

# SIGNALS



Understanding the  
coronavirus crisis

8 July 2020

AN IPSOS WEBINAR

GAME CHANGERS



# AGENDA

## Understanding the coronavirus crisis

### INTRODUCTION

**Jennifer Hubber**, Head of Ipsos Global Client Organization  
**Simon Atkinson**, Chief Knowledge Officer

### COVID WATCH: Digital Ethnography in times of crisis

**April Jeffries**, Global President, Ethnography and Immersive Research

### IPSOS ESSENTIALS: Emerging Consumer Behaviours

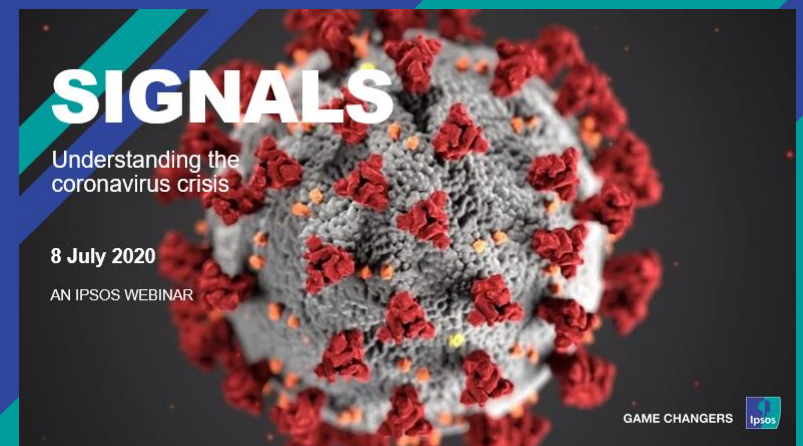
**Chris Murphy**, President, Brand & Market Strategy

### THE FORCES OF CUSTOMER EXPERIENCE

**Jean-Francois Damais**, Global Chief Research Officer, Customer Experience

### CREATIVITY IS BACK

**Shaun Dix**, Global Service Line Leader, Creative Excellence



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[26 March](#)

[8 April](#)

[23 April](#)

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[4 June](#)

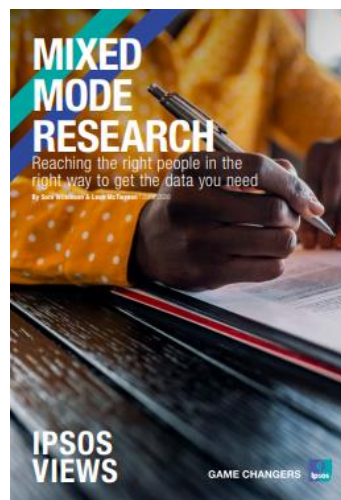
[18 June](#)



# UNDERSTANDING THE CRISIS: RESOURCES FROM IPSOS



## #1 Signals research digest and COVID-19 home page



## #2 Expert analysis



## #3 Staying close to consumer attitudes & behaviors

# COVID WATCH Using Digital Ethnography in times of crisis

**April Jeffries**  
Global President, Ethnography &  
Immersive Research

1



Follow [this link](#) for more on  
our **Ethnographic Research**

# IPSOS ESSENTIALS: Emerging Consumer Behaviours

**Chris Murphy**  
President, Brand and  
Market Strategy



## ESSENTIALS

### UNDERSTANDING THE WORLD OF COVID-19 AND BEYOND

Ipsos has created ESSENTIALS, a new syndicated tracker revealing how COVID-19 is impacting Citizens and Consumers and addressing the most frequently asked business questions:

- Understand new consumer behaviours
- Know the phases of the COVID-19 funnel in different markets
- Anticipate the future stages and consumer situation as markets go through the different phases

### MAKING MORE ACTIONABLE DECISIONS ABOUT...

- Brand positioning
- Innovation
- Advertising
- Strategic Planning
- Category Management
- Social Media

Follow [this link](#) for more  
on the **Ipsos Essentials**  
research programme

# 2



# IPSOS ESSENTIALS: 5 THINGS TO KNOW

8 July 2020

GAME CHANGERS







## ESSENTIALS: What is it?

We continue to evolve our global tracking to anticipate client questions about attitudinal and behavioural change amidst a prolonged health and financial crisis.

