



THE SIGNALS

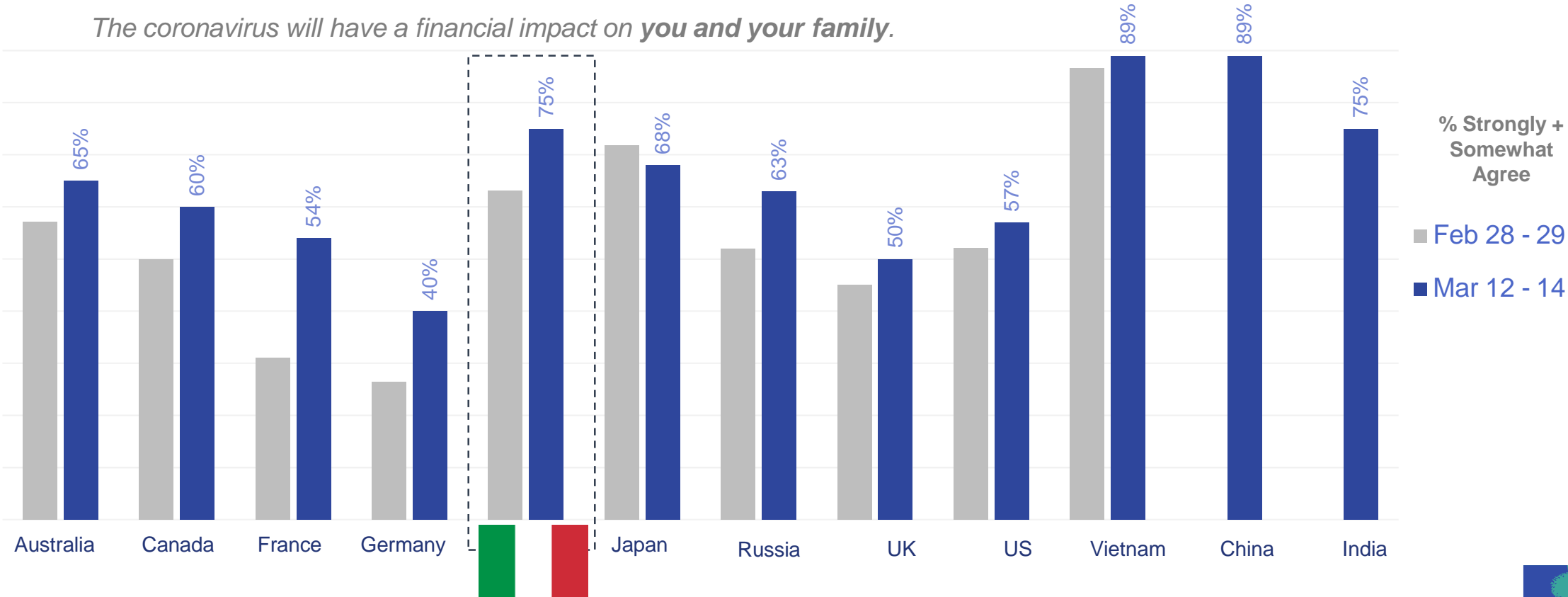
IN UN MONDO INCERTO,
I DATI CONTANO



THE SIGNALS

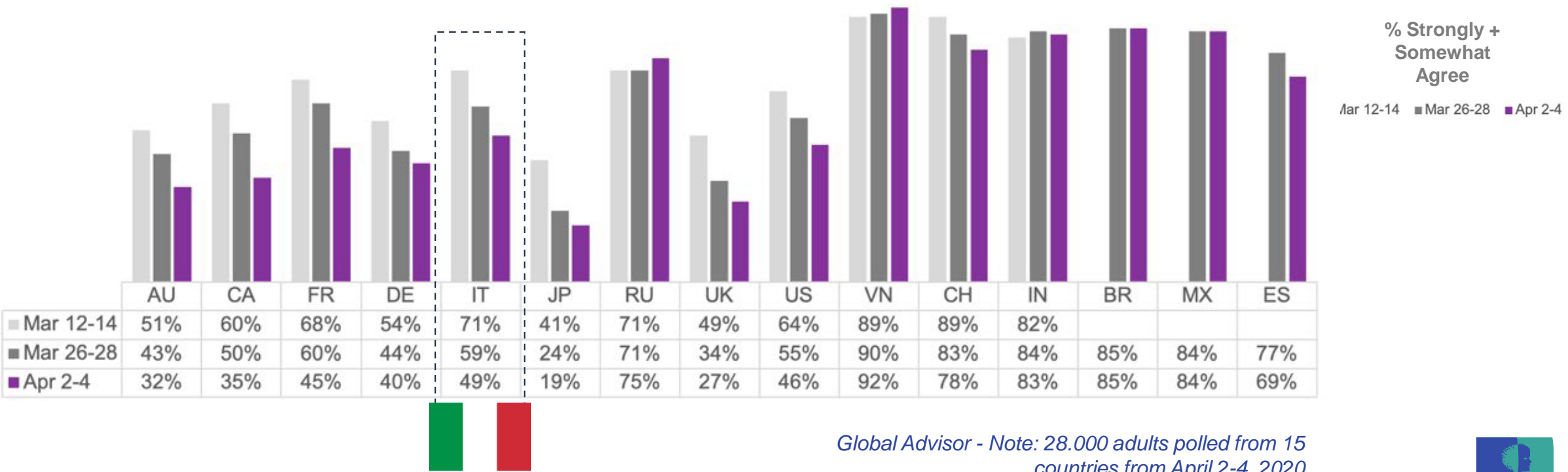
Innovation & technology to win
the challenge of change

