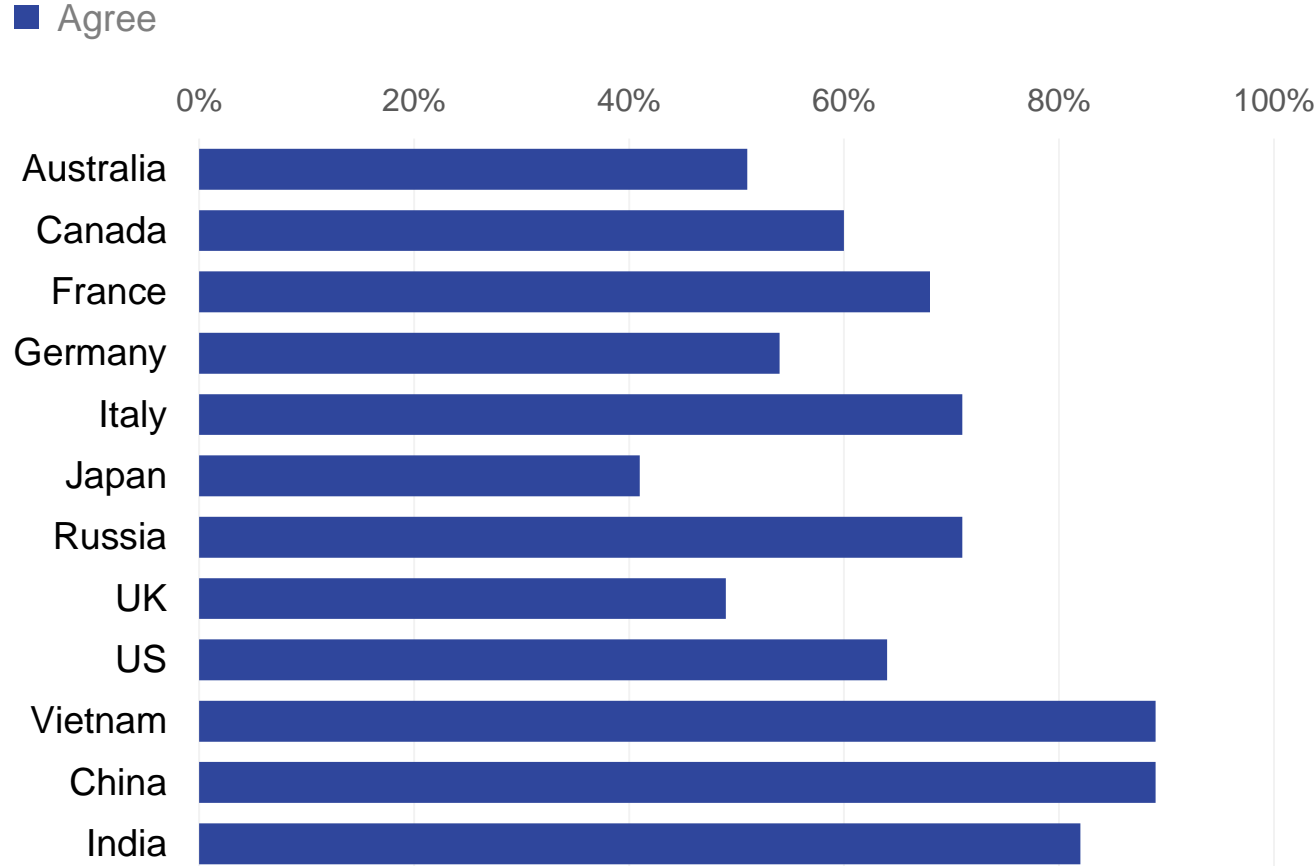


# KEEP MOVING IN TURBULENCE

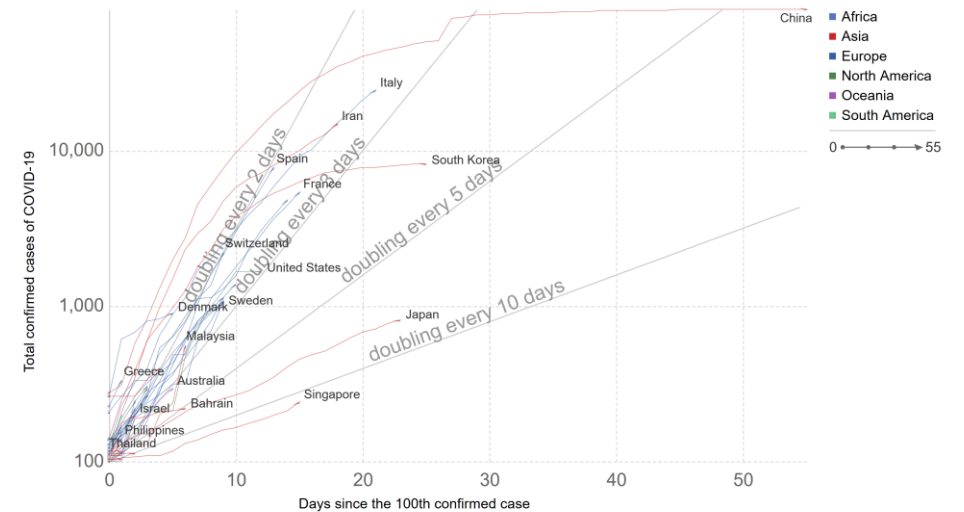
Ipsos learnings.

