

# ASK ME ANYTHING AUGUST COVID UPDATE

Coronavirus - Canada

 Context Trends – Knowledge Zones

## Behavioural Science to Understand Post-COVID-19 Engagement

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# The Issue

COVID-19 Pandemic biggest behavioural science experiment in history.

Shutdown universal, immediate. Come back will likely be more differentiated based on progress of disease, effectiveness of interventions.

As society and economy eases back from lock-down, what will drive re-engagement?

Ipsos conducted 27 country study where we applied our validated Behavioural Science lens – MAPPS -- in order to diagnose the Key Drivers of...

- Re-engagement in the economy, society
- Participation in COVID-19 mitigation

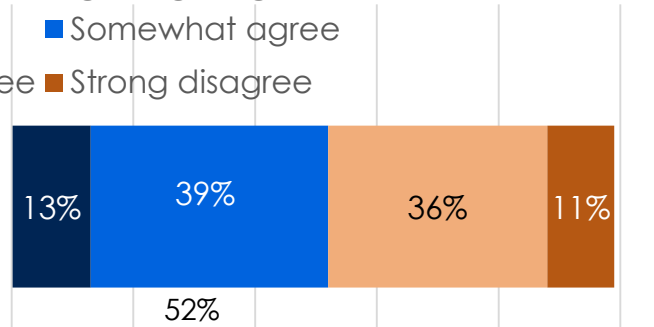
This provides an important starting point and backdrop to any future modelling regarding specific behaviours (i.e., going to a mall, travelling, taking public transit, etc.).

# At a high level, Canadians are split in their comfort re-engaging in economic, social behaviours. They are much more comfortable following mitigation guidelines. Combined, just over four-in-ten are comfortable with both re-engaging and mitigating, while the same number are comfortable with mitigating only.

“As the pandemic subsides, people will resume ‘**regular**’ activities of life they had given up, (such as going out to shop, eat or for entertainment, gathering with other people, traveling, or going back to work or to school).”

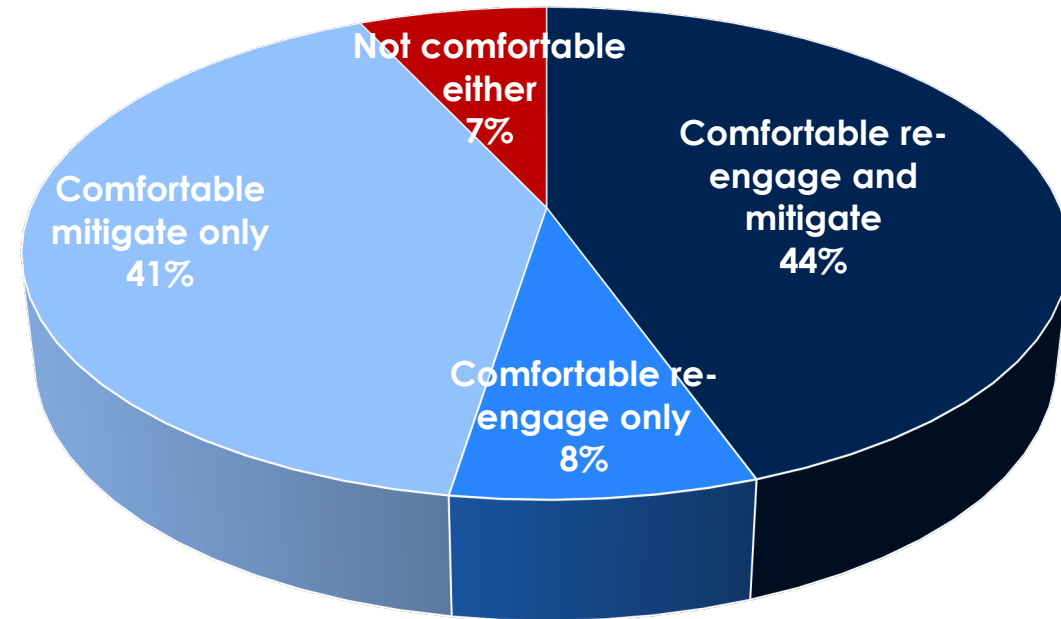
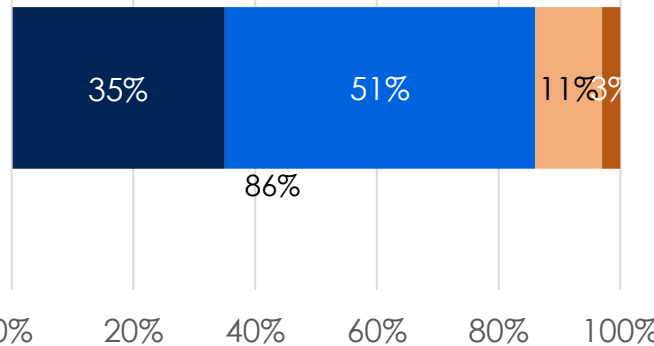
■ Strong agree    ■ Somewhat agree  
■ Somewhat disagree    ■ Strong disagree

