

KEEP MOVING IN TURBULENCE

A handbook of solutions
and alternative ways to fulfill your
learning plans and keep your
business moving forward

April 2020
Ipsos Germany





A Word from Our CEO

The corona-virus Sars CoV-2 has changed our lives in just a matter of weeks and continues to do so day by day. We have distanced ourselves socially – meaning we are working, communicating and living our lives differently but in many ways are yearning for and trying to stay closer at the same time.

No one can say how this will change us or whether we'll be behaving, thinking and feeling differently after the crisis. But, brands which will be able to rely upon data – captured during and after the crisis – will also make better informed decisions on how to act more successfully both during the crisis and after.

At Ipsos we have adapted to the limits of physical interaction and have developed a toolkit which allows your brand to stay close to your customer. We can help you to understand needs and emotions of your customers in the current context and provide you with reliable, relevant, actionable, and contextualized data, insights and analytics.

Thank you for your partnership. We are eager to provide you with our expertise to help you operate through the corona-crisis more successfully.


Martin Hellich
CEO, Ipsos Germany

Handbook Overview



Thought Leadership

Gain access to online blog, articles, resources and expert opinions related to COVID-19.



Insights Without Research

Generating insights without setting up complex research by leverage our Social Intelligence practices and smart ways to get more value out of the existing.



Qualitative and User Experience

Stay close when you cannot be close. Keep your learning plan on track with these approaches that deliver qualitative insight from afar.



Fast & Agile Tools

When change happens fast, gain quick answers to business issues surfacing during this turbulent time when behaviors may be modified due to health and economic issues.



Quantitative Considerations in Turbulence

Consider methodological implications for research, including brand health as well as communications and product testing.



Impact on Shoppers

Evaluate your shopper/customer data and systems to help manage your business through the global coronavirus epidemic to ensure de-risking long-term customer impacts.

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01. **THOUGHT LEADERSHIP**

Gain access to online blog,
articles, resources and expert
opinions related to COVID-19.

IPSOS SIGNALS summarizes all current content

THE CRISIS IN CONTEXT

Ipsos is committed to helping our clients navigate with confidence our world of rapid change, and this digest has been prepared to help us all better understand the dynamics of the current outbreak. We bring together our latest research on coronavirus, drawing on our surveys, social media monitoring and the analysis of our teams around the world.

Access content [here](#).

Content selection as of 3/31/20 is shown on next 2 pages. Further publications and global polls on opinions and attitudes about coronavirus can be found on our [website](#).



What you will find in IPSOS SIGNALS

PUBLIC OPINION AND CORONAVIRUS:

Crisis seen as a threat to both health and finances

The fifth wave of our survey on coronavirus finds the public are divided on whether isolation and travel bans will prevent the spread, while border closures have become more acceptable.

[Read more.](#)

INNOVATING DURING CHALLENGING TIMES:

Consumer attitudes and behaviours

From our concept testing database analysis based across 93 countries, we found consumers are often more open to new ideas during a crisis since their usual habits have been interrupted. [Read more.](#)

THE SOCIAL MEDIA CONVERSATION:

Combating misinformation

At a time when it is becoming essential to extract sense from the millions of online conversations about coronavirus, we explore how the world's top social media sites are combating misinformation. [Read more.](#)

CORPORATE REPUTATION AND CORONAVIRUS:

Developing an effective response

Considering how fast news around coronavirus is evolving, understanding shifts in public perception about the virus is critically important. This paper sets out early ideas on how organisations can respond to the pandemic. [Read more.](#)

SPOTLIGHT ON ITALY:

Life under lockdown

Findings show the #istayathome initiative is helping to keep the level of perceived personal threat under control in Italy, but limitations enforced by the government heighten the sense of threat. [Read more.](#)

SPOTLIGHT ON FRANCE:

Online reactions to confinement measures

Our analysis of online conversations following France's lockdown shows that social media can act as a real and positive outlet for the stressful experience of self-isolation. [Read more.](#)

SPOTLIGHT ON CHINA:

Impact and recovery

Three months after the first cases were reported, this report examines the current situation in China, setting out ideas for what other nations can learn from their experience, and what brands can do in these times. [Read more.](#)

MEDICAL CROWDSOURCING:

What are doctors discussing about coronavirus?

This analysis of the G-MED Global Physician Online Community highlights the voice of doctors globally through social data analytics and medical crowdsourcing (problem solving through sharing online). [Read more.](#)



Online Blog

Synthesio | Ipsos Coronavirus Series

Stay tuned -
Access latest developments
by clicking [here](#).

How can Brands respond to the Covid-19 crisis?

An Expert advice by our global leaders:

by Steven Naert, Global Solutions Leader, Ipsos Research Center

Access full article by clicking [here](#).

To read the German Ipsos Whitepaper on this topic, click [here](#).

HOW BRANDS CAN ADD VALUE TO PEOPLE'S LIVES IN THIS CHANGING CONTEXT (EXCERPT)

"What are brands doing in response to all this changing context? For now, we see that a lot of brands are hesitating to respond at all. Most seem to want to stay clear from the topic, because they are afraid of looking like they are profiteering. But there are things that brands can do to connect with people and show they understand how much their lives are impacted.

