

IPSOS ESSENTIALS

Tracking consumer attitudes and behavior
in a time of crisis

Phase 3



GAME CHANGERS



This is not just a
health crisis...



... or a financial
crisis ...





... but rather a control crisis!

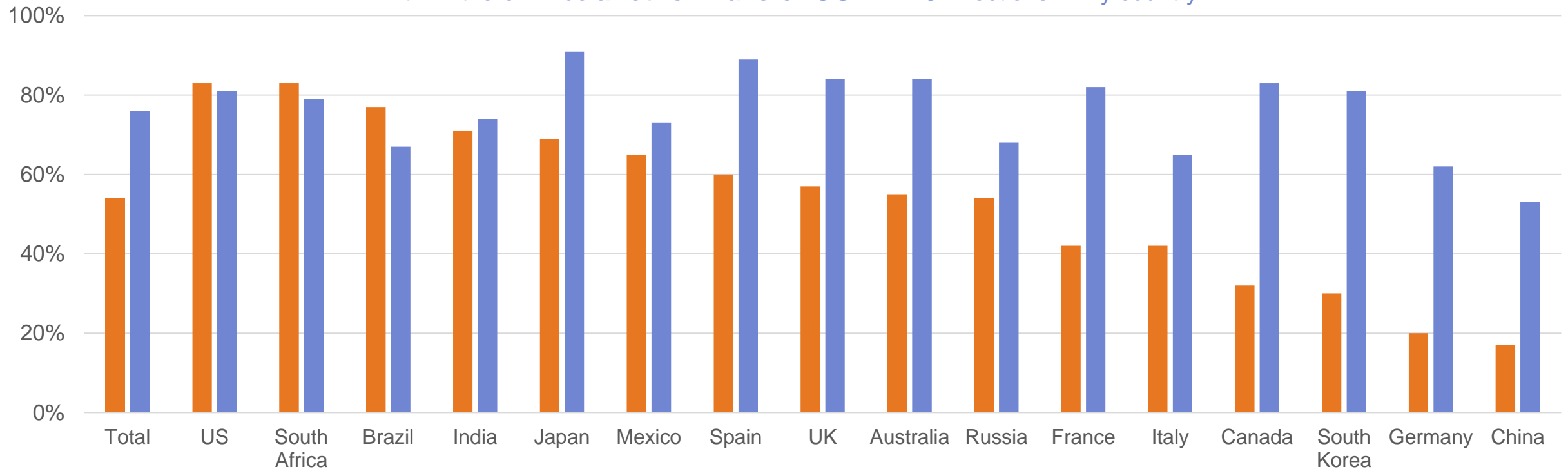
Lack of perceived control can induce mental and physical health issues

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

Loss of Control and Fear of Future Infections (Top-2 Box Agreement)

