

SIGNALS

Understanding the
coronavirus crisis

March 2020

INTRODUCTION

The defining event of 2020 is the spread of the new coronavirus (COVID-19) across the world. Within two months we have moved from the first deaths being announced in China to the World Health Organization labelling the outbreak as a pandemic.

The crisis sees governments, companies and individuals all having to respond to an unprecedented set of challenges, as the implications of this “once in a century” event start take shape.

There are so many topics to watch and monitor over the coming weeks and months. Governments will be under pressure to lead and inform. Businesses – large and small – have to make the right decisions for their employees and their customers. Meanwhile, people’s behaviours will be changing, in ways which may have longer-term implications beyond the immediate circumstances of the crisis.

Ipsos is committed to helping our clients navigate with confidence our world of rapid change, and this digest has been prepared to help us all better understand the dynamics of the current outbreak.

It sees us bring together our latest research on coronavirus and draws on our surveys, social media monitoring and the analysis of our teams around the world. We have sought to highlight our key learnings so far and started to identify how attitudes and behaviours around the world may be changing. For these reasons, we have adopted *Signals* as our title. We will be producing further editions of this document over the coming period; please email IKC@ipsos.com if you would like to subscribe.

In the meantime our latest research will be shared on Ipsos’ websites and social media channels; your regular Ipsos contacts are on hand to discuss how we can support you to better understand coronavirus and its implications for us all.

IN THIS EDITION:

THE CRISIS IN CONTEXT

The starting point

We take a look at the prevailing mood around the world as the first coronavirus cases started to emerge, through the lens of our latest *Understanding Complexity* trends report.

IDENTIFYING THE SIGNALS

What may be about to change?

These are unprecedented times, which challenge us to use the information we have to identify medium and longer term implications. We present some of the key themes Ipsos will be closely monitoring over the coming weeks.

PUBLIC OPINION AND CORONAVIRUS

Latest opinion polling shows widespread concern

The third wave of our opinion polling on coronavirus across 10 countries shows a significant increase in the number of people who believe that the virus will have a personal financial impact.

THE SOCIAL MEDIA CONVERSATION

Social intelligence data analysis

Coronavirus is one of the most active topics on social media. Using data from our social intelligence tool, Synthesio, we analyse the latest key trends and insights from over 40 million posts so far.

SPOTLIGHT ON ITALY

Italy in the time of coronavirus

Needless to say, the coronavirus outbreak is strongly impacting Italian citizens – who have faced a massive and sudden change in their way of living. This report examines the latest opinion polling in the country.

SPOTLIGHT ON CHINA

Optimism and anxiety

Since the outbreak of coronavirus, China has witnessed an epidemic that has affected commercial and daily life across the country. Our team present their latest research.

THE IPSOS BIOSURVEILLANCE ATLAS

Multi-method approach to monitoring the crisis

New tools such as the Ipsos Biosurveillance Atlas will give decision-makers critical real-time data to help their organisations react and adapt to coronavirus. This report outlines our approach to providing a unified picture.

CORONAVIRUS & BEHAVIOUR CHANGE

What does it mean for brands

The coronavirus means brands need to be flexible and adapt to change. Our new white paper explores how brands can pursue consumers in the right way and deliver value in a time of contextual fluidity.

THE CRISIS IN CONTEXT

The starting point

This year began with a mixture of realism (65% said 2019 had been a bad year for their country) and optimism (75% felt 2020 would be a better year for them personally). As the first coronavirus cases started to emerge, we could point to a world challenged by power conflicts, populist risings, climate emergency, and frightening technology. But the recent period has also seen satisfaction with living standards rising globally, alongside a gentle rise in self-fulfilment.

Indeed, going into 2020, our new [Ipsos Global Trends](#) analysis found growing support for globalisation, as well as improvements in the ratings of local public services in many countries. We observed more people worried that technology is destroying our lives, but simultaneously more people saying we need technology to solve our challenges. For this reason, we called our new Global Trends report *Understanding Complexity*, and it underlines the nuanced and careful approach we need to take to understanding public opinion.