# MAJORITIES IN MOST COUNTRIES ARE OPTIMISTIC THAT THINGS WILL RETURN TO NORMAL BY JUNE, DESPITE TRAJECTORIES SHOWING THE OPPOSITE



## Total confirmed cases of COVID-19

The starting point for each country is the day that country had reached 100 confirmed cases. This allows us to compare the trajectory of confirmed cases between countries. Because of limited testing the number of confirmed cases is lower than the number of total cases.

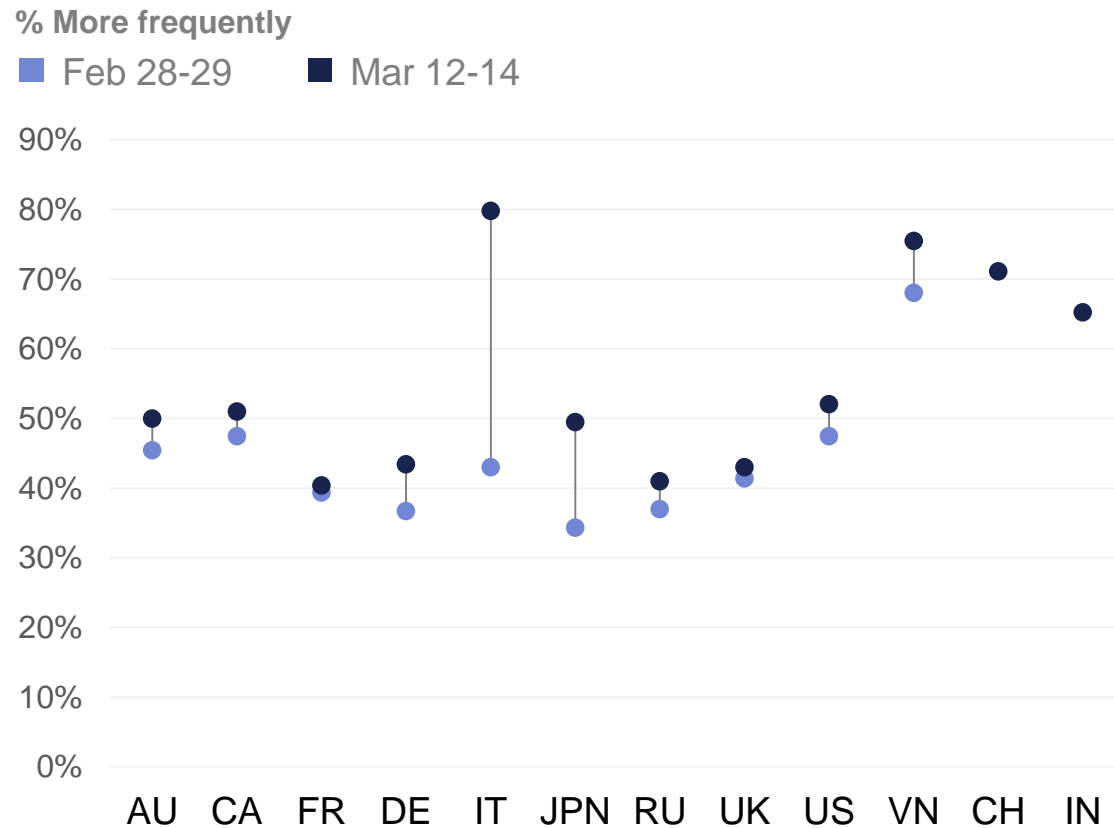


Source: WHO COVID-2019 Situation Reports

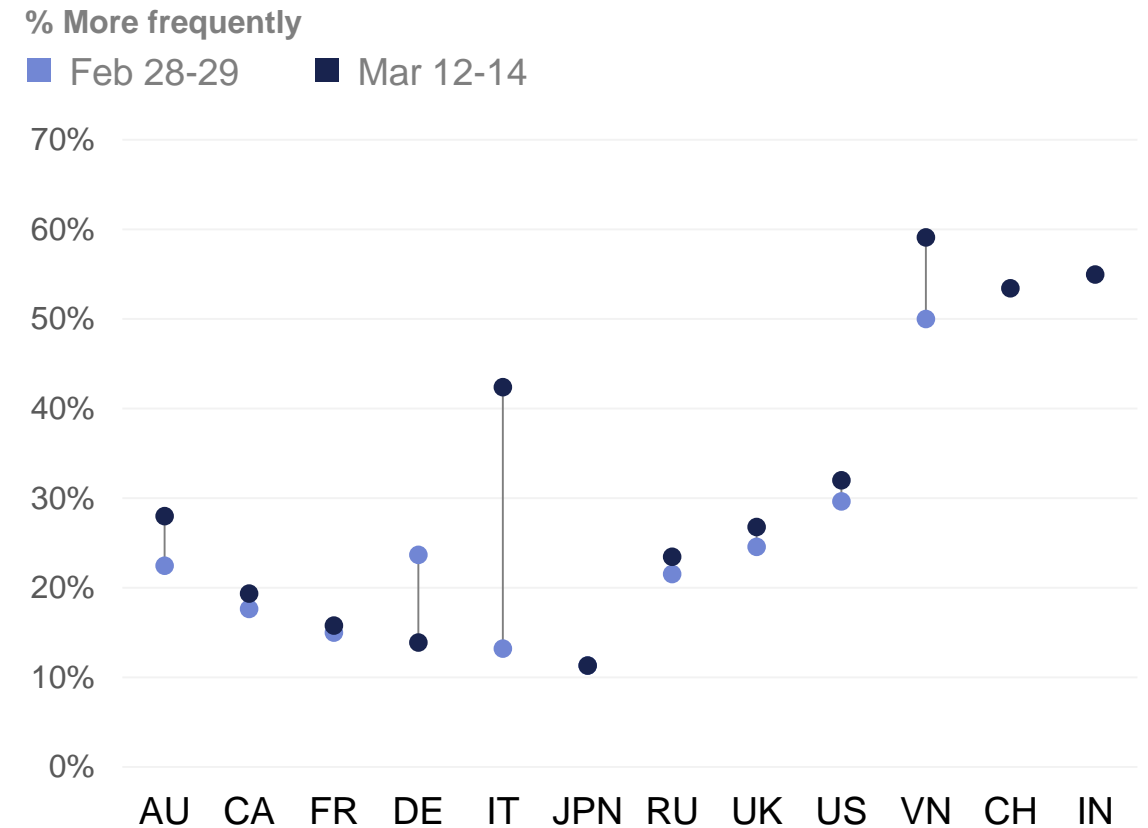
OurWorldInData.org/coronavirus • CC BY

# PEOPLE STARTING TO SPEND MORE TIME AT HOME, BUT SHOPPING BEHAVIOURS HAVE NOT YET SHIFTED EXCEPT – OF COURSE – IN ITALY.

## Spending Time at Home (among those who do this activity)



## Have food or groceries delivered online (among those who do this activity)



# WHAT ARE BRANDS DOING OR CONSIDERING...

- 1. Stopping or pausing all campaigns** – stop media-buying and assess (1) relevancy, (2) appropriateness and (3) short-term impact on sales.
- 2. Re-assessing and understanding new C-19 consumer needs** – this of course means quality market research is paramount and is also severely impacted by categories and local circumstances, which change very fast...
- 3. Reviewing brand values/messaging at the filter of C-19** – alignment to the context, how best to express these values in practical terms, etc...
- 4. Trying to join the dots and make sense of it all** – again, our workshop, curation and synthesizing capabilities are of prime relevance here to help clients make sense of a situation no one fully comprehends...
- 5. Build scenarios** – rather than a firm strategic plan, smart companies are returning to scenario planning at scale, which calls for multiple sources of insights adapted to these varied options.

## KFC pulls 'finger lickin' ads in UK amid coronavirus concerns



Retrieved from *Mother London* on March 13, 2020

## CHÚNG TÔI SẼ TẠM DỪNG CÁC HOẠT ĐỘNG QUẢNG CÁO

Chúng ta đang trải qua thời gian đầy thử thách, Coca-Cola Việt Nam sẽ làm tất cả những gì có thể để hỗ trợ cho cộng đồng.