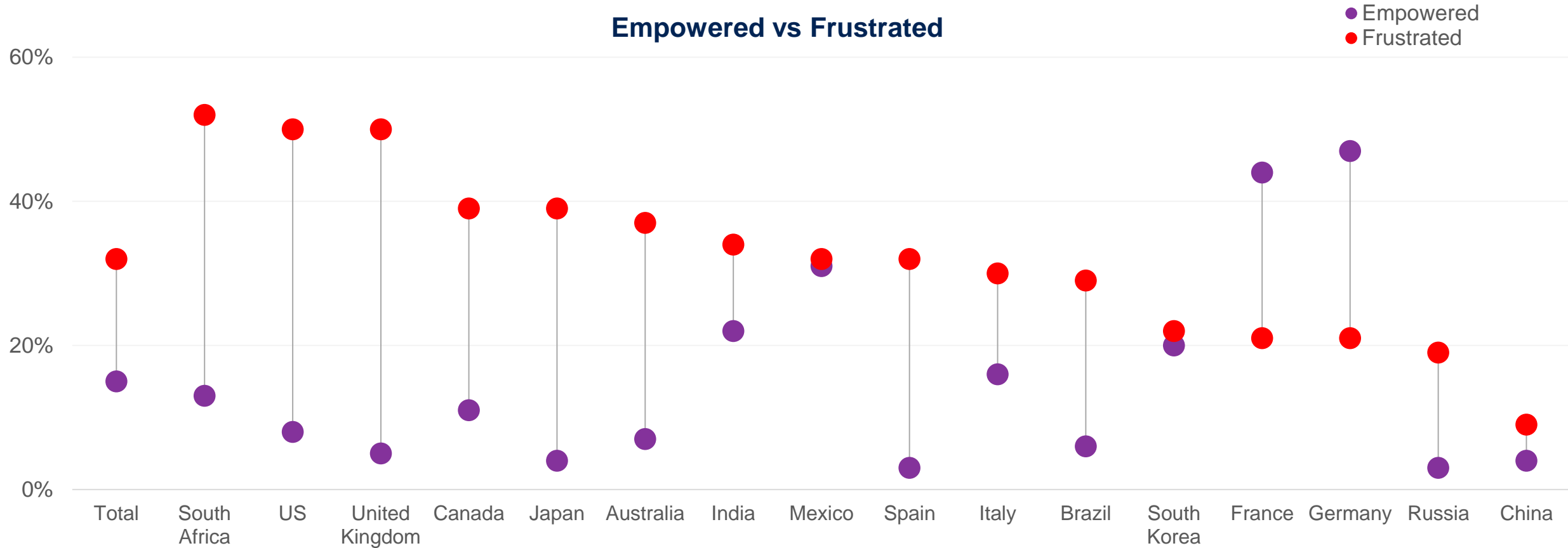
I feel like things in my country are **out-of-control** right now

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 [Thinking about resuming normal activities after the pandemic makes me feel very anxious]? (n= 14,518)

...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)

Why now? This thing has been dragging on for a while – what’s new?

Worldwide Search Interest in “Covid”



Source: Google Trends, August 2020, search term: “Covid” Worldwide.

