Post COVID-19 and Post Budget Scenarios

UNDERSTANDING CONSUMER BEHAVIOR SHIFTS

IPSOS SYNDICATED
HANDBOOK

of evidence-based insights and reliable
assumptions for corporate business planning

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INTRODUCTION TO THIS RESEARCH-BASED HANDBOOK

A multi-layered syndicated research that will capitalize upon Ipsos' wealth of knowledge on consumer behavior from its past initiatives, including;

Consumer Multimedia Index (CMi)

Consumer Household Panel

Tracker on Impact of COVID -19

Consumer Confidence Index (CCI)

WHAT VALUE IT CAN BRING FOR CORPORATE BUSINESS PLANNING.. ?

01 SALES FORECASTS

02 DISTRIBUTION CHANNELS DEVELOPMENT

03 NEW CATEGORIES/SKUs LAUNCHES

04 CAPEX PROJECTIONS

05 HR/SUPPLY CHAIN PLANNING

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METHODOLOGY

TWO-PRONGED APPROACH

DELIVERABLES & TIMELINES

UTILIZATION OF EXISTING DATASETS

CONSUMER MULTIMEDIA INDEX (CMi)

Consumption Patterns of 90+ Services/Product Categories, in Pakistan

TRACKER ON IMPACT OF COVID -19

Tracking of Behavior changes due to COVID-19 since Feb. '20

CONSUMER HOUSEHOLD PANEL

Pakistanis' HH expenses on various heads

CONSUMER CONFIDENCE INDEX (CCI)

Pakistanis' opinion and feedback on current & future state of local economy

A FRESH SURVEY

SURVEY ADMINISTRATION

Computer Assisted Telephonic Interviews with respondents reached via Random Digit Dialing (RDD) process

SAMPLE PROFILE

AGES 18+, Males & Females, With booster interviews for

- Housewives
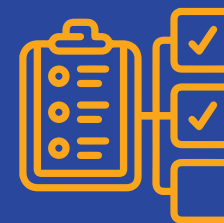- Heads of Households
- Millennials
- Generation Z

LENGTH OF INTERVIEW

25 Minutes

SAMPLE SIZE

2500 Interviews

REPORTING
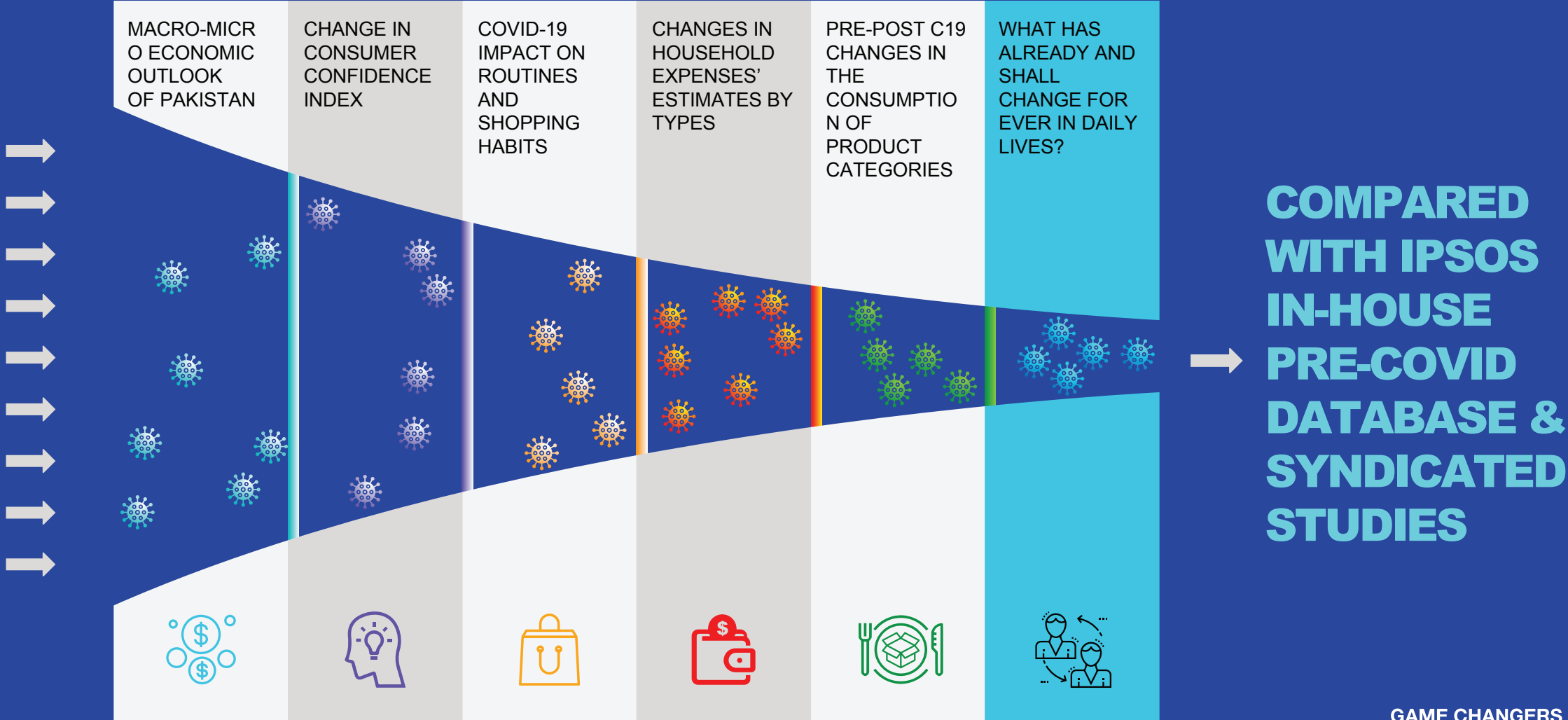
- Integrated report
- Results in the report will be broken down by key demographic segments