As governments take action to control the spread of the disease, the default position for many people – at least in principle – is of distrust in “authority”. Our 23-country [Ipsos Trustworthiness Monitor](#) found 14% describing their government as trustworthy. But again, the dynamics of public opinion are not so simple: a range of studies show that the public distinguishes between different professions. Those at the heart of the response to coronavirus – people working in education, healthcare/medicine, the police and the armed forces – tend to receive more positive trust ratings.

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IDENTIFYING THE SIGNALS

What may be about to change?

These are unprecedented times, which challenge us to use the information we have so far to identify the medium and longer term implications. Here are some of the key themes we will be monitoring closely over the coming weeks and months.

Spending levels – in some previous crises (such as 2008), the overall level of consumer spending shifted by only a few percentage points. What will the impact of coronavirus be? Initial signals from consumers themselves are very strong, with many saying they expect it to have a significant impact [on their personal finances](#).

Changing behaviours – how will the shape of our spending change? We can already see some reluctance to go to social or sporting events. More than six in 10 are telling us they are now washing their hands more regularly, as illustrated by stocks of soap and handwash struggling to cope.

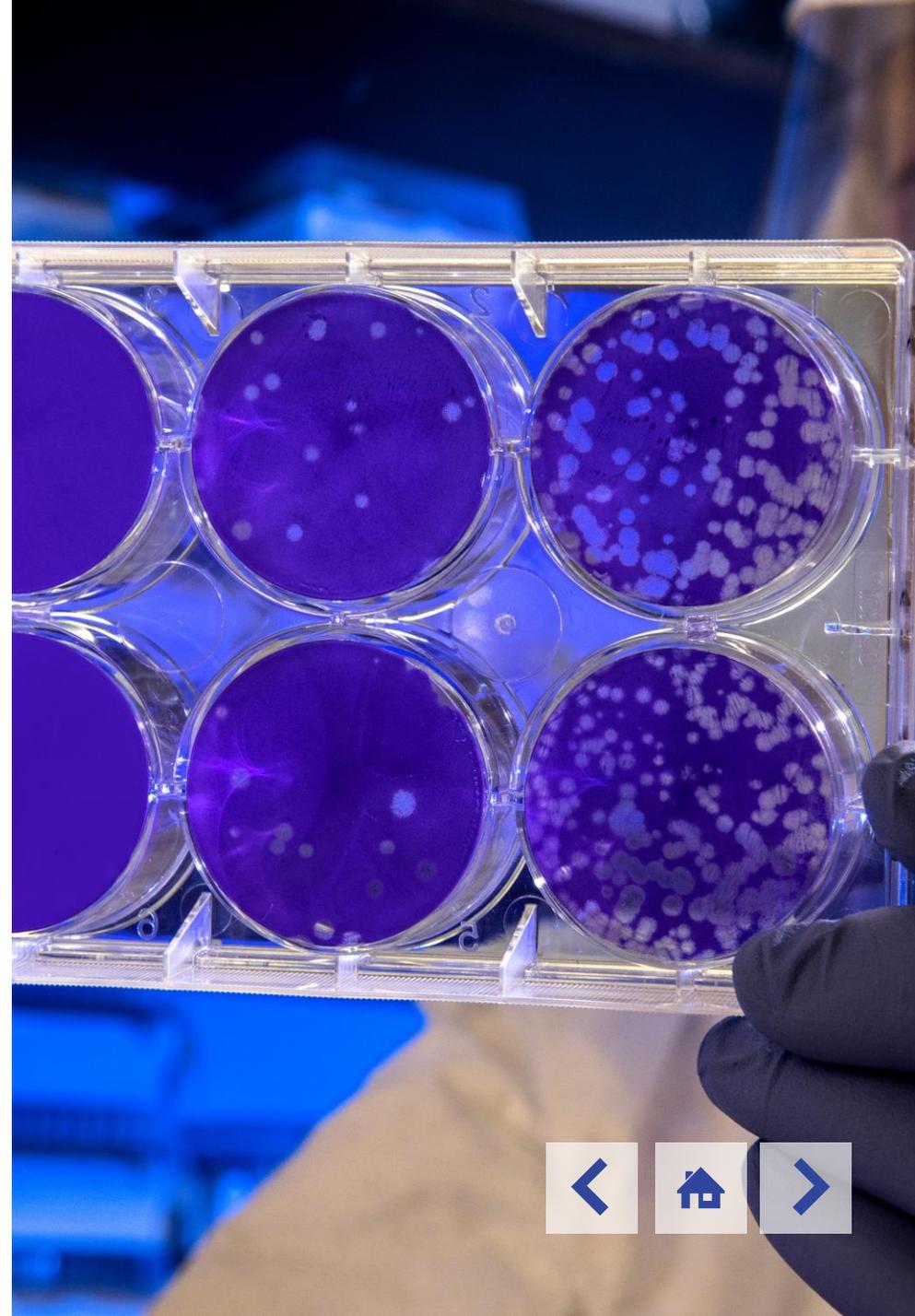
Brand matters – this crisis will add to the story on ‘local’, ‘authentic’ and ‘sustainable’ brands. We will be watching for early signals of nationalism and localism on the increase. In the meantime, this edition sees our team sketch out their initial thoughts on what this means for brands.

