Today’s webinar

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

Ipsos 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
Our crisis is shared, multidimensional, and in many ways it is about control.
This is not just a health crisis...
… or a financial crisis …
Ipsos Essentials: Amidst a prolonged, multi-dimensional 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.

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

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?

Q: What are the top concerns? (n=14501)

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

Total
India
South Korea
China
Spain
Brazil
Australia
Mexico
Italy
Canada
United Kingdom
Japan
Russia
Germany
US
France
South Africa
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
Ipsos Essentials: Amidst a prolonged, multi-dimensional crisis

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.

Return to Normal in One Year or More

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.)

Total Japan Spain France Canada South Korea Germany Italy Australia United Kingdom South Africa US Mexico Brazil India Russia China

July 17 - July 19 Aug 27 - Aug 30

41% 0% 20% 40% 60%

0% 20% 40% 60%

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**

<table>
<thead>
<tr>
<th>Phase</th>
<th>Description</th>
<th>Jul 17 - Jul 19</th>
<th>Jul 31 - Aug 2</th>
<th>Aug 14 - Aug 16</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRE PANDEMIC</td>
<td>The pandemic has not reached my area, so there have not been any restrictions so far</td>
<td>6%</td>
<td>18%</td>
<td>17%</td>
</tr>
<tr>
<td>PREPARATION</td>
<td>I am getting ready for possible new restrictions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ADJUSTMENT</td>
<td>I am reacting day-by-day to the restrictions and establishing new routines.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ACCLIMATION</td>
<td>I have adapted to the restrictions and settled into new routines.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>OPENING UP</td>
<td>It seems restrictions will soon be lifted in my area.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RE-START</td>
<td>I am starting to do some things again that used to be restricted.</td>
<td>4%</td>
<td>9%</td>
<td></td>
</tr>
<tr>
<td>NEW NORMAL</td>
<td>I am doing most of the things I used to do pre-COVID.</td>
<td>9%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>POST PANDEMIC</td>
<td>I feel the pandemic is behind me, and I am moving on with life.</td>
<td>4%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Categories</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audio &amp; Electronics</td>
<td>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)</td>
</tr>
<tr>
<td>Baby products</td>
<td>Baby diapers &amp; wipes, Baby food, Infant Milk Formula</td>
</tr>
<tr>
<td>Beauty &amp; Personal care</td>
<td>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 skin care, Shower gel, Hand sanitizer</td>
</tr>
<tr>
<td>Beverages - alcoholic</td>
<td>Beer, Wine, Spirits (e.g whiskey, gin, vodka, tequila)</td>
</tr>
<tr>
<td>Beverages - non-alcoholic</td>
<td>Carbonated/fizzy drinks, Coffee or tea, Juice, Sports/Energy/isotonic drinks, Bottled water (flat or carbonated), Plant based beverages</td>
</tr>
<tr>
<td>Dairy products</td>
<td>Cheese &amp; Cream, Yogurt, Milk/milk drinks</td>
</tr>
<tr>
<td>Frozen produce</td>
<td>Frozen meat/fish, Frozen Vegetables/Fruit, Frozen snacks/ice cream/frozen desserts</td>
</tr>
<tr>
<td>Home care</td>
<td>Cleaning products for kitchen, bathroom, toilet, windows, carpet, Disinfecting/anti-bacterial sprays/soaps, Fabric softeners, Laundry detergent/pre-wash</td>
</tr>
<tr>
<td>Medication</td>
<td>Cough &amp; cold/flu/sore throat medication</td>
</tr>
<tr>
<td>Sweets &amp; snacks</td>
<td>Candy/sweets, Savory snacks (chips, crisps, pretzels, ...), Chocolate (boxed, bars, tablets), Nutritional bars/snacks</td>
</tr>
<tr>
<td>Tobacco products</td>
<td>Cigarettes/ tobacco, E-cigarettes/vapes and other non-combustible nicotine devices</td>
</tr>
<tr>
<td>Arts &amp; crafts</td>
<td>Arts &amp; crafts</td>
</tr>
<tr>
<td>Baked goods/baking</td>
<td>Bread (incl. pastries, croissants, ...), Baking products</td>
</tr>
<tr>
<td>Canned/non-perishable goods</td>
<td>Cereals, Preserves (Canned or bottled), Pasta/rice</td>
</tr>
<tr>
<td>Clothing</td>
<td>Clothing/footwear/accessories, PJs/loungewear/underwear/socks</td>
</tr>
<tr>
<td>Cooking ingredients</td>
<td>Cooking ingredients/seasoning, e.g. sauces, premixes, seasoning</td>
</tr>
<tr>
<td>Interior decoration</td>
<td>Interior decoration</td>
</tr>
<tr>
<td>Milk modifiers</td>
<td>Milk modifiers (chocolate/fruit flavor, protein additives)</td>
</tr>
<tr>
<td>Paper products</td>
<td>Paper products (toilet paper, napkins, paper towels, tissues)</td>
</tr>
<tr>
<td>Pre-made food</td>
<td>Premade meals (frozen meals/pizza, delivery, ...), Instants (instant food)</td>
</tr>
<tr>
<td>Supplements</td>
<td>Nutritionals/supplements/vitamins/probiotics</td>
</tr>
<tr>
<td>Toys &amp; Games</td>
<td>Toys, games</td>
</tr>
</tbody>
</table>

Source: Ipsos Global Essentials Report Wave 8, June 25-28
For staples, spikes in fear seem to travel with spikes in behavior.

Which of the following products did you purchase more in the past week?

- **Food**
- **Drinks**
- **Personal/Beauty**
- **Home/Laundry**
- **OTC**
- **(e-)Cigarettes**

People feeling Overwhelmed/scared:

When we overlay those feeling fear at different phases in the COVID journey, the similarity (in the shape of the curves) to the corresponding behavioral adjustments is remarkable.

Those who are financially impacted or threatened report more dynamic purchase intentions as they make adjustments.

PRE PANDEMIC | PREPARATION | ADJUSTMENT | ACCLIMATION | OPENING UP | RE-START | NEW NORMAL | POST PANDEMIC

Time
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:
- Higher price than usual: 14% (Essential), 54% (Treats), 18% (Postponable), 14% (Expendable)
- Did not pay more: 15% (Essential), 39% (Treats), 24% (Postponable), 20% (Expendable)

**Categorization of make-up**, among people paid more / not more for beauty products:
- Higher price than usual: 19% (Essential), 34% (Treats), 27% (Postponable), 20% (Expendable)
- Did not pay more: 15% (Essential), 27% (Treats), 38% (Postponable), 21% (Expendable)
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)

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](https://www.ipsos.digital/essentials)
CovidWatch: Next wave is October fieldwork

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

You could see her going out in the vestibule and just - and I could just get emotional right now -

https://www.youtube.com/watch?v=voITAco0LJw