

# Ipsos Curation: Harnessing insights in times of Corona & beyond

Webinar

Amsterdam, 15<sup>th</sup> of May 2020











What we would like to share with you today...

**It's the perfect time  
for research!**

Research using *curation*...

# Joining you on the webinar...



**Rosemary Landeweerd**  
Associate Research Director, Ipsos UU



**Emma Grand**  
Director, Global Product Manager  
Ipsos



**Patricia Verhoelst**  
Associate Research Director, Ipsos Market  
Strategy & Understanding



**Marion Hoek-Koudenburg**  
Sr. Lead Consumer Insight EMEA  
Under Armour



**Anne Craninx**  
Research Director, Ipsos MORI



**Janneke van Veen**  
Strategy & Insight Manager, Danone  
Nutricia Early Life Nutrition





# What is curation?

Emma Grand

Director, Global Product Manager Ipsos



# what is... CURATION?

Emma Grand | Global Curation Lead

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**Ipsos** *Centre of Curation*





A close-up photograph of a woman's face, focusing on her wide, expressive brown eyes. She has brown hair and is looking directly at the camera. The image is partially obscured by a blue diagonal graphic element on the left side.

# infoBESITY

**INFORMATION RICH  
BUT KNOWLEDGE POOR**



# COVID-amplified

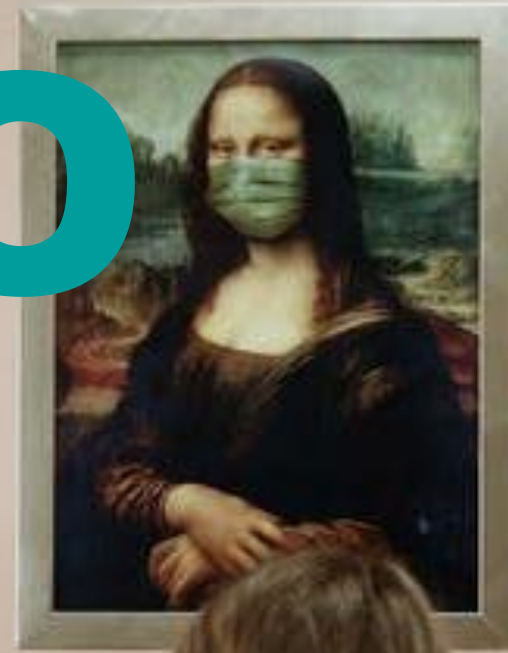
## FROM INFLUX TO BOMBARDMENT

- With so much information already available, how can we **make sense of it all** for our brands?
- How do we keep up when its **changing so rapidly**?
- With reduced budgets or capacity, can we **make the most of what we already know**?
- Which sources can we trust? Do we have the full context?
- Can we enable **the whole organization** to make full use of our insights and align our actions?



# don't start from **ZERO**

FROM COLLECTING  
TO CONNECTING &  
BRINGING INSIGHTS  
TO LIFE





## KNOW WHAT WE KNOW

Synthesize available information into digested insights that can guide the way forward



## DECODE CULTURES

Uncover & simplify complex cultural nuances to guide potential for brands, products and communications



## DISCOVER & CONTEXTUALIZE

Explore a broader context to identify meaningful insights, trends and opportunities



