

KEYS

AN IPSOS WEBINAR SERIES

“ROLLER COASTER RETAIL”

12th November 2020



Watch the recording [here](#)



AGENDA

INTRODUCTION

Jennifer Hubber

Head of Ipsos Global Client Organization

WHAT'S NEW? The Current Mood

Simon Atkinson

Chief Knowledge Officer

A RIDE ON THE RETAIL ROLLER COASTER

Alison Chaltas

Global President, Shopper & Retail

SHOPPERS RE-WIRED

Manuel Garcia-Garcia

Global Lead of Neuroscience

Geeta Lobo

Executive Director, Ipsos in India



KEYS

AN IPSOS WEBINAR SERIES

What's new?



Simon Atkinson

Chief Knowledge Officer

Spotlight on the US

1



SPOTLIGHT ON THE UNITED STATES

1 THE CANDIDATES as brands



Biden's lead narrows when viewed as a brand

Trump has stronger intensity of preference, as Democrats long for Obama

Attitudinal Equity **Trump 48%** **Biden 52%**

"On a 10-point scale, how close to you feel to each candidate?"

Trump voters

Biden voters

Closeness

41%...

of those likely to vote for Trump give him a top box score on Closeness.

26%...

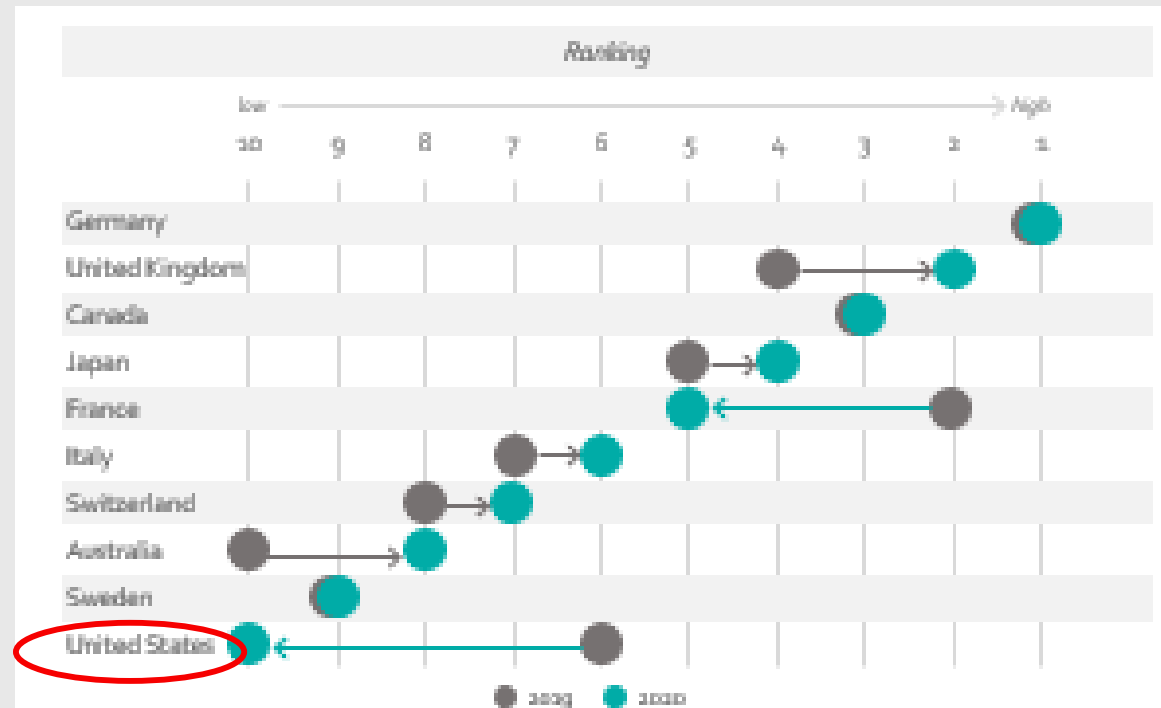
...while just 26% of those who plan to vote for Biden give him a top box score.

Which of the following public figures is your favorite?

	Democrat	Republican
Total	325	327
Donald Trump	5%	59%
Joe Biden	17%	3%
Barack Obama	52%	4%
Mike Pence	1%	7%
Bernie Sanders	11%	1%
George W. Bush	3%	14%
Kamala Harris	7%	1%
None of the above	5%	7%

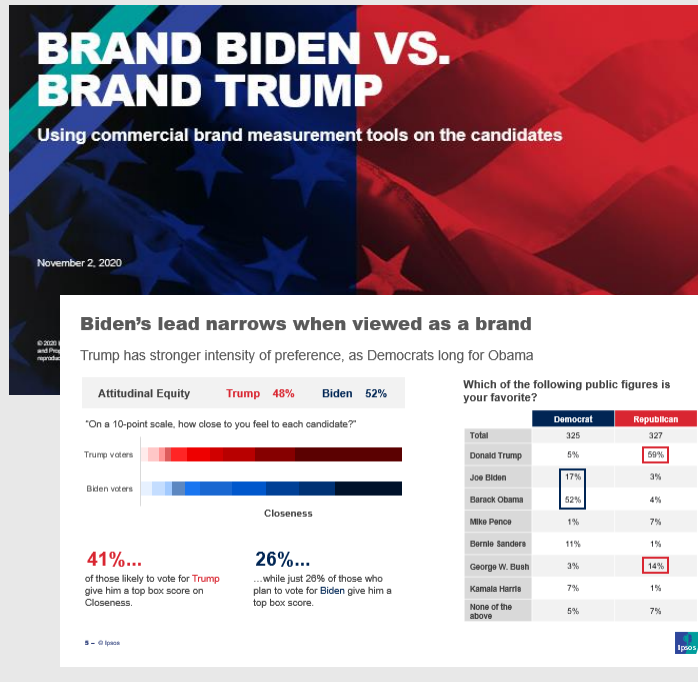
2 THE COUNTRY as a brand

#1: Anholt/Ipsos *Nations Brand Index*



SPOTLIGHT ON THE UNITED STATES

1 THE CANDIDATES as brands



2 THE COUNTRY as a brand

#2: Ipsos Global Advisor
29 country poll



Net score (above – below average):

Contributes to international peace/co-operation: **-22**

Respects human rights: **-24**

Respects its neighbours/other countries: **-34**

HOW U.S. COMPARES WITH OTHER COUNTRIES

13 PERFORMANCE AREAS

						Total above average	Total below average	Net score
Has a strong economy	20%	28%	33%	13%	6%	48%	19%	+29
Contributes to the global economy	16%	26%	34%	15%	10%	42%	25%	+17
Its people enjoy a good standard of living	14%	25%	35%	17%	9%	39%	26%	+13
Is a good country in which to invest	13%	23%	36%	17%	11%	36%	27%	+9
Contributes to international socio-economic development	10%	22%	35%	19%	13%	33%	32%	+1
Has strong democratic values and institutions*	11%	21%	36%	20%	13%	32%	32%	0
Has a strong commitment to culture and the arts	8%	19%	40%	21%	12%	27%	33%	-6
Respects contracts and the rule of law	9%	18%	35%	22%	16%	26%	38%	-12
Makes a positive difference in the world	9%	18%	33%	22%	18%	27%	40%	-13
Respects the rights of its citizens*	8%	16%	32%	24%	20%	24%	44%	-20
Contributes to international peace and cooperation	8%	16%	32%	24%	21%	23%	45%	-22
Respects human rights	7%	15%*	32%	25%	21%	22%	46%	-24
Respects its neighbors and other countries	6%	12%	30%	26%	26%	18%	52%	-34

■ Well above average
 ■ Slightly above average
 ■ Average
 ■ Slightly below average
 ■ Well below average

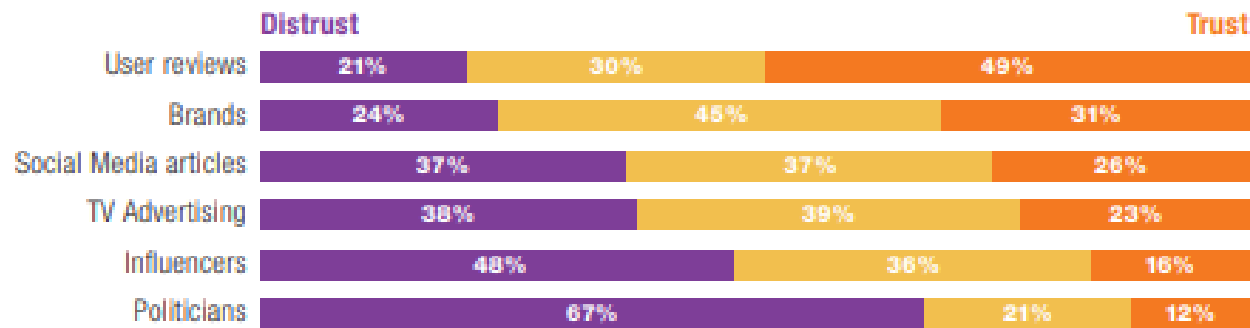
Base: 20,047 online adults aged 16-74 across 29 countries, items marked with an asterisk not asked in all countries

SPOTLIGHT ON THE UNITED STATES

3 INTO 2021 the big issues facing America

Figure 8 Trust is in Crisis

How much do you trust the information you receive from the following sources?