WITH NEW CONTEXT COMES NEW BEHAVIORS & OUTLOOKS

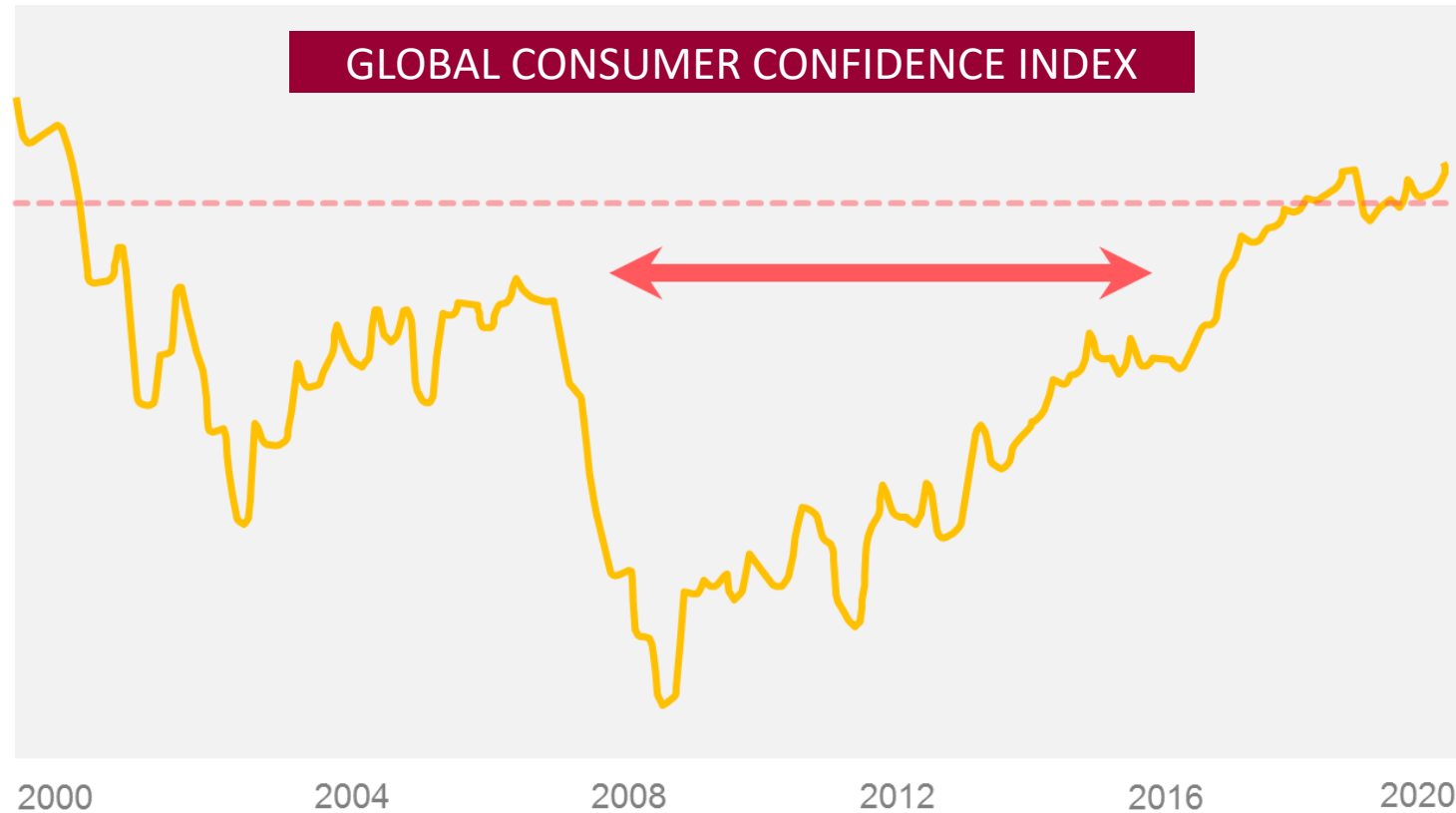


MORE TIME TO RETURN TO “NORMAL or NEW NORMAL”

