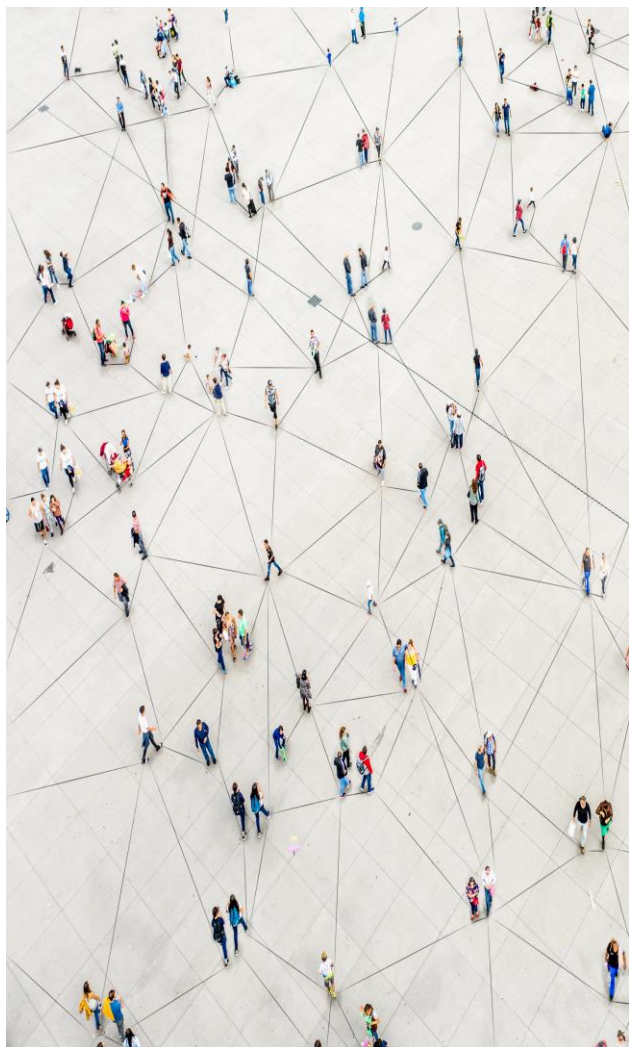




THE SIGNALS

IN UN MONDO INCERTO,
I DATI CONTANO

GLI APPUNTAMENTI



- 1 Aprile - Italia ai tempi del covid-19 - Cigno o Pipistrello?

- **6 aprile - Come possono i brand rispondere alla crisi del Coronavirus?**

- 8 aprile - Empathy e consumers centricity al tempo del Coronavirus
- 14 aprile - Come tutelare la reputazione aziendale in tempi di crisi
- 16 aprile - Comunicare all'epoca del Coronavirus: qualche risposta ai dilemmi delle marche
- 21 aprile - Innovazione & tecnologia per vincere la sfida del cambiamento
- 23 aprile - Mystery Calling: l'esperienza telefonica per generare fedeltà
- 28 aprile - Customer Experience: gestire il rischio durante il COVID-19