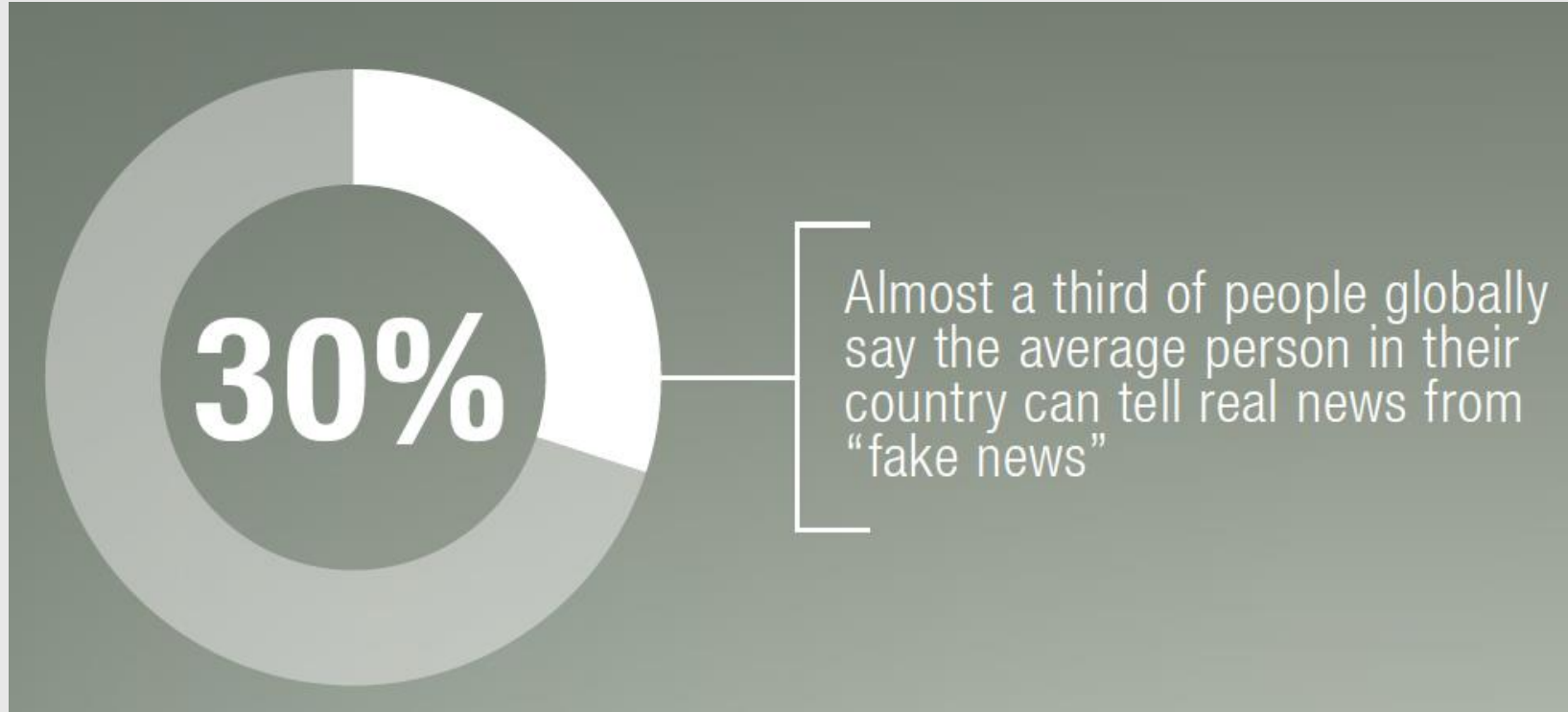
Source: Ipsos survey conducted between August 25–26, 2020 among 1,003 U.S. adults.

© Ipsos

New 29-country research report



SPOTLIGHT ON THE UNITED STATES



New 29-country [research report](#)



The current mood

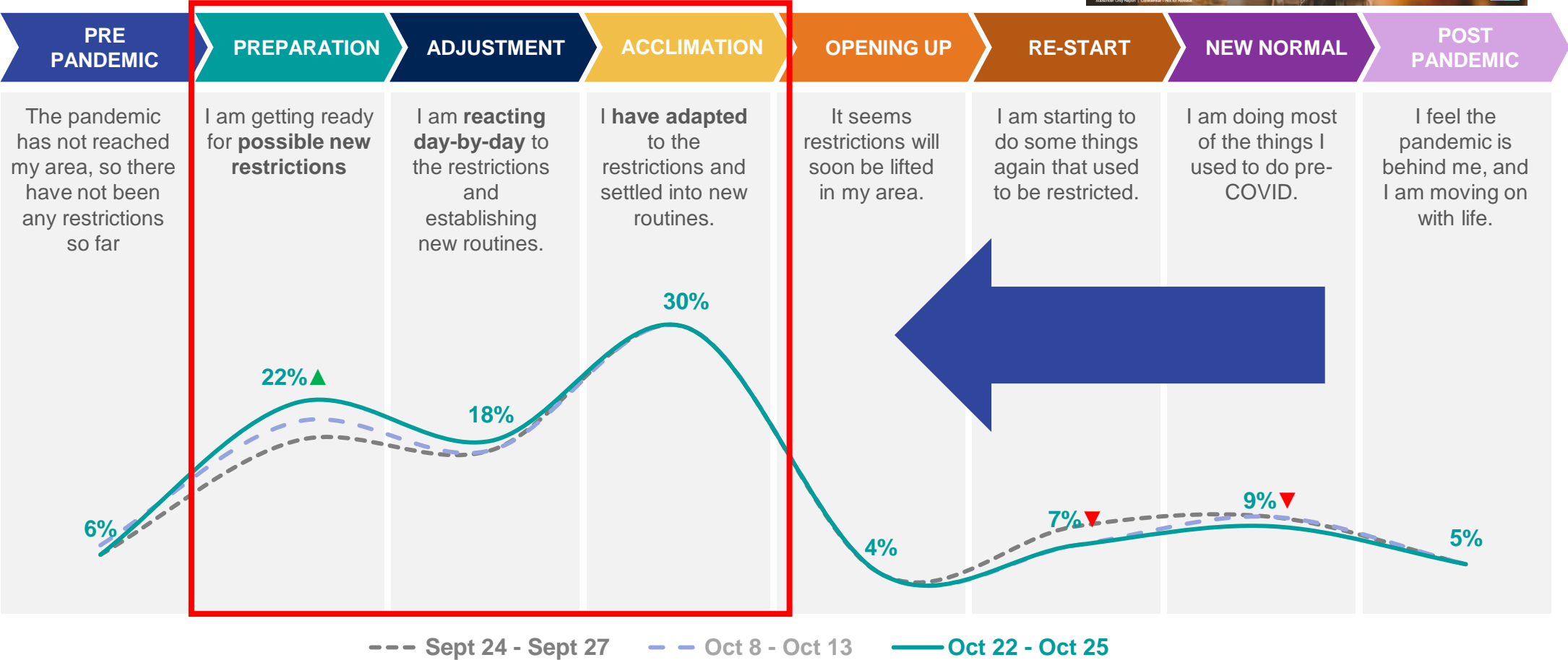
2



Download the white paper [here](#)

More resources at Ipsos' [COVID-19](#) web page

Globally, we're moving backwards, away from a "new normal", as new waves hit countries around the world

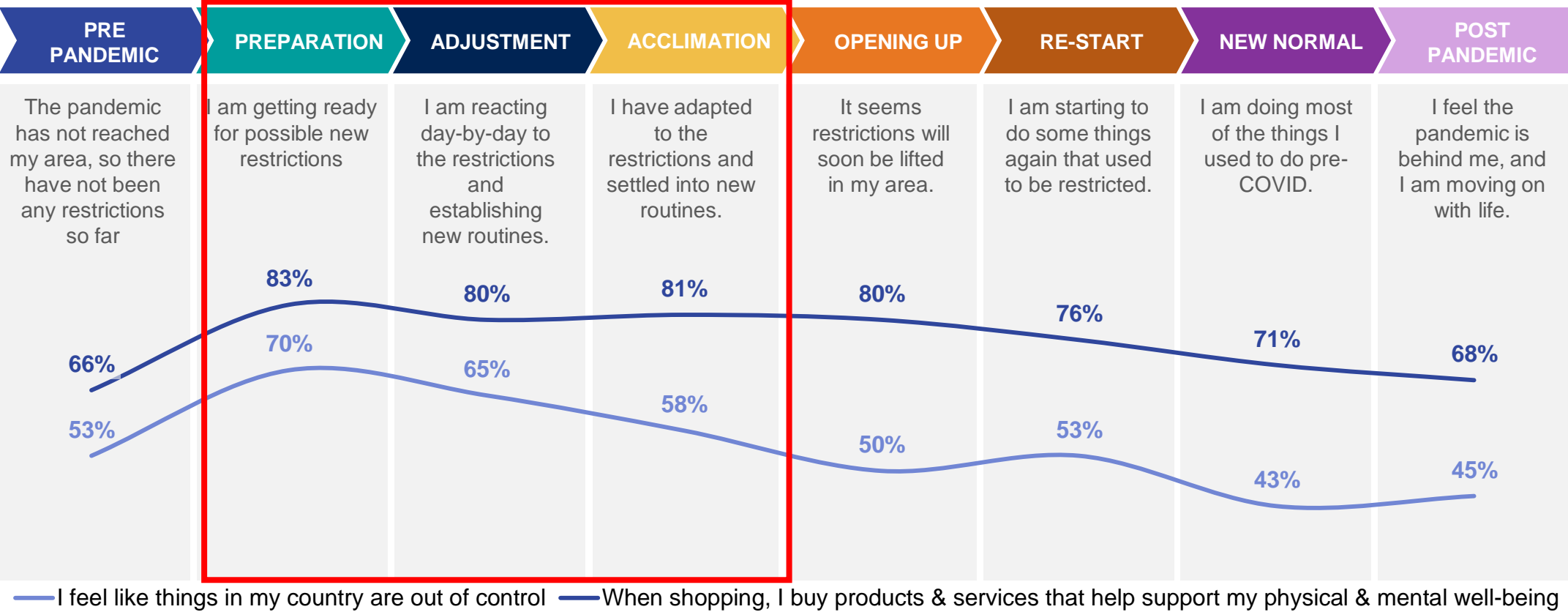


Q. There are often several phases or stages that people go through when times are hard. Which one of the following phases do you feel best describes your current situation regarding the covid-19 pandemic (n=14509)
▼ or ▲ indicate change vs. previous wave (statistically significant @ 95% C.I.)



As citizens move back to the ‘preparation’ stage, purchasing products that support physical and mental well-being provide a sense of control, when things around them feel out of control

“Out of Control” vs. “Support of Physical & Mental Well-Being”
(Top-2 Box Agreement %)

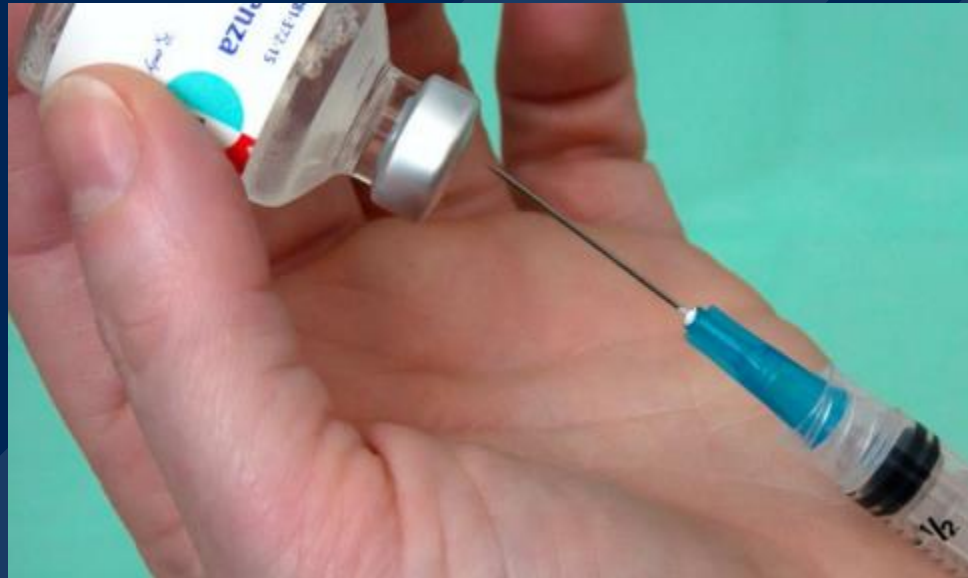


Q. (T2B Summary) To what extent do you agree or disagree with each of the following? (n=14509)
▼ or ▲ indicate change vs. previous wave (statistically significant @ 95% C.I.)
12 © Ipsos | Essential Report October 22 to 25 Fieldwork: For the Exclusive Use of Subscribers



Vaccine Matters

3



For the latest polls, reports & white papers, visit our [Global Vaccines Research](#) web page



Vaccine Matters

3



“73% say they would get a COVID-19 vaccine if it were available”

Survey details (15 countries) [here](https://www.ipsos.com/en/global-attitudes-covid-19-vaccine-october-2020)

ATTITUDES LIE ON A CONTINUUM...