## SOCIALIZE

Cascade & activate compelling insight stories across the organization





# Decoding culture

Marion Hoek-Koudenberg

Sr. Lead Consumer Insight EMEA

Under Armour



**DECODE  
CULTURES**

Cultural Insights




New insights without new research

Marion Hoek-Koudenburg





Do what you can, with what you have,  
where you are





## QUICK INTRODUCTIONS



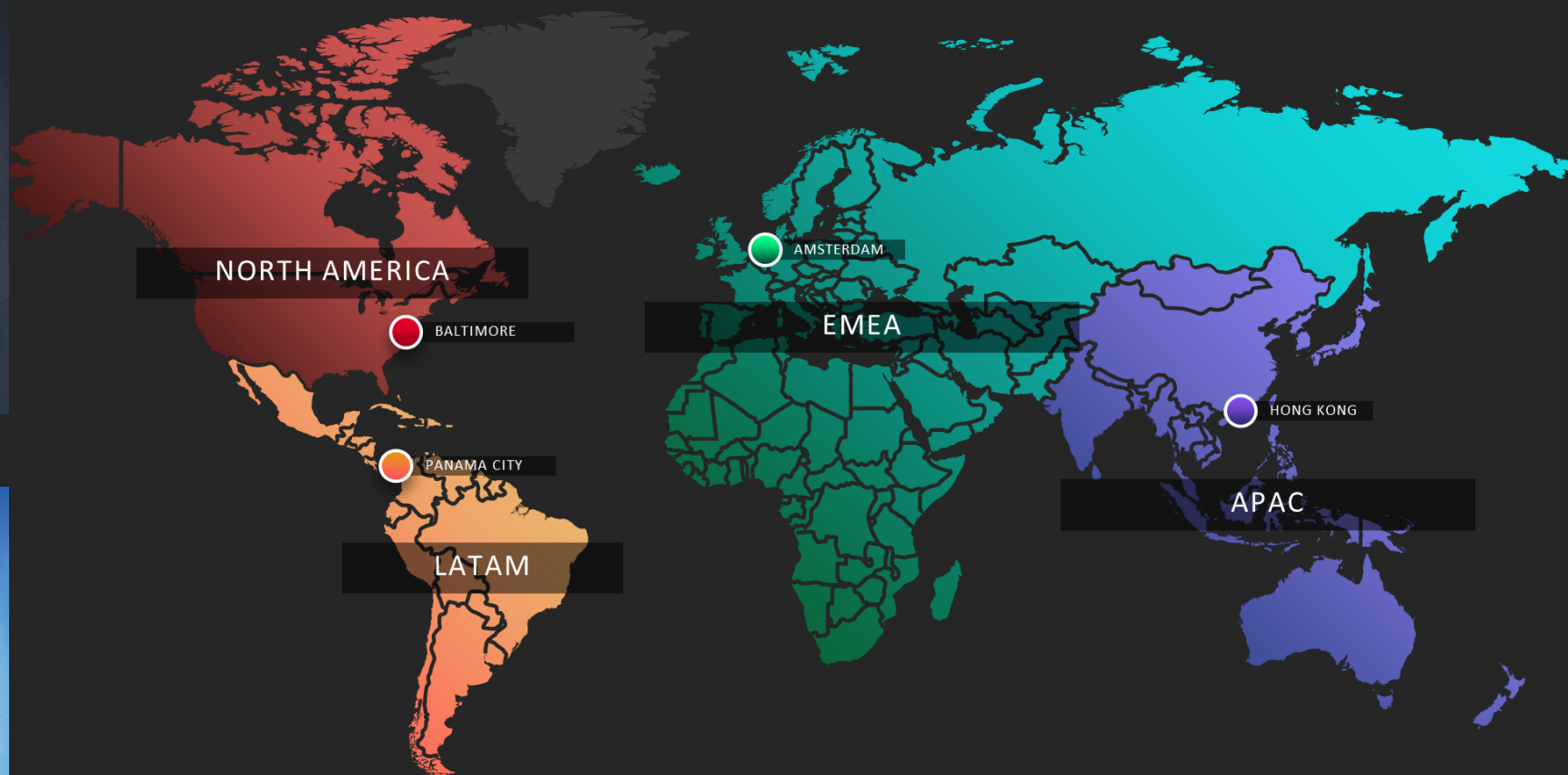


**UNDER ARMOUR®**

**THE HUMAN PERFORMANCE COMPANY  
THAT GIVES YOU THE EDGE TO PUSH  
BEYOND ANY LIMIT.**



# UNDER ARMOUR AMERICAN SPORTSWEAR





W H Y   &   W H A T

# WHAT



Curating existing  
knowledge



Prioritizing themes  
through relevant global  
trends



Cultural Decoding by local  
IPSOS researchers



**BOOK OF KNOWLEDGE**



**ALWAYS CONNECT**

[Marion Hoek-Koudenburg@underarmour.com](mailto:Marion.Hoek-Koudenburg@underarmour.com)