Delivery channels – our tracking survey is already showing that around a third of consumers in some key markets are saying they are less likely to visit a shopping centre.

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PUBLIC OPINION AND CORONAVIRUS

Ipsos' latest opinion survey shows rising concern about the impact of coronavirus.

Through our Global Advisor platform, we continue to track public opinion related to coronavirus.

Our third wave shows a significant increase in the number of people who believe the virus will have a personal financial impact, compared to [wave 1](#) and [wave 2](#). Out of the 10 countries surveyed, Italy sees the biggest jump on this measure with a 22-point increase – taking the number of those worried about the impact on their finances to two in five people (41%). There are also double-digit increases in Canada (+20), Russia (+19), Japan (+18), the US (+16), the UK (+16) and France (+14).

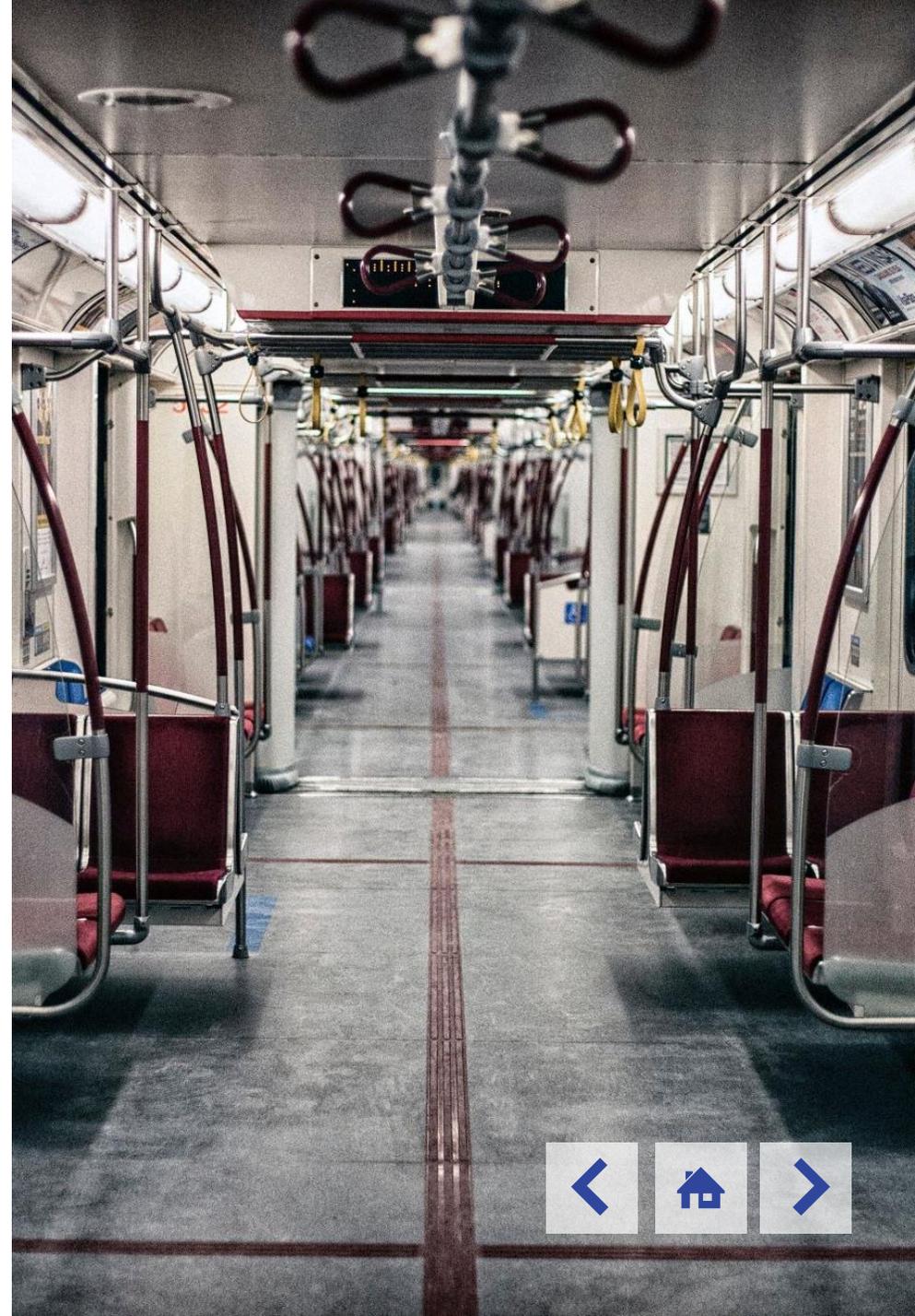
When asked why the virus has reached their country, a majority said this is because it is impossible to forecast how the virus will spread, rather than due to a lack of preventative action by government authorities. Those in Germany (80%), Vietnam (71%), the UK (69%), Canada (67%) and France (63%) are most likely to perceive the virus as impossible to forecast.

These latest findings show a general rise in the proportion who believe the virus poses a high or very high threat to their country. France saw the biggest increase on this measure at 49%, a 29-point increase from two weeks before.

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THE SOCIAL MEDIA CONVERSATION

Social intelligence data links the impact of the coronavirus epidemic and global economic fears.