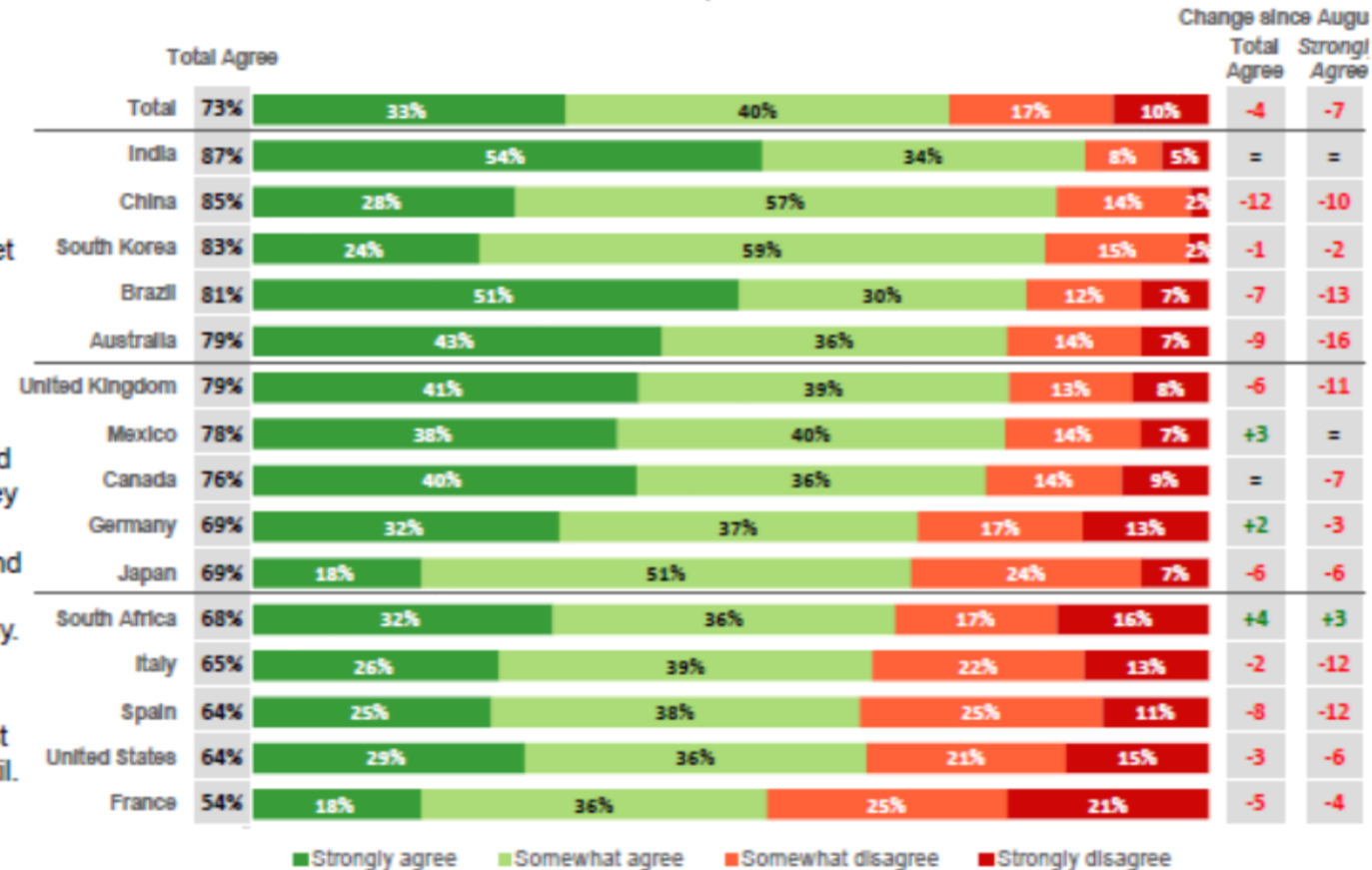
IF A VACCINE FOR COVID-19 WERE AVAILABLE, I WOULD GET IT

Q. To what extent do you agree or disagree with each of the following:
If a vaccine for COVID-19 were available, I would get it

Globally, 73% agree that they would get a COVID-19 vaccine if available. On average, across the 15 countries, vaccination intent is down 4 points since August.

More than four in five in India, mainland China, South Korea, and Brazil say they would get a vaccine if available – compared to just over half in France and about two in three in the U.S., Spain, Italy, South Africa, Japan, and Germany.

Since August, vaccination intent has declined in 10 of the 15 countries, most of all China, Australia, Spain, and Brazil.



Base: 18,526 online adults aged 16-74 across 15 countries

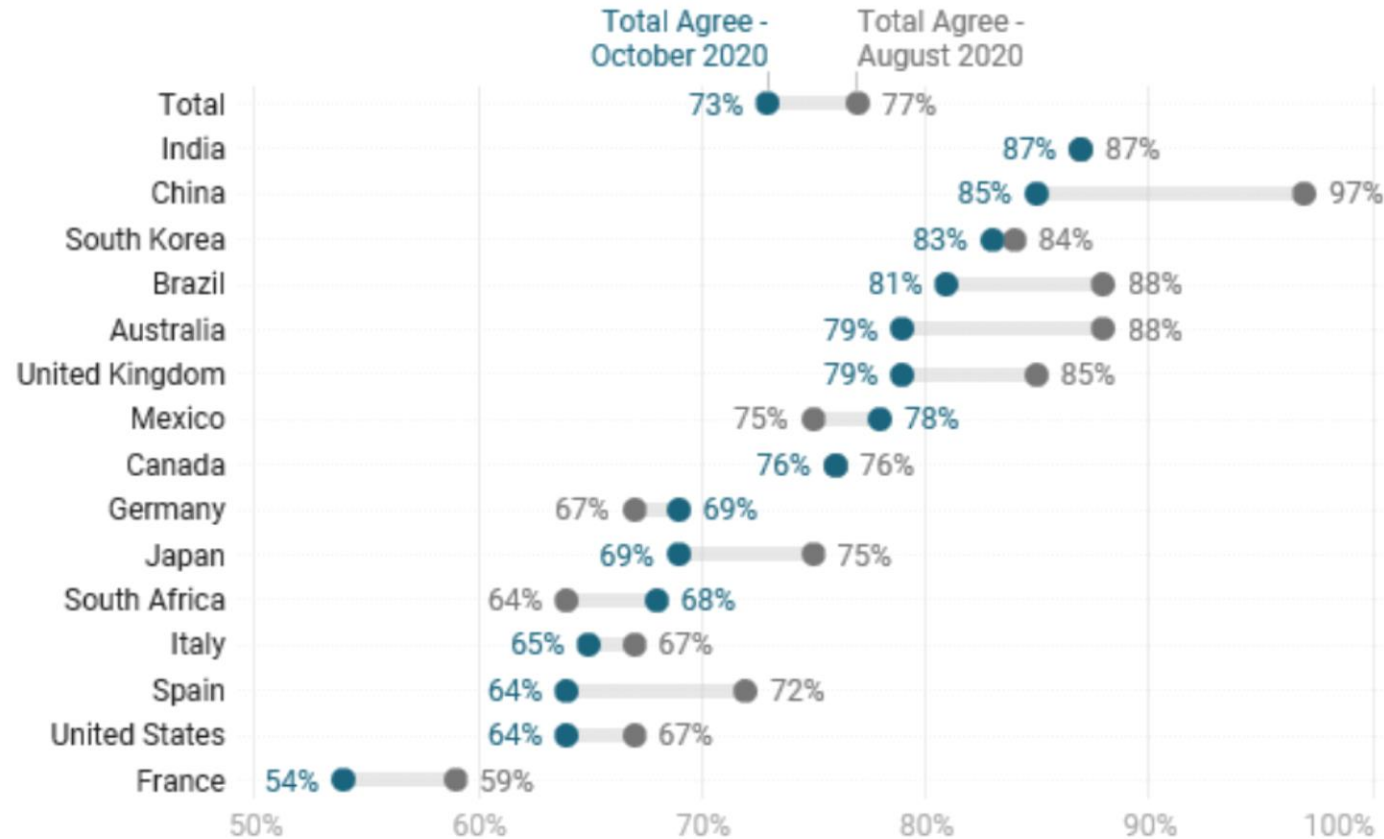
* Online samples in Brazil, China, India, Mexico, and South Africa tend to be more urban, educated, and/or affluent than the general population

2 - © Ipsos | Global attitudes on a COVID-19 vaccine

Strongly agree Somewhat agree Somewhat disagree Strongly disagree

...PEOPLE **LESS SURE** ABOUT VACCINE THAN THEY WERE

If a vaccine for COVID-19 were available, I would get it



Base: 18,526 online adults aged 16-74 across 15 countries



Download the
White Paper [here](#)



And now what?

4



IPSOS | CRACKING THE CODE FOR VOICE COMMERCE 4

AND NOW WHAT? Looking ahead

1 VOICE COMMERCE download



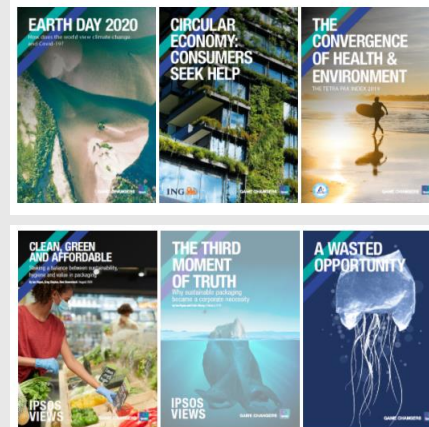
2 THE SUSTAINABILITY IMPERATIVE resources collection



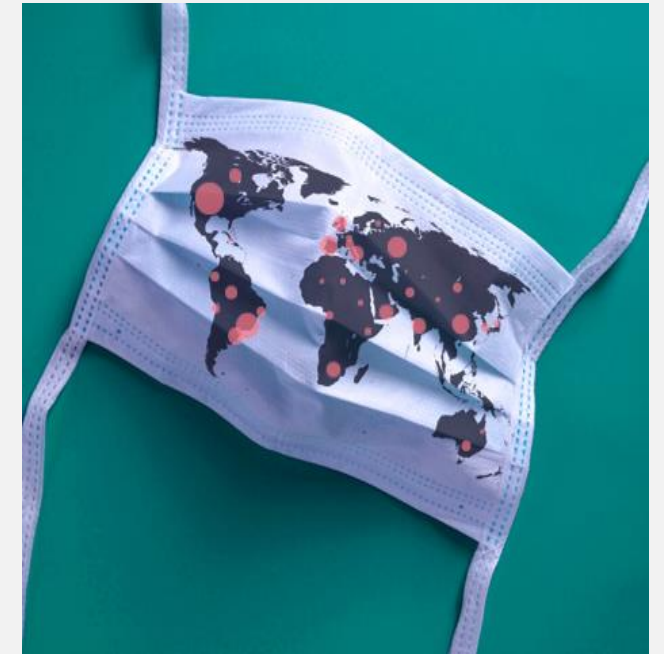
The Sustainability Imperative

Building Sustainable societies and organisations requires giving attention today to those practices that will ensure viability long-term.