TIMELINES

- Fieldwork – 3rd week of June
- Customized reports will be shared by 4th week of July

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HOW WE WILL MEASURE THE CONSUMER BEHAVIOR SHIFTS

MACRO-MICRO ECONOMIC OUTLOOK OF PAKISTAN

CHANGE IN CONSUMER CONFIDENCE INDEX

COVID-19 IMPACT ON ROUTINES AND SHOPPING HABITS

CHANGES IN HOUSEHOLD EXPENSES' ESTIMATES BY TYPES

PRE-POST C19 CHANGES IN THE CONSUMPTION OF PRODUCT CATEGORIES

WHAT HAS ALREADY AND SHALL CHANGE FOR EVER IN DAILY LIVES?

COMPARED WITH IPSOS IN-HOUSE PRE-COVID DATABASE & SYNDICATED STUDIES

BUSINESS ENVIRONMENT ANALYSIS

Analyze the macro economic indicators to understand the business environment landscape and map the key underlying growth drivers, identify comparable markets for cross market learnings from other emerging markets

Pakistan Macro-Economic Drivers Analysis

- Macro-economics / Business environment: GDP and growth projections, GDP contribution, Income pyramid analysis, literacy level, employment rate, interest rate, inflation, savings, electricity, weather, water resources etc.

- Demographics, population by age group, gender, urbanization, size of household, no. of kids in household / birth rates, proportion of women in workforce, share of time spent in-home vs. out of home, influence of peers

- Services landscape – organized players, chains etc. and its growth potential

- Service aggregators landscape if applicable.

- Government policies and regulations impacting the sector (ecommerce policy, FDI in retail, local brands support)

APPROACH

DESK RESEARCH OF PUBLISHED REPORTS, EXPERTS' OPINIONS AND ECONOMISTS' ANALYSES ON THE SUBJECT

TIME FRAME

PAST: *2009-10 TO 2019-20*
PROJECTION: *2020-21 TO 2022-23*

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CHANGE IN CONSUMER CONFIDENCE INDEX

Identifying shifts from Pre (March '20) to Post Lockdown (June '20)

GCCI CURRENT INDEX: Reflects respondents' perception of current economic climate, ability to make household purchases, job security, and investment confidence within the country.

GCCI INVESTMENT INDEX: Reflects respondents' perception of current financial situation, future financial situation, major purchase comfort, household purchase confidence within the country.

GCCI EXPECTATION INDEX: Reflects respondents' attitude regarding the future local economy, future financial situation and job loss expectation within their country.

GCCI JOB INDEX: Reflects respondents' perception regarding Job security, job loss experience, and job less expectation within the country.