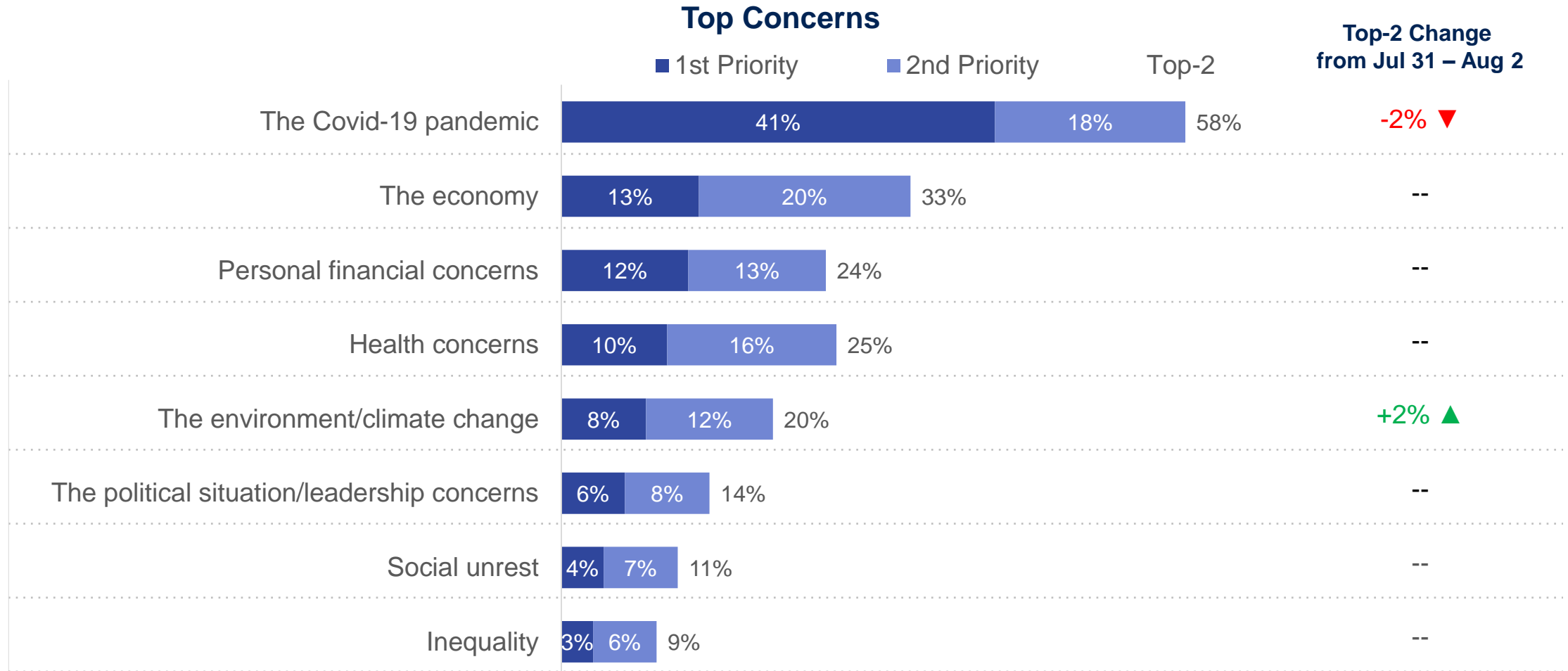
Five Things

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 computer, holding a white stylus. On the table in front of her is a yellow mug and another tablet. In the background, a young boy in a red long-sleeved shirt is sitting on a grey sofa, smiling and looking towards the camera. To the right, another child in a pink shirt and brown overalls is standing with their back to the camera, arms raised in a playful gesture. The setting is a bright, modern living room with a white wall and a potted plant in the background.

1

Covid-19 is the backdrop to various changes in behaviour, but implications are broader than Covid-19.

The pandemic is the top concern, but people have many things on their minds



Q: There are a number of challenges we may face today. Which of these concerns you the most? (n=15562)

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

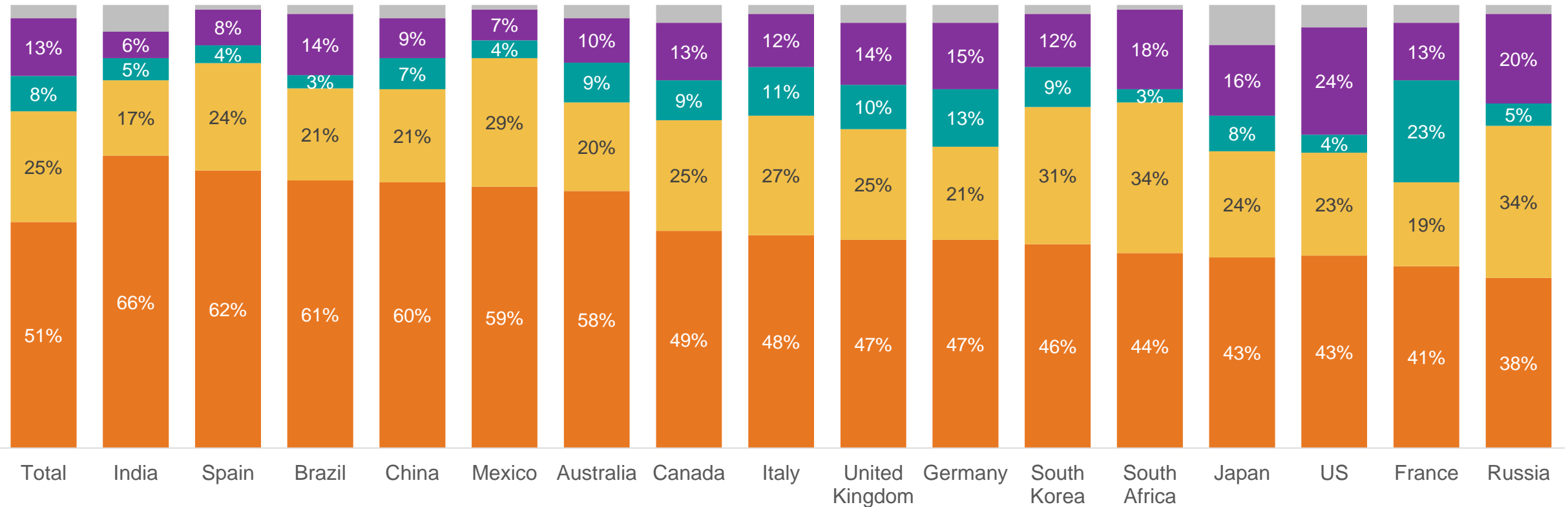
▼ or ▲ indicate change vs. previous wave (statistically significant @ 95% C.I.)