# Knowing what we know

Anne Craninx

Research Director, Ipsos MORI



**KNOW WHAT  
WE KNOW**

Digested Insights





# COVID-19 Spotlights





# Our brief



Cut through the noise  
with knowledge that  
inspires

Put people at the heart of  
what matters

THE WORLD IS  
TEMPORARILY CLOSED

And plan ahead for the  
new normal

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# Fully interactive weekly digests for LTCH – cascaded down the organisation to ensure congruence




Welcome to the sixth edition of our COVID-19 Spotlight.

In this edition we examine the potential changes in shopping behaviours, as countries begin the slow process of exiting lockdown and face the threat of entering a deep recessionary phase.

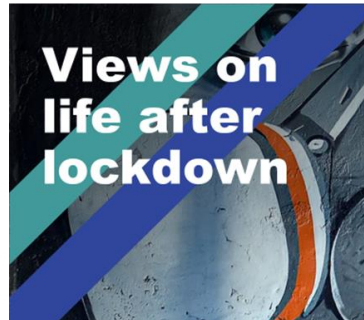
This edition will explore potential behaviour changes across the different consumer / shopper segments from those that are happy to, 'Stay Calm and Carry on' vs the, 'Cut Deep' segment which have been hardest hit by the pandemic. We will look at those behaviours which have changed and those that have been accelerated by the current crisis and will look at some of the key implications for GSK brands.

Whilst the current situation is challenging, companies that are agile, have a growth mindset and place the consumer and customer at the heart of what they do, will be the ones that are best placed to win in this new environment.



Thank you and stay safe.

Crispin Haywood  
EMEA Commercial Excellence Director



- 1: Setting the Scene
- 2: Sentiments, behaviours in lockdown
- 3: Communication
- 4: USA
- 5: Europe
- 6: Shopper & recession
- 7: Lessons from China
- 8: Experts
- 9: ...

**Introduced each week by senior stakeholders addressing evolving business needs**

# Multi-media... and multi-sources. Backed by data



## Ipsos ECE CovidWatch

Stocking up is part of everyone's lockdown routine.		Heightened awareness of the gravity of the situation.	
Fear and anxiety dominate.		Keeping inside and outside separate is key.	
Fresh ingredients matters to the French.		No stockpiling, but shop daily to get out.	

			All news sources Free sources

**SPOTLIGHT ON China**

Early reflections

[https://www.ipsos.com/sites/default/files/2020-03/china\\_in\\_the\\_time\\_of\\_coronavirus\\_march23.pdf](https://www.ipsos.com/sites/default/files/2020-03/china_in_the_time_of_coronavirus_march23.pdf)

**Opportunities created**

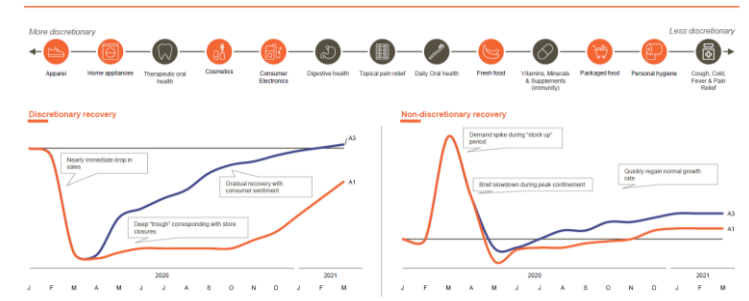
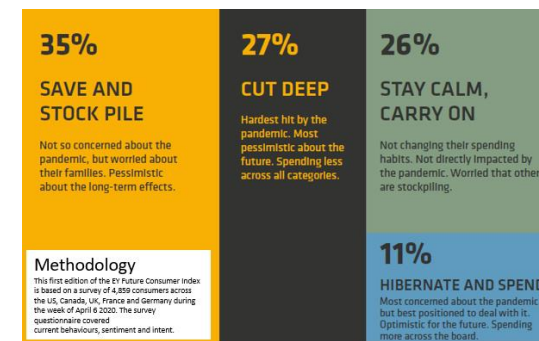
**Brand Stretch**

**Communication channels adapted**

**Other examples**

- Harbin Beer launching their own livestream platform
- Shede encouraging to capture shared moments
- Increase in CSR activities by big brands and communicating these

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Concise so that even those with ADHD read it!



