



MRS Awards 2020
International Research

Winner
Ipsos

CovidWatch –
An international social commentary
on what unites and divides us during
the pandemic

SUMMARY

Ipsos' syndicated research project 'CovidWatch' showed innovation from an insight and business perspective. With seven different clients buying into the study, it meant clients were able to find a cost effective way to understand how consumer behaviour was shifting towards the 'new normal'. Through leveraging Ipsos' international network, the project brought a cross-cultural narrative to what was happening during the pandemic.

The same research was used in numerous ways: it allowed McDonald's to stay in touch with customers during the crisis, helping inform them of their reopening strategy; it fed into the cross-category consumer engagement plan at GSK; and IFF created commercial opportunities through showing their clients they were in touch with consumer sentiment.

Whilst the initial goal was to avoid furlough and redundancy, the project developed into a social commentary on what was happening in China, US, Russia, UK, France and Italy. With underlying tensions and shifts in consumer sentiment, behaviours and values, we saw how the pandemic reshaped the 'new normal' into a 'hyper normal'. This research continues to create a public debate on how we want to live in a post-Covid world.

SYNOPSIS

The evolutionary challenge

On an evolutionary level, COVID-19 challenged the existence of the human race. It's the first time in a generation that the world has experienced an incurable disease which we can't control. When faced with a global crisis, we see the facets of life that matter most; *that we are a social race that huddles in groups for survival, where crisis forces us into short term planning, and that our levels of empathy increase, meaning inequality becomes unacceptable.*

This description of the pandemic, as told by one of the anthropologists at Ipsos, was a poignant narrative of how people felt across Europe in mid-March. It also turns out to be one that holds true on a macro and micro level as neighbourhoods came together – 700,000 people volunteered to help the NHS, we started shopping for neighbours, and became more outraged at the injustices we started to see across the world.

As a global phenomenon, it was a turning point in life as we knew it, and it had to be researched.

The business challenge

The Ipsos Ethnography Centre of Excellence has 24 ethnographers in 5 different countries, specialising in cultural and behavioural insight, and majors in a methodology based on spending time in people's homes... which posed a big problem.

With 70% of all ethnographic work delayed or cancelled, we had 24 brilliant researchers, cultural analysts, semioticians, and film makers facing furlough or redundancy. Yet these were the very same people who could make sense of the challenges as they were happening. It was a context requiring speedy innovation.

CovidWatch – watching the world

So 'CovidWatch' was born, a longitudinal study following 30 different households in China, US, Russia, UK, France and Italy. Using our ethnographic skillset, we commissioned five videos a week from *each* household (150 videos a week) based on the things that mattered most to our participants.

CovidWatch was launched on 24th March, and four months on, the study is still running with the same 30 households. We have received nearly 2,000 consumer generated videos, edited 110 different films together covering topics such as:

- Shopping nightmares – the move to e-commerce and why toilet paper was so important (dignity, in a moment of fear);
- Hygiene transparency – looking at cross cultural variation in hygiene habits (noting the new-found love of Dettol in China);
- Changing food routines – showing how creativity soon gave way to mundanity (and a lot of pasta);
- Mental wellbeing – proving quite how much people need people;

- Lockdown beauty – where we observed (perhaps counterintuitively) people looking in the mirror more, rather than less, during lockdown;
- Gender divided – showing that, sadly, housework was still the women's domain.

Syndicating Qual...!?

To finance this, we set it up as a syndicated study charging £9,000 per month for all 6 markets, with one report and six films every week. This price point was an attempt to give all our clients – large or small – access to an invaluable ethnographic dataset, with regular access to the shifting attitudes, behaviours and values during the crisis; it was not an attempt to profiteer or make money. Clients quickly recognised this, and by the beginning of April we had GSK, McDonald's, Bank of America, Amway and IFF signed up on a rolling monthly basis.

However, this came with a huge amount of trepidation. Qualitative research is not easily syndicated, as one Qualitative Director at Ipsos noted:

“Syndicated Qual never works. Everyone expects qual to be tailored to their specific questions, and clients don't like receiving a generic qual report. Either you overwork to satisfy everyone, or you end up with unsatisfied clients.”

However, given that the pandemic seemed to be changing everything we thought we knew, we felt it was worth a try!