## Syndicated attitudinal & behavior tracker

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

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

# A destabilizing, multidimensional crisis

## Health and Financial Impact

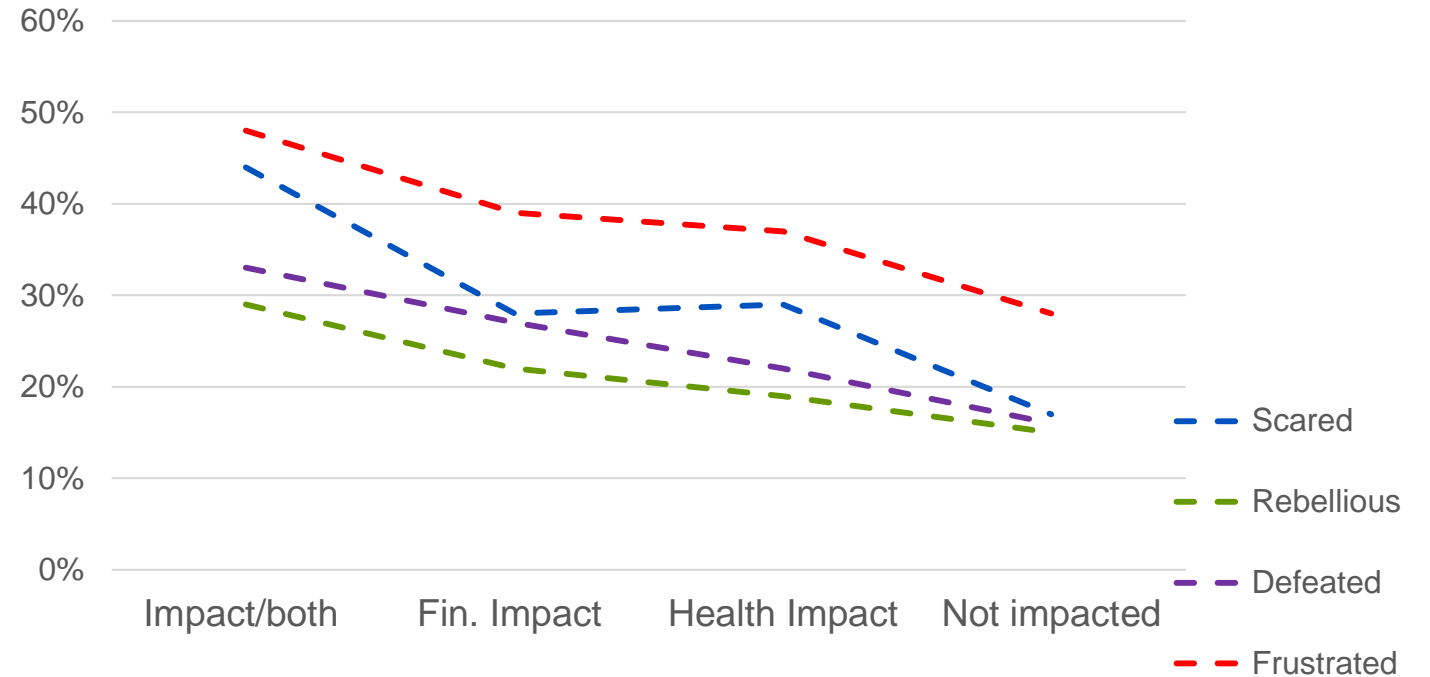
**28%** Health & financial impact

**16%** Health Impact

**20%** Financial Impact

**35%** Not impacted

## Censydiam Emotions

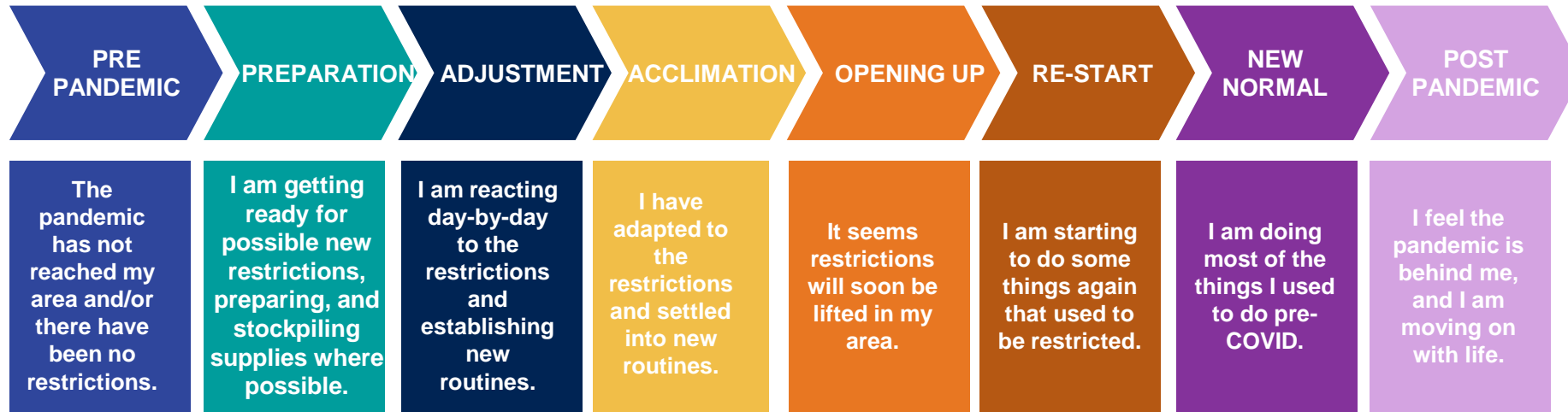




# A world on 'pause'

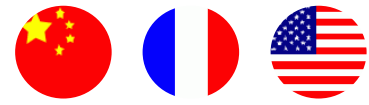
After a steady, 8 week advance to re-entry, this is the first week where things have stalled

*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*



We observe the same pattern in desires to **restart the economy**. After a steady two month rise, these sentiments either flattened or declined from country to country.

5%	8%	18%	33%	7%	<u>16%</u>	<u>8%</u>	3%	June 25 - 28
5%	8%	17%	32%	9%	<u>17%</u>	<u>9%</u>	<u>4%</u>	June 18 - 21
3%	8%	<u>21%</u>	<u>41%</u>	<u>13%</u>	7%	5%	3%	May 7 - 10



# A world on 'pause'

Many are uncertain about the future, struggling to make big decisions, take risks and make financial plans



*“For financial management, we would prefer conservative schemes with which the capital is guaranteed.”*



*“Everything is on hold. I am not willing to put anything into the market where I can't get it because there might be another spike in the Fall.”*



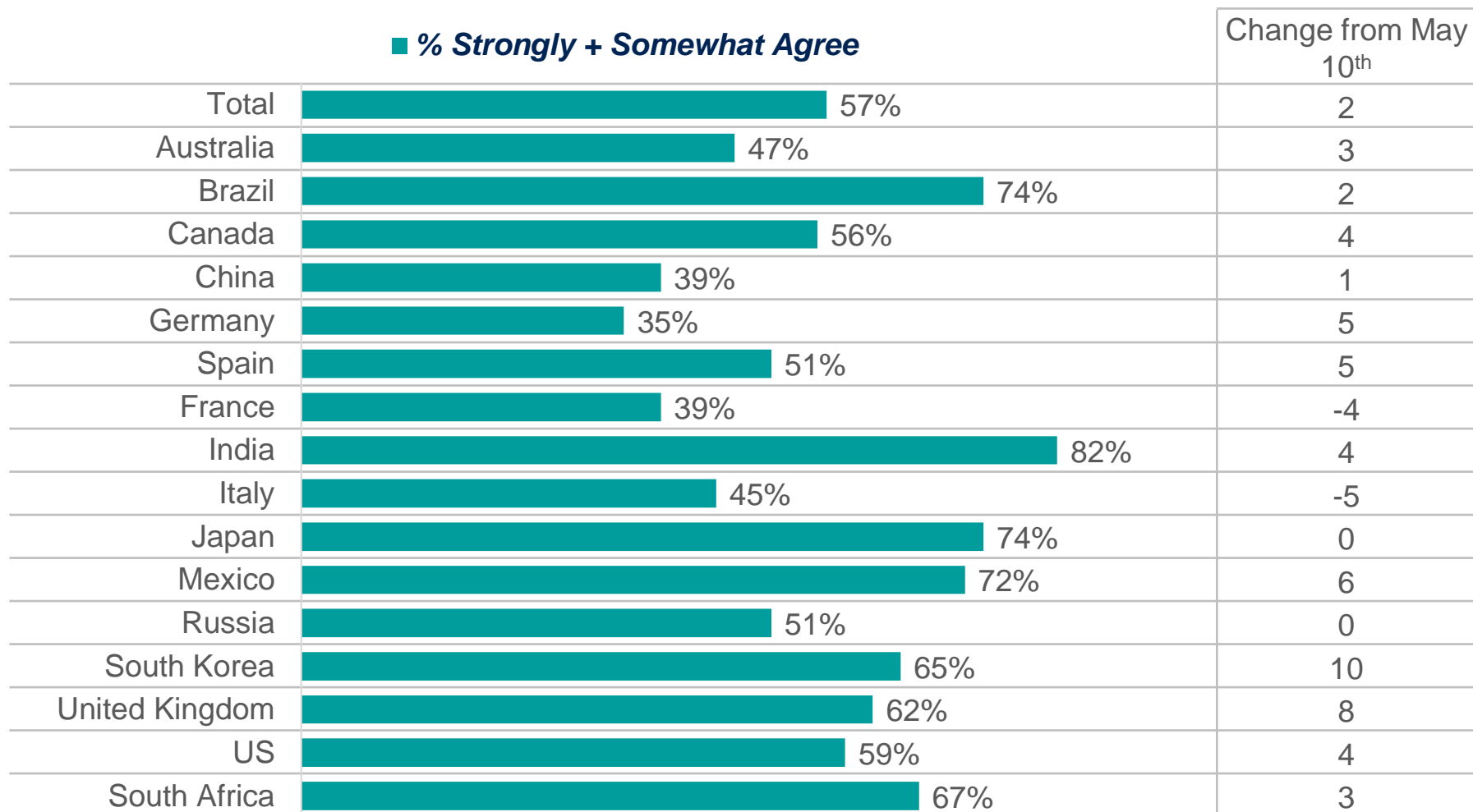
*“I simultaneously tell myself there is money there to be spent – but on the other side I am afraid to be broke. So I'm stuck in the middle.”*