*I expect things to return to **normal** by June*



SOME BEHAVIOR CHANGE TRIGGERED BY THE CRISIS WILL LAST FOR SEVERAL YEARS AND MAY BECOME PERMANENT



BRANDS NEED TO BE RELEVANT, BE ADAPTABLE TO SURVIVE

THIS PANDEMIC WILL BE A GAME CHANGER



SOCIETY.



MARKETS.



PEOPLE.

BRANDS CAN CREATE OPPORTUNITIES

ADAPTING EXISTING PIPELINE

The existing pipeline of innovations may need to be re-align to adapt to changes that could last for years

CLAIMS

PRODUCTS

CHANNELS

SERVICES

PACKS/FORMATS

IDENTIFYING NEW INNOVATIONS

With consumers more open to change and forming new habits, it's a good time to rethink the innovation pipeline to determine what resonates with consumers.

LX

CATEGORY

MARKET

INNOVATION IN-ACTION

NEW CHANNEL



LONELY PLANET
To escape and travel
while staying at home.

NEW PACK



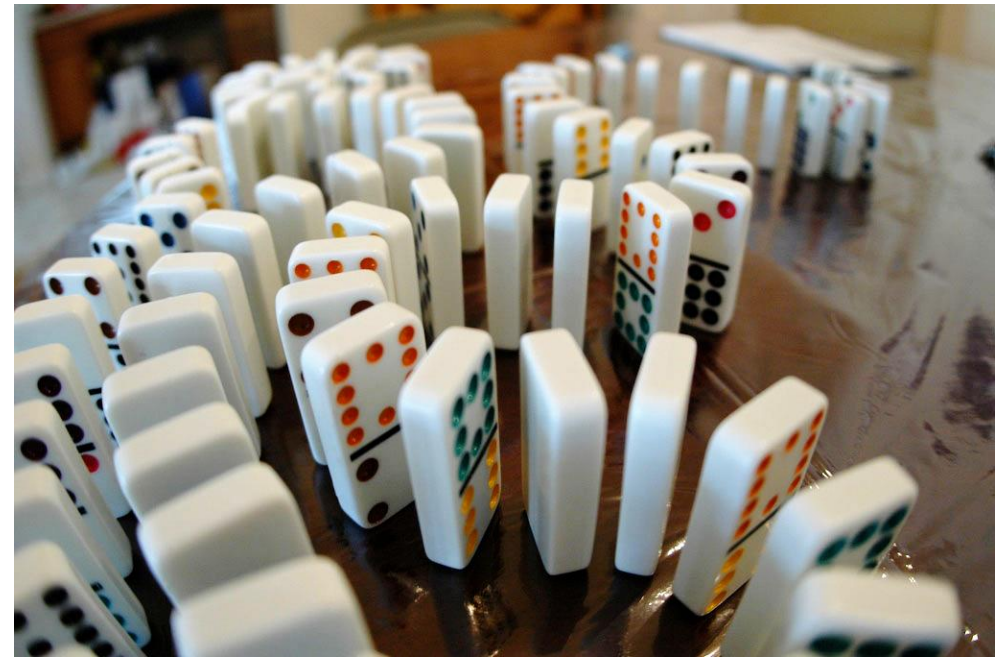
GARÇON WINES
Letter wine box

NEW OFFER



APPLE
Lessons for kids

WHICH IMPLICATIONS FOR INNOVATION RESEARCH DURING CRISIS?



