

IPSOS ESSENTIALS

Tracking consumer attitudes and behavior
in a time of crisis

Phase 3

Host:

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Presenters:

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GAME CHANGERS



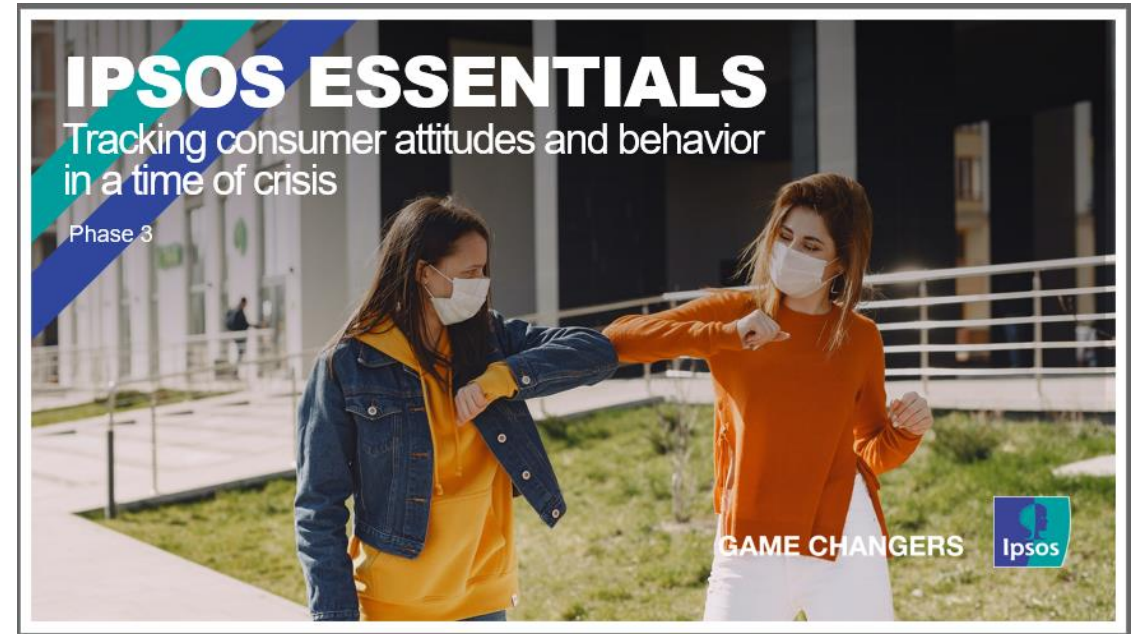
Today's webinar

What we've learnt, and how we stay in touch with the world



CovidWatch: Longitudinal ethnography

30 households in 6 markets, next report in October



Essentials: Quantitative tracking

1,000 interviews in 16 markets, reporting fortnightly

There was a Great Reset, a pause on life, where we relied on instinct and culture



Italy: Martina made pasta... for the first time!



Russia: Gregory dusted off his accordion.

It shone a light on Humanity...



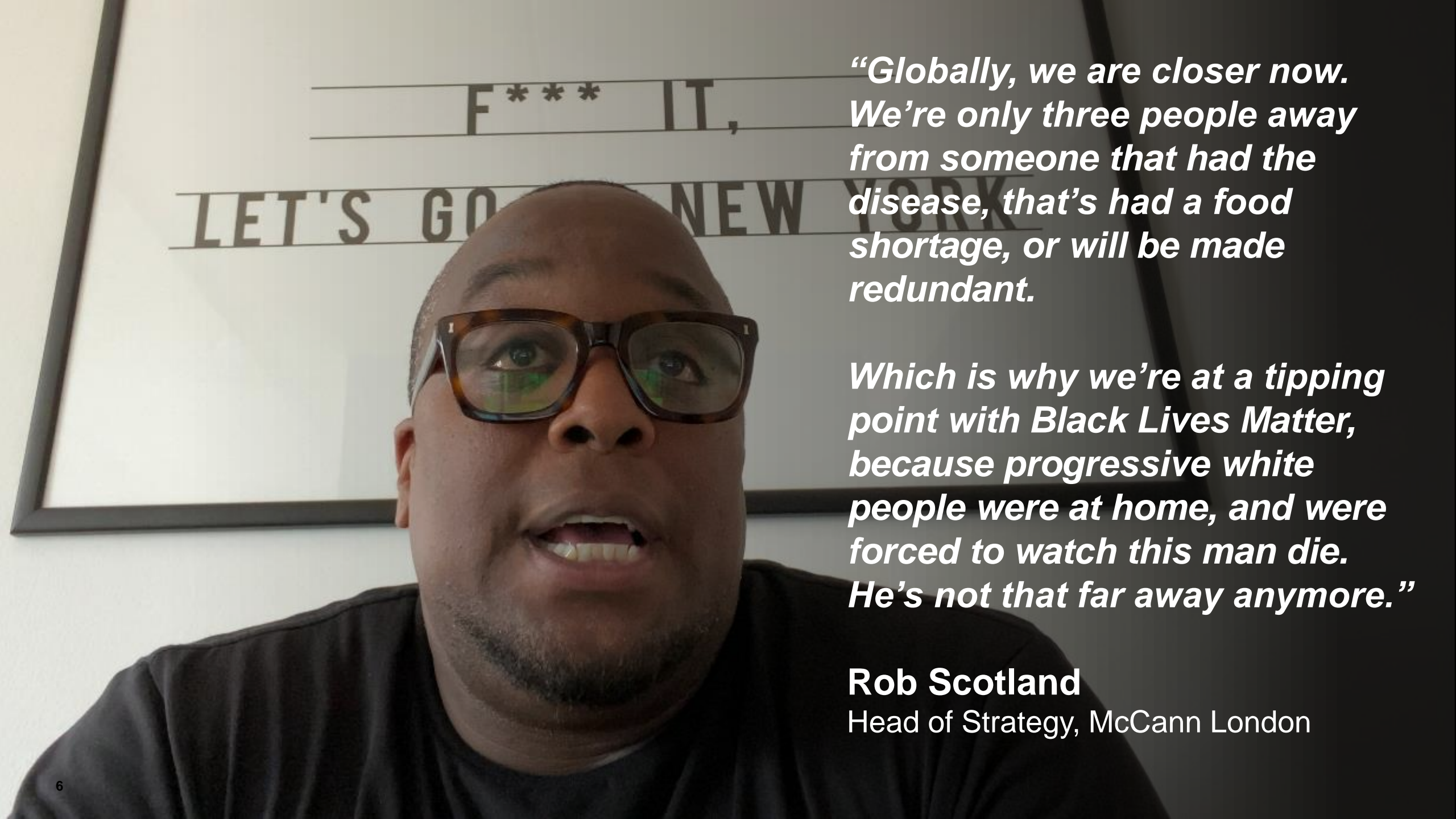
We clapped for carers...