*“Should we live our lives to the fullest? Should we spend the money we have? I really don't know.”*



# Anxiety and second wave worries?

*To what extent do you agree or disagree: Thinking about resuming normal activities after the pandemic makes me feel very anxious*



There seems to be a growing suspicion that a **second wave** will strike – and it's hard to imagine what it might look like

*"The second wave worries me. There are people already struggling a lot. They won't be able to financially deal with another lockdown."*

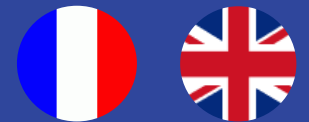
*"When we see the rage that's growing at the moment...I really don't see a second lockdown happening calmly."*

- Muriel, France



*"We're still in our bubble, and that will burst further down the line. We can't see the scale of the problem yet".*

*"I feel very anxious about my future. I couldn't tell you what it is exactly that I am scared of, but I am afraid."*





## “You first...”

There is an emerging (internal) conflict of miss and risk

***Many want the economy to re-open but...***



***“We can’t just remain locked down indefinitely. Slow progression is good – I feel happy about that. If there is something I don’t feel comfortable with then I won’t go. I wouldn’t go to the pub just yet – but I would let others go.”***



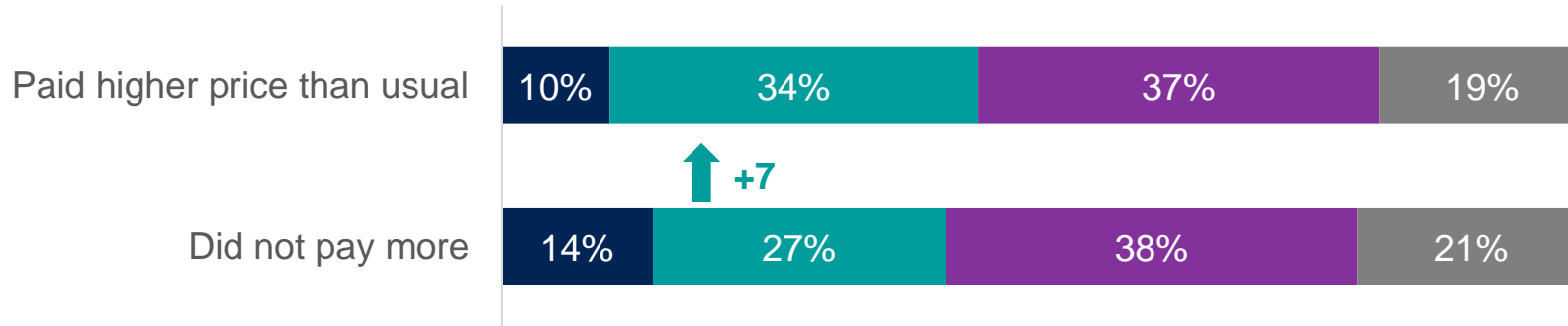
***“I’m not nervous about easing lockdown. The numbers don’t support shutting the whole country down.”***

***But...***

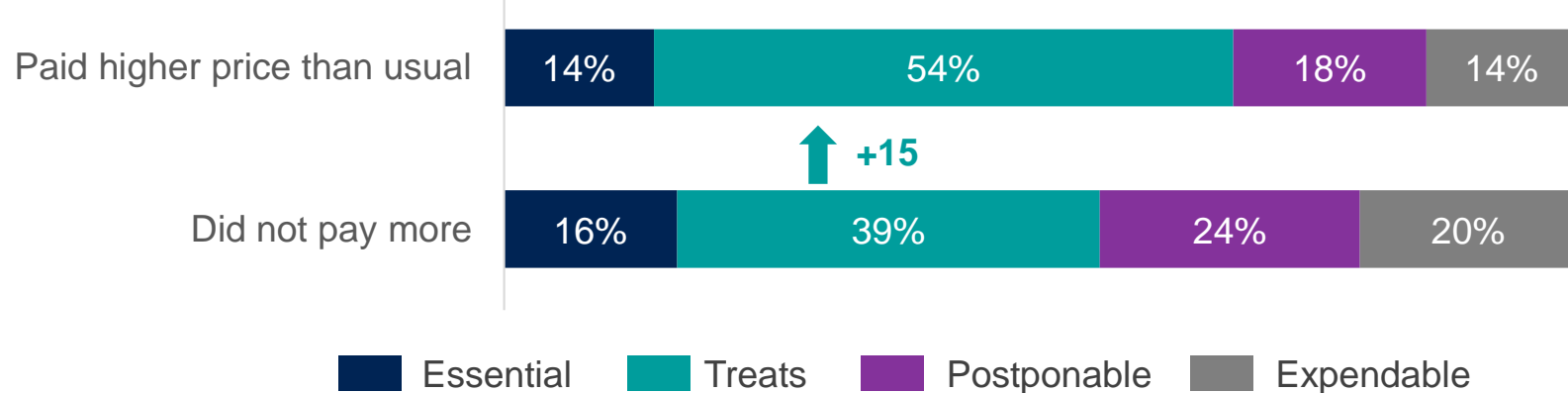
***“We went to a restaurant but I don’t want to go back...the gloves they were wearing...it grossed me out ...”***