Từ hôm nay, quảng cáo của công ty cũng như của các nhãn hàng tại Việt Nam sẽ được tạm dừng ít nhất một tháng nhằm tập trung nguồn lực hỗ trợ cho công tác phòng chống và đẩy lùi dịch COVID-19.

Bước đầu, ngân sách hơn 7 tỷ VND sẽ được ủng hộ cho Hội Chữ thập đỏ Việt Nam nhằm cung ứng các vật phẩm y tế, sản phẩm sát khuẩn và thức uống dinh dưỡng cho đội ngũ y bác sĩ và công đồng bị ảnh hưởng.

Cùng nhau, chúng ta sẽ tạo nên những thay đổi tích cực.

*Coca-Cola*

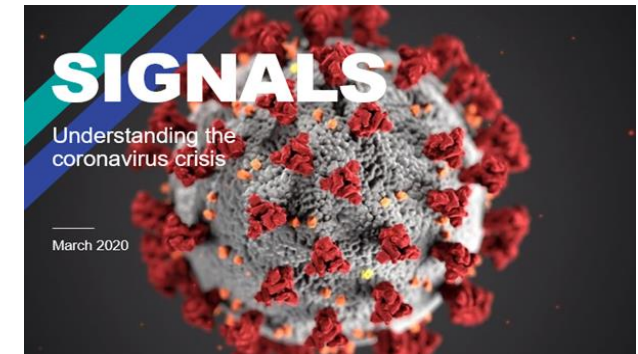
# IPSOS LEARNINGS AROUND COVID-19

## 1. SIGNALS – summary of all publications and white paper:

- <https://www.ipsos.com/sites/default/files/ct/publication/documents/2020-03/signals-understanding-coronavirus-crisis-ipsos-march.pdf>

## 2. Individual outputs:

- Transition to Online research  
<https://www.ipsos.com/sites/default/files/ct/publication/documents/2020-03/a-new-world-transitioning-online-ipsos.pdf>
- Coronavirus and Behavior Change  
<https://www.ipsos.com/sites/default/files/ct/publication/documents/2020-03/coronavirus-behavior-change-ipsos.pdf>
- Synthesio blog  
<https://www.synthesio.com/blog/social-listening-shows-covid-19-pandemic-dividing-online-conversations/>



# QUESTIONS POSED TO IPSOS

**1** Is current research feasible?

Is it ethical to research certain groups now (e.g. medics)

**2** Is current research reliable?

Guidance on comparing previous time periods on continuous research. How should we interpret norms or benchmarks?

**3** What should we research now?

How to create content and measure campaigns (growth in influencer content such as 'Jamie Oliver cooking tutorials')

**4** What do you recommend to prep future?

Guidance on category, channel, brand and media shift (experience 9/11/ SARs/ 2008).  
  
Focus on disruptive innovation or core?

**NEED FOR COVID PROOF  
FASTER INSIGHTS**

# Ipsos Coronavirus Polling

## OVERVIEW

The coronavirus has impacted markets, behaviors and lives. Understanding how citizen and consumer opinions and behaviors are evolving is crucial to managing effectively and understanding the appropriate response.

