all countries in our survey have started cycling through these initial phases, according to our survey of 28,000 people in 14 countries to see where people place themselves along the continuum:

Figure 3: Different countries are progressing through the stages at different rates



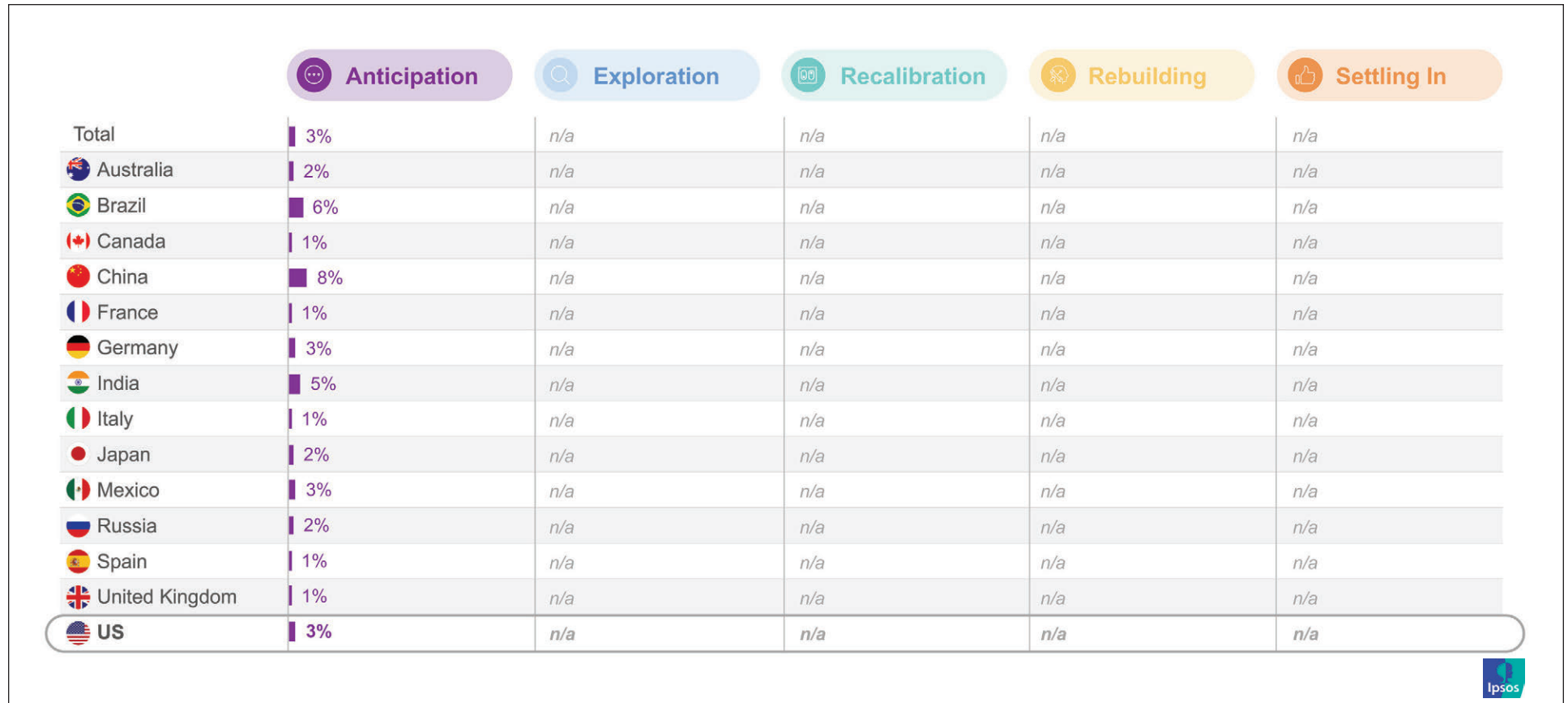
Not surprisingly, we see people from most countries feel they are well into the **Adjustment** and **Acclimation** phases. In countries like China, Italy and Germany, many feel they have moved into the **Enduring** phase.

Figure 4: Projected IPAC phase details



While a few countries are starting to loosen restrictions and reopen their economies, most people feel they have not fully entered into the **Anticipation** phase.