COVID-19 and health remain top concerns for most hard-hit countries

Environmental priorities are more important in European countries, such as France, Germany, Italy, and the U.K., and have been growing as a priority in France specifically over the past six weeks. In the U.S., political and social issues are more of a concern than anywhere else.

Top Concerns – First Priority

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



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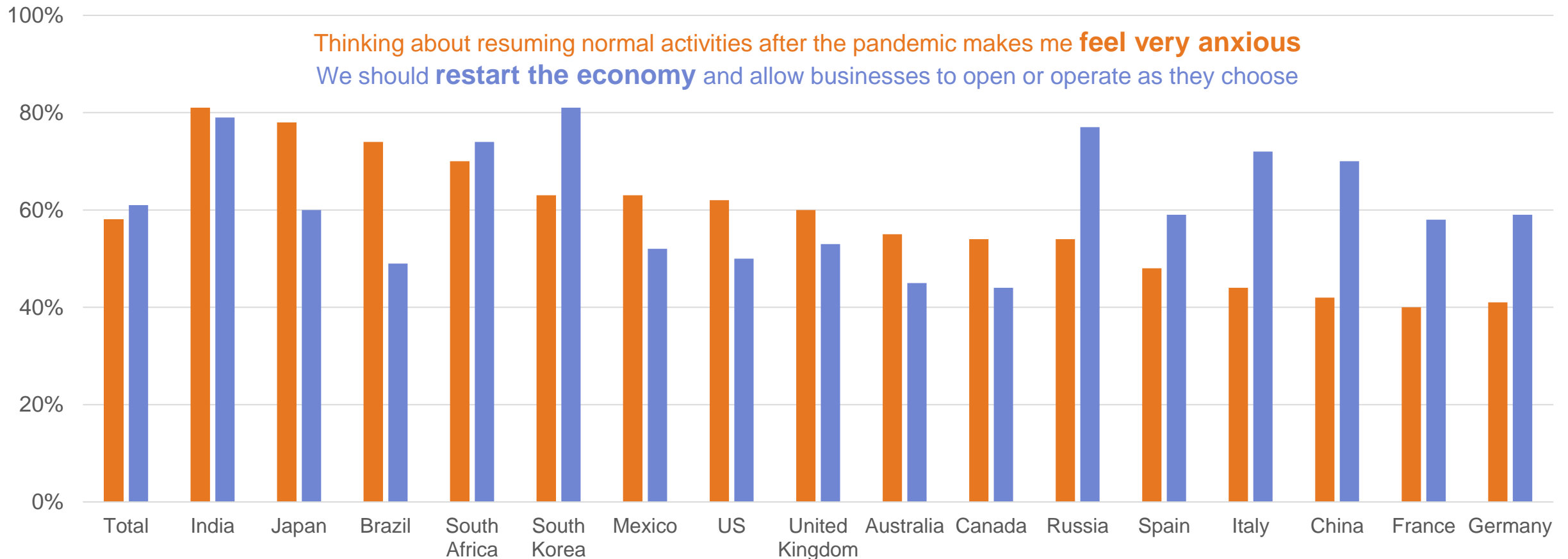


2

People are feeling conflicted about a great many things including health, finances, and the environment. They need information and assurance when making decisions and many will look to brands for stability.