CURRENT INDEX
INVESTMENT INDEX
EXPECTATION INDEX
JOB INDEX

GCCI NATIONAL INDEX

GCCI NATIONAL INDEX: Reflects respondents' perception of current local economy, future local economy, current financial situation, future financial situation, major purchase comfort, household purchase comfort, job security, investment confidence, job loss experience and job loss expectation within their country.

Confidence Level
LOW   HIGH

IPSOS CONSUMER CONFIDENCE INDEX (CCI)

CCI IS IPSOS NATIONAL SURVEY OF CONSUMER ATTITUDES ON THE CURRENT AND FUTURE STATE OF THE LOCAL ECONOMY, PERSONAL FINANCIAL SITUATION, AS WELL AS CONFIDENCE TO MAKE LARGE INVESTMENTS AND ABILITY TO SAVE.

Being tracked in Pakistan since Q3 '19

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COVID-19 IMPACT 360° ON PAKISTANIS

Uncovering the changes and understand the COVID-19 impact

CHANGES IN
Dining, Snacking, and Cooking Habits

IMPACT ON SHOPPING
Behaviors, Channels, Brand and SKU Selection

CONSCIOUSNESS
Balanced Nutrition and Healthy Eating

CHANGES IN
Personal Care, Grooming & Socializing

TRIAL & ADOPTION
of Digital Financial Services, e-learning, online video games, movie streaming

IMPACT
on Dining Out and Home Food Delivery

COVID19- 360° IMPACT SERIES

IPSOS HAS BEEN TRACKING COVID-19 IMPACT IN PAKISTAN **SINCE MARCH' 2020.**

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CHANGE IN HOUSEHOLD EXPENSES

Household expenses' estimates and proportions by types

KITCHEN ITEMS/ GROCERIES

HOUSING

RECREATION & ENTERTAINMENT

TRANSPORT AND COMMUNICATION

FUEL AND UTILITIES

APPEARANCE & PERSONAL GROOMING

IPSOS CONSUMER HOUSEHOLD PANEL

DATA COLLECTED IN PRE-COVID TIME FROM 5500 HOUSEHOLDS FROM ALL PROVINCES OF PAKISTAN REPRESENTING ALL GEOGRAPHIES, REGIONAL BELTS, SECS AND HOUSEHOLD SIZES.

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PRE-POST C19 CHANGES IN THE CONSUMPTION OF PRODUCT CATEGORIES

UP TO 5 CATEGORIES
of client's choice, per subscription

Revealing Users Consumption patterns pre & post COVID-19

	INCIDENCE OF USAGE		ESTIMATED CHANGE IN CONSUMPTION SINCE Q1	EXPECTED CHANGE IN CONSUMPTION IN NEXT 6 MONTHS	CONSIDERING CATEGORY NOW AS ESSENTIAL OR NON-ESSENTIAL
	PRE-C19 Q1 '20	POST-C19 JULY '20			
CATEGORY X	53%	45%	-15%	-8%	NON-ESSENTIAL
CATEGORY Y	88%	91%	+10%	+5%	ESSENTIAL
CATEGORY Z	18%	13%	-22%	-10%	NON-ESSENTIAL

cmi
Consumer Multimedia Index

FOR A QUICK OVERVIEW

https://www.ipsos.com/en-pk/most-robust-study-only-syndicated-pan-industry-national-representative-study-first-and-only-read

ANALYSIS BY

- SEC
- Demographics
- Consumption patterns

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5 PRODUCT CATEGORIES TO CHOOSE FROM

- Baby Cereals
- Biscuits
- Breakfast Cereals
- Coffee
- CSD
- Dishwash
- Energy Drinks
- Face Wash
- Facial Creams (Lotion)
- Food Home Deliveries
- Handwash Liquids
- Instant Noodles
- Internet Service Providers
- Juices

- Laundry Detergents
- Liquid Milk
- Mineral Water
- Mobile Apps
- Mobile Phone Sets
- Mobile Service Providers
- Personal Soaps
- Salted Snacks
- Sanitizers
- Shampoos
- Surface Cleaners
- Tea
- Tissues

WHAT HAS ALREADY CHANGED AND WHAT SHALL CHANGE FOREVER ?

DEFINING "NEW NORMAL" LIFE IN POST COVID WORLD, TO ADJUST BRANDS' POSITIONING

LIFESTYLES & ACTIVITIES

ATTITUDE TOWARDS LIFE

INTERESTS & HOBBIES

Short Open-ended responses to be collected across Pakistan, to help clients craft more relevant and effective communication

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