Ipsos has been monitoring public opinion since February 7th with now three polls across larger countries. The results of first wave are publicly available. A second wave, conducted Feb 14 and 15 and the third (Feb 28 and 29) are available for private access by companies, organizations and public institutions and governments. Given the rapidly evolving nature of the circumstances, the polling and survey have been adapted accordingly. We have now established a syndicated offer in which you can participate.

## APPROACH

In our Global Coronavirus Polling, we have the following questions in scope:

- Thinking about day to day activities what are people doing more/less frequently than a month ago (these are related to travel, transit, public culture and sporting events)
- Other things they are doing more/less frequently (these are related to restaurants, e-commerce purchases, grocery delivery, financial decisions and online streaming)
- Awareness of news about the COVID-19 outbreak and perception relative to the seasonal flu.
- Perceptions about government and WHO reaction/plans
- What information sources are trusted
- Some attribute agreement/disagreement re what might happen
- Personal action (e.g. face masks, hand sanitizer etc) and plans
- Intention to buy more/less/same of various categories

The following markets are included in our Syndicated COVID-19: includes US, UK, China, France, Germany, Japan, India, Canada, Australia, Russia, Vietnam and Italy.

## COVID-19 CONSIDERATIONS

- Provides quick responses in highly volatile environment
- 100% online, mobile-optimized platform
- No travel or face-to-face required
- Fully profiled audience ready to answer critical business questions with fast turnaround



## Ipsos Coronavirus Polling

**Tracking public perceptions and behavioral response over 12 large markets.**

- **Started:** 02/07/20
- **Tracking:** Change in behaviors, financial impact, countermeasures, attitudes and fears, perceived short-term and long-term outcomes.
- **Custom questions** may be included.
- **Sample:** 1000 gen pop adults per country every week.
- **Interested?** Contact your Client Officer for details on timing, deliverables, and pricing.



# Social Intelligence Daily Tracking

## OVERVIEW

When things evolve fast and you need a real time compass to finetune strategies, Ipsos Social Intelligence Analytics (SIA) translates the billions of consumer mentions generated online every day, cuts through the noise, and delivers insights that you can put into action. Tap into critical, up-to-the-minute intelligence about the conversations surrounding your brand with our daily tracking program.

Powered by leading social listening platform Synthesio, our program leverages global research expertise and advanced AI-driven analytics to explore key events, topics, or trends impacting consumer and brand perceptions NOW – enabling you to move forward with speed, agility, and confidence.

## APPROACH

**Daily evaluation of brand conversations against COVID-19 mentions:** Volume and sentiment are evaluated against established threshold of conversations (brand + topic mentions), and email alerts are triggered once threshold is surpassed. Email alerts include volume, sentiment, emotion, key themes, verbatim comments, and relevant media data.

**Weekly (3-4 page) Memo-style report:** 3-part report includes analysis of conversations around primary brand, specified competitor(s), and overall trends related to COVID-19. Includes recommendations and assessment of potential crises or reputation management triggers.

**Access to Synthesio platform:** World's largest data coverage; 80 languages covered in 190+ countries; Customized, DIY dashboards for always-on, real time monitoring of your brand's global and local reach in an interactive interface

## ADDITIONAL SIA PRODUCTS

### MARKET EXPLORER

Explore motivations, unmet customer needs, and changing customer landscape for your brand.

### TREND RADAR

A customer-centric trend approach designed to deliver critical insights on behavior shifts and future impact on category needs.

### BRAND PULSE

Explore how customers naturally talk about brands with dynamic and context rich insights from customer generated data.

### CUSTOMER EXPERIENCE

Deliver context to the customer journey, immerse deeply into specific issues and track your customer experience echo over time.

## COVID-19 CONSIDERATIONS

- 100% online, mobile-optimized platform
- No travel or face-to-face required
- 24/7 access to fully profiled audience ready to answer critical business questions in real-time
- On-demand access to qualitative feedback and survey data



### Case Study: COVID-19 Social Listening

Our social intelligence tool, Synthesio, has collected over 40 million posts and we are analyzing the latest key trends and insights, including:

- The US surpasses China for the largest volume of conversations, with over three million mentions compared to 1.8 million posts in China.
- Discussions have mainly centered 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.

# Online Omnibus

## OVERVIEW

Ipsos Omnibus is a very fast, flexible and cost-effective tool to obtain fast responses on simple marketing questions.

- Response time from overnight to a few days.
- Focus on specific targets as needed (US Hispanics, teens etc.).
- Possible custom Omnibus for low-incidence categories.

## APPROACH

Ipsos Omnibus can be leveraged for a broad range of topics:

- Reputation tracking,
- Crisis Management,
- Attitude, usage, awareness of brand or service,
- Videos/ images,
- Monthly tracking,
- Concept, message tests.

Ipsos offers 4 different Omnibus:

- **eNation** = Overnight.
- **Custom Express** = Quick quant.
- **UTarget eNation** = Specific targets.
- **Knowledge Panel** = Largest and broadest online probability-based research panel in the US.

## COVID-19 CONSIDERATIONS

- Provides quick responses to right-caliber strategies in highly volatile environment.
- 100% online, mobile-optimized platform.
- No travel or face-to-face required.
- Fully profiled audience ready to answer critical business questions with fast turnaround.

## ENATION OVERNIGHT

### Fastest Ipsos Omnibus

Send a question before 11pm ET, full results by 4pm ET next day

## KNOWLEDGE PANEL

Largest and broadest online probability-based research panel in the US.