## Affordable indulgences and modest treats

*Categorization of Make-up, among people who paid more / not more for beauty products*



*Categorization of Beer, among people who paid more / not more for beer*



*“You feel like a butterfly, emerging into the world again - you need to show you’ve done something to improve your appearance.”*

*“I am wearing highlighter on my eyes. I feel like I’ve woken up again suddenly.”*

*“I am trying to save money but I allow myself some treats... things that are for me, really.”*





# 5 things to know / implications for brands

**1**

**A destabilizing, multidimensional crisis has led to...**

**2**

**A world on pause, where many play things conservatively**

**3**

**There is a growing fear of a second wave**

**4**

**After you, my friend...some contradictions between what we say we want vs. what we are actually willing to do**

**5**

**We find modest joys in affordable indulgences**

**Need to discern between stated desires and what people will do, adjusting to evolving emotional states and financial capacity.**

**And in times like these..... a little happiness goes a long way.**



# THE FORCES OF CUSTOMER EXPERIENCE

**Jean-Francois Damais**  
Chief Research Officer,  
Customer Experience



Download the **white paper** in [English](#) or [Spanish](#)

Twitter: [@IpsosCX](#)

# 3

# THE FORCES OF CUSTOMER EXPERIENCE

## The Science of Strong Relationships

Jean-Francois Damais

Ipsos

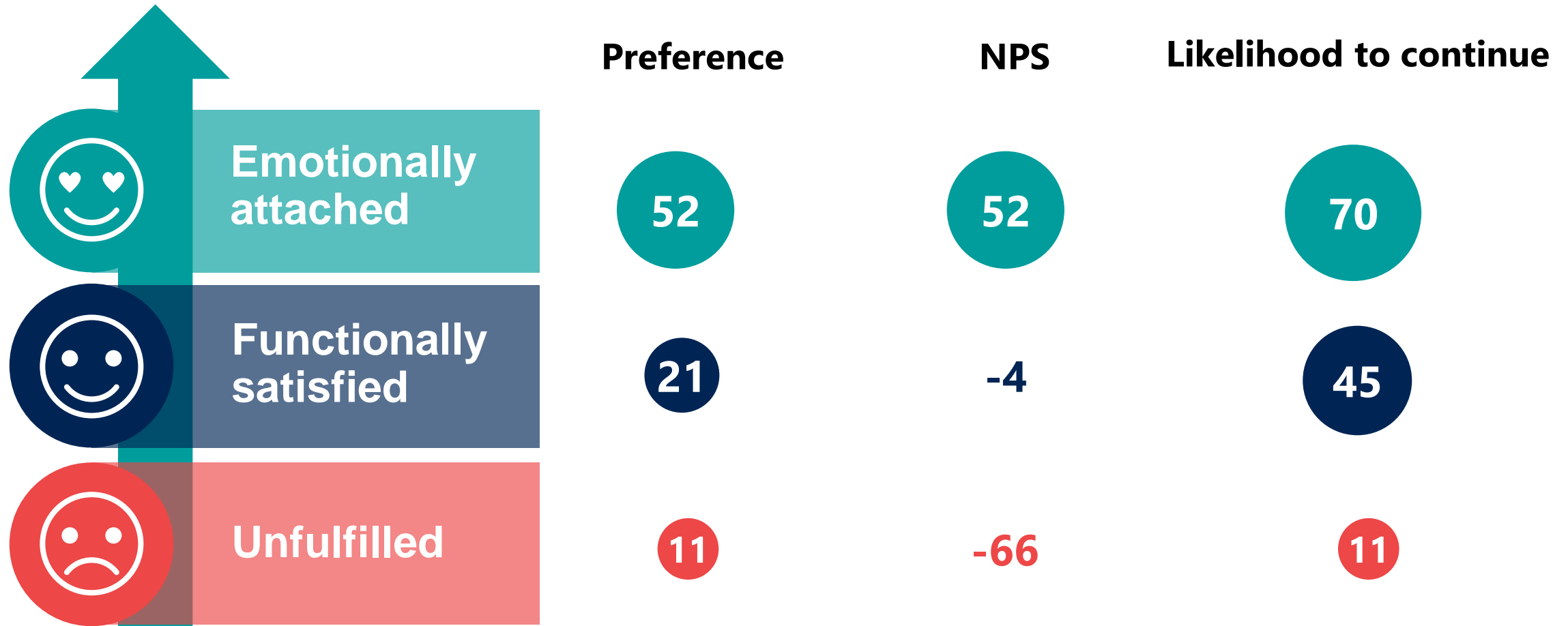
July 2020



# DESIGNING EXPERIENCES OF THE FUTURE



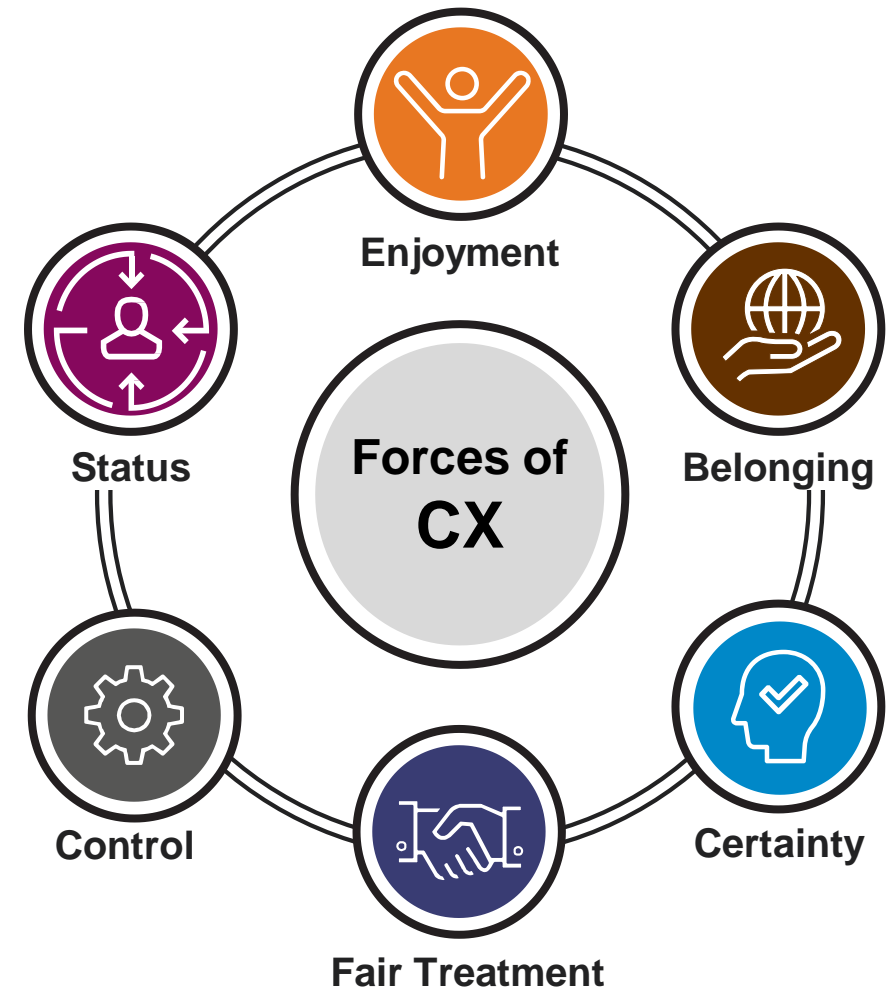
# WE NEED EMOTIONAL ATTACHMENT TO DRIVE STRONGER RELATIONSHIPS AND HIGHER CUSTOMER LIFETIME VALUES