..and wanted to hug our family

..and what can no longer accept





“Globally, we are closer now. We’re only three people away from someone that had the disease, that’s had a food shortage, or will be made redundant.

Which is why we’re at a tipping point with Black Lives Matter, because progressive white people were at home, and were forced to watch this man die. He’s not that far away anymore.”

Rob Scotland

Head of Strategy, McCann London

And as we emerge, we are staring into a new set of routines, a new economic model, based around a new set of values



China were largely ready for an online economy.



In the US, many health and social decisions are politically divided



ESSENTIALS: What is it?

- Fortnightly syndicated tracking of consumer behavior, attitudes and sentiments
- Qualitative deep dives through longitudinal ethnography

Every other week, we connect with 1,000 consumers in: Australia, Brazil, Canada, China, France, Germany, India, Italy, Japan, Mexico*, Russia*, South Africa*, South Korea, Spain, United Kingdom, and the USA

3 things
you need
to know

A woman with dark hair tied back, wearing a white turtleneck, is seated at a dark wooden table. She is looking down at a tablet device, holding a white stylus. On the table in front of her is a yellow mug and a laptop. In the background, a young boy in a red shirt is sitting on a grey sofa, smiling and looking towards the camera. To the right, another child in a pink shirt is standing with their arms raised, appearing to be in motion. The scene is set in a bright, modern living room with a white wall and a potted plant in the background.

1

**Our crisis is shared,
multidimensional, and in many
ways it is about control**

This is not just a
health crisis...



... or a financial
crisis ...