# For this to work...

- Ipsos curators, not Ipsos Centric
- Collaboration [client & their research agencies]
- Weekly calls with senior stakeholders
- Alignment with evolving business questions
- Established dissemination plan in place





# Discovering & Contextualizing

Patricia Verhoelst

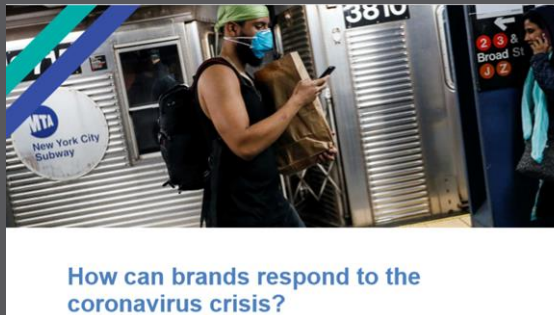
Associate Research Director, Ipsos Market Strategy & Understanding



**DISCOVER &  
CONTEXTUALIZE**

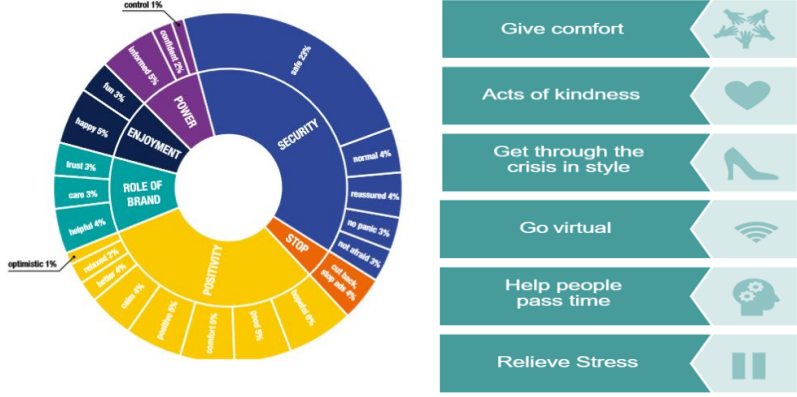
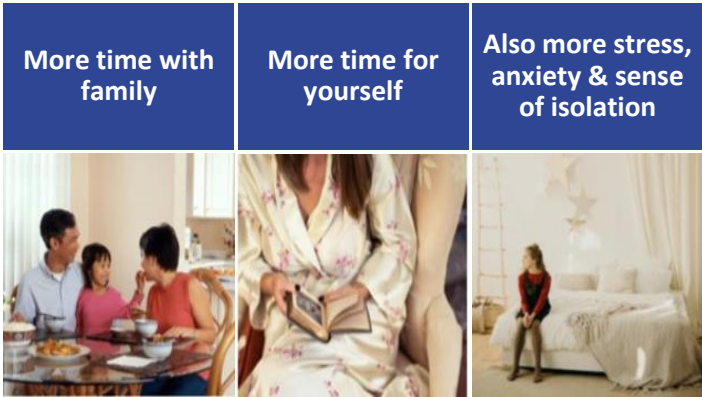
In-context Insights

# Helping a candy client make sense of all the COVID<sub>19</sub> insights





# This resulted in a short story with clear category insights



**Influence of COVID<sup>19</sup> on how consumers behave**

**People are quickly adopting new routines & rituals**

**Brands can react in different ways**



# We collected inspiration from different categories

Help people pass time



Acts of kindness



Under Armour making protective gear for Maryland hospital workers during coronavirus pandemic