# INTRODUCING THE FORCES OF CX

## The science of strong relationships

- **Fair Treatment**  
Make customers feel that there is a fair exchange in their relationship with you
- **Certainty**  
Make customers feel that things are clear, transparent and working as expected
- **Control**  
Help customers feel in control of the situation and in the driving seat
- **Status**  
Make customers feel valued, respected and worthy of special treatment
- **Belonging**  
Help customers feel a sense of belonging and show you care about the greater good
- **Enjoyment**  
Make customers' lives easier, so they feel a sense of freedom





# RELATIONAL NEEDS VARY ACROSS COUNTRIES/ REGIONS



# Customer journeys



**Enjoyment**



**Belonging**



**Certainty**



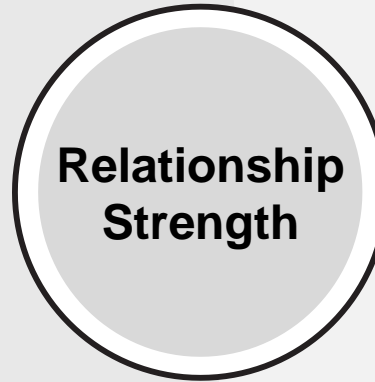
**Control**



**Fair Treatment**



**Status**



**Retention**

Customers are retained and at-risk customers are recovered



**Advocacy**

Customers share their positive experiences with others



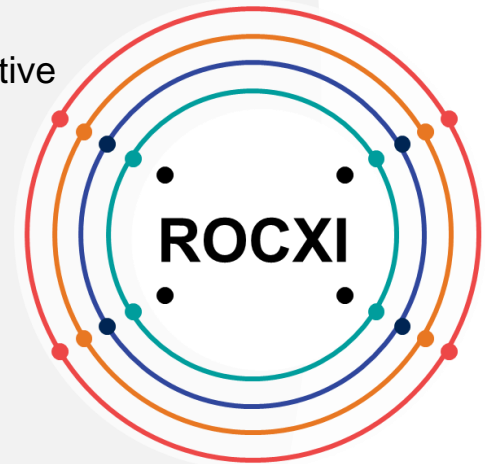
**Share of Spend**

Customers choose you more often



**Operational Efficiency**

Customers are served in a quality-driven, cost-effective way



# CREATIVITY IS BACK

**Shaun Dix**

Global Service Line Leader,  
Creative Excellence



Download the  
white paper [here](#)

# 4



# CREATIVITY IS BACK

Speaker:

Shaun Dix

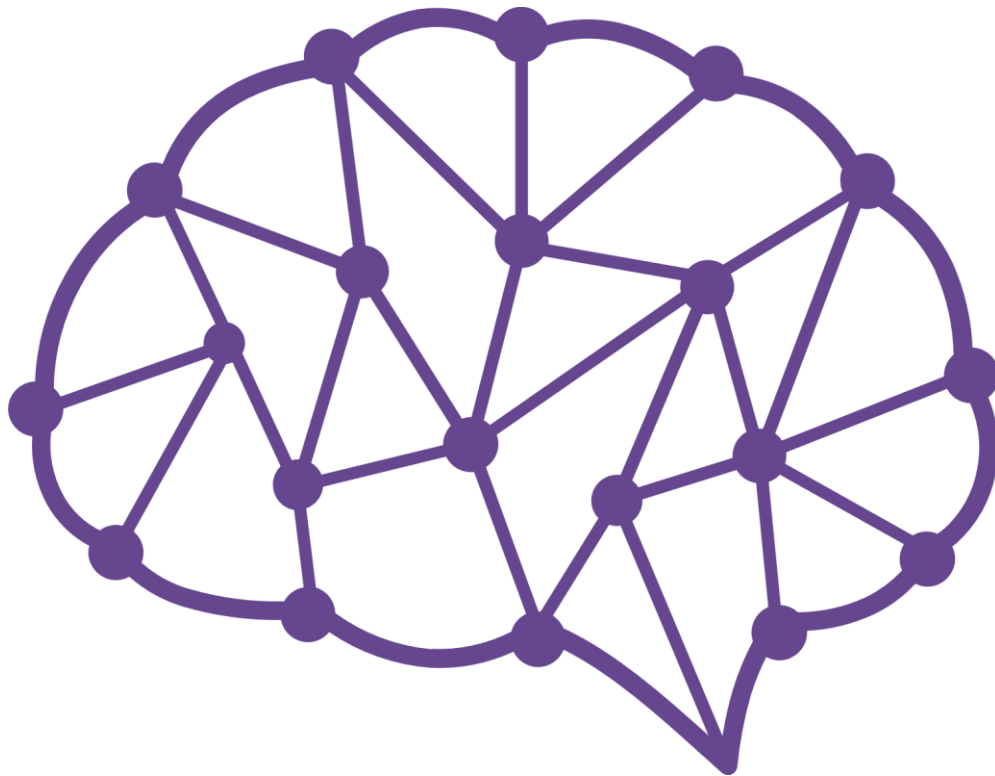
*Global Head Of Creative Excellence*

GAME CHANGERS

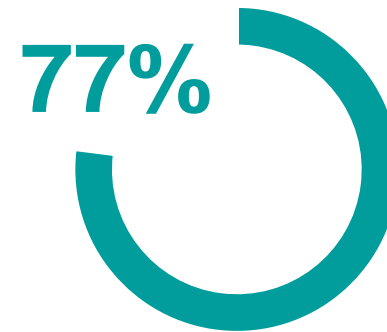


# WHAT IS A BRAND?

A memory network of associations and experiences, of thoughts, feelings, images, and sounds



*People wouldn't care if...*



*...of brands disappeared*

# CREATIVITY STILL MATTERS

CREATIVITY drives business growth



Market Shares Gains\*



More Stock Market Performance\*\*



# GOING DARK IS NOT THE ANSWER



**Coca-Cola:** “We are going to **kick off again our communications very soon**,”  
Barbara Sala, CEE Strategic Connection and Media Director.