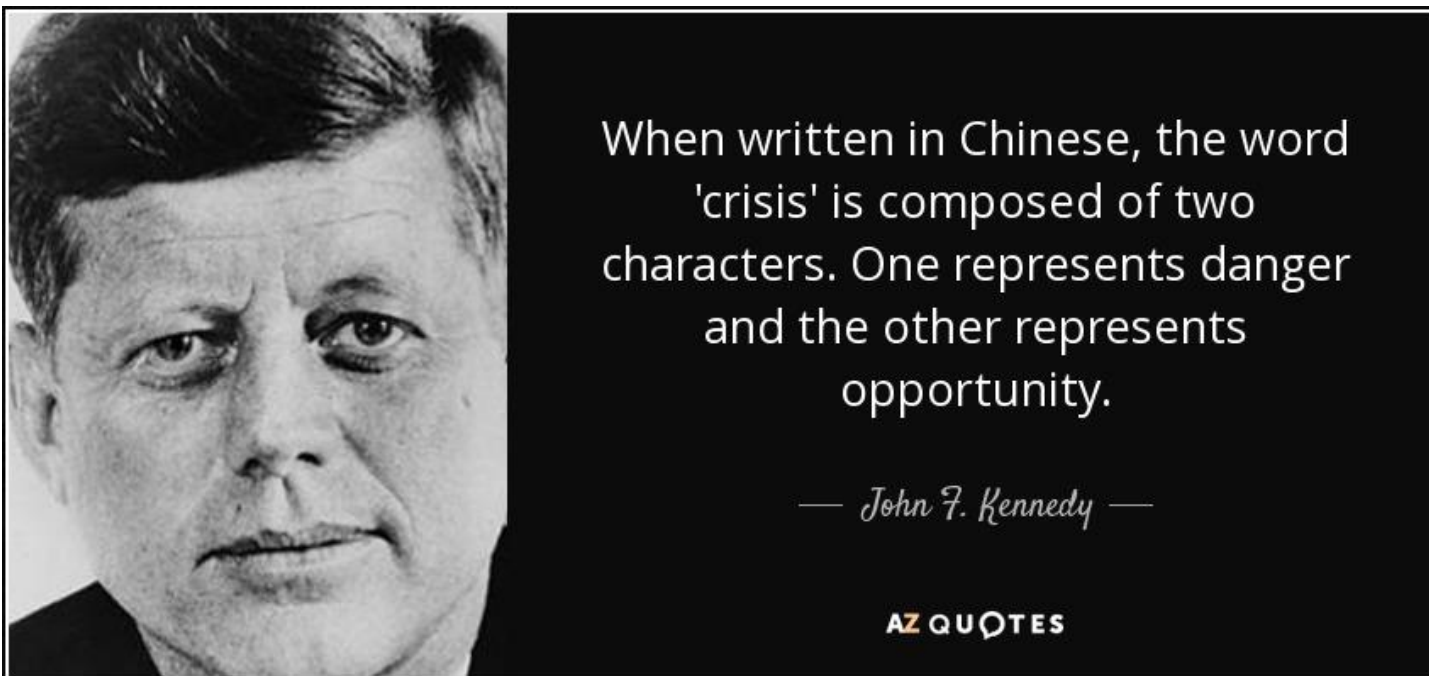


THE SIGNALS

**Come possono i brand
rispondere alla crisi del
Coronavirus?**

HOW CAN BRAND CONNECT WITH CONSUMERS DURING THESE UNCERTAIN TIMES?

Every crisis also brings opportunity. The brands should ask themselves how they can add value in light of this new reality.



危机

DANGER

OPPORTUNITY

WE ARE ADAPTIVE DECISION-MAKERS

Coronavirus has created unstable environments around the world. The spread COVID-19 has made our physical and social environments increasingly fluid, operating without fixed, solid patterns.



School &
University closure



Shopping
restrictions



Social
distancing



Most services
closure



Stay home except
for key reasons



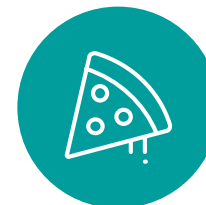
Borders closure



Transport
limitations



Ban of gatherings
above a certain size



Bars & restaurant
limitations



Funerals can't
have more than a
handful of people

A CHANGE IN CONTEXT ALSO MEANS THAT PEOPLE'S NEEDS AND BEHAVIOR ARE IMPACTED

In home isolation brings people to spend more time on their own or with their close family. There are some benefits to this: in a way life slows down, but for many people is also very stressful. They will experience anxiety and a sense of loss of control over their lives.

Home and health



- Meal planning
- Wholesome cooking
- Household cleaning
- Disinfection regimes
- Home exercise – livestreaming exercise classes
- Nutritional supplements
- Hand washing/mask wearing outside the home
- Social distance outside the home
- Checking daily virus spread statistics

Entertainment or Connecting

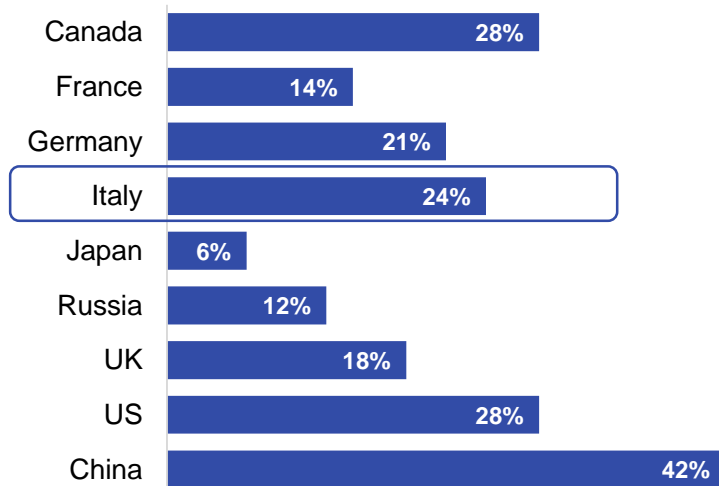


- Reading, music, television, social media
- Self improvement/ online learning
- Some find **comfort** and **a sense of achievement** in domestic achievements (e.g. learning to cook, trying new recipes)
- Conversation – closeness/bonding with family
- Social media and chat
- Online gaming with friends
- Livestreaming events