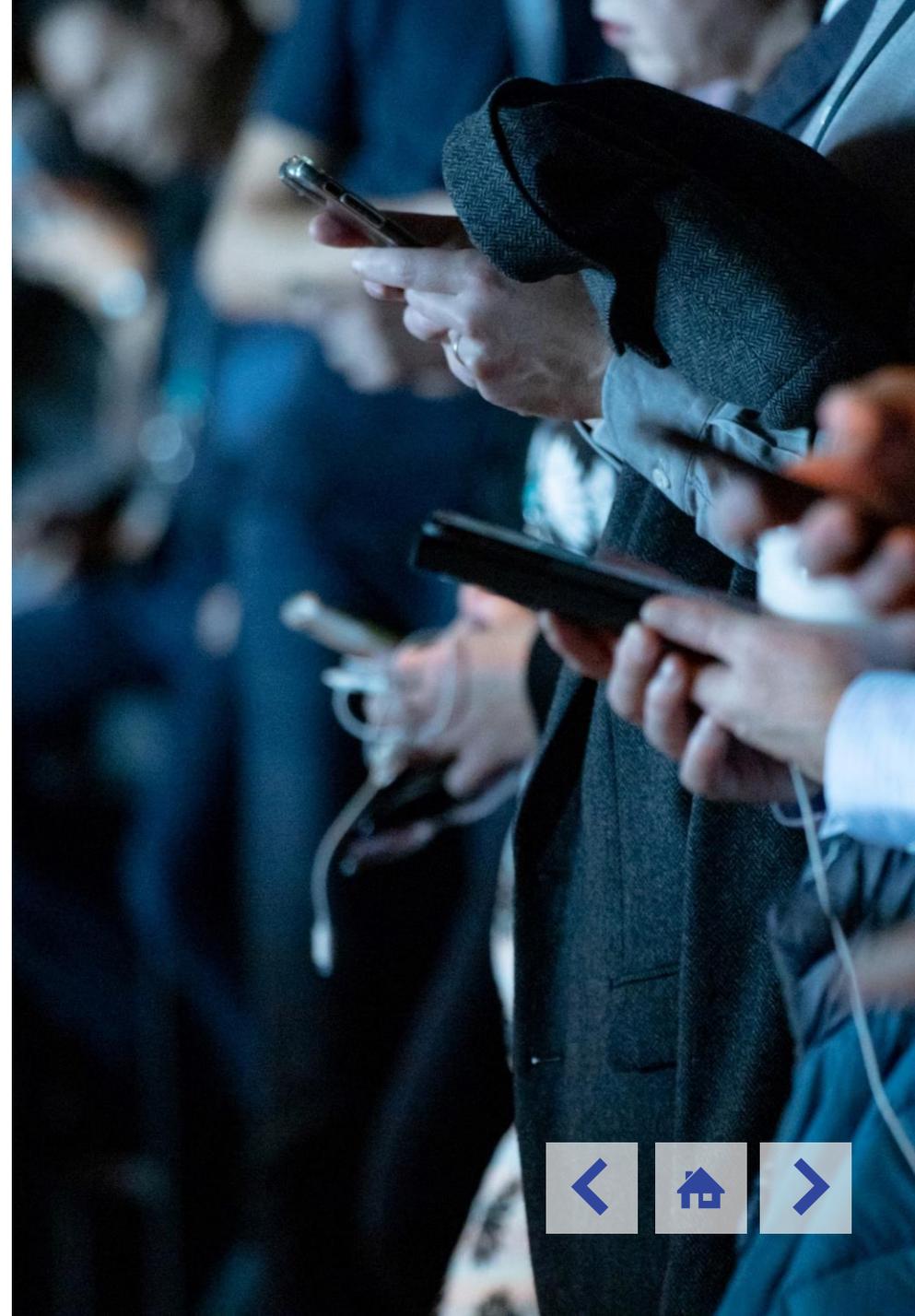
From worries about global economic markets to concern for personal safety, coronavirus is one of the most active topics on social media. Our social intelligence tool, Synthesio, has collected over 40 million posts so far and we are analysing the latest key trends and insights. These include:

- The US surpasses China for the largest volume of conversations, with over three million mentions compared to 1.8 million posts in China. In Europe, Italy heads up the online conversation in Europe with nearly 800,000 mentions, followed by the UK, with over 700,000 mentions.
- Discussions have mainly centred around the challenge of going to work, stemming from fears around public transportation and transport restrictions due to the spreading virus. A new topic emerging on social media has been the personal financial impact – also evident from our [latest public opinion polling](#).
- In affected locations, people are sharing stories about their experience being quarantined or working from home. In areas that the epidemic has not reached, populations were discussing potential quarantine measures and the impact it will have on their lives.

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SPOTLIGHT ON ITALY

Italy in the time of coronavirus

Needless to say, the coronavirus outbreak is strongly impacting Italian citizens – who have had to face a massive and sudden change in their way of living.

Our latest opinion polling in Italy reveals:

- No change in the confidence of the effectiveness of major institutions to keep the threat under control. Healthcare experts are the best performers (71% believe they are effective in controlling the spread), followed by the World Health Organization (68%) and regional government (53%).
- Italians are aware that the infection will not be limited to people, and that the whole economic and productive system will be seriously impacted. 84% believe tourism will be impacted the most, followed by hotels (75%), culture and entertainment (60%), and fairs and events (58%).
- On a positive note, 40% of Italians believe that once the emergency is over Italy will have been part of the solution, more than the problem (29%).

Over the past month, Ipsos in Italy have released a weekly report featuring the results of the latest public opinion polling. This latest version also looks back at the previous findings to present a complete picture of the story so far.