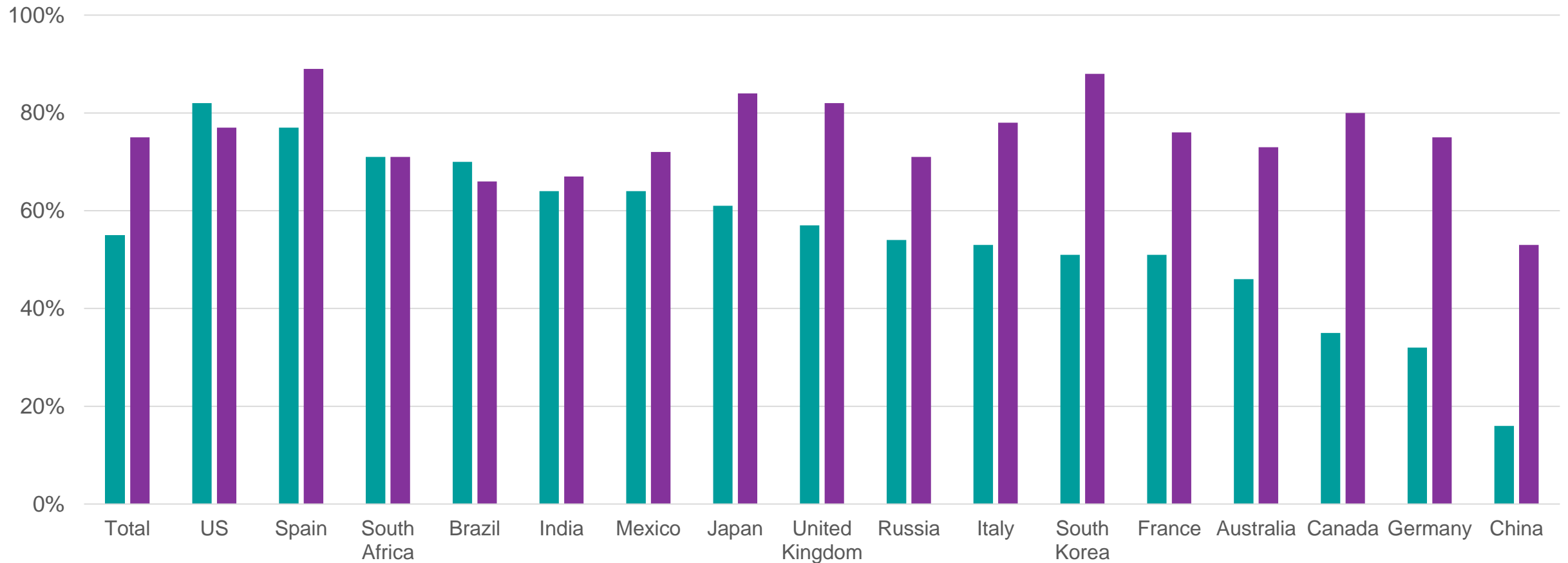


... but rather a control crisis!

Lack of perceived control can induce mental and physical health issues

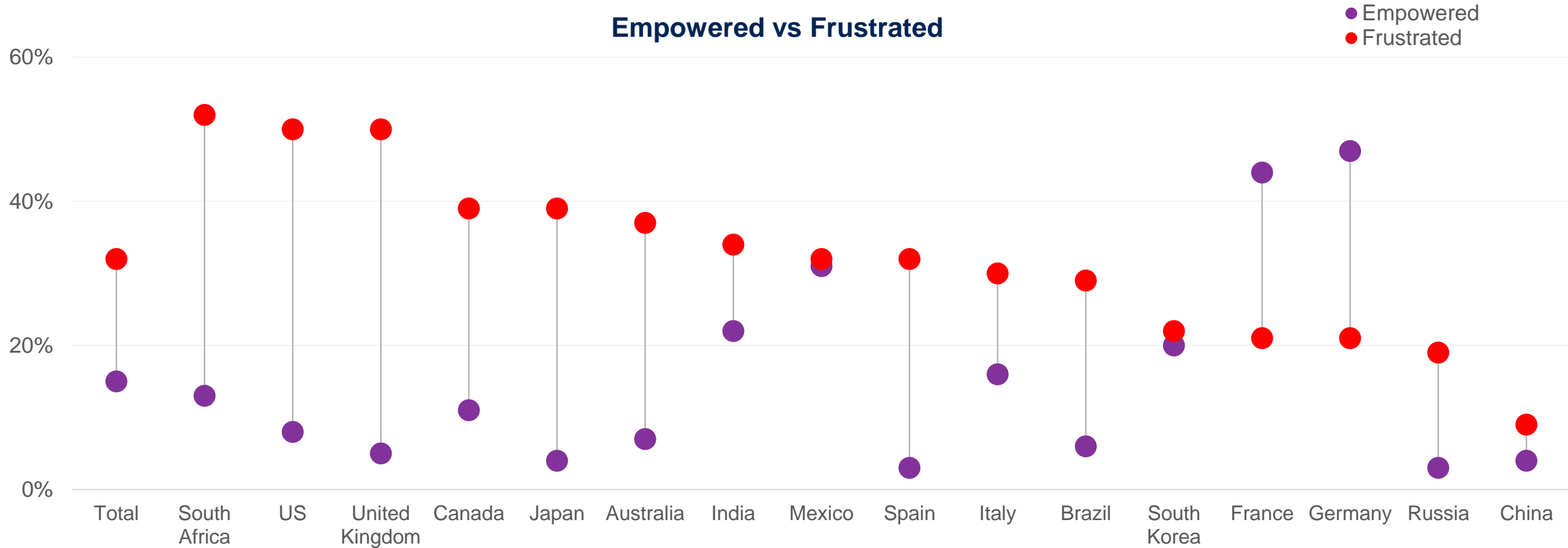
Things are perceived as 'out-of-control' in many countries – especially in the USA - and second wave worries are shared internationally

I feel like things in my country are out of control right now
I think there will be another wave of COVID-19 infections in my country



Q: (T2B Summary) To what extent do you agree or disagree with each of the following? [I feel like things in my country are out of control right now] [I think there will be another wave of COVID-19 infections in my country] (n=14501)