9 November 2020 Sustainability



3 GLOBAL TRENDS beyond the pandemic



Global Trends 2020

Beyond the pandemic

**An exploration of social
change in seven countries**

NEW RELEASE

11 November 2020



How has Covid-19 changed our societies?

The pandemic has had far-reaching impacts on our **behaviour**.

How far is this translating into change in **values**?



The study revisits 12 trends...



Six trends have registered more change

Healthcare, brands, climate, globalisation and reactions to inequality



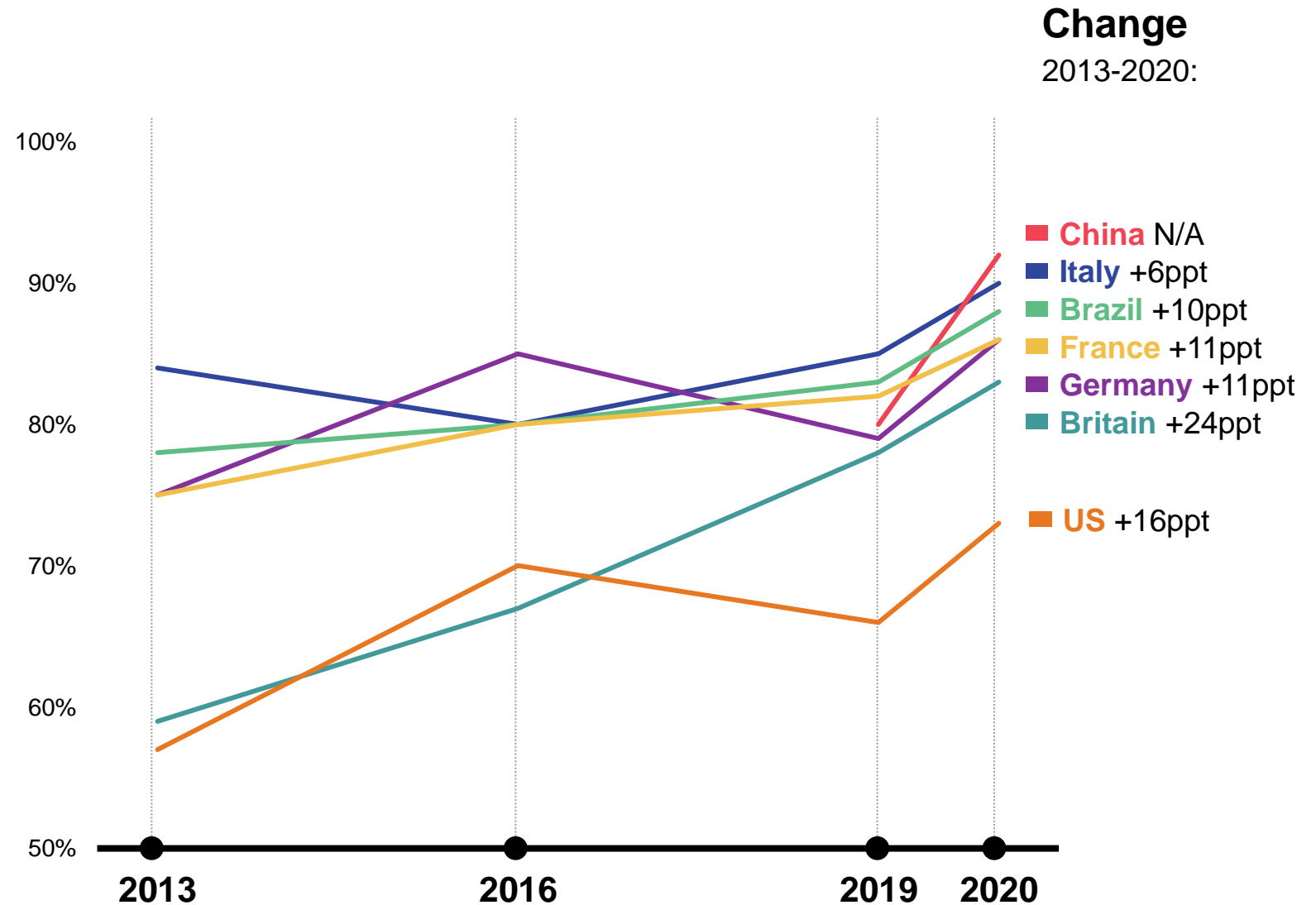
#1: The climate emergency



Covid has not dented climate concern

“We are heading for environmental disaster unless we change our habits quickly”

% agree



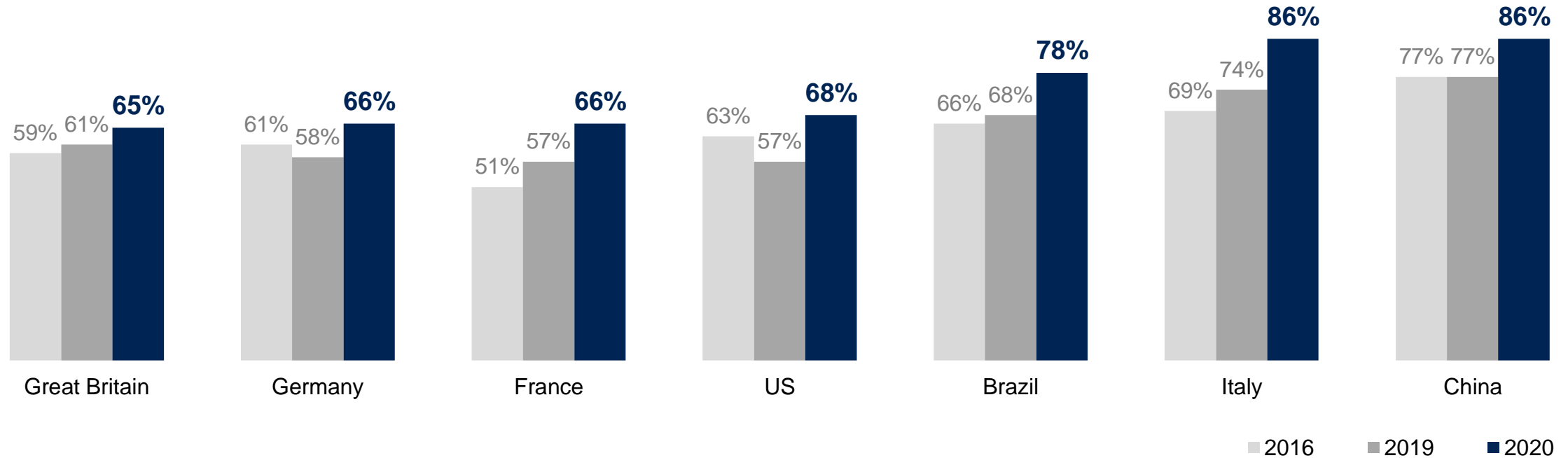
Ipsos Global Trends Series
Base: c. 1,000 adults aged 16-75 (18-75 in US) in each market for each wave

#2: Healthcare and trust in science



Health has moved up the agenda for consumers

“I will sacrifice convenience if it means getting healthier products” - % agree



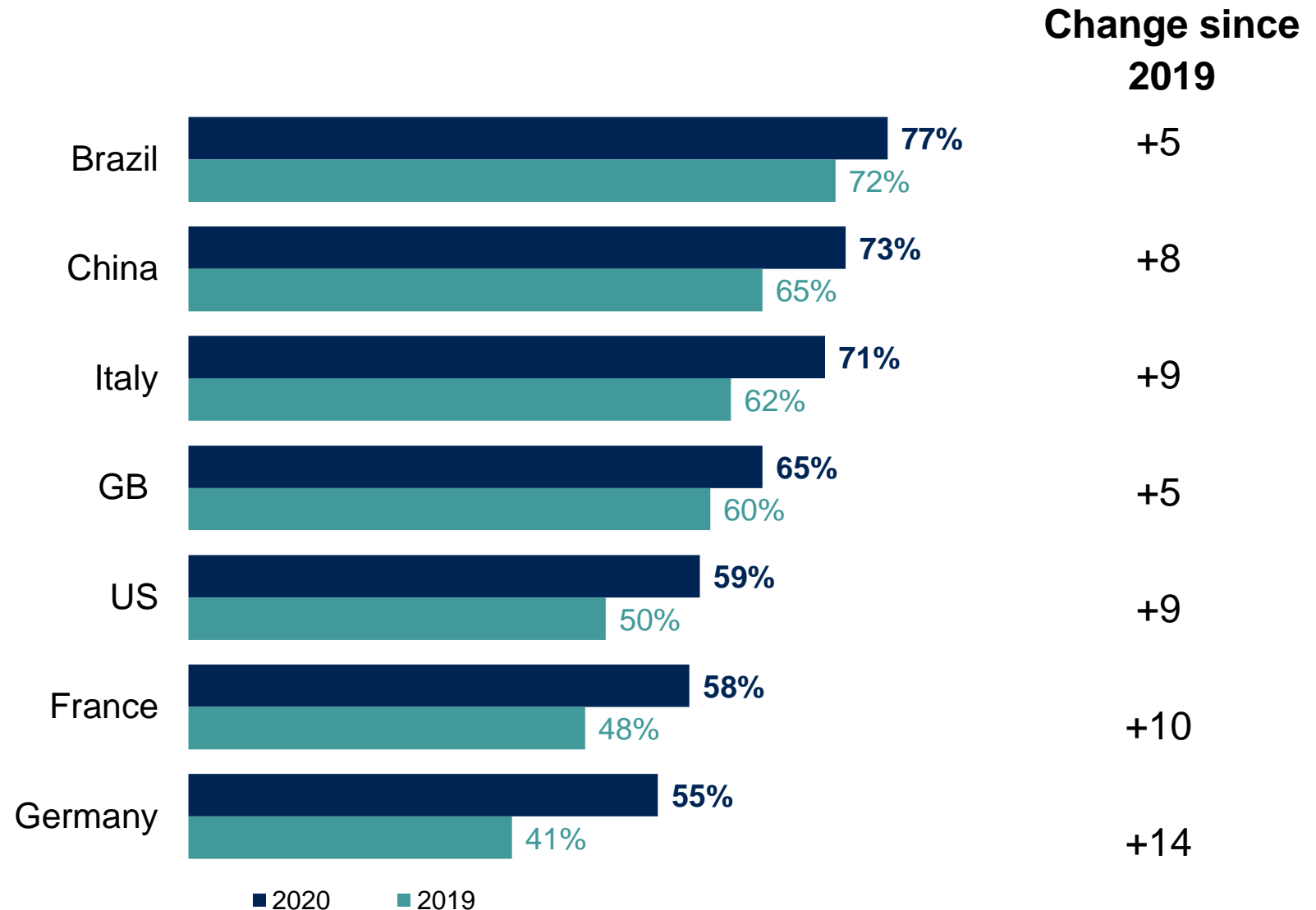
Base: 7,444 adults aged 16-75 (18-75 in US) in 7 markets interviewed in September 2020

#3: Rebalancing global and local

Wanderlust has risen under lockdown

“I would like to experience
living in different parts of
the world”

% agree



Ipsos Global Trends Series
Base: c. 1,000 adults aged 16-75 (18-75 in US) in each market for each wave

#4: Where do we see less sign of change?