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SPOTLIGHT ON CHINA

Optimism and anxiety

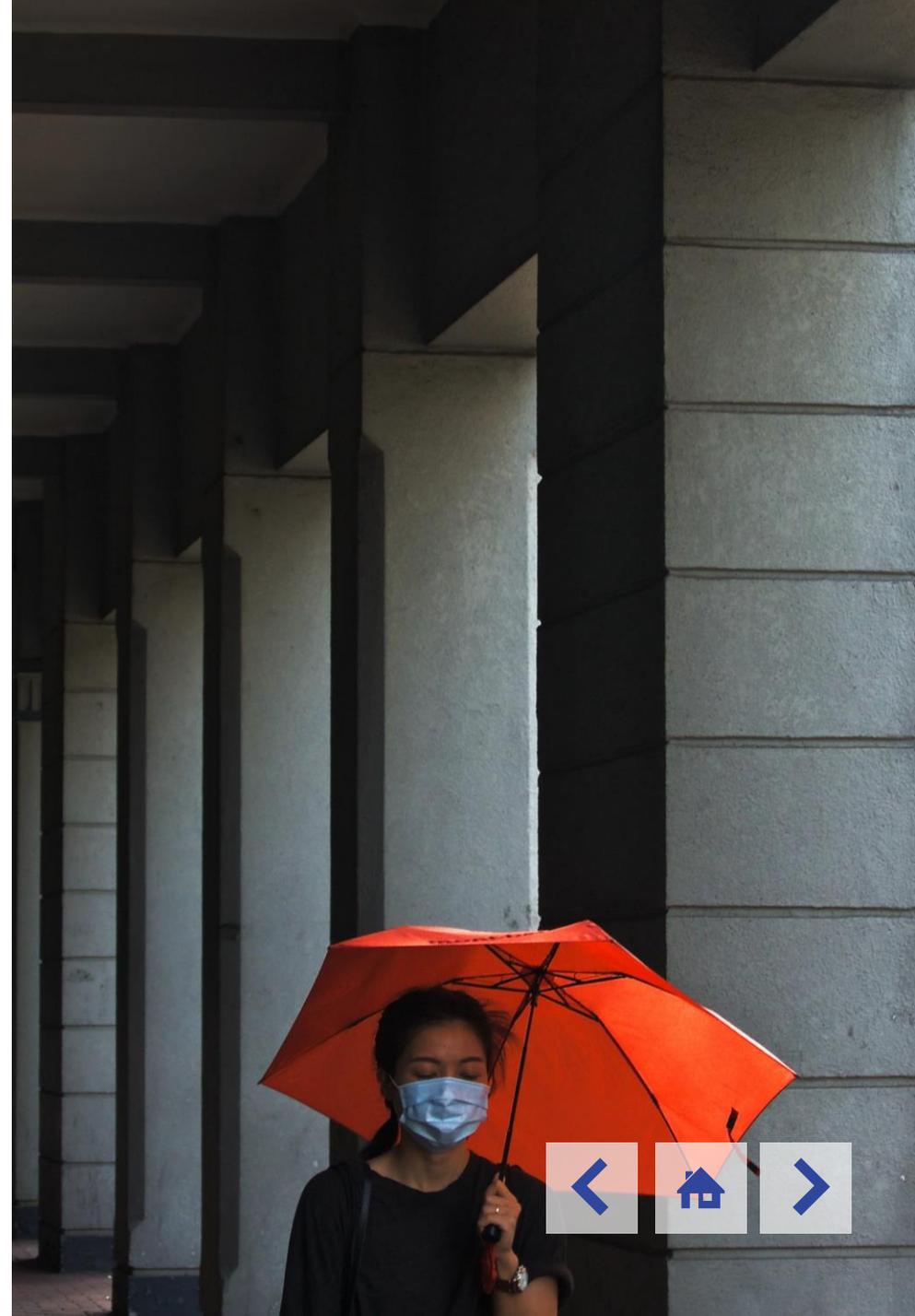
Since the outbreak of coronavirus, China has witnessed an epidemic that has affected commercial and daily life across the country. Given changes in consumer behaviours and perceptions, how will the market structure be affected? And how do brands respond? Here we present Ipsos' latest research into public opinion in China:

- Chinese citizens have high protection awareness of the virus, and 82% consciously wear a mask when they go out. They also show high enthusiasm for public welfare, with 49% having taken part in at least one donation or volunteer activity during the outbreak.
- Nearly half of all respondents are worried about salaries or personal development. However, many say they are feeling positive for the second half of the year.
- There is an obvious impact on shopping, with 76% of people saying they have reduced their outgoings. Unsurprisingly, online shopping has been very popular during the outbreak, while consumption of clothing, sports, beauty products and offline activities have decreased dramatically.
- There has been a sharp decline in public transport use, with many choosing to travel by foot or private car. The reduction in public transport use is expected to continue, along with a rise in automotive production and sales.

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BIOSURVEILLANCE ATLAS

Ipsos' multi-method approach to monitoring the coronavirus pandemic

As the spread of coronavirus evolves, it will become critical for decision-makers at the highest levels of government to have access to both real-time and validated information about public perception and reaction to the disease. Making educated and real-time decisions in an evolving crisis requires using multiple disparate information sources and applying advanced research methods to better understand the public's reaction to the crisis.

Innovative tools such as the Ipsos Biosurveillance Atlas will give decision-makers critical real-time data to help their organisations react and adapt to coronavirus. Our data will enable leaders to make those decisions in an informed and educated fashion, surfacing issues as they arise and minimising costly mistakes due to misinformation.

The tool combines real-time data, social media, newspapers, and other digital public opinion streams with traditional gold-standard survey data, applying proprietary algorithms and deep knowledge of geospatial analysis to make these data streams and outputs actionable.

In this report, we outline the metrics behind our biosurveillance platform to provide a unified picture of public reaction to coronavirus.

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CORONAVIRUS & BEHAVIOUR CHANGE

What does it mean for brands?

The speed and global spread of coronavirus has brought about a huge shift in people's behaviour, such as bulk-buying or self-isolating. The virus has led to our environment becoming increasingly 'liquid', subject to change, and operating without familiar context and predictable patterns. Considering these shifts in consumer behaviour, how can brands stay relevant to what their customers want?

The coronavirus pandemic means brands need to be flexible and adapt to change. When the context and pattern in which people live changes, brands should ask themselves: how they can add value considering this new reality?

Our new white paper explores how brands can pursue consumers in the right way and deliver value in a time of contextual fluidity. While, of course, it is vital to avoid being seen as a crisis profiteer, there are a number of ways brands can play enhanced roles in people's lives in a period where people are out of their automatic behavioural rhythms. There is little doubt we are now making decisions in a time of distress, making us more likely to pay attention to the brands willing to engage with us in the right way.

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SHORTCUTS

No travel? No problem!

The current climate has prompted many to delay travel or change their research plans. It raises questions as to which digital and online capabilities can be best deployed to assist the researcher's insight needs.

This is the focus of a new piece by Heather Carruthers where she explores how different digital tools can be put to work in circumstances where it may not be possible to liaise with clients and respondents directly. The generation of insights through [social communities](#) is one such approach, while the deployment of [curation techniques](#) provides a framework to master many different forms of data.

The options now available to our researchers and clients range from webcam-enabled platforms to applications that enable ethnographic learnings, as well as a variety of digital co-creation tools.

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Consumer Confidence Index

Consumer confidence in China dropped 4.3 points, falling to its lowest level in three years, according to February's Global Consumer Confidence Index.

The index measures consumer sentiment across 24 markets, with China seeing the biggest fall over the month. This the first time the index has been released since the coronavirus outbreak was first reported back in January.

To formulate the Global Consumer Confidence Index, we track attitudes to a range of factors which include the current state of the local economy, expectations of a stronger economy and the current financial situation. On a global level, consumer confidence was 48.5, almost the same figure as three months ago, when it was 48.6. However, it remains to be seen whether this level of stability will remain when the new data is released (which will be [available here](#)). This will be the first time the Index has been polled since coronavirus has spread globally.