The interplay between anxiousness and the desire to restart the economy is universal

Anxiety vs. Economy (Top-2 Box Agreement)



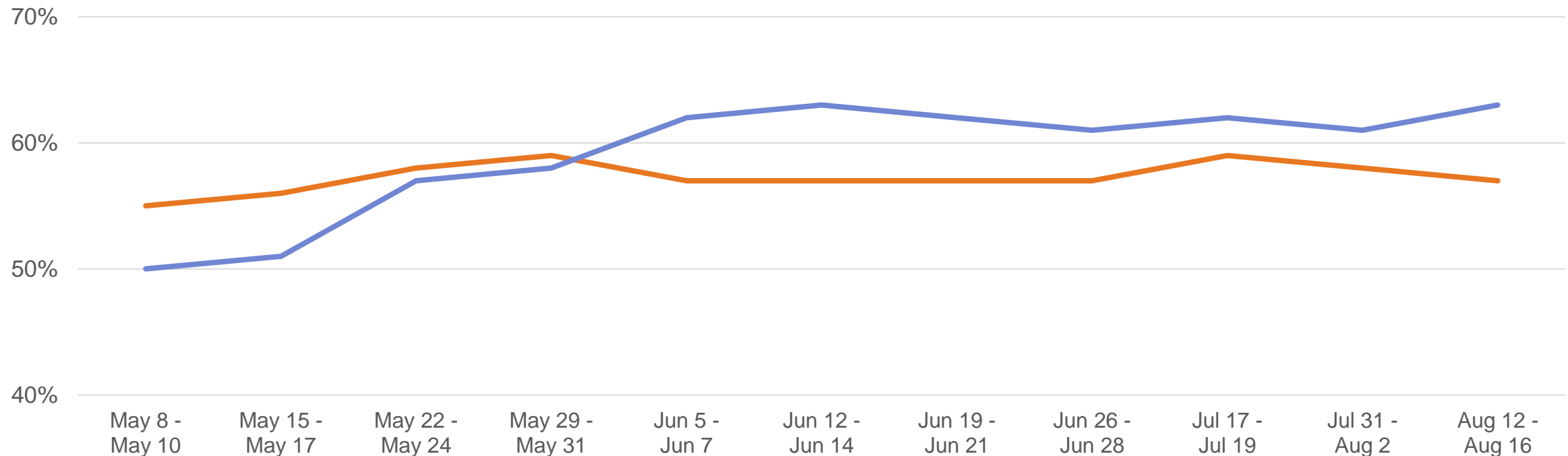
Q: (T2B Summary) To what extent do you agree or disagree with each of the following [Thinking about resuming normal activities after the pandemic makes me feel very anxious][We should restart the economy and allow businesses to open or operate as they choose]? (n= 14510)

At a broader level, the desire to reopen and the anxiety around reopening were closely competing in the month of July; more recently, anxieties have quelled and support for reopening has increased

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=15562)



3

Companies can't use a 'one-size fits all' model to account for changes in behaviour. Different consumers have different priorities.

Two largest segments are focused on getting things back on track – just in very different ways

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.

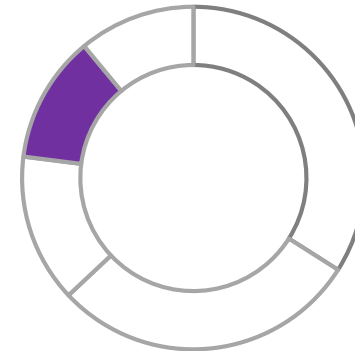
Get Up, Stand Up



14%

The politic 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.