CONSUMERS ARE MORE OPEN TO NEW INNOVATIONS

“ Consumers may be more open to new ideas during a crisis since their usual habits have been disrupted and rated their current product lower on Relevance



New Concepts

High Trial Potential

Great Recession
(2008-2009)

39%

Recent years
(2016-2019)

34%

Current Product

Relevance

Great Recession
(2008-2009)

100

Recent years
(2016-2019)

106

(Recent year scores are indexed to the scores during the financial crisis period)

VALUE IS IMPORTANT

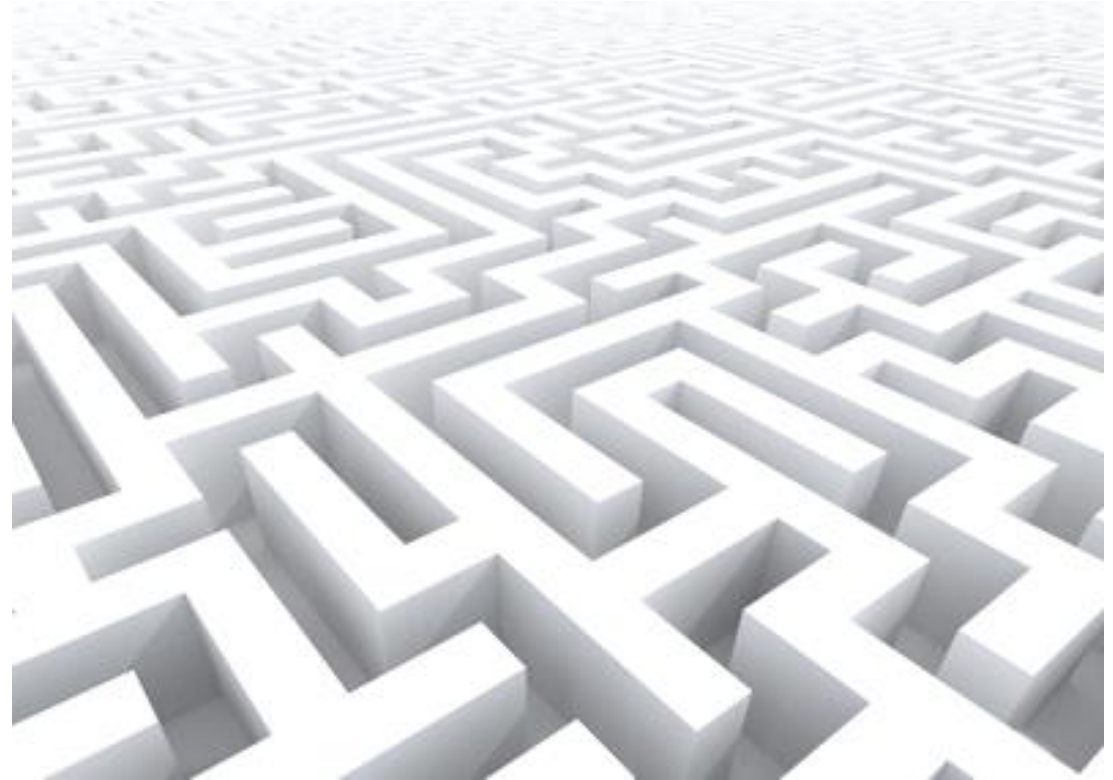
“ Concepts perceived to be of a good value were more likely to achieve high trial potential during the last recession and also today



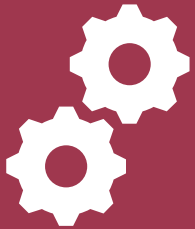
Concepts with High Trial Potential

	Value	Premium
Great Recession (2008-2009)	27%	11%
Recent years (2016-2019)	17%	35%

HOW CAN WE HELP YOU IN ORIENTING IN THIS CONTEXT?