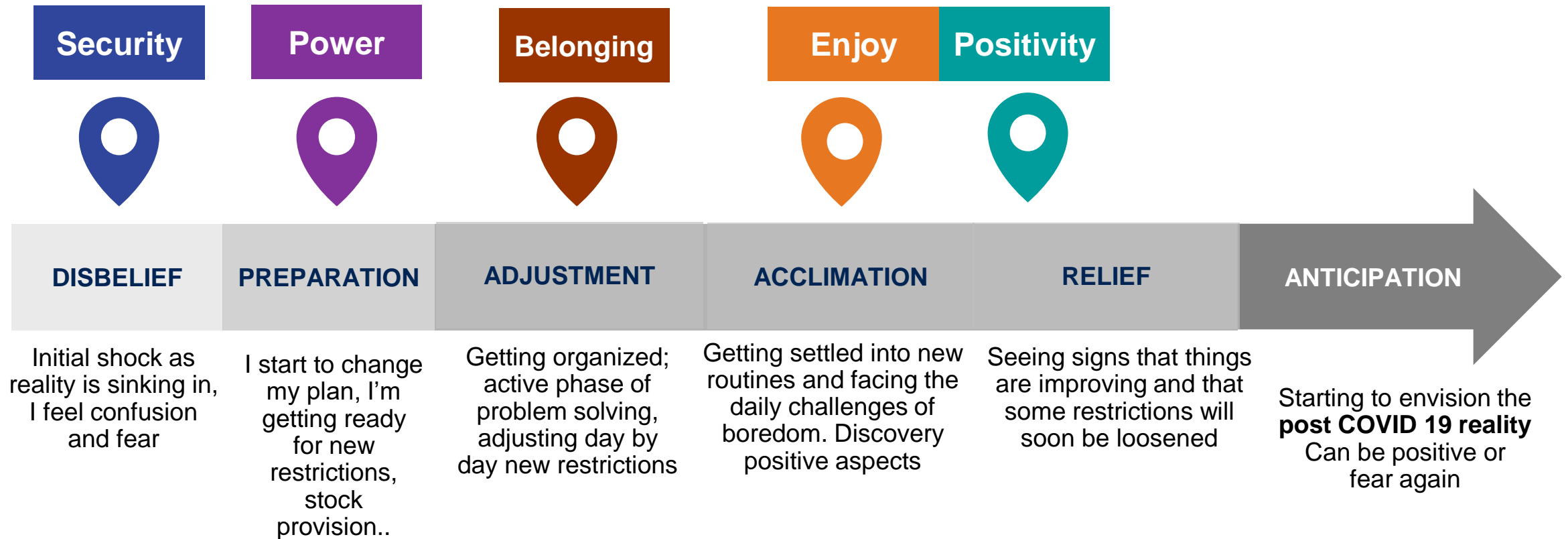
**“The decision to be dark is not sustainable in the longer term and especially now that our customers are going back to being active.”**

**Procter & Gamble** believes the Covid-19 pandemic is a time for the FMCG company to **“remind” consumers of its brands and their benefits.**

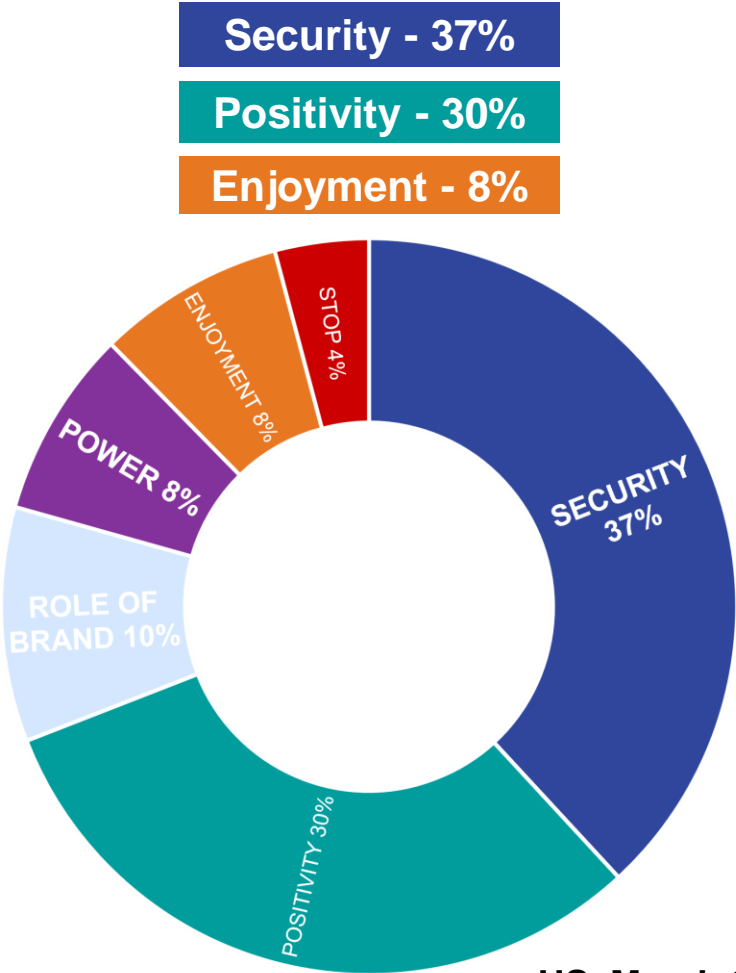
CFO Jon Moeller said: **P&G is “doubling down”.**