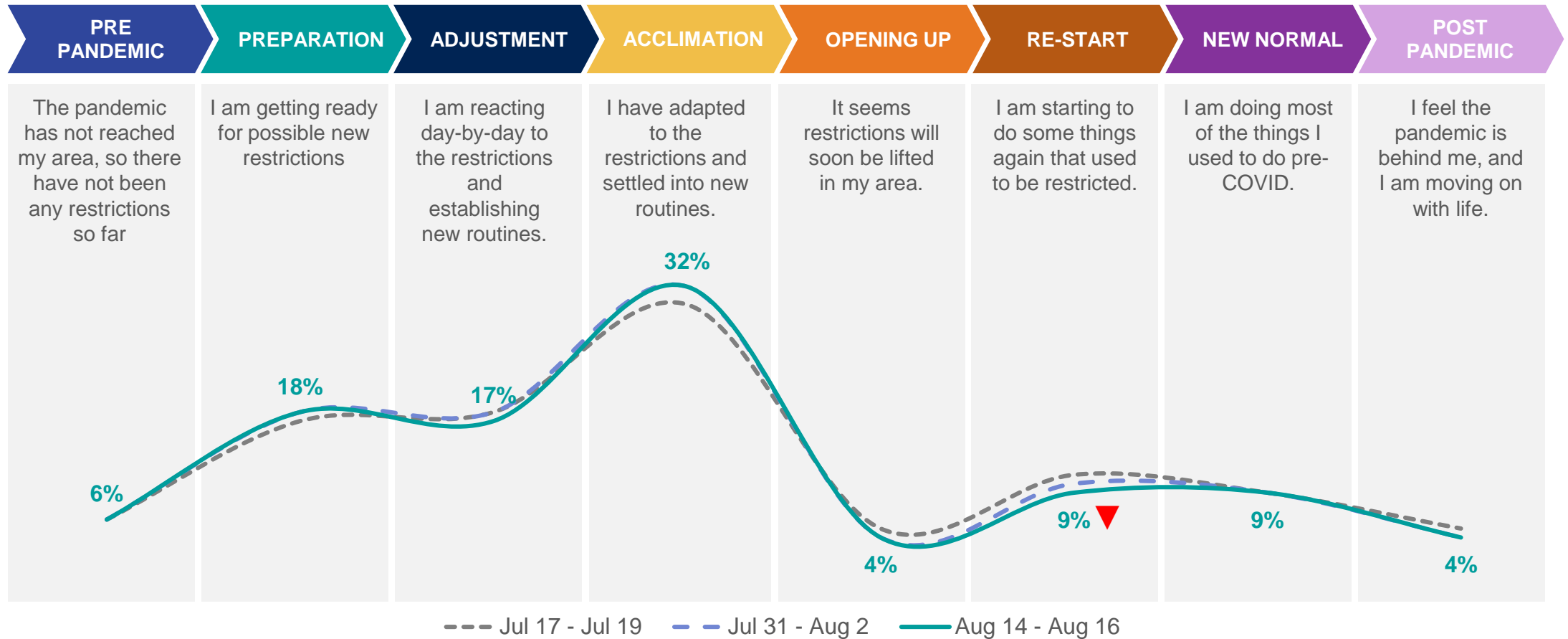


4

With fears of second and third waves, this is likely to be a long-term issue. The impact and implications of Covid-19 will in some cases permanently change how people behave and how companies provide services.

The “long middle” means that instead of doing things people would have done before restrictions, they are instead acclimatizing to the idea that restrictions will drive new routines.

Phases: International View



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.)