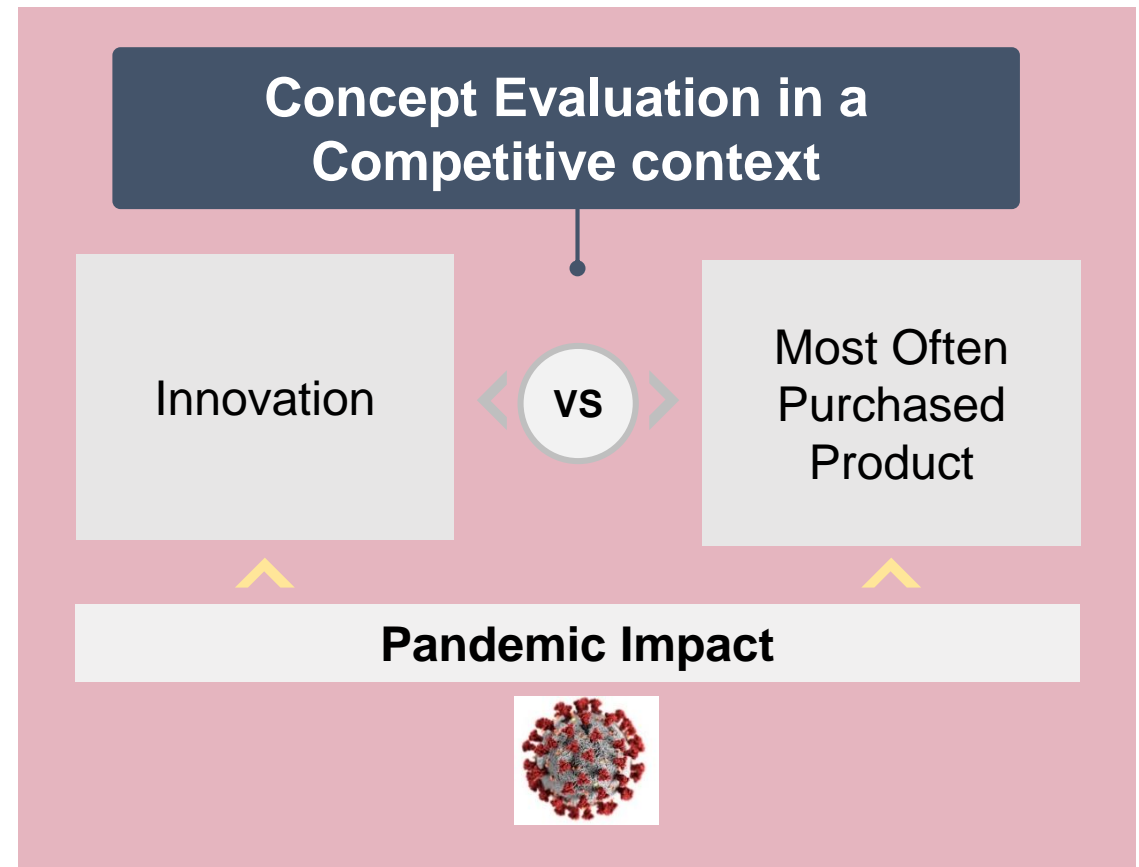
ROBUST AND ACCURATE APPROACH EVEN IN CHALLENGING TIMES



IPSOS'S RELATIONAL DATABASING CAPTURES PANDEMIC IMPACT

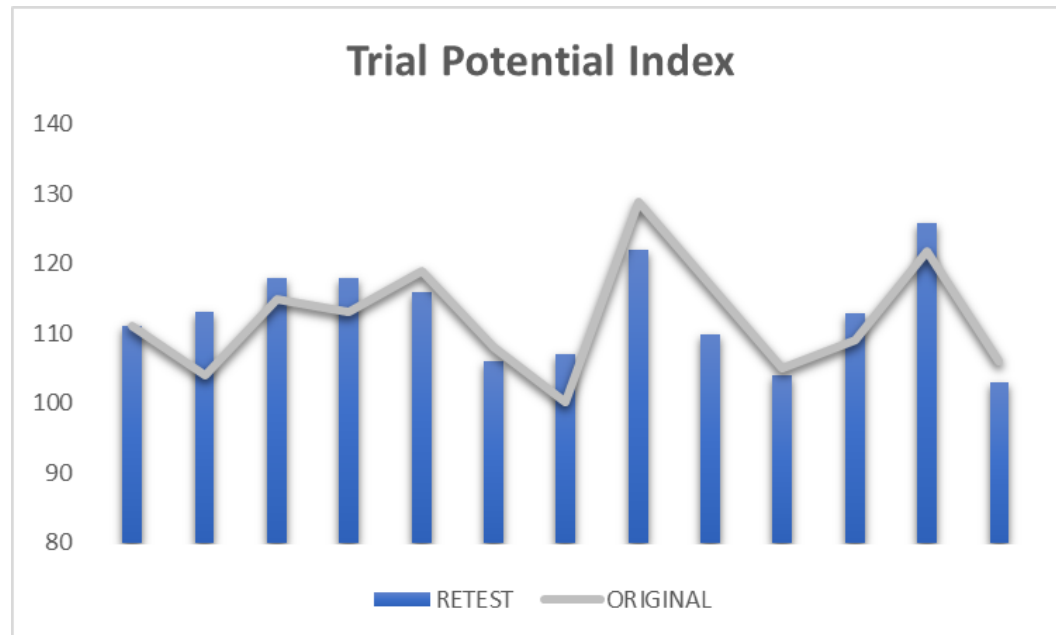
Innovations are evaluated in the context of self-defined competitive benchmark.

The comparative approach neutralises the bias caused by challenging times and ensures the innovation context is relevant and up-to-date.