...leading to high frustration and low empowerment

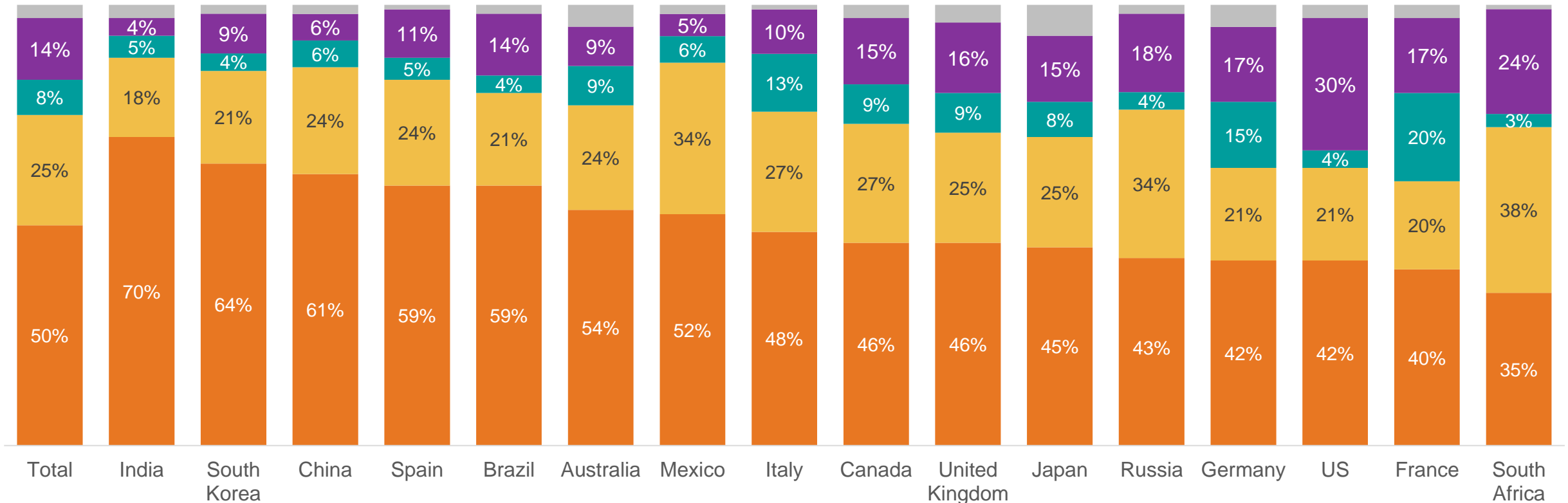


Q: Which of these words describe your state of mind right now? Please select at least 3 and up to a maximum of 8 responses (n=14,518)

U.S. leads in political/social issues as a top concern with both elections and racial tensions top-of-mind for many over the past two weeks

Top Concerns – First Priority

■ COVID-19 / Health
 ■ Economy / Finances
 ■ Environment / Climate
 ■ Political / Social / Inequality
 ■ None



Q: There are a number of challenges we may face today. Which of these concerns you the most? (n=14501)

Q: Of the items remaining, which of these concerns you the most?

Social tensions continue in the USA

Sources of division have expanded to include things like the recognition of national holidays.



*“My daughter commented somewhere saying that she loved 4th July – and well, then of course she’s called a racist and everything else. Somebody yelled out ‘those are the Trump-supporting b****es!’ She’s 13 years old. A lot of it is just pure hate.”*

- Tara, US 



“How would you like to be black for a month? Now you say that you can understand what black people go through, but I would like for you to change places with someone who is black and then have to deal with the situations that they deal with.”

- Jaye, US 



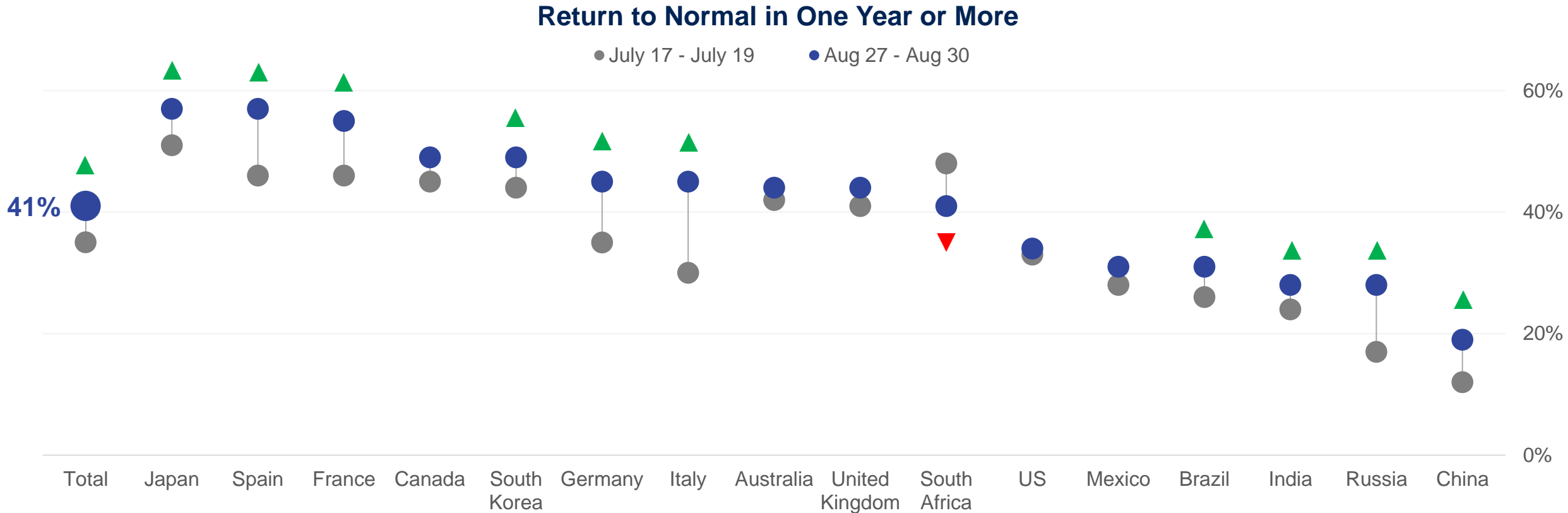
2

The 'no normal'