Some of the ‘bigger picture’ factors – social nostalgia and the search for simplicity, ideology and attitudes towards **tech and data**



FOR THE FULL RESULTS...



Watch [the presentation](#)

Explore the Ipsos Global Trends [web pages](#)

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What's new?

Simon Atkinson

Chief Knowledge Officer



Download latest edition of [Ipsos Update](#)



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KEYS

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“ROLLER COASTER RETAIL”

Alison Chaltas
Global President, Retail and Shopper



ROLLER COASTER RETAIL

**Inspiring shoppers along the ups & downs
of today's omnichannel landscape**

GAME CHANGERS



WHAT'S CHANGED SINCE APRIL?



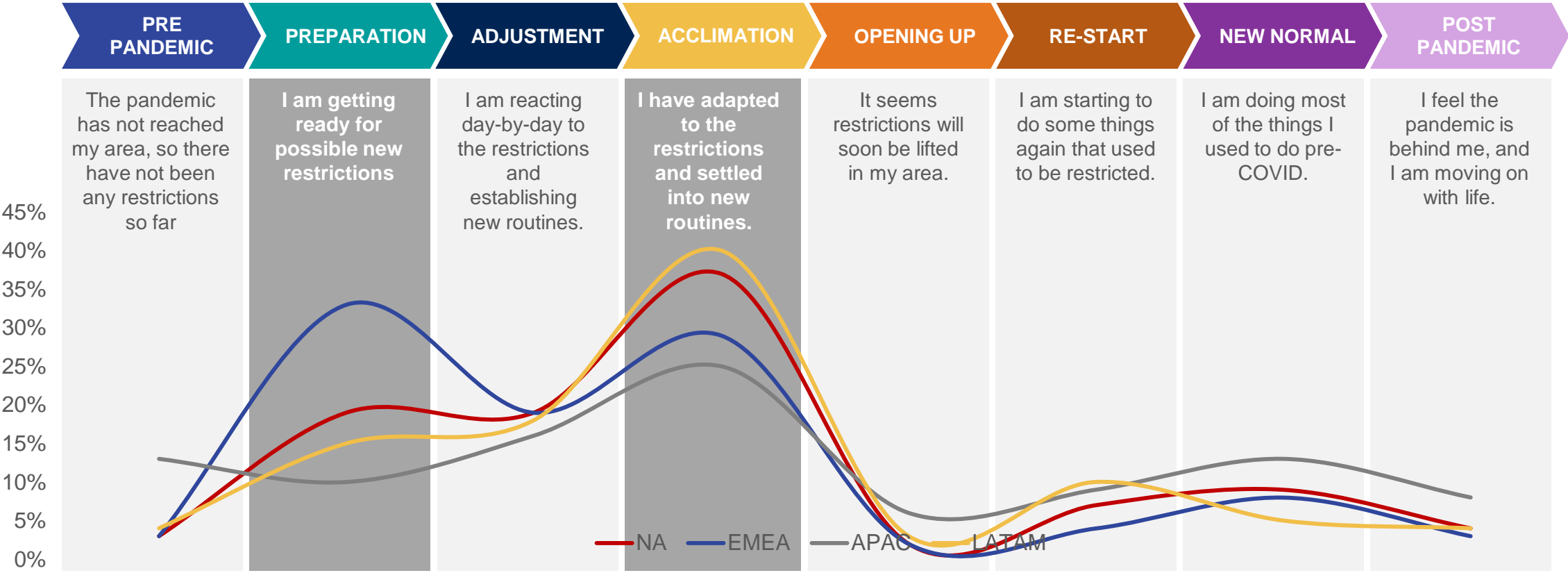
Acceptance that thanks to COVID-19 we are on a very long roller coaster ride

Digitalization of life driving rapid and radical changes in shopper journeys

- Omnichannel innovation raising the bar fast
- Brick & mortar players reinventing everything
- Bored shoppers seeking retail-tainment online
- Fulfillment and speed becoming game changers

Chronic anxiety shaping unpredictable behaviors – as societies and shoppers

THE FOUNDATION OF THE ROLLER COASTER



WHAT IT FEELS LIKE TO BE A RETAILER TODAY

**Forced operational changes
across all sectors**

**Tipping point
for eCommerce**

**Increased frugality
further pressuring margins**

**Dramatic shift to new
digital payment platforms**

**Accelerated decline of already
fragile retailers**

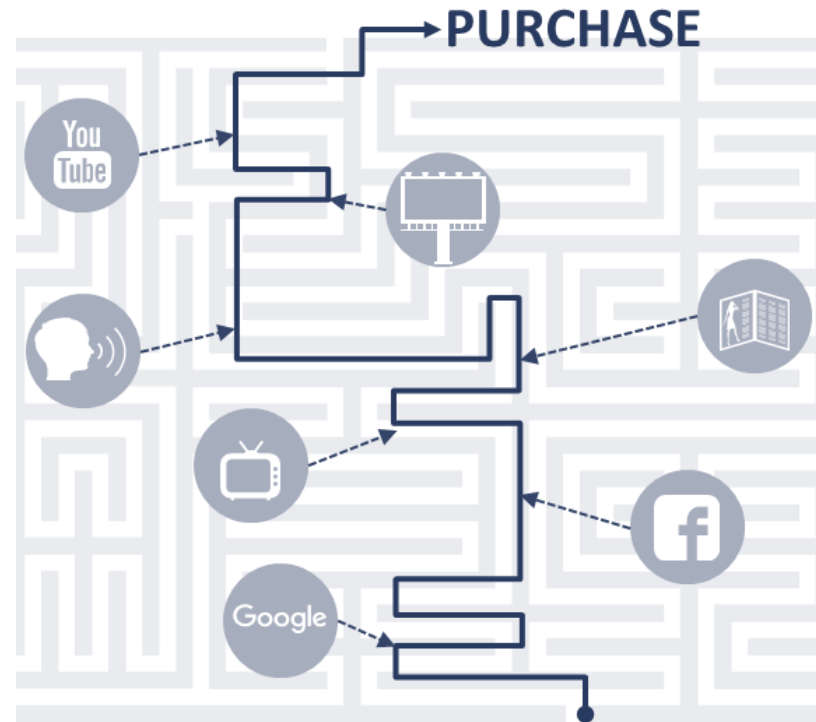
**Need to reinvent
at every turn**

A WHOLE NEW SET OF SHOPPER JOURNEYS

“We live more simply to stay safe and save money.”

“We buy more in local shops to support our neighbors.”

“I only buy necessities and shop sales online more & more.”



“Online shopping is boring. I just check prices and checkout.”

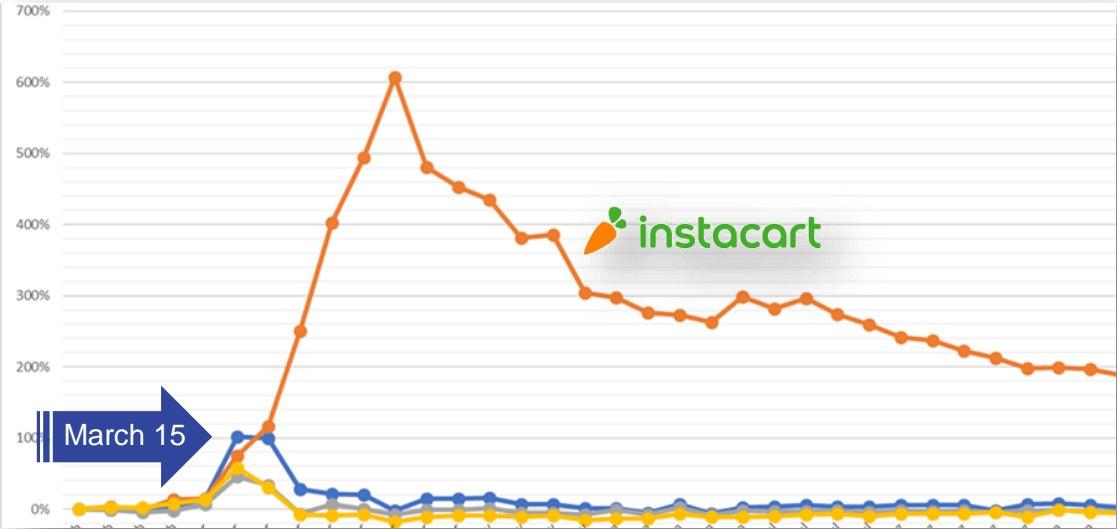
“I buy from my list and leave. Too scary to browse.”

“I shop fewer stores to avoid people.”