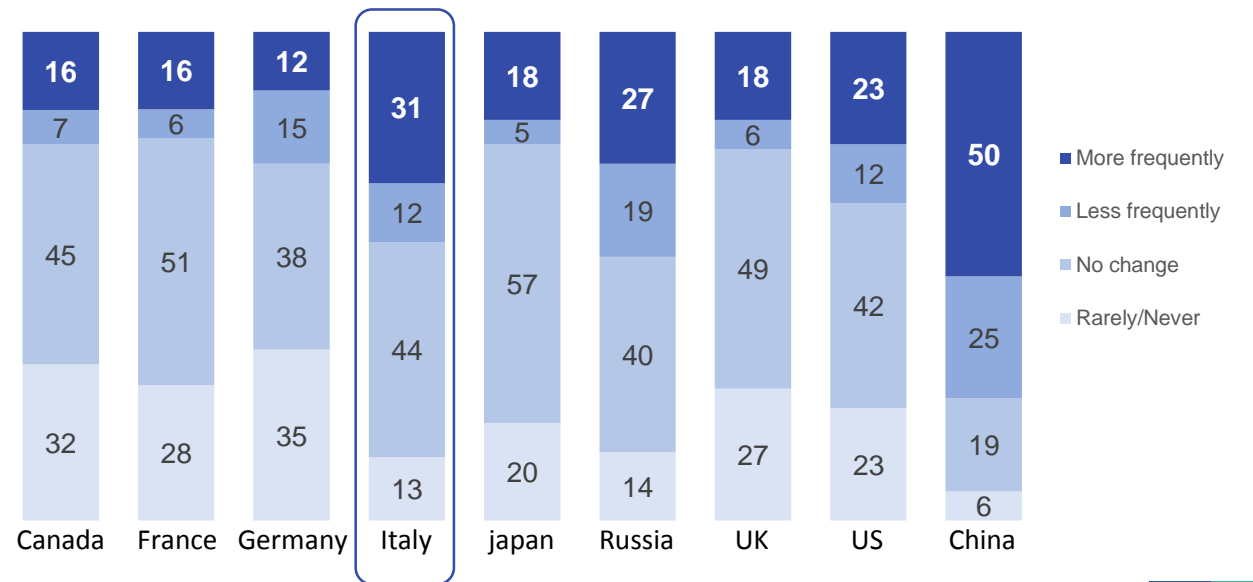
NEW SHOPPING PATTERNS BECOME EVIDENT

Italy shows a significant shift towards the reliance on e-commerce

% of people taking action in stocking up on food



Are you using e-commerce to purchase products you would normally buy in-store more frequently or less compared to one month ago?

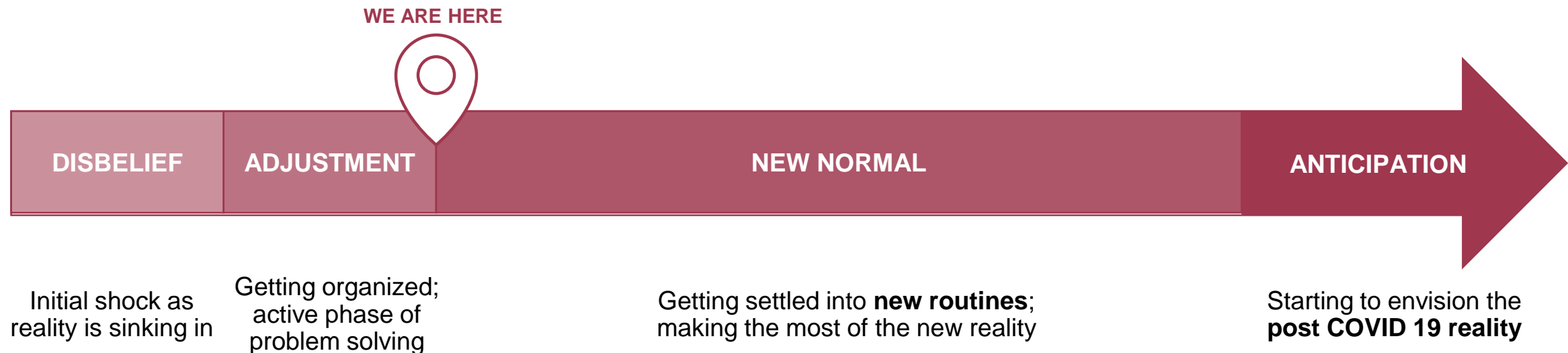


WE CAN LEVERAGE THE LESSON LEARNT FROM CHINA TO MAKE SOME PREDICTIONS

Key stages in the pandemic journey



AFTER AN INITIAL PHASE OF DISBELIEF AND ADJUSTMENT, CONSUMERS WILL PRETTY SOON SETTLE INTO A “NEW NORMAL”



BRANDS CAN'T JUST WAIT THE STORM TO PASS



They need to
adjust their
strategy to
this new
reality.
Fast.