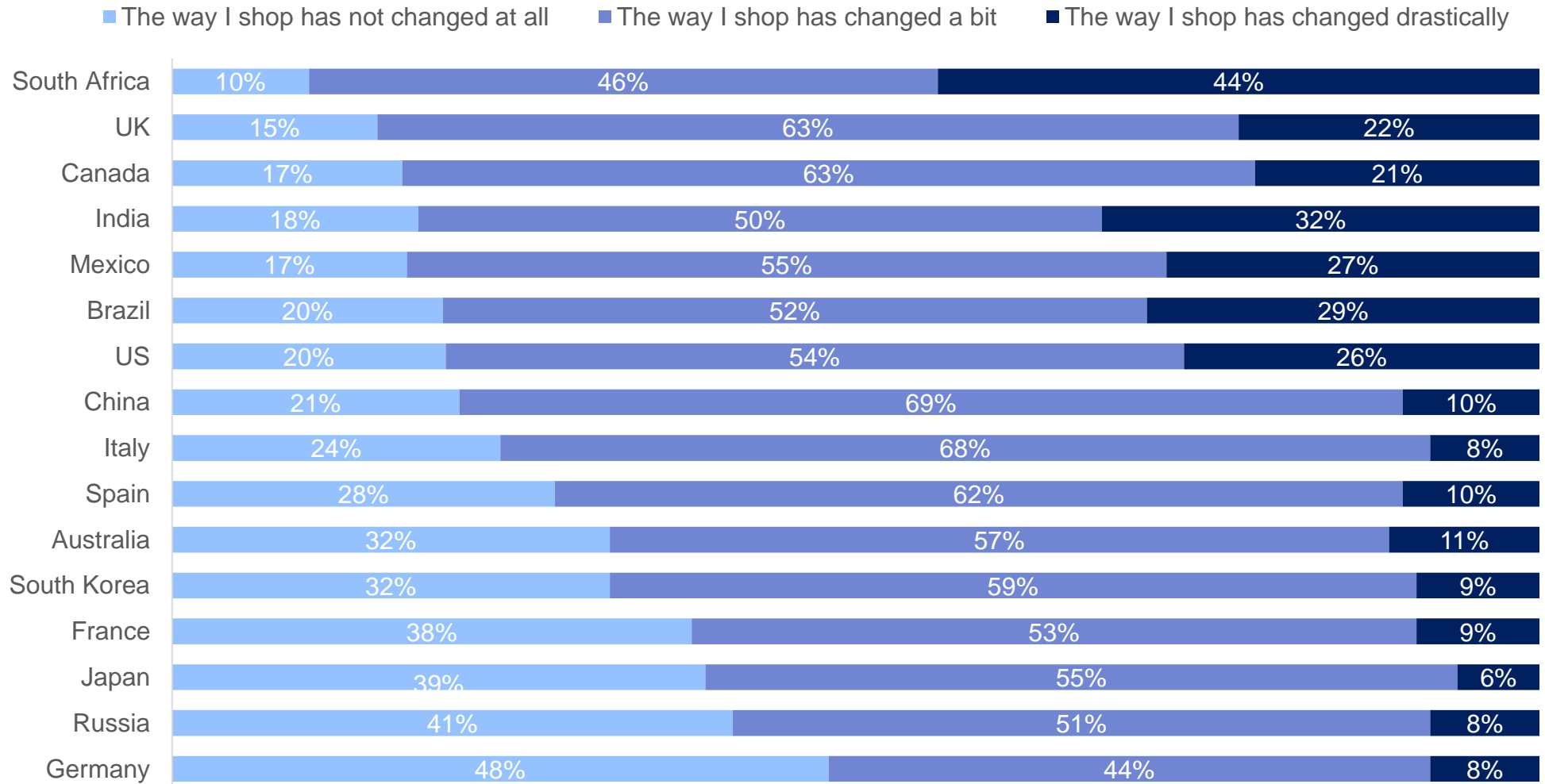


5

Q4 will be a challenge for many companies, and they need to be armed with this data to help them navigate the busy holiday shopping season.

We know the pandemic has led to a change in shopping behaviour

How much has your shopping changed due to COVID-19?



Total

Not at all
26%

A bit
56%

Drastic
18%

Q: How much if at all would you say the way you shop has changed as a result of COVID-19? (n=14,518)



Some takeaways

1. Covid-19 has been a change agent for consumers, creating opportunities and threats for brands.
2. An individual's coping mechanism depends on their motivational state.
3. Brands need to understand consumers' emotional state and their coping mechanisms and offer solutions to help consumers with these mechanisms.
4. Q4 will be an anxious time for shoppers – retailers and brands that win will offer an element of 'customer service' that provides assurance and safety.



What clients 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.”