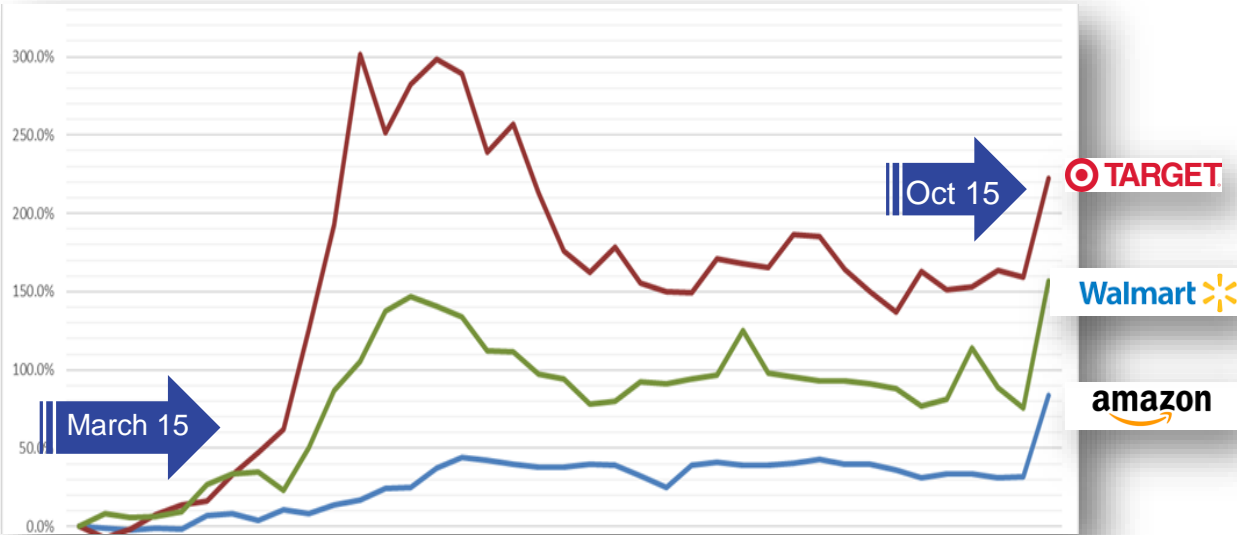
MASSIVE SHIFTS IN ONLINE BEHAVIORS

eComm Spending Trends – US Top Players Weekly Sales Growth vs January 2020

Instacart Delivery Platform vs Traditional US Grocers



Growth of Top US eComm Players

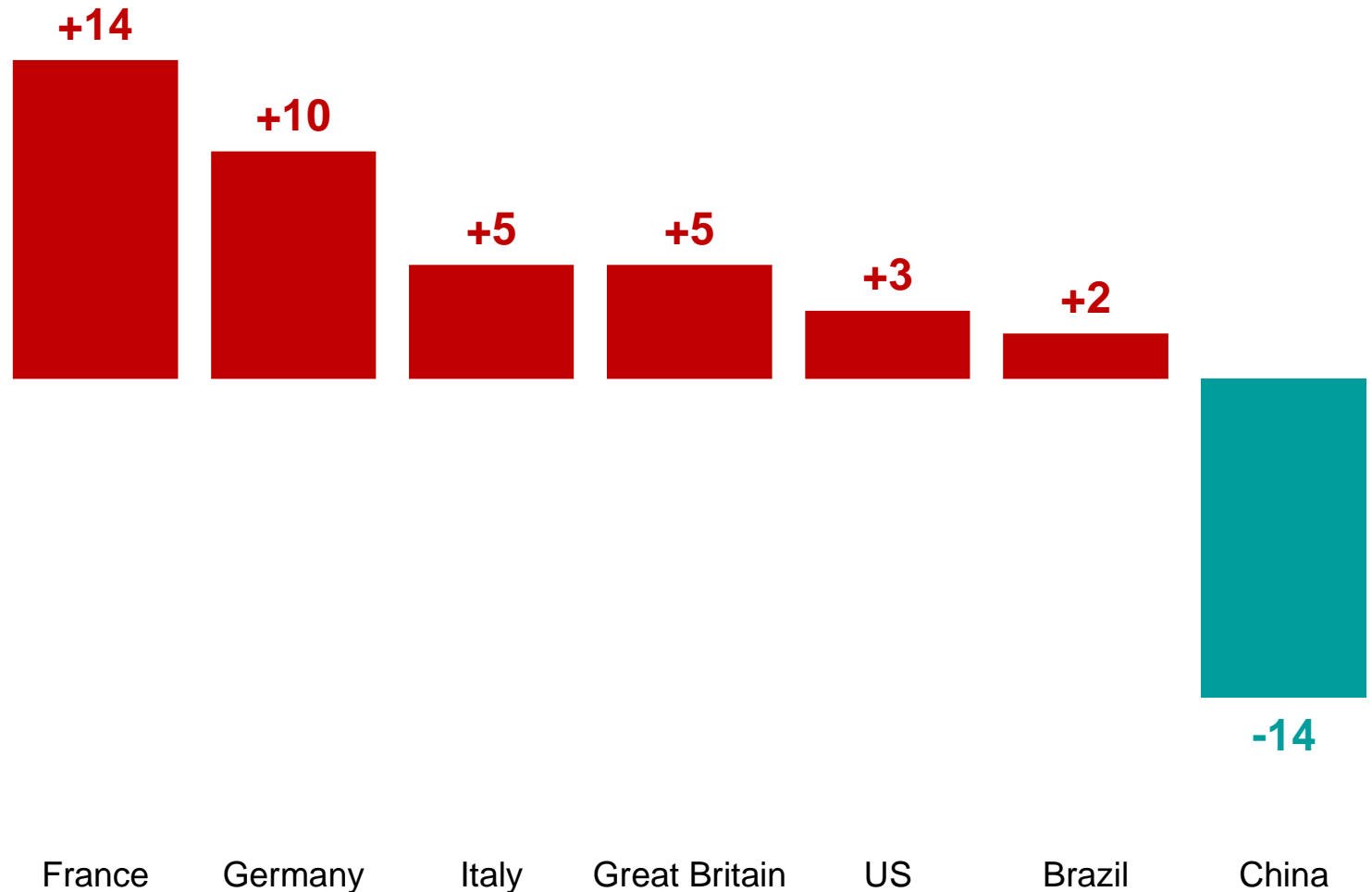


Source: Affinity Solutions, 2020

GROWING FRICTION WITH ECOMMERCE

“I find shopping online more difficult
than shopping in traditional stores”

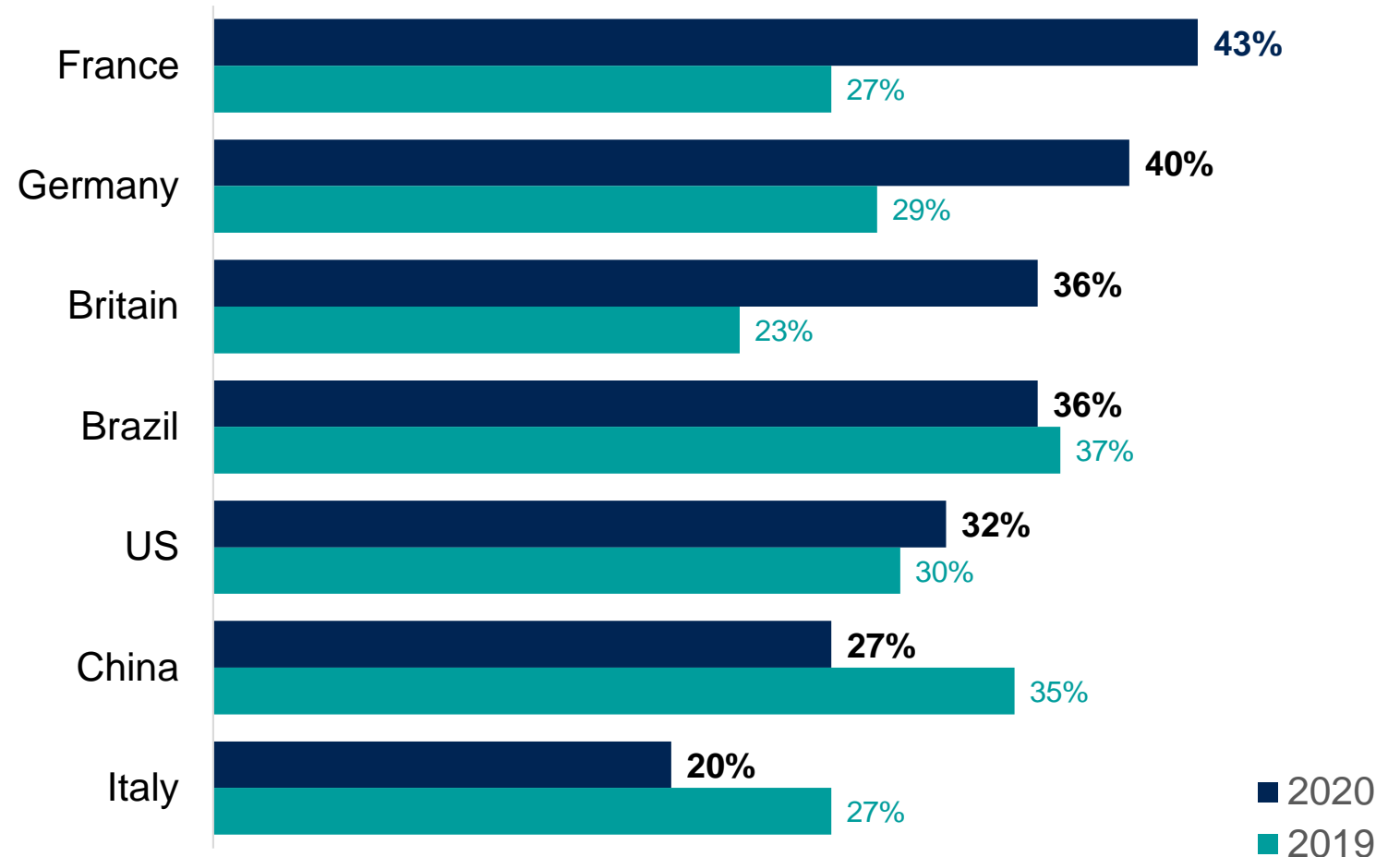
Change in % agree
2019-2020



Ipsos Global Trends Series, 2020

EVEN DIGITAL NATIVES ARE FRUSTRATED WITH THE ONLINE EXPERIENCE

“I find shopping online more difficult than shopping in traditional stores” - % agree, Generation Z