**P&G confirms having learnt from previous recessions**, which is improving their hand.

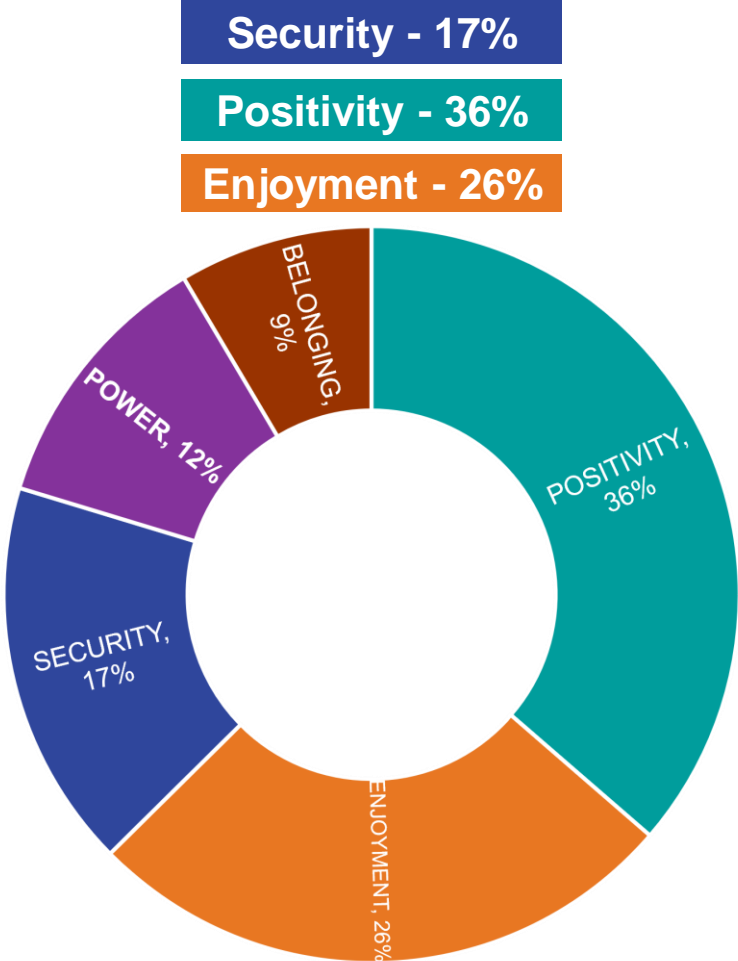
# THINKING ABOUT WHERE WE ARE TODAY: ADVERTISING SHOULD CAPTURE THE RIGHT MOTIVATION



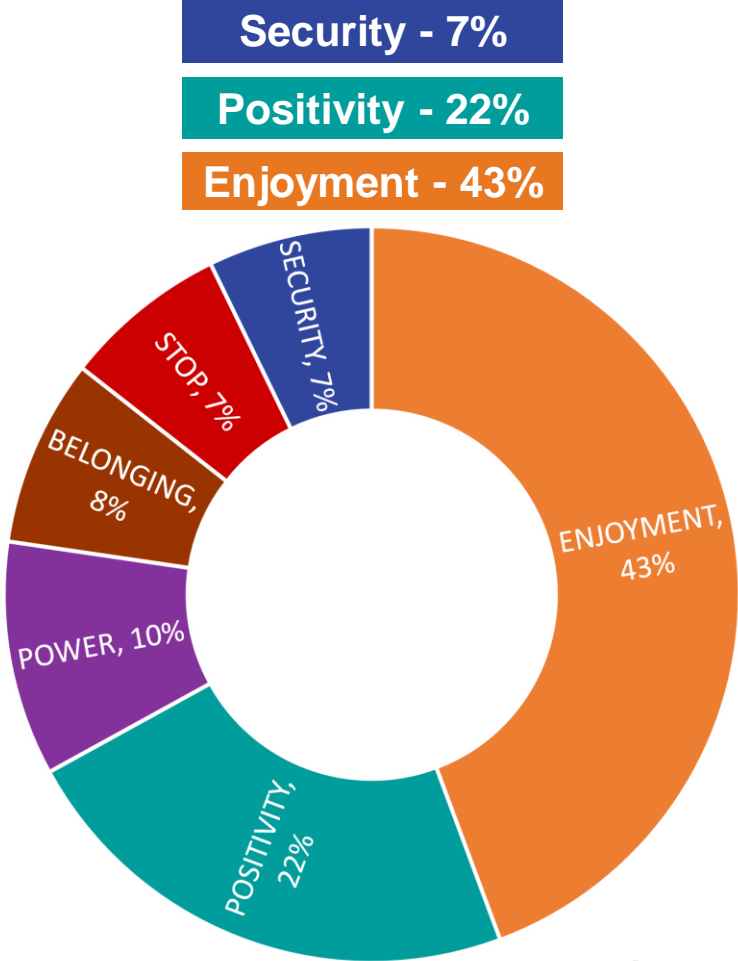
# FROM SECURITY TO POSITIVITY & ENJOYMENT



US, March 20th



Italy, April 6th



France, April 18th



# OVERDOSE OF COVID COMMUNICATION - IT IS IMPORTANT TO NOT GET CAUGHT IN THE SEA OF SAMENESS



65%

have seen  
Coronavirus  
related advertising

<20%

Connect this to a  
specific company  
or brand



Frankly, I'm tired of the sad-sac music playing along each ad. Tired of desperate looking people waving from dark windows. **Stop the “we’re here for you” lies...**



I need a break from the 24/7 COVID – advertising brings some normalcy to my life – well, it did....



I need to know where we are going – not that we are in unprecedented times, we all know

# REFRESHINGLY GOOD

View the ad [here](#)