PEOPLE EXPECT BRANDS TO ACTIVELY PLAY A ROLE

Consumers feel brands have a social responsibility and want to in general hear from helpful brands. In an era where many are increasingly open to brands rather than traditional institutions to promote social progress and well-being, the current crisis could accelerate that pattern if brands rise to the occasion

% completely/somewhat agree

72%

Companies have a **social responsibility to offer aid** during Coronavirus

71%

I am interest in hearing from brands that can **help me navigate the crisis**

70%

I want to continue to hear from brands and companies on **what they have to offer**

HOW SHOULD BRANDS RESPOND?

Brands can articulate their response on 3 different phases:



1 – Empathy

2 – Adjust to new reality

3 – Start envisioning the post C19 future

WHILE MANY BRANDS WERE SLOW TO RESPOND AT THE START OF THE OUTBREAK, WE ARE NOW SEEING MORE AND MORE BRANDS SHOWING EMPATHY IN DIFFERENT WAYS

Act of
kindness



Help people pass time
and build new routines



Give comfort



Reinforce social
messages



EXAMPLES OF BRANDS SHOWING EMPATHY

Give comfort



L'INIZIATIVA

Coronavirus, Vodafone, Tim e Wind Tre offrono giga gratis ai clienti delle aree colpite

I tre operatori stanno attivando automaticamente e senza costi aggiuntivi delle promozioni che permetteranno agli utenti di navigare di più per un mese

CORRIERE DELLA SERA



Spesa a domicilio con consegna gratis da Esselunga, Supermercato24 e Pam!

Help people pass time and build new routines



Reinforce social messages



AFTER SHOWING THEIR EMPATHY BRANDS SHOULD ADJUST TO NEW REALITY

Times of crisis present many challenges to business, but they can also act as an accelerator or agent for change.

Go virtual



Use more digital tools to interact with customers. Start different "clubs" (i.e. bookstores, gym...)

Brand / Category Stretch



Beauty brands are all moving into sanitizing products.

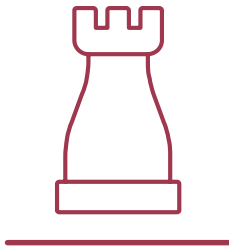
Staff changing roles



Staff becoming Online Influencers

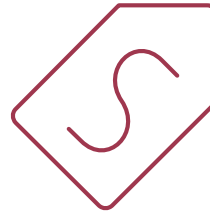
LEARN FROM THE LAST 'NEW NORMAL'

History provides evidence that brands can grow in distressing times.
Excellent cases are our last recession and Russia after embargo.



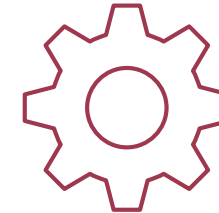
NEW BUSINESS MODEL

Brands like Netflix, Lego, Amazon, and Domino's courageously expanded their horizons through investment, alternative pricing models and transparency.