Finding the signals of change

The study fast became an investigation into the signals of change. Clients started asking *how was consumer sentiment changing? What could we learn from China and Italy? Will everyone continue baking bread?* Clients started to use this study as a way of seeing change in the world, before the quantitative data was showing it, and they even started feeding in new questions to their quantitative tracking based on this study.

One of the most powerful ways to highlight how change was manifesting, was to use pre-crisis trends as a benchmark for comparison. In short, every pre-crisis trend held firm, but had just accelerated ten-fold. *Conscientious Health, Brand Authenticity, Capitalism's Turning Point, and Peak Globalisation* were all key trends that we could see growing rather than shrinking. And none more so than the trend of *Reactions to Uncertainty and Inequality*.

Signalling Black Lives Matter

At the end of April we challenged the (then) common narrative that *'Coronavirus is the great leveller in society'* as it affected everyone, no matter wealth, colour, or tribe. Our 'Culture Shifts' report on 29th April stated that *“America holds dear the meritocratic idea that all have equal potential to achieve 'success', yet the pandemic is challenging this through widening national inequalities. Tensions are fast emerging amongst the African American community over the fact that the political establishment are ignoring their plight.”*

On the 25th May George Floyd was murdered. Whilst no one could have predicted the manner and time of his death, there were numerous signals to show that the public would react in this way, both from the African American community, and the growing number of non-Black allies.

Many of the participants in our study felt affected during this moment – some of whom went out to protest – and on 29th May we made this film to help our clients understand the sentiment across the US:

The George Floyd effect:

<https://vimeo.com/425516330>

PW: ECECovidWatch2020

Signalling spending habits

One of the crucial stories to come out of this pandemic will be how the world deals with the impending recession. While the numbers coming from government and economists are huge – *The UK government borrowed £55bn in May* – the consumer response is one of bemusement and confusion:

“It's all just play money, it's ridiculous”

On closer inspection we are seeing a shift away from a *'habit of spending'* – a key behavioural heuristic commonly seen within the world of financial services. Consumers are getting used to not spending money and still achieving the same level of enjoyment as before. This may bode well for managing personal finances as they head into a recession, but not with a consumer-driven economic recovery plan.

Stories that create action

Through this research we've followed people around the world through lockdown, shared their birthdays, experienced deaths of relatives, been with people on illegal hook ups, heard the conspiracy theories, been on the civil rights marches, experienced a flood, watched people save and lose money... and we've even seen lockdown dating (Mel, in the UK, found a boyfriend during lockdown). It is these stories that have given our clients the human story to understand the world at large.

“Understanding consumer sentiments and changing behaviors have been a central part of every decision-making meeting. The closer look at consumers' lives on an objective level has been very helpful and instrumental while making tough decisions on changing brand and category actions and priorities. Thanks to all Ipsos teams involved for all their efforts supporting us through this difficult time.”

Bilge BALCI, Insight Lead, GSK Consumer Healthcare

McDonalds': Offering a framework for reopening

This research led to the "Yes... but..." framework at McDonald's that showed how customers are weighing up *Desire vs. Risk*. From this, it became clear that:

- safety is paramount, if you are not deemed safe, you are irresponsible;
- a limited menu is fine, if the family favourites are there;
- the brand needs to demonstrate generosity.

McDonald's were a primary sponsor throughout the study as they felt this was the only way to understand the questions they didn't know they needed to ask. Given the world was changing so fast, they needed to focus on reopening with their customers' needs in mind.

"This work has been shared right across McDonald's through weekly digests, at market specific downloads, and fortnightly global share-outs. We are now using it for our 'family-refresh' strategy,"

**Christine Antoine-Simonet, Senior Director,
Global Strategy**

A social commentary, at a time when it's more needed than ever

This research has been more than simply delivering insight to clients, it has become an international social commentary on what unites and divides us at one of the most important moments in world history.

The next phase of this research is to make these ideas available to everyone that needs them, starting with a public facing documentary on the social issues the pandemic has caused. We are doing this partly for all our participants (we believe in the power of reciprocity), and partly as an ongoing insight generation process into how the pandemic has affected humanity. By putting our films online, we hope to start a debate amongst insight professionals, marketers and the public about what the biggest issues during the pandemic have been. Watch this space: <https://covidwatch.ipsos.com/>