Ipsos Global Trends Series, 2020

RAISING THE OMNICHANNEL BAR – 11.11.2020

Alibaba's "Mega Shopping Festival" peaked at 583,000 orders in one second

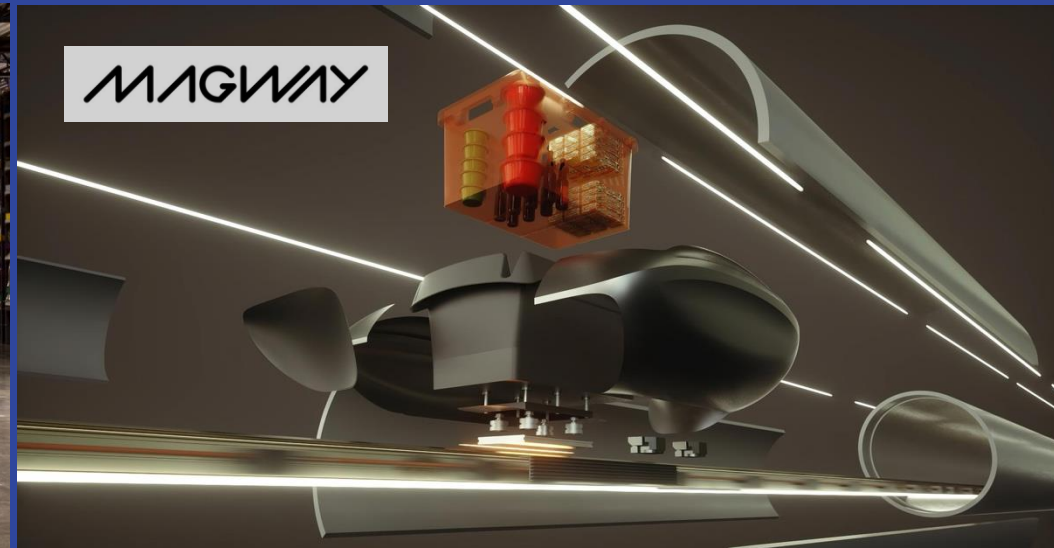


Alibaba sales: \$75B and counting...
+30% growth for the 6th straight year

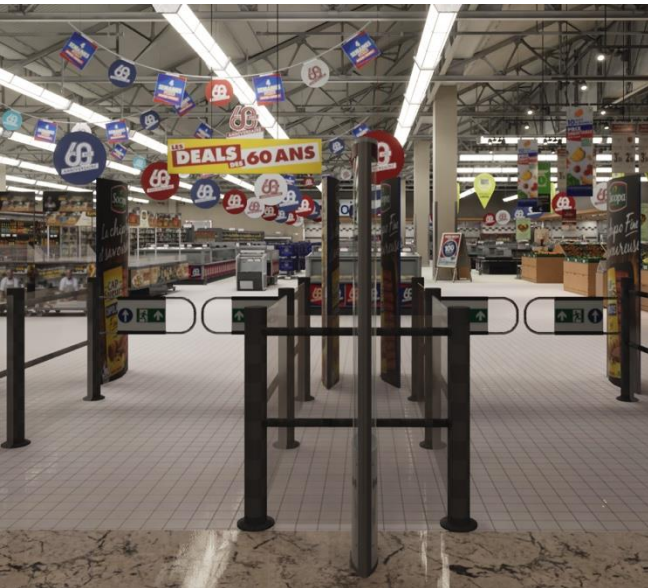


+100 brands each generated
+\$15M in first 111 minutes of 4 day event

SPACE AGE FULFILLMENT WILL ACCELERATE THE RIDE



RAISING THE IMPORTANCE OF GETTING IT RIGHT ACROSS YOUR POINT OF PURCHASE ECOSYSTEM



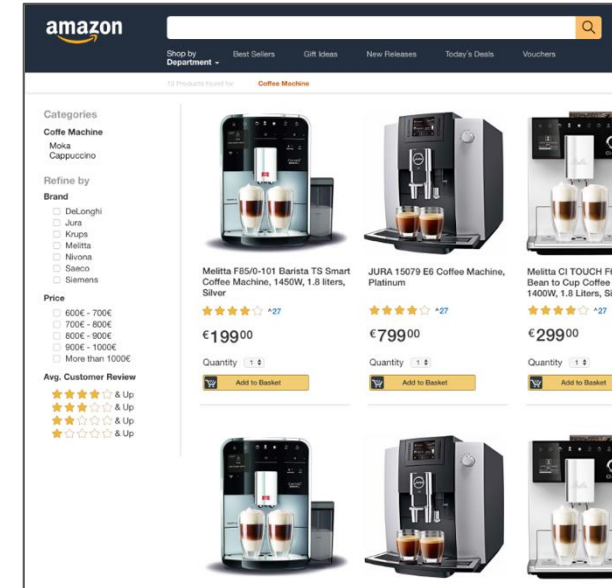
ACROSS THE STORE



AT THE SHELF



ON PREMISE



ONLINE

FOUNDATIONS FOR STAYING ON TRACK

ACCEPT AND EMBRACE THE ROLLER COASTER RIDE

UNDERSTAND THE NEW TRULY OMNICHANNEL SHOPPER JOURNEY

REACH HIGHER AS THE DIGITAL BAR RISES

GET READY FOR THE RIDE TO GET FASTER

HELP SHOPPERS MANAGE THEIR ANXIETY

KEYS

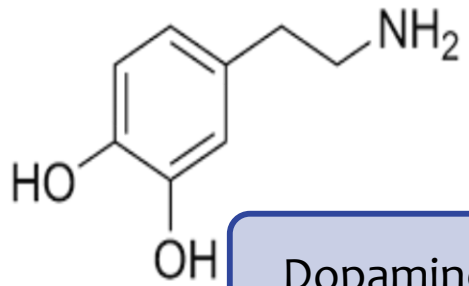
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“SHOPPERS RE-WIRED”

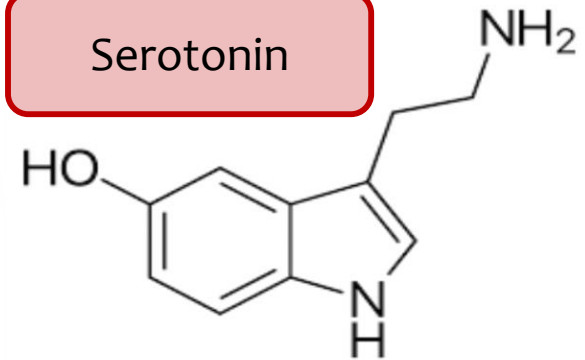
Manuel Garcia-Garcia
Global Head of Neuroscience



The Brains and Emotions Behind Shopper Behavior



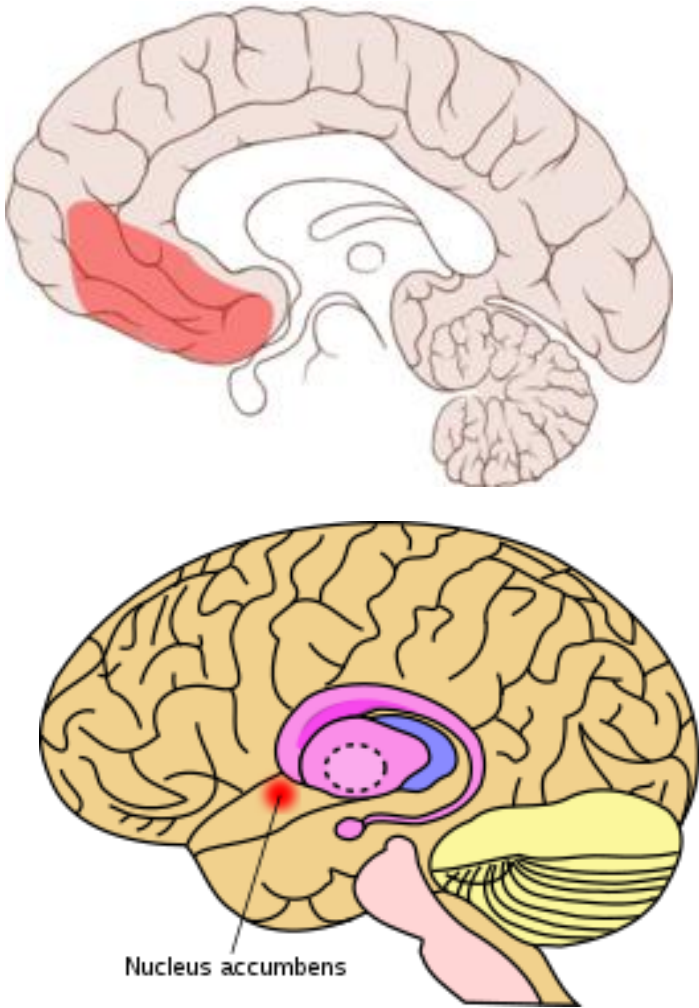
Dopamine



Serotonin



THE REWARD SYSTEM

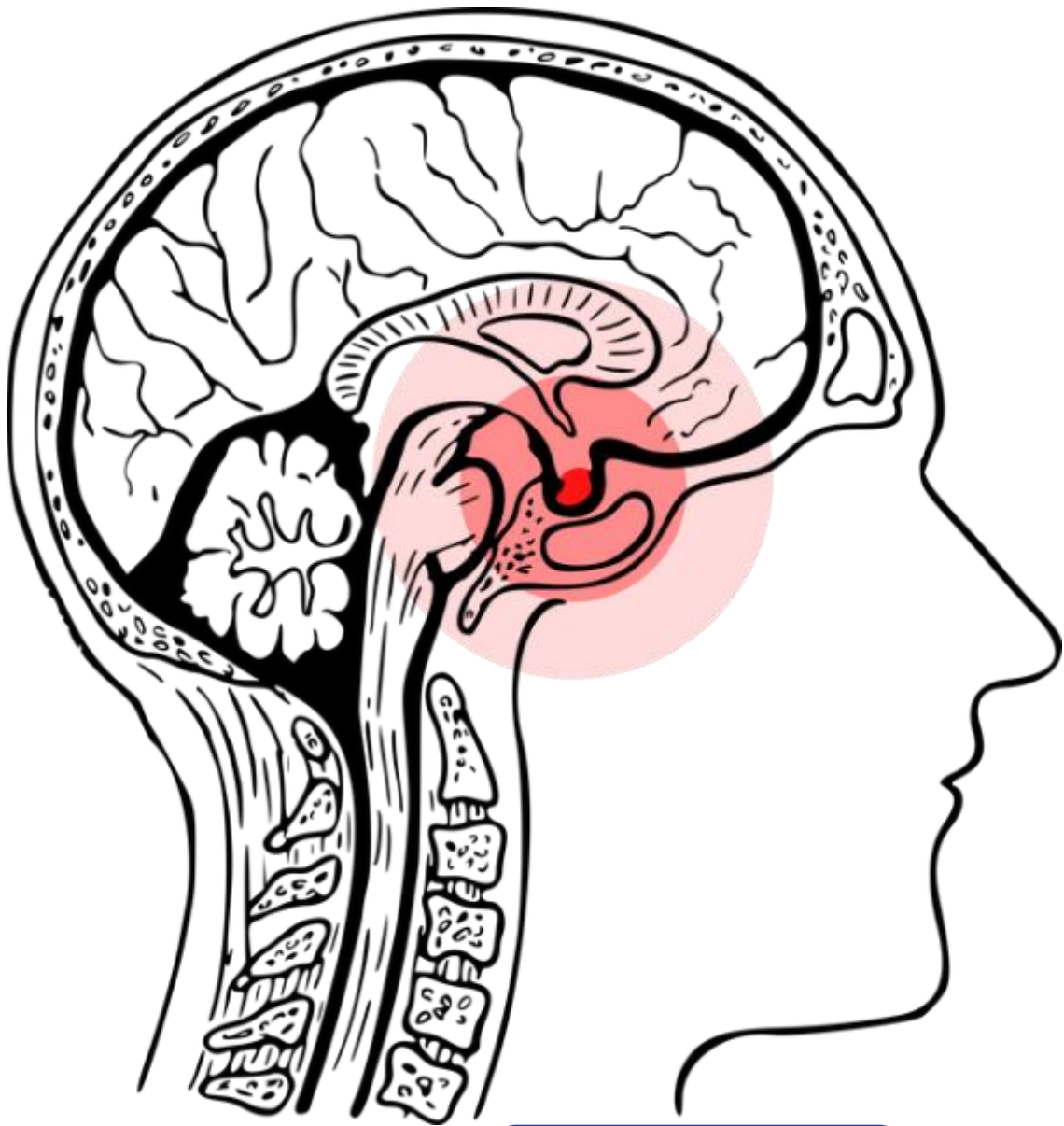


Anticipatory

Consummatory

UPDATING

BETTER THAN EXPECTED!!!