Figure 5: Countries have not yet moved beyond the Anticipation phase

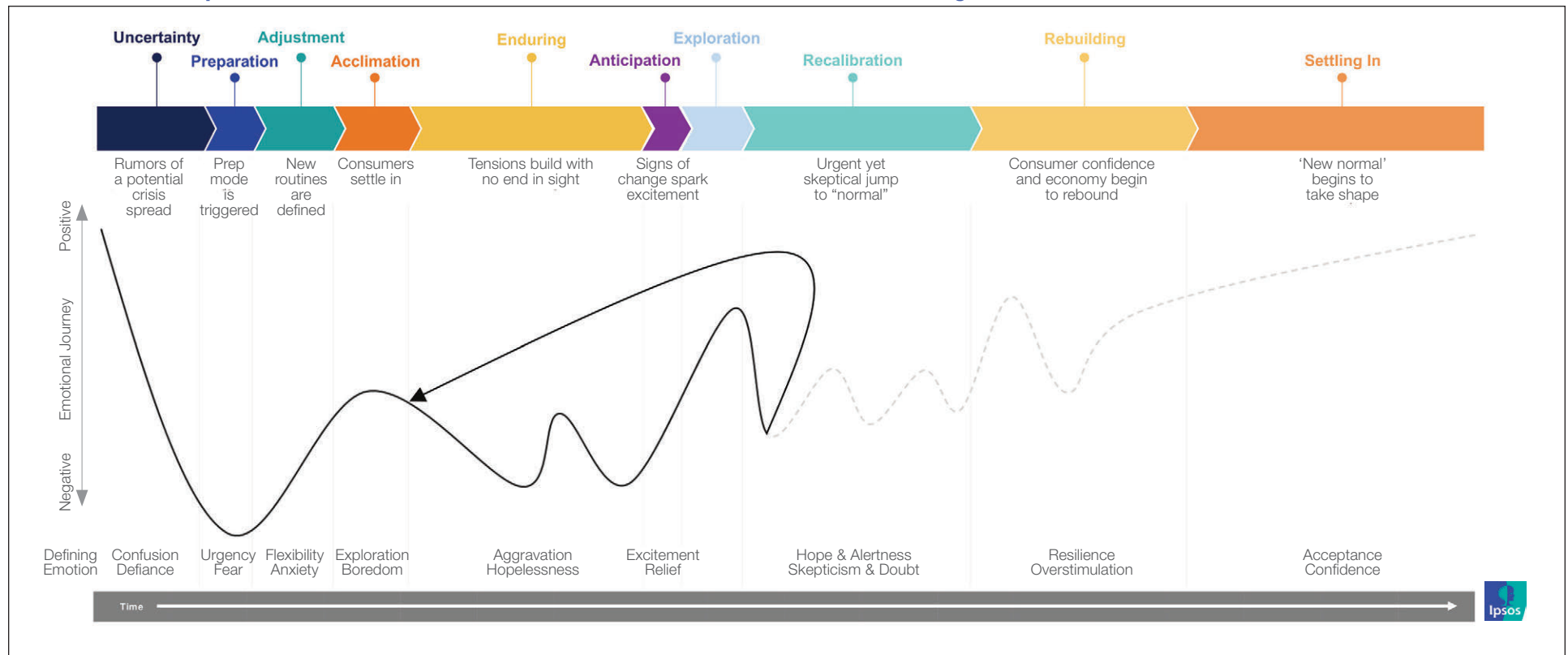


Based on this model, we use proven behavioral science frameworks for emotional and behavioral change to help identify psychological signals of progression or regression of stages. By tuning into these signals, we will be able help you spot societal changes that might affect your category, product or brand earlier. If we start by understanding what people are doing and how they are thinking in the context of the sociocultural and political forces at play, we can gauge where the public is in terms of moving through the phases.

Where this model is most valuable is in mapping events that can change the continuum trajectory toward restoration. The rebuilding phases in each country will depend on the state of each country prior to the pandemic, epidemiological trends of the pandemic, the resources to address those trends, how long the country's economy has been stagnant, and a host of other factors. Each phase will vary in length in each country. Because we know that relapses often occur with pandemics, there are multiple scenarios to consider where a country in one phase may return to a prior phase.