IPSOS CONCEPTS RETESTED DURING COVID-19 SHOW STABLE RESULTS VS. ORIGINAL TEST

Innovation concepts tested immediately before the Covid-19 crisis in end of January are RETESTED during the height of the crisis beginning of April 2020



Consistent winning and losing concepts in original and retests



Scores in the re-test inch up slightly suggesting openness to innovations during the crisis (*average trial index increased from 112 in original study to 113 in the retest*)



Individual KPIs such as Relevance, Differentiation, and Believability were also very stable between the original study and the re-test

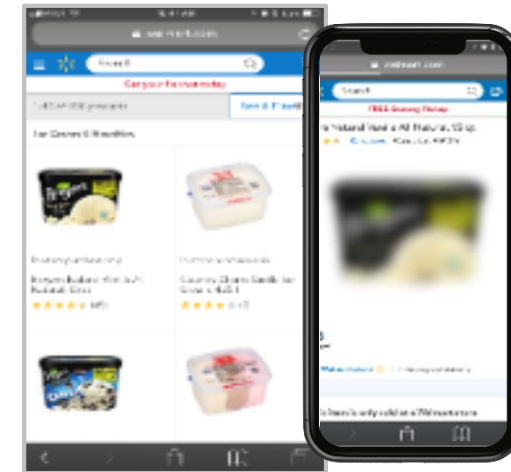
BEHAVIORAL BASED PREDICTIONS, PASSIVE METRICS AND NEW RESEARCH APPROACHES WILL BE IMPORTANT



Virtual Shopping

92%

Correlation between consumer behaviour on simulated shelves vs. physical shelves



Understanding eComm

89%

Correlation between consumer behaviour on a simulated eComm platform vs. real eComm behaviour