With fears of a second wave of infections, this will be a long-term issue

For some, the crisis journey may prove to be more elliptical than linear

The outlook on when things will return to normal is extending further and further out into the distance



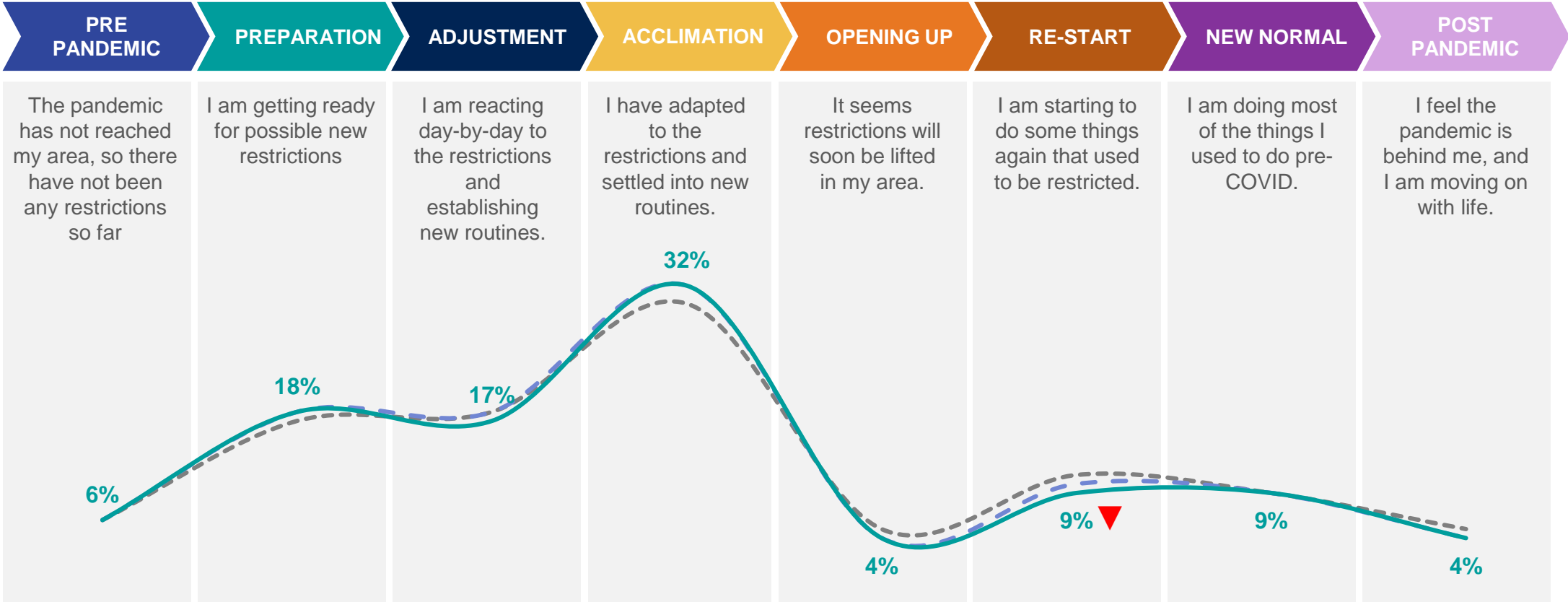
Q: How long do you think it will take before things feel like they are getting back to normal? (n=14501)

▼ or ▲ indicate change vs. previous wave (statistically significant @ 95% C.I.)

Things have....changed

As we proceed through re-entry phases, fear of health events abate - but for many, financial distress remains

Phases: International View



--- Jul 17 - Jul 19 - - - Jul 31 - Aug 2 — Aug 14 - Aug 16

Q. There are often several phases or stages that people go through when times are hard. Which one of the following phases do you feel best describes your current situation regarding the covid-19 pandemic (n=15562)

▼ or ▲ indicate change vs. previous wave (statistically significant @ 95% C.I.)