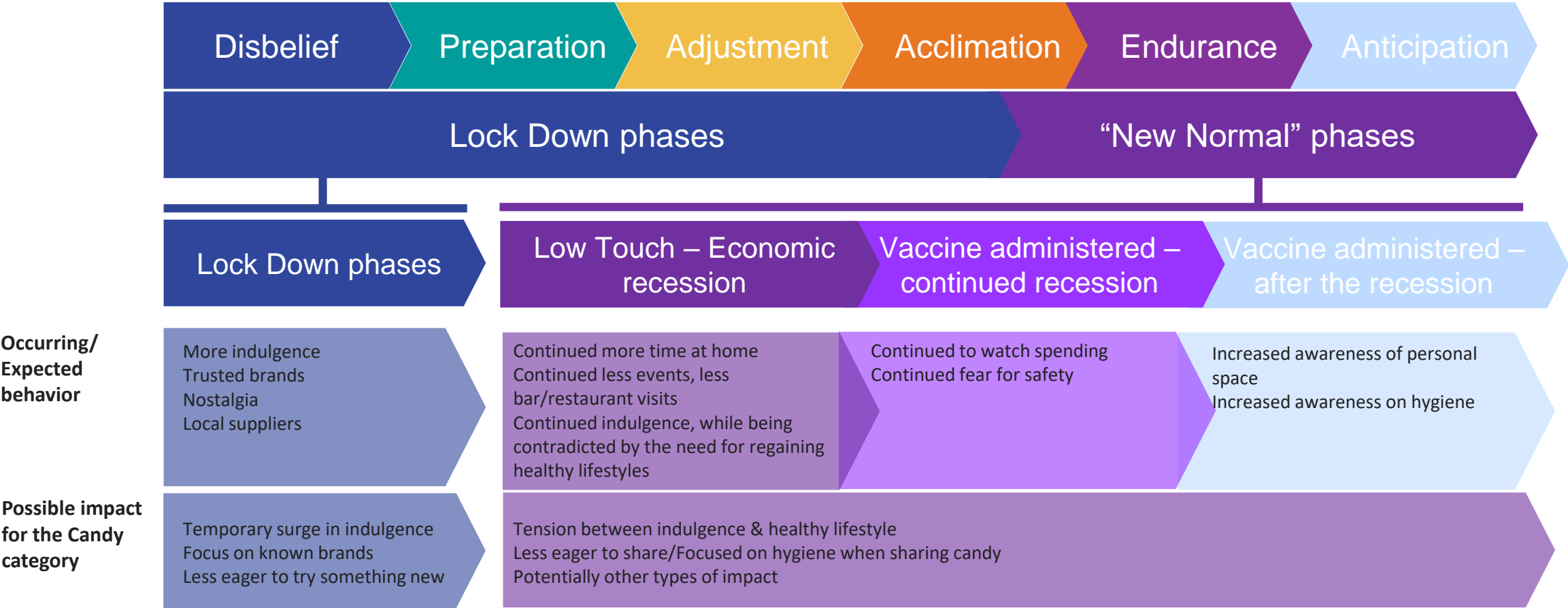


Go virtual

**Going for a (virtual) pint**  
After switching up their UK bars to click & collect via their Hop Drop app, craft brewer BrewDog will now open 102 bars online this 27 March, with the new virtual bars offering beer tastings, homebrewing masterclasses, pub quizzes, live music and comedy.



# Different phases of the COVID<sub>19</sub> crisis & the potential impact for our client's business



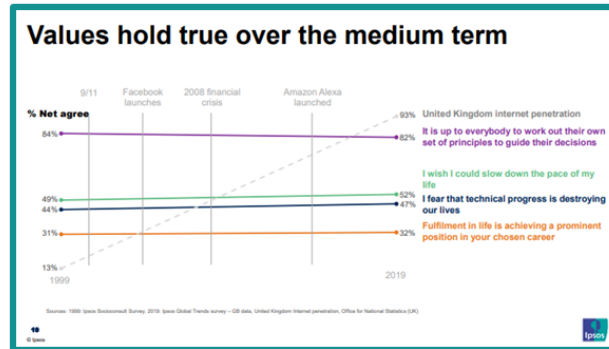
# But does behavior actually change this quickly?

