Consumer Sentiment During Covid-19
The Epsilon-Conversant and CJ Affiliate Consumer Survey

COUNTRIES
UK, France, USA, Italy, Spain

COLLECTION PERIOD
26/03/20 – 05/04/20

RESPONDENTS
4,045
Purpose
To ascertain consumer sentiment during the Covid-19 global pandemic, Epsilon-Conversant and CJ Affiliate are running a consumer survey across multiple countries, over a prolonged period. While the data contained in this initial report – based on the first set of results from the UK, France, USA, Italy, and Spain, collected between 26/03/20 and 05/04/20 – holds value in understanding regional consumer sentiment during the current period, it is expected that the greatest value will be apparent in understanding evolving consumer sentiment over the coming weeks and months.

Methodology
Epsilon-Conversant and CJ Affiliate are promoting the survey to all demographics within the UK, France, USA, Italy, and Spain, encouraging responses with entry to a prize draw. It is expected that each week, a different set of consumers will respond to the survey. As such, it is not recommended to draw comparisons between shifts in demographics each week – such as the overall percentage of respondents in full-time employment. Reliable insight can instead be gleaned from the differences in sentiment between demographics, how this evolves over time, and from country to country. Sample data is included at the end of this report, and limitations – if any – are detailed alongside the relevant data.
CHAPTER 1
Regional variations and key takeaways
As people’s global and local circumstances have rapidly evolved, that has reflected in a clear shift in their buying preferences.

How likely are you to purchase products or services within the following categories over the next seven days?

**Winners**
Grocery, Wellbeing, and Home Entertainment  

**Losers**
Travel and Furniture  

**Ones to Watch**
Fashion, Electronics, Home Improvement, and Exercise
Think before you speak

This is a human problem that requires brands to find their human sides. On the one hand, there is opportunity. But is that opportunity actually an obligation to act as stewards of our own brands? What is for certain is Covid-19 leaves no room for opportunists.

Winners
ASOS
Deliveroo
IHG,
Domino’s & 50+ more

Takeaways

• Act like a first responder, not as a marketer. If you have a product or technology that could be used for good or donated to help during this crisis then this is your time of calling.

• Seek to improve the mood, not your P&L. If you have a product or brand that isn’t deemed essential, then there’s an opportunity to leverage your brand equity to deliver some much-needed joy to the population.

• Think outside the ‘box’ – Netflix, YouTube, Amazon; as good as they are, they’re not going to cure all our social and educational needs. Museums and zoos have been a fantastic example of bringing their product to the home.

Have you received a marketing message in the past two weeks from a company that felt poorly timed or didn’t match your interests?
Rumours circulating the internet are affecting consumers decisions to purchase items that require delivery with 23% of total respondents admitting the fear of catching Covid-19 from delivered packages and parcels has deterred them from making a purchase. 32% admit that the chance of a retailer being unable to fulfil an order has stopped them from purchasing.

Takeaways

- Because this is a new illness, it is not known exactly how coronavirus spreads from person to person. However the WHO have stated its very unlikely that Covid-19 can be spread through commercial packages or food.
- Many brands use delivery companies that have very clear procedures during this period. Yodel, DPD, Amazon, Hermes, DHL, UPS, Royal Mail
- Here is a wonderful opportunity to explain to your customers how you’re taking responsibility for the crisis from start to end.

There are many rumours circulating right now about the spread of Covid-19. Please select whether the following rumours have affected your shopping habits.

Please note: many of these are unsubstantiated rumours - we are including them here to gauge how rumours affect sentiment.
Don’t stop talking to your customers

Turning off paid marketing channels during this pandemic could lead to a decreased share of voice. In fact, 62% of respondents across all regions surveyed do not think brands need to stop advertising during the Covid-19 outbreak.

Takeaways

• Keep the brand burning. If you don’t advertise, any one of your competitors can and will eat into your market share. Equally, here is an open door to securing share of voice from those who may choose to pull back.
• Trying to reignite your brand in six months’ time could be more costly in the long term.
• Brand equity will suffer in the long term for a short-term gain.
• If spend must be reduced, then pivot your messaging in a manner which maintains brand presence in a more considered but no less effective manner.

Do you feel it appropriate for brands to be advertising to consumers right now, during this global pandemic?
Should I speak to my audience at a time like this?

Demand is lower but this isn’t Ground Zero for digital advertising. Across age groups the message is clear, with an average of 62% in all regions saying they want to see adverts from brands during the pandemic.

Takeaways

- The majority of age groups in most countries want to see brands advertising during the pandemic.
- If you have an ecommerce site, you need to let consumers know that you are still open for business, even if the bricks-and-mortar locations are not.
- Don’t leave you customers high and dry. Think about how you want your brand to be perceived today, not just when the world returns to normal.
- When times are good, you should advertise. When times are bad, it has been proven you must advertise.
- Pivot your product and message. Having your brand support other more charitable needs now will pay off when normality returns.
How do I speak to my audience?

Brands can stay relevant by telling stories about what they’re doing to have a positive impact on their communities, their staff and their customers.

McDonald’s is just one example of a brand being proactive about store closures in order to contribute to efforts to flatten the curve.