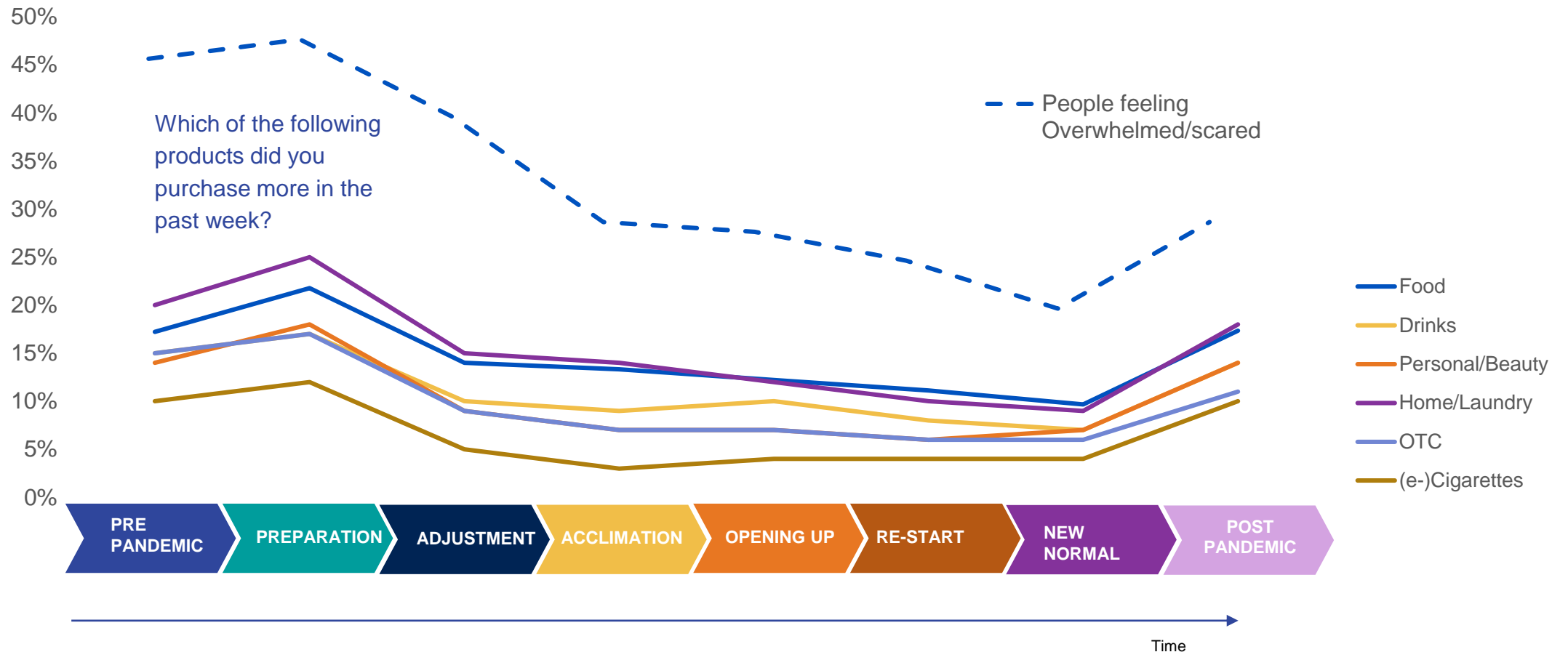
Categories that we measure



Categories	Details
Audio & Electronics	Cell phone/Smartphone, Television, Laptop/Notebook (include 2-in-1 laptops), Gaming console, E-book readers, Smart Watch, High-Quality Headphones (incl Bluetooth), Portable Speakers (with Bluetooth pairing)
Baby products	Baby diapers & wipes, Baby food, Infant Milk Formula
Beauty & Personal care	Deodorant/anti-perspirant, Make-up/cosmetics, Facial Skin care products, Feminine care (e.g. tampons, sanitary napkins, panty liners), Oral care products (e.g. toothpaste, mouthwash, floss), Hair care, Shaving/grooming, Body skincare, Shower gel, Hand sanitizer
Beverages - alcoholic	Beer, Wine, Spirits (e.g whiskey, gin, vodka, tequila)
Beverages - non-alcoholic	Carbonated/fizzy drinks, Coffee or tea, Juice, Sports/Energy/Isotonic drinks, Bottled water (flat or carbonated), Plant based beverages
Dairy products	Cheese & Cream, Yogurt, Milk/milk drinks
Frozen produce	Frozen meat/fish, Frozen Vegetables/Fruit, Frozen snacks/ice cream/frozen desserts
Home care	Cleaning products for kitchen, bathroom, toilet, windows, carpet, Disinfecting/anti-bacterial sprays/soaps, Fabric softeners, Laundry detergent/pre-wash
Medication	Cough & cold/flu/sore throat medication
Sweets & snacks	Candy/sweets, Savory snacks (chips, crisps, pretzels, ...), Chocolate (boxed, bars, tablets), Nutritional bars/snacks
Tobacco products	Cigarettes/ tobacco, E-cigarettes/vapes and other non-combustible nicotine devices
Arts & crafts	Arts & crafts
Baked goods/baking	Bread (incl. pastries, croissants,), Baking products
Canned/non-perishable goods	Cereals, Preserves (Canned or bottled), Pasta/rice
Clothing	Clothing/footwear/accessories, PJs/loungewear/underwear/socks
Cooking ingredients	Cooking ingredients/seasoning, e.g. sauces, premixes, seasoning
Interior decoration	Interior decoration
Milk modifiers	Milk modifiers (chocolate/fruit flavor, protein additives)
Paper products	Paper products (toilet paper, napkins, paper towels, tissues)
Pre-made food	Premade meals (frozen meals/pizza, delivery,), Instant (instant food)
Supplements	Nutritionals/supplements/vitamins/probiotics
Toys & Games	Toys, games