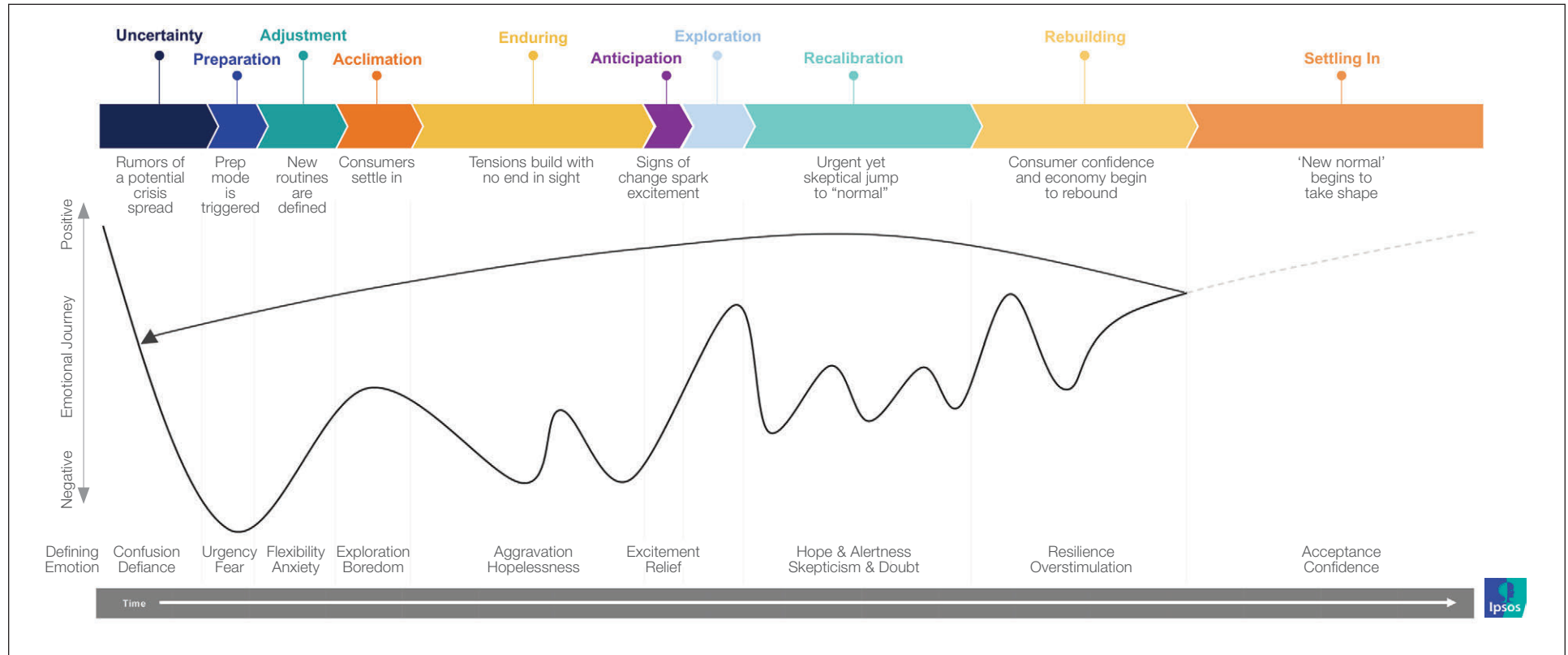
For example, if a country moves to **Recalibration** and triggers a smaller relapse or reversal of a flattened curve occurs, it will send people back into lockdown and into the **Enduring** phase.

Scenario A: An unexpected wave of COVID-19 in Recalibration sends consumers back to Enduring



But if a country is even further along in the **Rebuilding** phase and the virus mutates or returns with a vengeance, that could throw the country back to the **Uncertainty** phase. The whole process would begin anew. Brands can incorporate these contingencies into their marketing and communication plans so they're more prepared and agile.

Scenario B: Significant social unrest in Rebuilding sends consumers back to Uncertainty



Modeling for the 6-Foot Economy

Brands and companies can use the model to inform a number of strategies. One is to optimize the role of digital in shopping in the 6-Foot Economy driven by social distancing. Brands can determine how best to equip their organizations, including staffing and work models, and anticipate behavior changes that will persist in a category.

It also helps companies analyze who within the majority is further behind or ahead through the continuum phases by mental state, means, or environmental factors. Are minorities disproportionately impacted? Are the wealthy further along in the stages than people with lower household income? These contrasts are key to helping companies become genuinely helpful to consumers.

Ultimately, we have been using the continuum to help our clients develop strategies in these three ways:

- To understand the critical phases consumers are in to determine how your business should act in the moment
- To understand the upcoming phases that consumers in your market will enter
- To plan your brand activities to meet your consumers where you expect them to be

We believe that by doing so, companies can boost customer satisfaction and create new brand bonds that will endure in the future.

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About Ipsos

At Ipsos we are passionately curious about people, markets, brands and society. We deliver information and analysis that makes our complex world easier and faster to navigate and inspires our clients to make smarter decisions. With a strong presence in 90 countries, Ipsos employs more than 18,000 people and conducts research programs in more than 100 countries. Founded in France in 1975, Ipsos is controlled and managed by research professionals. www.ipsos.com/en-us