I am fully comfortable resuming normal activities

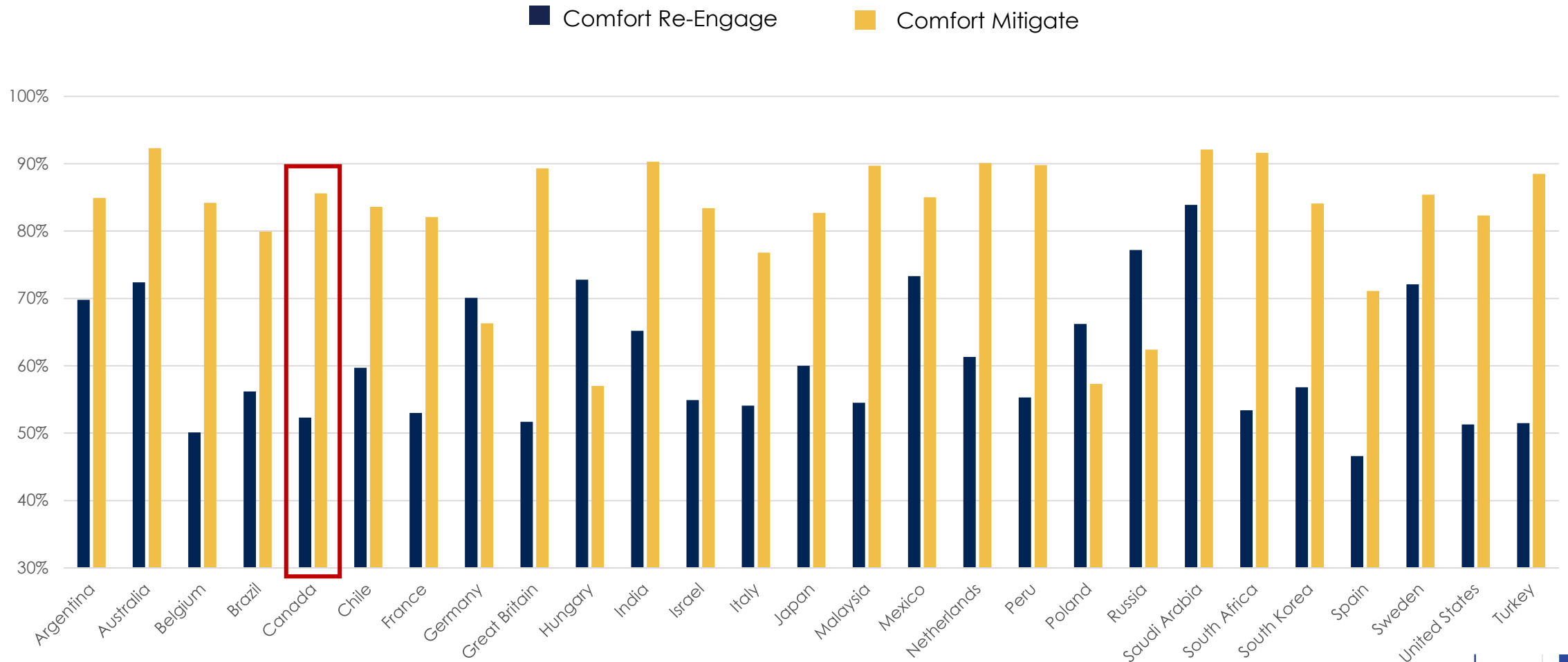


“There are **protective guidelines** for keeping you and others safe from the threat of Coronavirus. Examples include [washing hands, wearing masks, physical distancing, not shaking hands, sneezing or coughing into sleeve, and staying at home].”

I am fully comfortable following these guidelines



Interestingly, in just a handful of countries, Hungary, Russia, Poland and Germany, the overall level of agreement in comfort re-engaging is greater than for mitigation. Countries where there is particular skew to mitigation vs re-engagement are South Africa, Great Britain, Turkey, Malaysia, Peru, Belgium and Canada.



Men, business owners, Prairie and Atlantic residents are most comfortable re-engaging in economic, social behaviours. Boomers, business owners, BC, Quebec and Atlantic residents are most comfortable following guidelines.

	Men	Women	Gen Z/Millennial	Gen X	Boomer	Lower \$	Mid \$	Higher \$	Business Owner
	%	%	%	%	%	%	%	%	%
Comfort...									
Re-engage economy, society	63	42	50	50	55	54	54	56	59
Follow guidelines	84	87	82	84	89	84	87	85	90

	BC	Alberta	Prairies	Ontario	Quebec	Atlantic
	%	%	%	%	%	%
Comfort...						
Re-engage economy, society	54	50	62	52	49	61
Follow guidelines	89	86	80	82	89	92

# Key Observations

Re-engagement and mitigation share three of the same top five drivers:

- Motivation – Outcome expectations -- I do/don't think it will work (Resuming normal activities after the pandemic will likely be safe; Following these protective guidelines helps keep me and others safe)
- Ability – Routines -- It is/is not part of what I usually do (I will be able to resume normal activities after the pandemic by doing what I did before; Following these protective guidelines has become automatic for me)