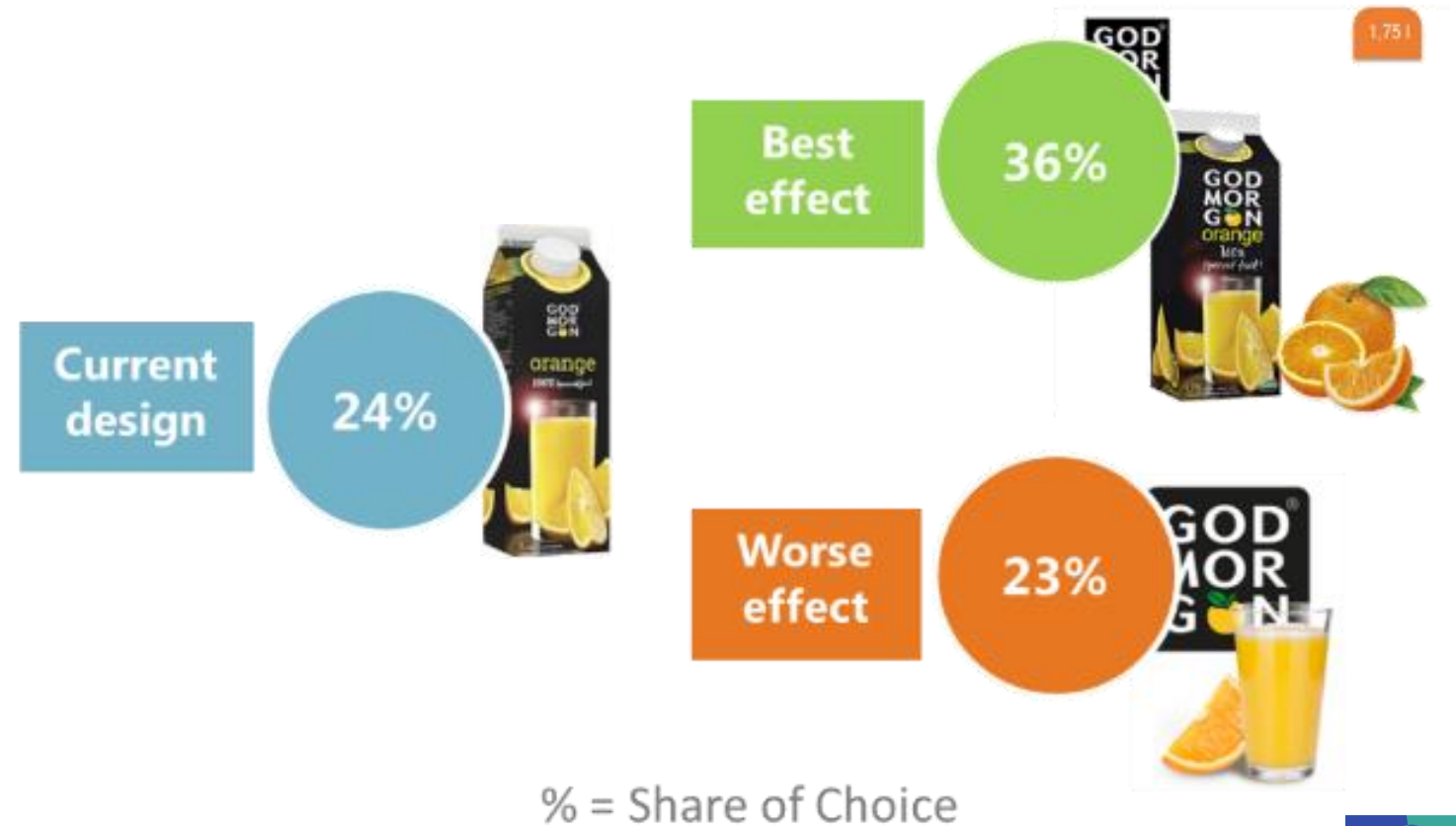


IN E-COMMERCE THE POTENTIAL OF PACKAGING TO DRIVE CHOICE IS MORE & MORE CRUCIAL

As eCommerce becomes particularly relevant, how products are presented online is important: **images** need to capture **attention** and **communicate** product **characteristics** and **benefits** quickly.

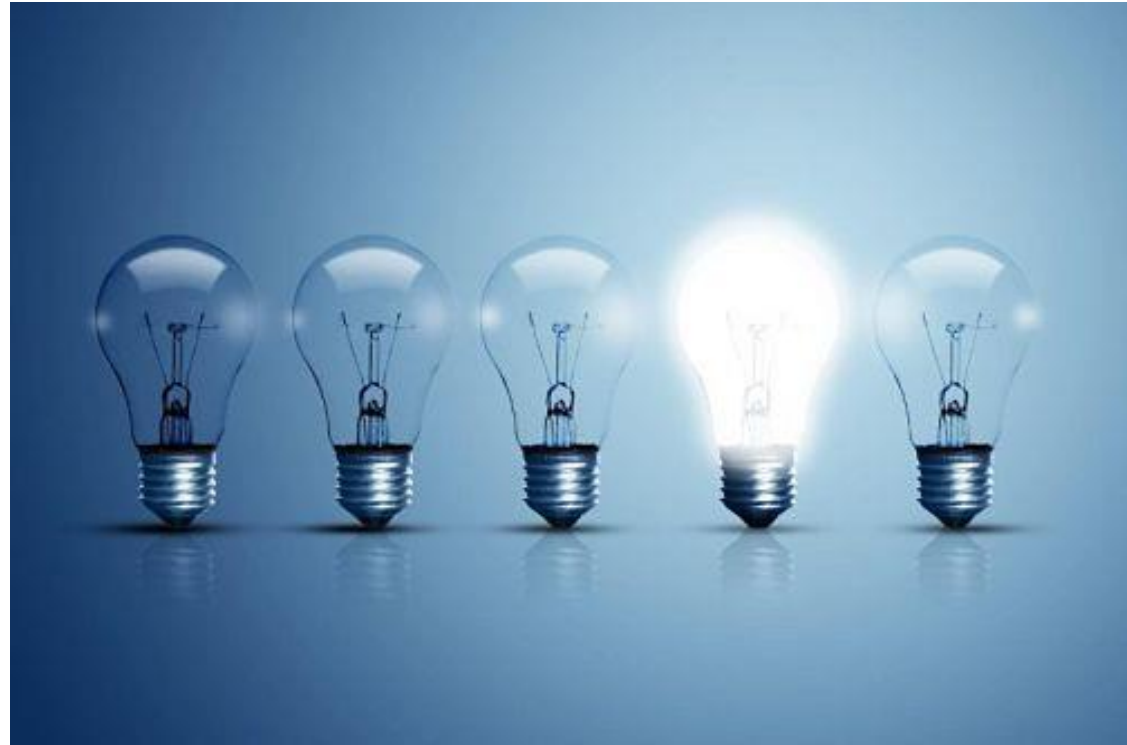
We can provide you with a **realistic eComm environment** where testing different packaging designs.

Designs which **triggered the category** and **promoted key** assets while emphasizing important product details **tended to be more effective** (e.g. size, variant).



Example – hero pack optimization in ecommerce

WHAT POTENTIAL OPPORTUNITIES ?