## Omnibus Application

### Our mission is to provide omnibus research with:

- Speed
- Affordability
- Flexibility/Agility
- Attention to Detail
- Great Customer Service

### Potential questions for quick turnaround research:

- Awareness of COVID-19 activity
- Reactions to Brand response to COVID-19
- Adherence to #stayhome
- Concern about which family members
- Reaction to actions at the state level
- Concerns about availability of specific categories/brands
- Concerns about product quality
- Concerns about food supply
- How long expected to be impacted
- More concern about COVID or the economic situation

# Online Communities

## OVERVIEW

Ipsos online communities help you stay connected to your consumers with ease and efficiency, especially in the face of travel restrictions and other current face-to-face research challenges. Through a combination of proven engagement tactics and analytical rigor, our online communities deliver both qualitative and quantitative learning opportunities, quick-turn or longitudinal insights, and flexible project execution from syndicated to bespoke; US-based to multi-country.

## APPROACH

Online communities vary in length, number of participants, and range of activities, but they can be classified broadly as follows:

- Instant – from 1-2 weeks, with 15+ participants – looking at a “point-in-time.”
- Pop-up – 3 weeks - 6 months, 50+ participants – short-term, in-depth exploration.
- Ongoing – 6+ months, 500+ participants, used to inform multiple research objectives over time.
- Syndicated – tap into our U.S. syndicated community for single or multiple quick-turn projects.

With leading sample quality procedures and best-in-class access, we ensure you are connected to authentic and engaged respondents through the course of your project.

Our integrated qual/quant platform includes a range of activities such as:

- Discussions
- Blogs & Diaries
- Live Chats & Video Focus Groups
- Co-Creation and Ideation Tools
- Robust Quantitative Surveys

## COVID-19 CONSIDERATIONS

- 100% online, mobile-optimized platform
- Available in 36 languages
- No travel or face-to-face required
- 24/7 access to fully profiled audience ready to answer critical business questions in real-time
- On-demand access to qualitative feedback and survey data

## A SAFE AND WELCOME SPACE IN THE FACE OF COVID-19

Community members are actively voicing their concerns and sharing their changing habits in relation to the health crisis. At the same time, as many countries around the world put quarantines and social distancing measures in place, the community is seen as a haven for connecting with others, underscoring the richness and depth of information respondents are willing to provide.

*“Please do as many activities as possible, so you can keep us busy, helping us to pass our time at home! A great virtual hug to all of you!” – Community Member from Italy*



## Case Study: COVID-19 Syndicated Community Discussion

With over 700 responses in 24 hours, our U.S. syndicated discussion has yielded rich insights around evolving perceptions and habits:

- **Mixed Messages from Media Fueling Confusion and Fear:** *“The situation feels very chaotic and scary because of all the unknowns. There aren’t any definite ways to control or treat the virus yet. We are all just doing our best and waiting for the worst, in a way.”*
- **Rapidly Evolving Shopping Habits:** *“I will have to spend more time shopping, will add to my stockpile of water, food and supplies, and I will have to shop around more since stock is out.”*

# Behavioral Science Audits

## OVERVIEW

**Behavioral Science** is an interdisciplinary field of science that allows us to better understand the contextual, nonconscious, and, often hidden, drivers of behavior. Especially during turbulent times like the coronavirus, BeSci can be leveraged to tap into the unconscious concerns of buying households.

There are a significant amount of **untapped, validated BeSci insights** in academic literature.

Ipsos has a team of Ph.D. Behavioral Scientists that can identify the relevant BeSci insights from academic papers to audit and optimize consumer stimuli **without even talking to consumers**. These audit analyzes shed light not only on what consumers will do but also on **why**. Predictive value of audits has been validated in A/B testing and market results (e.g., double-digit lift in market behavior based on our audit work on a direct mail).

## APPROACH

Our BeSci experts will diagnose:

- How to improve and integrate **non-conscious cues** to make them more concrete, tangible and vivid.
- What the **optimal wording** is that will grab attention and drive desired behavior?
- How can we **frame product benefit with consumers** motivational goals to drive connection?

Collateral we can audit includes but is not limited to:

1. TV ads
2. Digital/ Print Ads
3. Website
4. Brick-and-mortar/Digital Stores
5. Packaging
6. Direct Mail



## COVID-19 CONSIDERATIONS

- No travel or face-to-face required
- No primary research required
- Taps into the sub-conscious behaviors, mindsets and emotional triggers associated with COVID-19



## Case Study: Packaging Audit

Food images on the bottom of the package signify that the food is heavier/more filling (Deng, X., and Kahn, B.E., 2009); this is desirable if heaviness is a positive attribute but undesirable if heaviness is a negative attribute (such as the one on the right).

Pack shape can also convey attributes about the food contained inside – taller, thinner containers are perceived as having fewer calories (Koo, J., and Suk, K. (2016).

# Qualitative: No Travel? No Worries!

## OVERVIEW

Ipsos UU has a full suite of digital tools, from web-cam platforms and apps that enable ethnographic research, to digital co-creation tools, we've got a solution for you. With our big global footprint, we are on the ground in 76 countries across the world, and here in the U.S., with 150 qualitative researchers and staff coast to coast. We are here to help you keep your insights work on track!

Further, Ipsos Curation Services can help you make smart business decisions now by mining your existing data, and identify gaps so you can move faster once your research plans get back on track. Because this too, shall pass. Curation helps to answer "why" and "what to do next" by paring down and transforming disparate data and data types to clarify and identify business opportunities.