- Processing – Decision Forces -- How information is processed (Figuring out how to resume normal activities after the pandemic will be simple and easy; I know how to follow these protective guidelines)

Re-engagement and mitigation have two other unique drivers:

- Re-engagement
  - Motivation – Self-Efficacy -- I do/don't feel able to do it (I feel confident about how to resume normal activities after the pandemic)
  - Ability – Capability -- I am/am not able to do it (I know how to resume normal activities after the pandemic)
- Mitigation
  - Motivation – Emotion -- I do/don't feel like doing it (I feel happy about following these protective guidelines)
  - Motivation – Internalization -- I do/don't want to do it (It gives me personal satisfaction to follow these protective guidelines)

# Key Observations

Urgency of pandemic remains high, but potential to re-engage in some behaviours is starting to inch up.

Canadians (like most countries) are much more prepared to participate in mitigation behaviours than re-engaging with the economy, society.

Not driven by usual market factors – supply, demand, price. Even though we want to reengage and many opportunities exist, we continue to stay at home.

New equation: DESIRE – RISK = TIME.

We are not all the same – ready to go, ready to go with knowledge/reassurance, content to wait, truly afraid. Size of each group differs by activity.

“Emotion” drives mitigation, “rational thought” drives re-engagement.

Reengagement requires knowing what experience will LOOK like. Can I control my own safety (I don't trust others); will it be worth it?

What happens before I arrive? How serious is operator about my safety (visual cues)? How can I control my own experience?

Positive experience will lead to lead to repeat behavior, adjacent trial.

Understanding the role of masks.