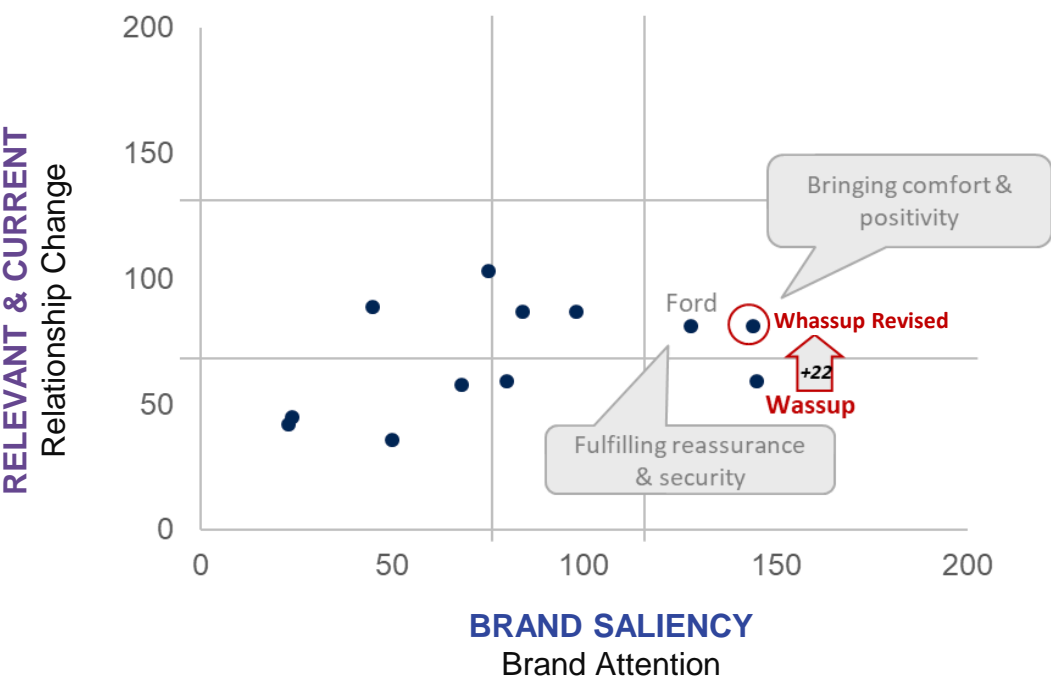


# BUDWEISER SUCCESSFULLY RE-IMAGINES ICONIC WHASSUP

## BUDWEISER'S CREATIVE CHALLENGE

Is the creative **appropriate** to air **during Covid-19**?

The ad proved to be Ipsos' strongest Covid Creative



# USE THE POWER OF YOUR DISTINCTIVE ASSETS



NON-BRAND NAME ELEMENTS THAT  
TRIGGER THE BRAND  
INTO THE MEMORY OF CATEGORY BUYERS

Source: Sharp & Romaniuk, 'Differentiation versus distinctiveness', in Sharp, B (ed.), How Brands Grow, 2010: Ipsos Creative Excellence "The Power of You" Paper, here)

## TAGLINE

Nike

*"Just do it"*

## AMBASSADOR

Nespresso



## SCENT

Singapore Airlines



## SCENERY

Corona



## FONT

Budweiser

*Name Brand*

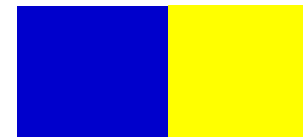
## AD STYLE

Mastercard



## COLOR

IKEA



## LOGO

BMW



## SYMBOL

Heineken



## PACK

Coke



## SONIC

Schweppes

*Schhh ...*

## MUSIC

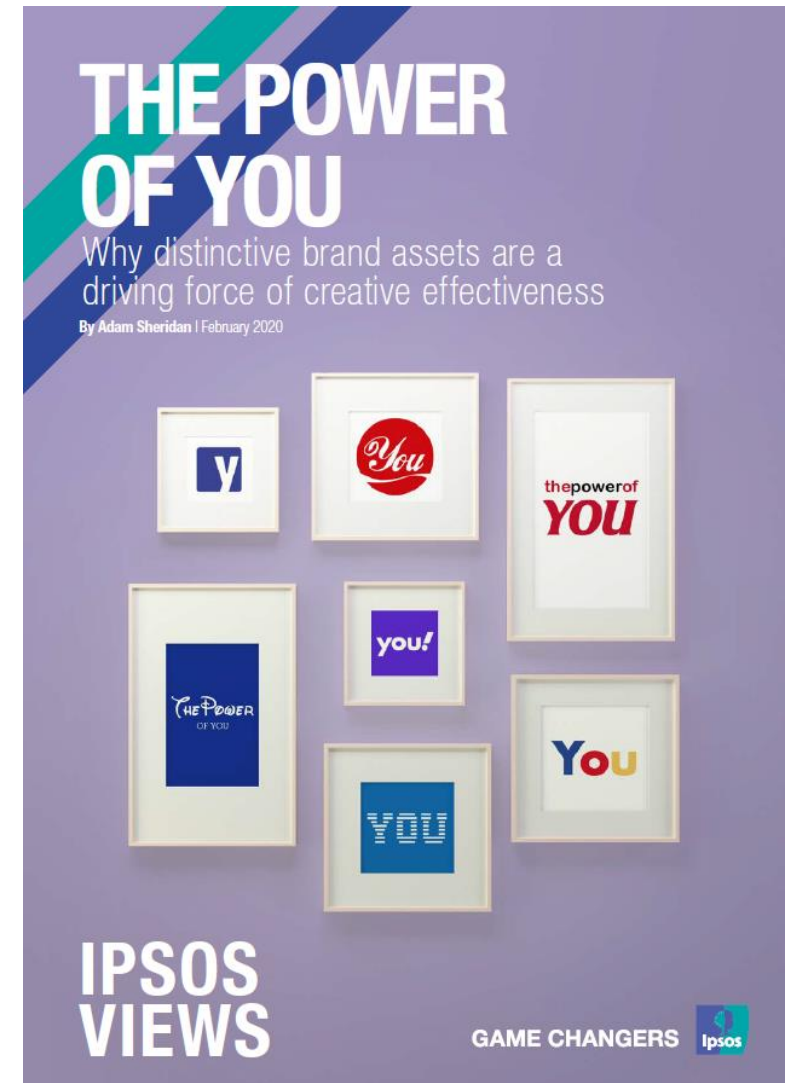
McDonalds





# LESSONS LEARNT

1. Don't get caught in the **sea of sameness** or rush to produce creative that is not connected to or impactful for your brand.
2. The **presence of brand assets** is strongly linked to positive Branded Attention performance, more so than just directly showing or talking about the brand.
3. **Creative quality** still matters and is back.



# CREATIVITY *IS* BACK!

Speaker:

Shaun Dix

*Global Head Of Creative Excellence*

GAME CHANGERS



# THANK YOU

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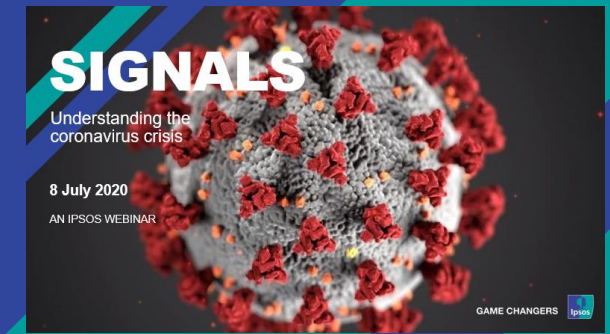
Chris Murphy, President, Brand & Market Strategy

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**Please join us on**  
**10<sup>th</sup> September**