## APPROACH

**AppLife** - In-the-moment input from consumers in their natural environment, including text, audio, photo, video

**Qualspace Online** - The depth of a 1:1 with the convenience of online, on the respondent's terms, over a day or over time

**Streaming Immersion** - Go in context without leaving your desk, as IJU's moderator and videographer stream immersions live in real time

**Virtual Intercepts**- Intercept from online surveys, social media, or email campaigns and route to moderated 1:1 web-cam interviews

**Passive with Reflective IDIs** - Observe behavior and delve into the "whys" by following passive video collection or metering with reflective interviewing

**Curation** - Synthesize disparate data into insights for impact. IJU curators connect the dots amongst existing knowledge and identify actions to take

## COVID-19 CONSIDERATIONS

- If you maintain your face-to-face research, we will maintain careful procedures to ensure that recruited respondents honor their commitment to attend your project.
- We respectfully request that the recruited respondents be treated fairly in the event that they must be cancelled due to illness.



## Case Study: Understanding Millennial Men

A personal care brand needed to explore relatable, unexpected moments when Millennial Men experience stress. We asked 20 men to share their stories around the moments, both big and small, they felt stressed.

AppLife enabled the consumers to respond as an event was unfolding, providing fresh emotions and stories. They were also able to share their thoughts via text, pictures and videos, which provided additional richness to the insights.

The mobile capability allowed the brand team to follow along, in real-time, throughout the consumer's journey

# Innovation during the Crisis

## OVERVIEW

It is important to ensure your innovation, pricing and mix strategies are equipped for today's market realities and pandemic crises. There is no need to stop doing Innovation research, but the context of your questions must be adapted.

You may want to consider the following questions:

- Do people need **new products and services** to thrive in a self-quarantine world?
- Is the **messaging** around my product appropriate given the current mood?
- In a stockpiling climate, do I have the **right mix of products** in the market?
- Is the **pricing** for my product optimal given shifts in demand and product shortages?
- Will **cost-saving changes** to my product be noticed by my customers?
- How will **sales** of my new launch be impacted by a cut to marketing support?

## APPROACH

Ipsos offers comprehensive services that are safe for you and your customers and quickly deliver answers to your critical questions. Further, our studies can nearly all be executed online – keeping things safe.

Respondents are able to participate in engaging online surveys designed to replicate real-life behavior from the convenience of their homes, allowing us to reach a representative sample of your consumers regardless of quarantine measures.

You also have the flexibility of adding a video-capture approach onto any Innovation research (i.e. Concept, Product, Pricing, etc.) that you design.

Specifically, we can stay close to your consumers via employing our P360 video-led approach. Specially-screened respondents are given “task-based” research assignments depending on learning agenda via an interactive mobile app.

Feedback is video-based and uploaded in real time to a video analysis platform. You will get deeply contextualized insight into product experience – qualitative and quantitative – including consumer language, functional and emotional benefits, and issues that might have been missed in a traditional survey. [see Case Study box for more information.]

Note: Please see DIY InnoTest for DIY digital solutions.

## COVID-19 CONSIDERATIONS

- While the overwhelming majority of Ipsos Innovation services are done online, extra safety precautions are being implemented for engagements where face-to-face research is the appropriate methodology.



### Case Study: Beverage Usage Moments P-360

Our beverage client had not conducted competitive benchmarking in several years and was experiencing a decline in share. The team was concerned with declining product quality yet some in the team also worried their brand was losing relevancy in key regions.

Ipsos leveraged P360<sup>o</sup> to capture the real consumer voice & behavior through video.

Respondents were engaged via “tasks” as opposed to traditional surveys. Over a week, consumers recorded tasks including a kitchen tour, unboxing the products, preparing & consuming them and sharing any moment they or the family consumed the beverage.

50 respondents provided over 152,000 spoken words via the task videos.

# DUEL Screening & Assessment Tool

## OVERVIEW

In a highly volatile environment, DUEL is a simple, practical tool designed to provide responses to right-caliber strategies.

Consumers spend less than 7 seconds to purchase a product in-store, which is why marketers need a screening solution that mimics how consumers make decisions: Fast, intuitive, and choice-based.

Also applied to Fast Pack – A device agnostic screening tool that reflects consumer shopping experience.

## APPROACH

DUEL provides a gamified consumer experience putting stimuli into a fast and intuitive choice exercise.

Designed to work with any type of simple marketing proposition: **Claims, varieties, names, and visuals.**

### BeSci powered:

- Tournament-like game.
- Fast, intuitive choice mimicking real life.
- No scales or ratings.
- A 5-minute questionnaire on any device.

### Direct and Indirect Measures

- Direct measure from choice to preference.
- Indirect punch measure from response time reveals conviction of choice.
- Preference and Punch are combined into a single metric reflecting appeal and passion.

### Agility with Substance.

- Validated with strong innovation legacy.
- 45,000 stimuli tested.
- Best-in-class sample quality with built-in AI fraud detection.

## COVID-19 CONSIDERATIONS

- 100% online, mobile-optimized platform.
- No travel or face-to-face required.
- 24/7 access to fully profiled audience ready to answer.

## AGILE

Available in DIY and researcher-assisted service.

## NEURO 7 BESCO

To understand appeal and passion.

A next generation early-stage screener that leverages learning from BeSci and Cognitive Psychology to capture both explicit and indirect consumer response.



## Case Study: Mars Occasions DUEL Research

MARS wanted to create new purchase occasions with the introduction of M&M's Candygrams and wanted to test messaging that coincides with specific M&M's characters.

We utilized our online device agnostic design utilizing the Ipsos DUEL Testing Methodology. Each respondent evaluated different messages in a 'tournament style' test.