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Country round-up

Many of our Ipsos teams around the world have been analysing data to explore what coronavirus means for their country.

An article from Ipsos in Canada looks at [how the spread of coronavirus is casting a shadow over the country's public mood](#). Over the last two weeks, Ipsos polling has shown that concern about the virus becoming a threat to Canada has risen from 15% to 21%.

In the US, the majority of Americans want to see more [widespread diagnostic testing, mandatory quarantines, and restricted immigration](#). In another article, the team explore the [impact of the virus on shopping habits](#).

Meanwhile, this infographic from Ipsos in the UAE looks at [what online citizens in the UAE want to know about the virus](#). Using social intelligence data, it analyses 49,000 mentions on social media in the country between February 29 and March 4. Our findings show that 36% want credible news updates, 31% want health information, 15% seek travel information, while 11% are using social media to question the actions of global and national bodies.

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LINK SUMMARY

THE CRISIS IN CONTEXT

Read more: <https://www.ipsos.com/en/global-trends-2020-understanding-complexity>

Download:

<https://www.ipsos.com/sites/default/files/ct/publication/documents/2020-02/global-trends-2020-understanding-complexity-ipsos.pdf>

Contact: Simon.Atkinson@Ipsos.com

IDENTIFYING THE SIGNALS

Read more: <https://www.ipsos.com/en/public-opinion-covid-19-outbreak>

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Contact: Simon.Atkinson@Ipsos.com

PUBLIC OPINION AND CORONAVIRUS

Read more: <https://www.ipsos.com/en/rising-concern-coronavirus-will-have-personal-financial-impact-and-poses-high-threat-their-country>

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<https://www.ipsos.com/sites/default/files/ct/news/documents/2020-03/coronavirus-ipsos-wave3-report.pdf>

Contact: Natalie.Lacey@Ipsos.com

THE SOCIAL MEDIA CONVERSATION

Read more: <https://www.ipsos.com/en/worries-about-worldwide-markets-concern-personal-safety-and-political-responses>

Download: <https://www.synthesio.com/blog/social-media-data-links-coronavirus-epidemic-global-economic-fears>

Contact: Laila.Idtaleb@ipsos.com

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SPOTLIGHT ON CHINA

Read more:

<https://www.ipsos.com/en-cn/optimism-and-anxieties-during-covid-19-outbreak>

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Contact: Shadow.Shi@ipsos.com

IPSOS BIOSURVEILLANCE ATLAS

Read more: <https://www.ipsos.com/en-us/knowledge/society/Ipsos-Biosurveillance-Atlas-COVID-19-Monitoring>

Download: https://www.ipsos.com/sites/default/files/ct/publication/documents/2020-03/20-03_50_atlas_v4_0.pdf

Contact: Robert.Torongo@ipsos.com

SPOTLIGHT ON ITALY

Read more: <https://www.ipsos.com/it-it/il-clima-dopinione-sullepidemia-di-covid-19>

Download: https://www.ipsos.com/sites/default/files/2020-03/italia_ai_tempi_del_covid_-_march_update_eng.pdf

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CORONAVIRUS & BEHAVIOUR CHANGE

Read more: <https://www.ipsos.com/en/coronavirus-behaviour-change-what-does-it-mean-brands>

Download: <https://www.ipsos.com/sites/default/files/ct/publication/documents/2020-03/coronavirus-behavior-change-ipsos.pdf>

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SHORTCUTS SUMMARY

No travel? No problem!

Read more:

<https://www.ipsos.com/en-us/knowledge/new-services/No-travel-No-problem>

Consumer Confidence Index – February 2020

Read more:

<https://www.ipsos.com/en/consumer-sentiment-drops-china-not-other-major-economies>

Coronavirus: What online citizens in the UAE want to know

Read more:

<https://www.ipsos.com/en-ae/coronavirus-what-online-citizens-uae-want-know>

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All the information within this document is in the public domain – and is therefore available to both Ipsos colleagues and clients.

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