True behavioral change

## Behavior does not easily change

### Major events do not impact in major trends

Even major events like 9/11 or the financial crisis in 2008 did not strongly impact macro trends in the past 10 years.



### Behavioral change only truly sticks if...

Behavioural science experts have defined when behavioral change actually sticks for a longer time. This only happens when...

There needs to be a real **motivation** to change

People need to have the **ability** to change

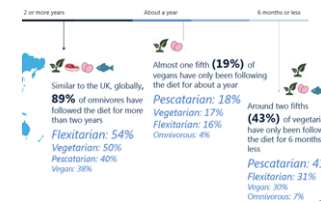
The change needs to occur **frequent** enough

**Covid-19 on its own will not be the main instigator, combined with other influences long lasting effects can occur**



### Increased focus on health

69% in the US are concerned about their **sugar in take** when it comes to candy



### Rise of vegetarianism

31% of flexitarians started 6 months ago or less



### Rise of climate concerns

82% globally agree that the **climate change** we see is the result of human activity



Impact of Covid-19 on general trends

## What industries do we expect to truly change?



### The travel industry:

This is a no-brainer during the Covid-19 situation. But even afterwards, (airplane) travel will be seen more as an unnecessary indulgence – not just because of lingering health fears but in combination with increasing climate change awareness. *Can “flight shame” lead to an upsurge in staycations, more local activities and increased involvement in community?*



### E-Commerce:

E-commerce has been a boom to the large e-tailers, as previously offline shoppers are dipping their toes into buying online. Provided e-tailers can get their logistics right (supply and delivery), *can this be a watershed moment in converting a large volume of consumers to the convenience of online?*



### Digital service migration:

This pandemic has forced people to adopt digital tools for previously offline services – which has led to a surge in new, creative digital solutions in fields from telemedicine to remote working practices. Once the crisis has passed, at least some of these services will now remain online... *so will you have your next dental visit via Zoom?*

## What about your category?

### Indulgence and comfort eating increases... but people will want a return to health



During times of crisis, people draw comfort and reassurance from familiar and indulgent foods. In-home candy consumption may spike. But if the situation continues for a prolonged period, *will consumers feel a need to control their weight and their health?*



### Sharing versus safety

Candy jars in communal spaces, where anyone can grab a handful of sweets, have obviously lower appeal right now. Assuming the concerns around hygiene continue to linger, *will we face a backlash against sharing packs?*



### Individual packs versus environmental concerns

If we turn to individually wrapped treats to reassure ourselves about contagion, *how long will it be before we worry about the excessive packaging that individual portions require? And how will we resolve this tension?*