Amygdala Hijack

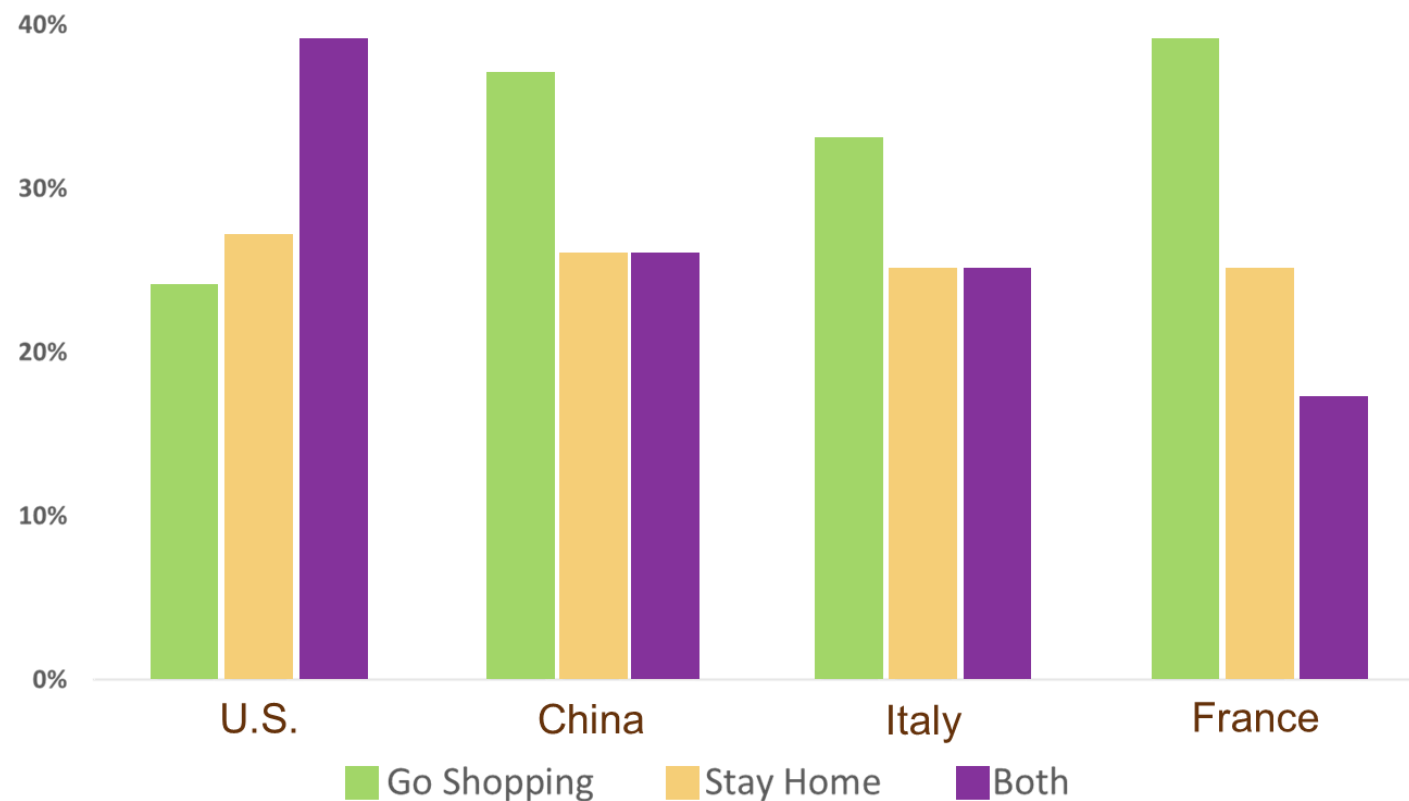


Irrational Behaviors

GLOBAL DECISION DILEMMA

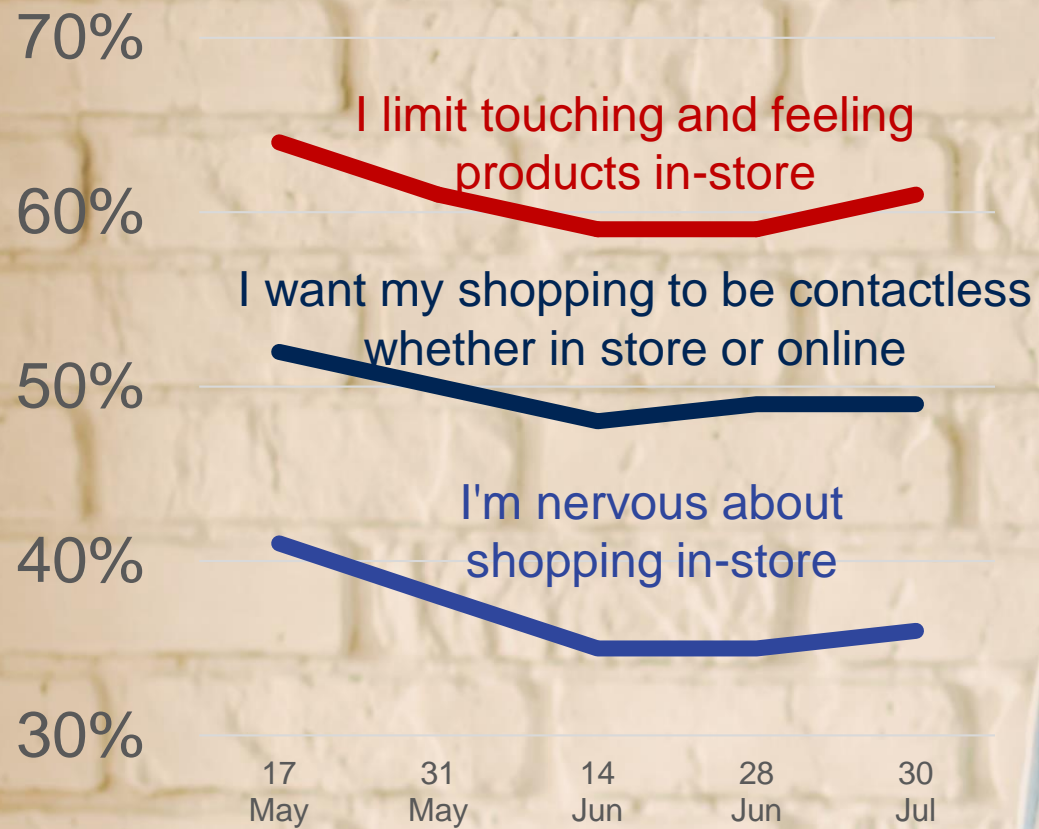
*Preferences for either stay home
or resume normal life are not two
ends of a spectrum*

People with Strong Preferences for Staying Home and Shopping



Disrupting System 1 Thinking: Better Science for Smarter Marketing, ESOMAR 2020

INFLUENCING
SHOPPERS
OVERPOWERED
BY ANXIETY:
**CHALLENGE &
OPPORTUNITY**



KEYS

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“SHOPPERS RE-WIRED”

Geeta Lobo
Executive Director, Ipsos in India



**Festive shopping
rush at a Silk
Saree store**



Responsible retailing : short circuits many of the emotional payback of shopping.



Nearly
60%

Shoppers limit touching and feeling products in-store

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TRY & BUY

Comfort Of Shopping
Jewellery Now Accessible
At Your Home.

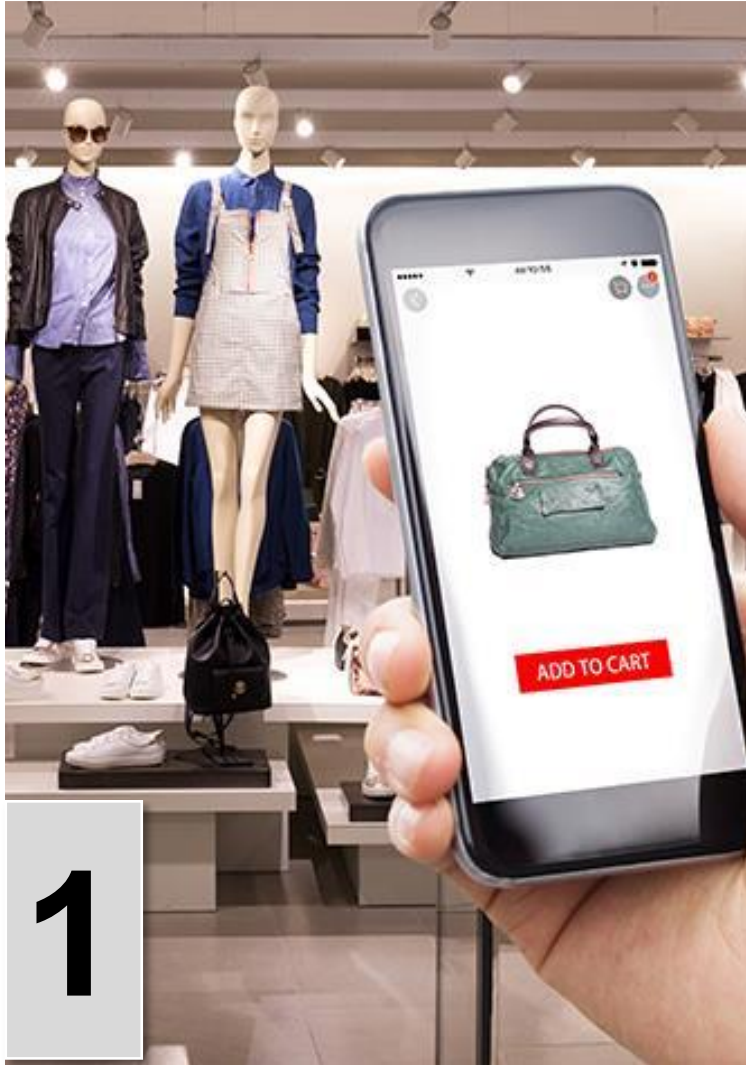
Technology has been able to restore **access** better than **experience**

TRY AT HOME

Experience our collections in the comfort of your home or office at your convenience. Indulge yourself or a loved one with a curated selection of thoughtfully designed, everyday diamond jewellery.

Ipsos

Rewiring shopping experience



Go omnichannel



Visual over touch



Rejig pack info

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