76 messages were tested overall. Each message was developed for an overarching occasion, 11 in total, and was accompanied by a simple pack design.

The M&M's brand launched 36 themed package designs with messages ranging from, "You make mama proud," to "Congrats on that thing you did," and "I love being socially awkward with you".

# Accelerator Labs for Innovation and Creative

## OVERVIEW

Labs accelerate decision-making at any stage of the innovation life cycle and can be executed in person or fully online. They eliminate the trade-off between rigor and speed.

Speed teams use labs to identify in a single day which ideas, concepts, copy, packaging to move forward.

When applied to creative, ads pre-tested with the benefit of Creative|Labs have more potential for above average business impact (138 index).

## APPROACH

Remote client participation is already available **if you cannot attend the research event:**

- Quant data shared electronically (e.g. live via Google Docs, or via Excel immediately after each session)
- Qual streamed over FocusVision
- Video conferences replace debriefs to engage with stakeholders throughout the day
- Ipsos are happy to attend client offices, if requested, to guide teams through results in person.

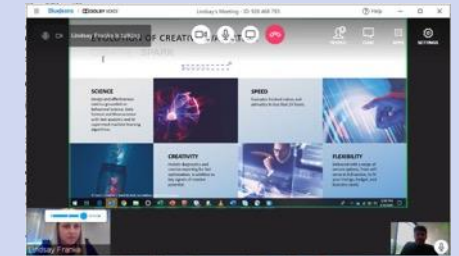
If respondents **stop attending research** (voluntarily or mandated) then we have a final back-up for full remote Lab sessions:

- Supplier hosts a remote session with the recruited participants for the Lab.
- Quant happens virtually, but in real-time during the allocated session timing
- Data available immediately
- Qual viewed online with IUU moderator
- Debriefs via video conference with full advisory experience and digital whiteboarding
- Same Day learning

## COVID-19 CONSIDERATIONS

- Respondents with coughs or who are visibly ill at check in will not be permitted to participate in the study
- During confirmation call, if a respondent sounds ill they will be either A) dismissed from the study; B) will be flagged to verify if they are ill during check in.
- Over-over recruit has been implemented to include 5 additional respondents per session
- Keypads/pens/laminated cards will be wiped down after every quantitative session.
- Client and Respondent rooms will be sprayed with Lysol and Client room counters will be disinfected after every quant/qual group.
- Client and Respondent food will be served individually, rather than shareable dishes

## VIEW OF CREATIVE STIMULI IN BLUEJEANS SCREEN



## Case Study: Accelerator Labs

A market-leading CPG brand needed artwork guidance to move into an adjacent area, driving breakthrough and brand linkage. Identified winning route and aligned multi-functional team to artwork optimization.

A leading tech client holds regular labs as a campaign element decision-making vehicle across projects

One OTC client cracked its creative in a single lab after 3 years of lackluster copy, while cutting research spend by 50%



# Virtual Store Research

## OVERVIEW

Ipsos is a leader of virtual shopping experience and operates an established shopper research consultancy. Instead of designing and executing controlled store tests requiring in-store installations, Ipsos can support your store research needs via virtual store design options, including 2D Shelf, 3D Shelf/Store, Immersive VR, and eCommerce.

During the pandemic with significant households being quarantined and shopping online, we can help answer:

- What is the optimal online assortment? What are the implications for improving online store navigation?
- Which scenario is superior in terms of conversion, speed of shop and basket size?
- How should digital communication touchpoints be prioritized?
- Where should digital content be located to maximize conversion?
- What is the optimal combination of price and pack size in the online environment?

## APPROACH

With **Simstore**, we create highly realistic recreations of all kinds of shopping environments and can use different technology platforms depending on the business question.

Our **2D Virtual Shelf** design is used for plan-o-gram testing, decision trees and assortment.

Our **3D Virtual Shelf, Aisle or Full Store** testing is used for larger or multiple categories/aisles.

We partner with InVRsion when a completely **immersive VR experience** is required.

Our Simstore approaches can assist our clients with:

### PRODUCT ASSORTMENT

Evaluate the impact of adding or delisting SKUs on shopper satisfaction and sales by channel and retailer.

### PLANOGRAM

Understand the shopper decision tree and evaluate the impact of shelf organization on category and brand sales.

### PRICE

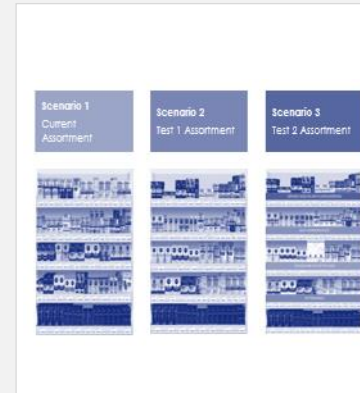
Analyze the impact of price changes, and simulate price change impact on shopper perceptions, sales, and profit.

### PROMOTIONS AND POS

Optimize the content, location, and format of in-store POS materials and assess their impact on ease of navigation and sales.

## COVID-19 CONSIDERATIONS

- 100% online, mobile-optimized platform
- No travel or store entry required



## Case Study: Simstore Assortment Research

- A Personal Care manufacturer needed to determine which assortment scenario had the potential to drive category and brand sales.
- Our Simstore platform provided an understanding of time to find the correct product, total sales, segment sales, and aligned with desired brand imagery.
- From the research, our client learned that Scenario 3 provided an optimal shelf for driving category sales, increasing brand share, and improving shopper satisfaction.