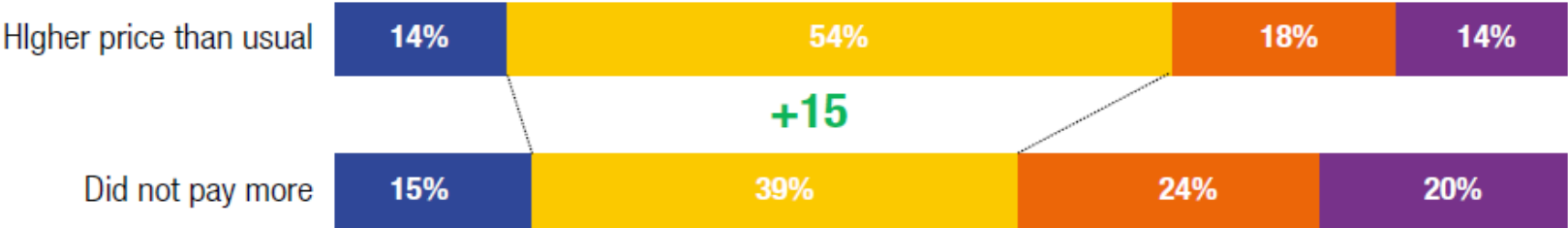
For staples, spikes in fear seem to travel with spikes in behavior

% People that bought more last week

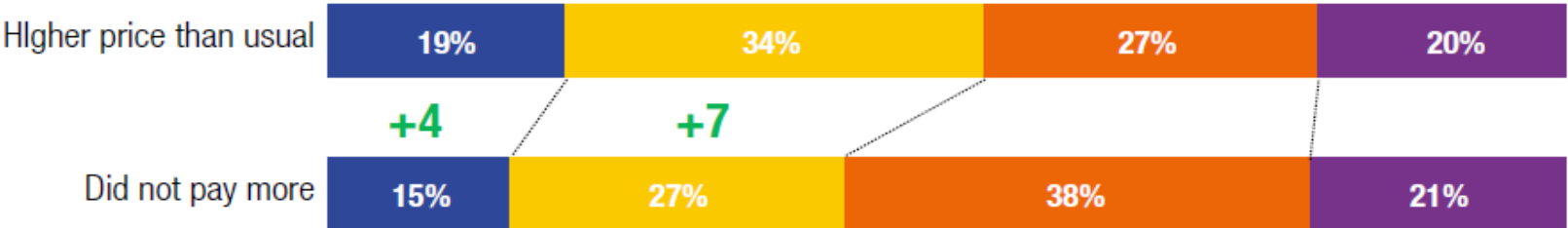


Even in a period of financial distress, consumers are willing to pay more for a treat

Categorization of beer, among people paid more / not more for beer



Categorization of make-up, among people paid more / not more for beauty products



■ Essential ■ Treats ■ Postponable ■ Expendable



3

**The Central Dilemma:
The tension between health & finance**

**We can't use a 'one-size fits all' model to
account for changes in behavior**

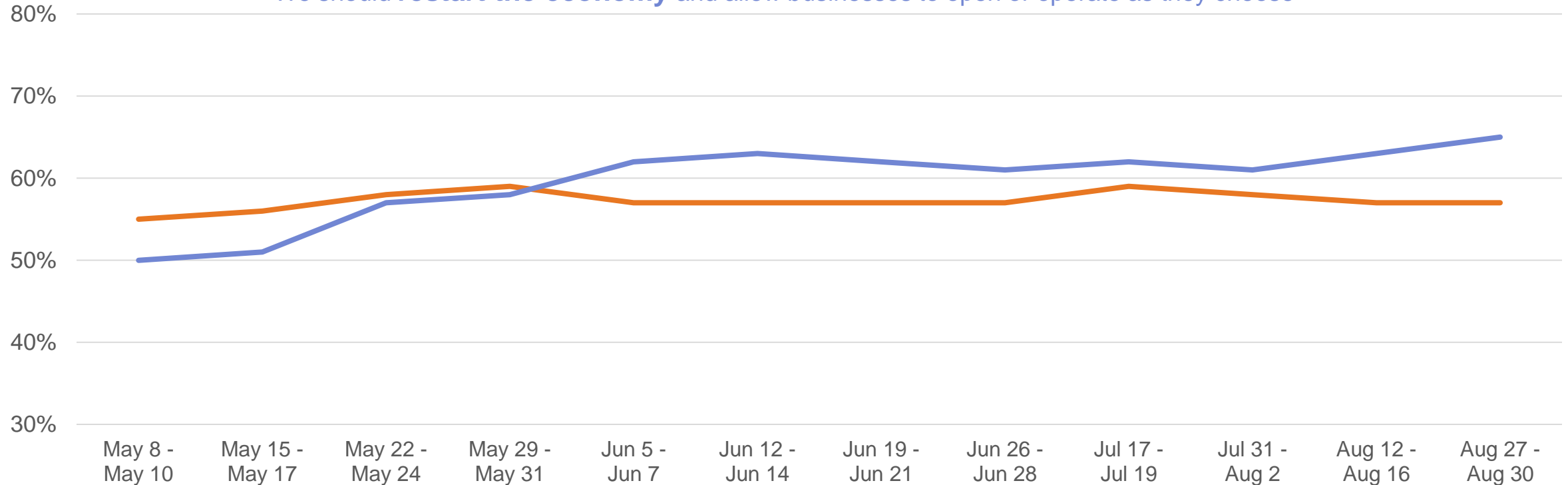
Different consumers, different priorities

A Central Tension

Growing support for reopening the economy comes with high anxiety

Anxiety vs. Economy (Top-2 Box Agreement)