According to Maslow’s laws of Hierarchy we may be departing from the Physiological and Safety foundations into a wave of Love and Belonginess, with half of all respondents requesting wellbeing and positive messages from brands.

Please note: Due to the nuances of different languages and cultures, it is not recommended to compare countries based on the results on this page.
Communications should be valuable, timely and relevant

During times of uncertainty, customers want to receive relevant, timely and valuable information. While we know respondents felt it is still appropriate for brands to advertise to them during the Covid-19 outbreak, the messaging and timing needs to be right. In fact, 49% of all respondents felt they received marketing messaging over the preceding seven days that was poorly timed or didn’t match their interest.

Takeaways

- With 38% of all respondents citing email as their preferred communication channel, ensure you leverage your data and technology stack to provide truly personalised, relevant, and timely communications.
- Stay connected to your customers through relevant communication channels but adapt messaging to reflect your recipient’s preferences.
- While consumers expect to receive communications from brands, now more than ever, personalisation should be integrated into the entire experience, across all communication channels.
- Now is the time for smarter promotions, changes to the overall experience and support services, and positive news.
Where do I speak to them?

For obvious reasons, brands are moving marketing investments away from out-of-home (OOH) and events towards digital and ecommerce. With fewer channels at a brand’s disposal, the messaging and creative become that much more important.

Interestingly, almost every age group views display as the least obtrusive channel they’ve been exposed to.

Takeaways

- Social media comes second with 44% of combined average across all age groups saying they’ve received too many adverts via these channels during the pandemic.
- Since the lockdown was introduced in the UK, time spent online by individuals has increased by 20% per day. There is a similar picture in Italy where they saw a 30% increase.
- Epsilon-Conversant’s unobtrusive display methodology applies perfectly to the apparent appetites of the respondents.
CHAPTER 2

Country-level variations in sentiment between age demographics
How likely are you to purchase products or services within the below categories over the next seven days?

Have you received a marketing message in the past two weeks from a company that felt poorly timed or didn’t match your interests?

Right now, what messages do you feel are appropriate for brands to send to consumers?

Select any of the below formats that you feel - during this global pandemic - you are receiving too many marketing and advertising communications from brands in:

During this global pandemic, via which channels would you prefer to receive communications from brands?
There are many rumours circulating right now about the spread of Covid-19. Please select whether the following rumours have affected your shopping habits. Please note: many of these are unsubstantiated rumours - we are including them here to gauge how rumours affect sentiment.

- This has deterred me from shopping online.
- I have not changed my shopping habits because of this.

In 2019, which of the below best described your online shopping habits?

Today - during this global pandemic - which of the following best describes your online shopping habits?
How likely are you to purchase products or services within the below categories over the next seven days?

Do you feel it appropriate for brands to be advertising to consumers right now, during this global pandemic?

During this global pandemic, via which channels would you prefer to receive communications from brands?

Have you received a marketing message in the past two weeks from a company that felt poorly timed or didn’t match your interests?

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France

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In 2019, which of the below best described your online shopping habits?

Today - during this global pandemic - which of the following best describes your online shopping habits?

- It is possible to catch Covid-19 from parcels, packages and mail delivered to your house
- Retailers are less likely to fulfil orders as a result of the spread of Covid-19.
- The spread of Covid-19 and the global reaction could trigger a long-term global recession.
USA
Do you feel it appropriate for brands to be advertising to consumers right now, during this global pandemic?

Have you received a marketing message in the past two weeks from a company that felt poorly timed or didn’t match your interests?

Right now, what messages do you feel are appropriate for brands to send to consumers?

How likely are you to purchase products or services within the below categories over the next seven days?

Select any of the below formats that you feel - during this global pandemic - you are receiving too many marketing and advertising communications from brands in:

During this global pandemic, via which channels would you prefer to receive communications from brands?

- Email
- Social media
- Display adverts
- Online-video adverts
- Television adverts
- Not receiving too many marketing and advertising communications from brands
- Other (Please specify)

Definitely
Likely
Possibly
Unlikely
Definitely not
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The spread of Covid-19 and the global reaction could trigger a long-term global recession.

It is possible to catch Covid-19 from parcels, packages and mail delivered to your house.
Do you feel it appropriate for brands to be advertising to consumers right now, during this global pandemic?

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Right now, what messages do you feel are appropriate for brands to send to consumers?

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- Retailers are less likely to fulfil orders as a result of the spread of Covid-19.
- The spread of Covid-19 and the global reaction could trigger a long-term global recession.

Today - during this global pandemic - which of the following best describes your online shopping habits?

- I don't purchase online.
- My family and friends sometimes purchase online on my behalf.
- I occasionally purchase products online.
- I regularly purchase products online.
- I exclusively purchase products online.
Sample
Sample

Collected between 26/03/2020 and 05/04/2020, only complete responses to the survey were used to compile this report (i.e. the 4,045 respondents included in this report gave a response to every question).

Demographic data that the respondents gave for the purposes of measuring consumer sentiment are listed on the right.

Outside the scope of this specific report, future consumer surveys will be organised by Epsilon-Conversant and CJ Affiliate, and it is expected that a different sample of respondents will partake. The demographic data listed here applies only to this specific report.
THANK YOU