# Retail Performance

## OVERVIEW

As the pandemic influences channel migration and category navigation, we can provide behavioral analysis, insights and Key Performance Indicators to measure, manage and improve shopper behavior and the customer experience at Retail globally.

We monitor over 3.1 billion retail store visits a year on behalf of our clients in 52 countries.

We combine technology, behavioral data and analytics to provide trend analysis and forecasts to optimize a retailer and manufacturer's performance, resulting in improved conversion, increased profitability and sustainable growth.

## APPROACH

Ipsos Retail Performance can support in-store behavioral assessment via:

- Tracking overall store footfall or signage views
- Breaking out Conversion Rate by Transaction Type
- Providing Shopper Mobile Metrics via Apple or Android Apps

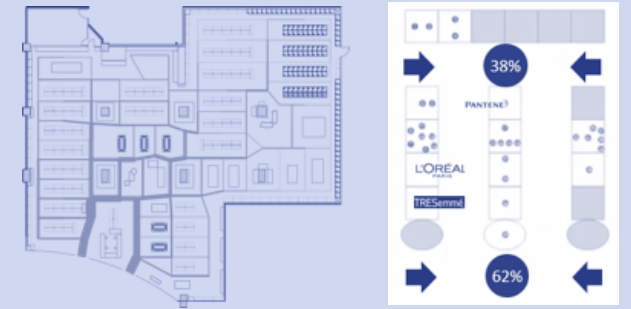
Through our Shopper Engage methodology, we can install cameras in the store or employ observational interviewers to help you answer:

How are my customers shopping while they are in the store? How do promotional ends affect in-aisle purchases? Are congestion spots developing? Are we converting all opportunities? Have shopper navigation paths changed as a result of the pandemic crisis? Does this new pattern require a different aisle layout or product orientation?

## COVID-19 CONSIDERATIONS

If you are concerned about how shoppers are now navigating your category and want to monitor how shoppers are shopping your category in specific retailers, we can install cameras or staff with observational interviewers to capture real-time behavior.

## FLOW NAVIGATION MAPS



## Case Study: Shampoo Shopper Engage Lite

Ipsos' discreet observers collected quantitative data on real shoppers who are unaware they are participating, so their behaviors are completely natural.

We recruit consumers immediately after the shopping trip to explain their behavior in the store via mobile survey. We then discover their ingoing mission and what influenced their selection.

Finally, we recruit consumers after the shopping trip to participate in eye tracking research to see the shelf through consumer eyes, providing more granular understanding of shelf, product variant, and marketing materials interaction.

# eCommerce Unboxed

## OVERVIEW

eCommerce Unboxed is a global syndicated eCommerce study that delivers insights for driving online sales and futureproofing your strategy. Today's shopping attitudes and behaviors have become disrupted seemingly overnight – and are likely to carryover once we return to normalcy. eCommerce Unboxed is ready to capture the post-pandemic shopper as it:

- Focuses on today's – not yesterday's – shopper attitudes and needs.
- Captures triggers, preferred searches, and impact of social media.
- Provides the shopper's perspective of their emerging shopping plans.

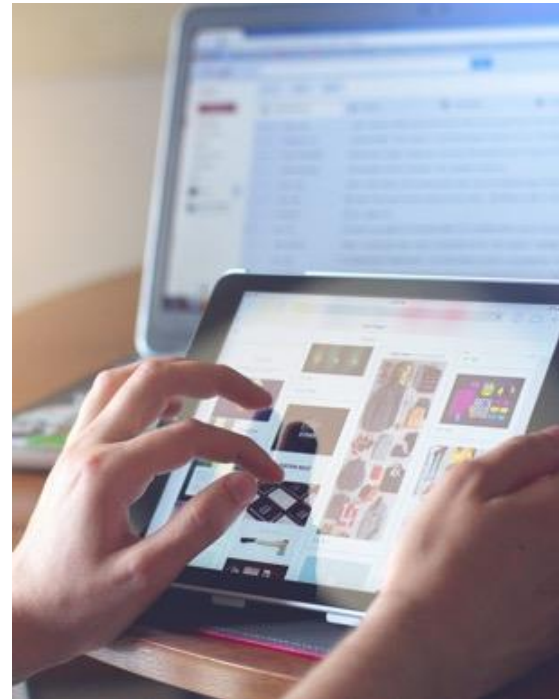
## APPROACH

eCommerce Unboxed will be fielded in 25+ countries through a 20-minute online survey. We will interview 2,000 shoppers per country across the following categories:

- Alcohol
- Beauty, Health, Personal Care
- Electronics/Appliances
- Entertainment
- Fashion
- Financial Services
- Food and Beverages
- Furniture
- Tobacco
- Travel/Tourism

## COVID-19 CONSIDERATIONS

- 100% online, mobile-optimized platform
- No travel or face-to-face required
- Future-oriented to capture the long-term impact of the pandemic on online shopping behavior and attitudes



## Business Questions Addressed

- How can I profile eCommerce shoppers and what are their preferences?
- What are the digital paths to purchase for major categories?
- How can I measure eCommerce category incidence, adoption, drivers and barriers?
- What are shoppers' motivations, perceptions, and future eCommerce purchase plans?

# ABOUT IPSOS

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Ipsos is the world's third largest market research company, present in 90 markets and employing more than 18,000 people.

Our passionately curious research professionals, analysts and scientists have built unique multi-specialist capabilities that provide true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. We serve more than 5000 clients across the world with 75 business solutions.

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

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# GAME CHANGERS

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In our world of rapid change, the need of reliable information to make confident decisions has never been greater.

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder. Ultimately, success comes down to a simple truth:  
**You act better when you are sure.**