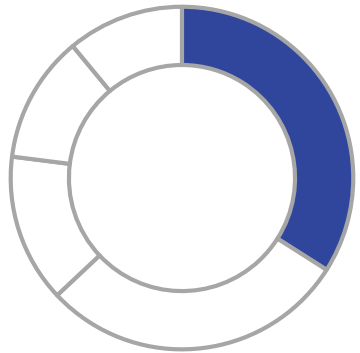
Thinking about resuming normal activities after the pandemic makes me **feel very anxious**
We should **restart the economy** and allow businesses to open or operate as they choose



Q: (T2B Summary) To what extent do you agree or disagree with each of the following [Thinking about resuming normal activities after the pandemic makes me feel very anxious] [We should restart the economy and allow businesses to open or operate as they choose]? (n=14501)

We see 5 different segments across markets, each with different priorities and outlooks about the future

We Can Work It Out



34%

Biggest concern is COVID-19/health, but they are pragmatic – the economy and financial concerns are also top of mind. The personal financial impact is mounting so, many are advocates for restarting the economy and getting back to work.

Get Back



29%

COVID-19/health is **not** a top concern. The focus is on a variety of other socio-economic and political issues. Least supportive of restrictions and monitoring. Looking to restart the economy and for life to get back to normal.

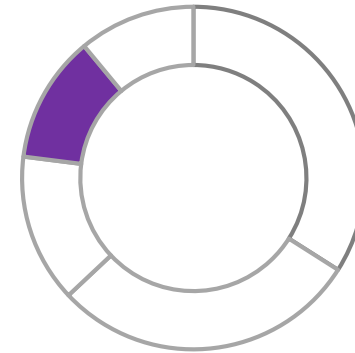
Get Up, Stand Up



14%

The political climate, social unrest and inequality are their top concerns following the COVID-19 pandemic. They are most likely to feel that the country is out of control and to be critical of the government.

Gimme Shelter



12%

The number one concern is COVID-19/health. Elevated concerns about being personally diagnosed. Supports restrictions and monitoring. Anxious about re-opening. The expectation that life will dramatically change even after the pandemic.

Green Day



11%

Top concern is still COVID-19 but also highly concerned with the environment and climate change. This group has the lowest personal financial concerns and are least likely to feel like things are out of control.

3 things to know / implications for brands

1

We've learned a lot about who we are and where our values lie as we deal with a multidimensional control crisis

2

For some, the crisis journey may prove to be more elliptical than linear, with 1Q2021 shaping up as a 'no normal'

3

We can't use a 'one-size fits all' model to account for priorities & changes in behavior

Brands must keep their fingers on the conflicted consumer pulse in this time of profound change. It's never been more important to know their...

- emotional state, priorities, and behavioral adjustments and...**
- offer tone-appropriate messaging & solutions to help them cope when many feel lack of control amplified by unstable surroundings**



What subscribers have to say about Essentials...

“the executive summaries are always super – great every time!”

“The sorting (essentials/treats, etc.) is really interesting”

“This stuff goes to our CEO”

“we have been quite impressed with so much content that goes into the weekly reports.”

“Your work has quite a large and senior readership”

“the program has a global audience, and it’s working very well.”

“The C-suite passionately awaits each report”

“I love the videos – it makes it real”

“The ethno’s are amazing – they tell such a human story”

“each week, we’re like ‘WOW!’”

“It gets distributed very widely”

“...about 800 employees look at the research that we provide each week and **it’s helping several different divisions within the company make strategic decisions”**

“We value it and use it SO much!”

“It’s super rich and super helpful.”

Two servicing models to meet clients needs

Global report

- **16 markets:** 1,000 completes per wave in Australia, Brazil, Canada, China, France, Germany, India, Italy, Japan, South Korea, Spain, United Kingdom, and United States & 500 completes per wave in Mexico, Russia, South Africa
- Fielding bi-weekly Thursday to Sunday
- The report delivered on Thursday of the same week
- Access to Data Liberation dashboard
- Data tables available upon request
- \$10,000 USD per month (covers 2 waves)
- Discount for 4 month subscription at \$36,000

Country report

- Data for one market, with indexes to the global total
- Report released the week following the global report
- Data tables available upon request
- \$2,500 USD per month for Australia, Canada, France, Germany, Japan, South Korea, United Kingdom, United States
- \$1,250 USD per month for Brazil, China, India, Italy, Mexico, South Africa, Spain, Russia

Visit our website: <https://www.ipsos.digital/essentials>

CovidWatch: Next wave is October fieldwork



CovidWatch:

To understand the new normal across the world, Ipsos is running a longitudinal study with 30 households in six countries.

www.covidwatch.ipsos.com



CovidWatch (October)

- Ethnographic interviews with 30 different households in China, Russia, US, UK, France and Italy
- Report to focus on
 - Sentiment in each market, including attitudes to easing lockdown, the economy, and upcoming elections
 - Consumer behaviour change, including which routines and behaviours have stayed from lockdown, and which have gone back to the old normal
- 18 x ethnographic films, from 6 markets
- \$23k for full report and films

Blindsided: trailer



- 25min documentary about what's happened in the last 6 months, and what this means as we head into a recession
- Consumer footage from our CovidWatch programme, show how consumers behaviour has evolved
- Expert interview for in-depth analysis on the pandemic and the upcoming recession
- China, Russia, US, UK, France and Italy
- FREE

<https://www.youtube.com/watch?v=voITAc0LJw>