HEALTH & HYGIENE INNOVATIONS TO FEEL & STAY SAFE



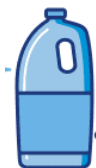
Wipes
+122%



Soap
+66%



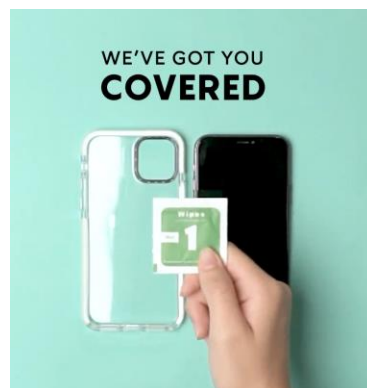
Alcohol
+179%



Bleach
+62%

POTENTIAL OPPORTUNITIES

- Medical devices - thermometer/oximeter
- Supplements for immunity boosting, anxiety/relaxed sleep
- Sterilizing - Antibacterial/antiviral – home (soft furnishing) and portable (clothing).
- Air depuration/ treatment devices



CASETiFy
Protects



**GRAPPA ALTO
GRADO 71**
A throat disinfectant

FOOD OFFERS GROW : SAFE, TASTY & ITALIAN

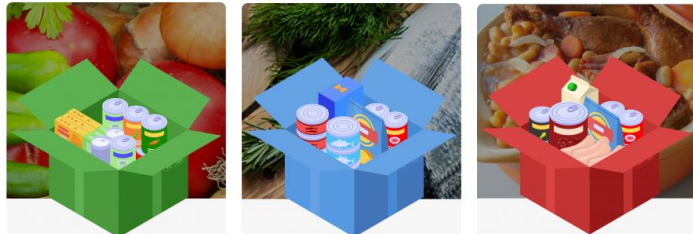
POTENTIAL OPPORTUNITIES

- Foods that can be taken out of home easily.
- Home routines brought in working places, schools ...
- Safe and hygienic packaging
- Stock formats



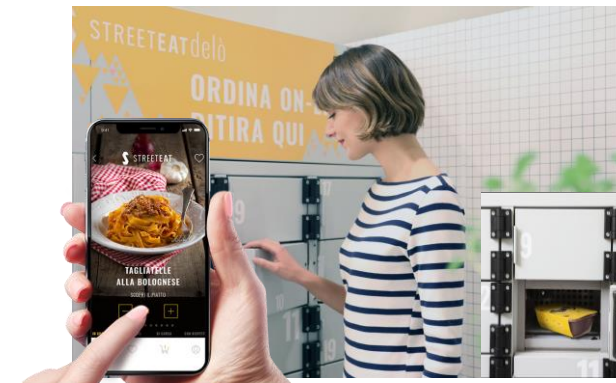
MY COOKING BOX

Products to prepare a gourmet dish



GLI ESSENZIALI CARREFOUR

Thematic Food Boxes, pre-selected fixed products for 2 people x 1 week



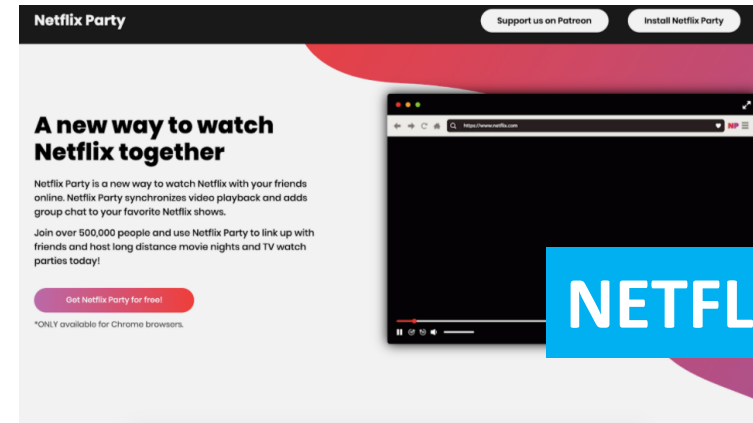
STREETEAT DELO'

Meals safely delivered in lockers for office lunches

ONLINE AND LIVESTREAMING SERVICES PROLIFERATE

POTENTIAL OPPORTUNITIES

- Fitness courses, classes
- Home cooking support - Recipes, online cooking/baking guides...
- Gaming
- Distance learning modules/Online tutorials
- Travel by proxy
- Subscription for product delivery, memberships for content, apps for safety, community and simplicity



INFORMATION IS KEY FOR COMPANIES TO RENOVATE OR INNOVATE WITH SUCCESS

1

Some changes will become permanent. Research during a crisis helps understanding what actions need to be taken.

2

Consumers are more open to new ideas during a crisis since their usual habits have been disrupted.

3

Understanding innovation performance in an eComm environment is more critical now than ever before.

4

As crisis provides rapid change in consumer behavior, fast and agile approaches are advisable for feedback in real time





*L'attesa è il futuro che si
presenta a mani vuote*

Michelangelo



GRAZIE!

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