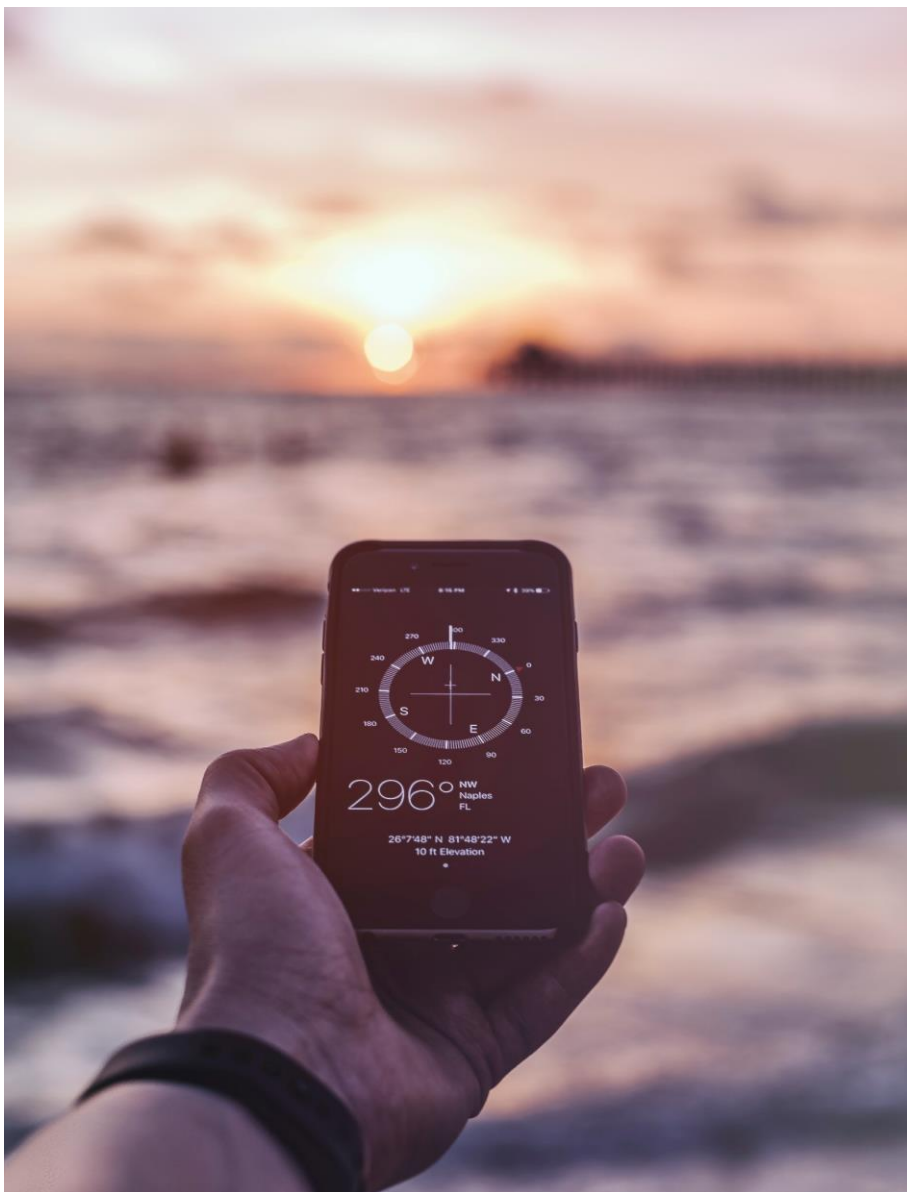
PRIVATE LABEL GROWTH

During last economic downturn, many consumers switched to private labels and lower-cost brands. When the recession was over they didn't return to their usual brands.



BEHAVIOR SHIFTS

After significant price increase and product embargo from the Western countries, automatic behavior stopped working. They had no other way than to change behavior and switch to the manual mode.



We don't know how the world will change

Which is why research
has never been more
important.

There are many scenarios on how the
situation will develop. One possible
scenario is that some form of social
distancing will be part of our lives for 12
months+

UNDERSTANDING CONSUMERS NOW IS CRITICAL IN FORMULATING THE RIGHT RESPONSE TODAY AND BEING PREPARED FOR TOMORROW

Analyzing changes in terms of longevity and impact is key to start envisioning the post Covid 19 reality

Consumers driven by new needs

In times of crisis, consumers are not just responding to want, they have a new set of pressing needs that can manifestly change their behaviors

1

2

3

Consolidation

The duration of the crisis enables consumers to experience and habituate these new services. And once the crisis subsides, the best of these new offers can maintain their appeal and relevance

Accelerated business development

Businesses who respond quickly to these needs, can open up new areas of business and quickly develop a user base or create new modes of connection and service delivery

TO SUPPORT OUR CLIENTS WE NEED TO ADAPT OURSELVES TO THE SITUATION AND RESEARCH AS WELL NEEDS TO BE ADJUSTED

Adaptation #1: Re-think your research objectives

Include the following objectives in your brand research in the near-term:

1. Understand which behaviors and attitudes have changed during the crisis
2. Identify new needs and routines that have arisen
3. Determine the likelihood that these changes in behaviors, attitudes and needs will continue to exist when consumers' lives return to some degree of normality

Adaptation #2: Re-define and monitor shoppers' use outside your brand

As consumers find their usual brands out-of-stock, they are being forced to try new brands or even new product solutions.

Adaptation #3: Consider new approaches

We have developed several new approaches to help our clients get what they need when they need it. These new approaches include:

- A **fast and agile category deep dive** that helps clients understand how the context of consumption is changing
- A **Brand Sprint approach** that helps clients define a relevant role for their brand to play in today's fluid context
- **Scenario and war-gaming solutions.** We can help clients determine which scenario is most likely to come to pass,

Ipsos can help you navigate through these challenging times



GRAZIE!

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