# Always On Socialization Insight Cloud

Janneke van Veen

Strategy & Insight Manager, Danone Nutricia Early Life  
Nutrition



**ALWAYS ON  
SOCIALIZATION**

Actionable Insight Stories



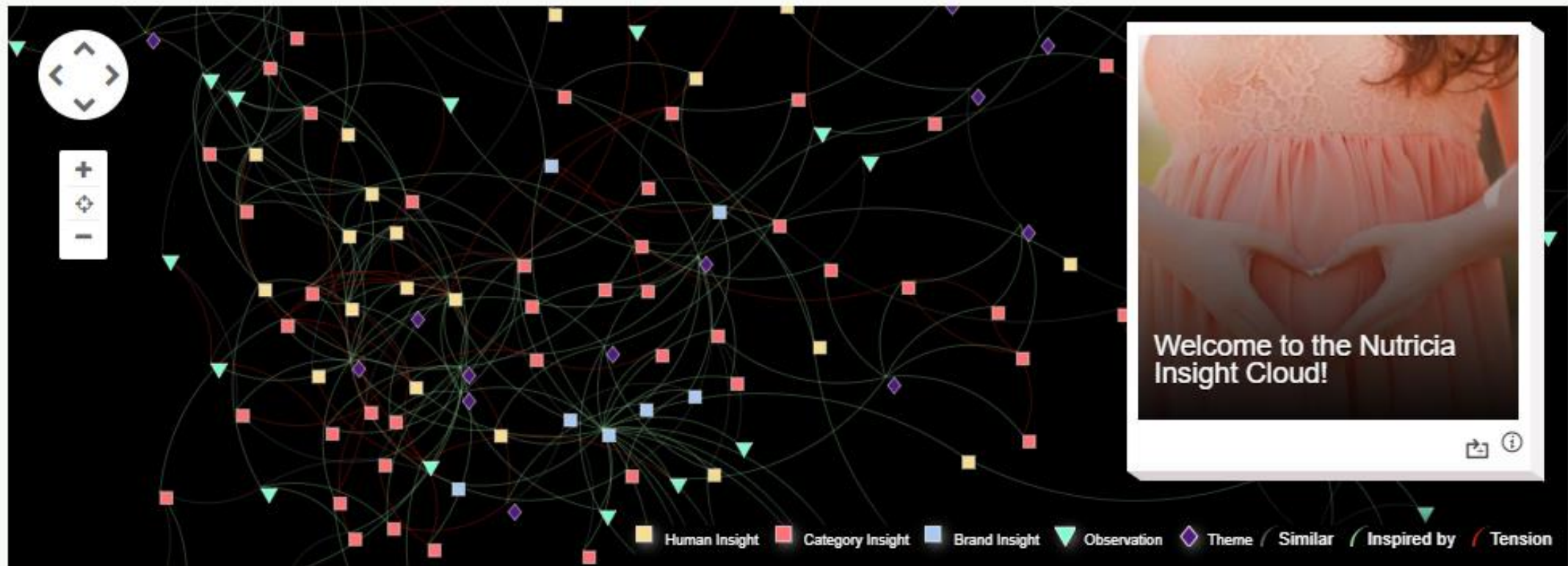
# Nutricia Insight Cloud





listen  
to your  
mum





curate our insights  
link insights from various sources

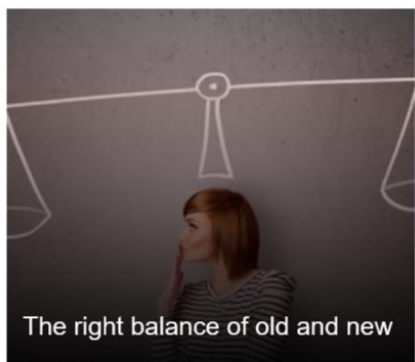




The mirror has two faces



Rosemary Landeweerd  
Sep 22nd 2017  
Human Insight



The right balance of old and new



Inge Van Bremen  
Aug 30th 2017  
Category Insight



Mums in control



Rosemary Landeweerd  
May 22nd 2017  
Category Insight

do we  
know..

growing up

babyhood

proud

toddler

trust

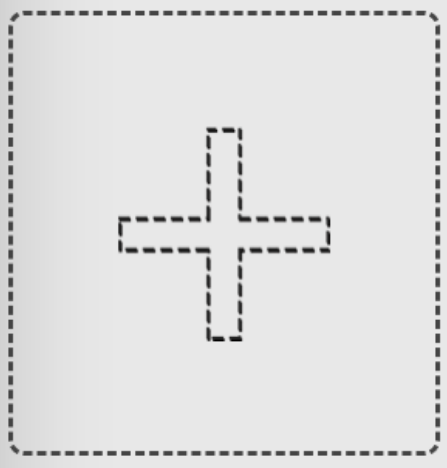
opinions

online

social media

Curation: the cloud as our starting point for every project





Connection the dots: finding the red thread



listen  
to your  
mum

easy find  
intuitive  
insightful 😊

# Our Suite of Curation Solutions



## KNOW WHAT WE KNOW

Digested Insights



## DISCOVER & CONTEXTUALIZE

In-context Insights



## DECODE CULTURES

Cultural Insights



## ALWAYS ON SOCIALIZATION

Actionable Insight Stories



A black clothespin is hanging a white rectangular card from a thin, dark string. The card is centered and features the word "QUESTIONS?" in a bold, teal, sans-serif font. The background is a light gray, textured surface.

**QUESTIONS?**



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# THANK YOU