There is indeed one thing that brands should avoid at all costs. They really need to be careful not to be seen as opportunistic. In The Netherlands, for instance, an online consumer electronics retailer suddenly increased prices on many of their products in order to manage demand in anticipation of product shortages. Even if perfectly rational, this did lead to quite a bit of negative buzz on social media, which could cause long-term damage.

But there are many positive things brands can do.

GIVE COMFORT

Louis Vuitton posted a heartfelt message to Chinese customers across different social media platforms like WeChat and Weibo: "Every paused journey will eventually restart. Louis Vuitton hopes you and your beloved ones stay safe and healthy."

ACTS OF KINDNESS

There have been some examples of brands that have taken initiatives to help stop the spread or to avoid negative impact. In the UK, Lush is inviting people to come into their stores to wash their hands. In India, we have seen communication from Lifebuoy, a

Unilever brand, to wash your hands, even if it's with a competitive brand.

GET THROUGH THE CRISIS IN STYLE

If you are going to have to wear a face mask, then it might as well be a very fashionable looking mask; from Shanghai to New York we have seen brands launch masks with stylish prints and colors. There are also many examples of influencers sharing make-ups look to wear with facial masks.

GO VIRTUAL

We expect to see a big, further shift to virtual. In China, online car sales increased in the first weeks of the crisis, despite overall car sales crashing. We also see many professional meetings and exhibitions moving online, just as many museums have started to create online experiences by creating virtual rooms where art is being shown.

HELP PEOPLE PASS TIME

This is very inspiring territory: how can brands help people make good use of the extra time they spend at home? How can they offer extra entertainment, how can people keep their kids busy while schools are closed, etc. Alibaba, for instance, is organizing no-meeting concerts where they live-stream new content. Ikea is offering daily tips to help people get through their new routines, ranging from how to organize your home office to how to bake with kids.

RELIEVE STRESS

In times of crisis people rely on coping mechanisms such as humor, meditation or taking time to unwind. In Italy, the most used emoji during the initial days of the outbreak was 'tears full of joy', often accompanying posts that made the tension and stress more of a shared burden. Brands can also use other ways to take people's minds off the stress and anxiety this crisis brings. Of course, brands need to be very careful not to offend people.

02.

INSIGHTS WITHOUT RESEARCH

Leverage our various approaches to generate insights without setting up complex research

Social Intelligence Daily Tracking

OVERVIEW

When things evolve fast and you need a real time compass to finetune strategies, Ipsos Social Intelligence Analytics (SIA) translates the billions of consumer mentions generated online every day, cuts through the noise, and delivers insights that you can put into action. Tap into critical, up-to-the-minute intelligence about the conversations surrounding your brand with our daily tracking program.

Powered by leading social listening platform Synthesio, our program leverages global research expertise and advanced AI-driven analytics to explore key events, topics, or trends impacting consumer and brand perceptions NOW – enabling you to move forward with speed, agility, and confidence.

APPROACH

Daily evaluation of brand conversations against COVID-19 mentions: Volume and sentiment are evaluated against established threshold of conversations (brand + topic mentions), and email alerts are triggered once threshold is surpassed. Email alerts include volume, sentiment, emotion, key themes, verbatim comments, and relevant media data.

Weekly (3-4 page) Memo-style report: 3-part report includes analysis of conversations around primary brand, specified competitor(s), and overall trends related to COVID-19. Includes recommendations and assessment of potential crises or reputation management triggers.

Access to Synthesio platform: World's largest data coverage; 80 languages covered in 190+ countries; Customized, DIY dashboards for always-on, real time monitoring of your brand's global and local reach in an interactive interface.

ADDITIONAL SIA PRODUCTS

MARKET

EXPLORER

Explore motivations, unmet customer needs, and changing customer landscape for your brand.

TREND RADAR

A customer-centric trend approach designed to deliver critical insights on behavior shifts and future impact on category needs.

BRAND PULSE

Explore how customers naturally talk about brands with dynamic and context rich insights from customer generated data.

CUSTOMER

EXPERIENCE

Deliver context to the customer journey, immerse deeply into specific issues and track your customer experience echo over time.

COVID-19 CONSIDERATIONS

- 100% online, mobile-optimized platform
- No travel or face-to-face required
- 24/7 access to fully profiled audience ready to answer critical business questions in real-time
- On-demand access to qualitative feedback and survey data



Case Study: COVID-19 Social Listening

Our social intelligence tool, Synthesio, has collected over 40 million posts and we are analyzing the latest key trends and insights, including:

- The US surpasses China for the largest volume of conversations, with over three million mentions compared to 1.8 million posts in China.
- Discussions have mainly centered around the challenge of going to work, stemming from fears around public transportation and transport restrictions due to the spreading virus.
- A new topic emerging on social media has been the personal financial impact – also evident from our latest public opinion polling.
- In affected locations, people are sharing stories about their experience being quarantined or working from home. In areas that the epidemic has not reached, populations were discussing potential quarantine measures and the impact it will have on their lives.

Covid-19 Impact Explorer – via Social Media techniques



IMPACT EXPLORER

Our approach is designed to unearth the attitudinal and behavioural drivers of change for your market and brand. We combine AI algorithms with millions of social data signals to spot the key topics, emerging trends, emotions, new needs, threats & opportunities and set the new horizon for you to plan early and act fast.

WHAT YOU WILL LEARN

- **CHANGE DRIVERS**
Deep dives into how consumers adjust their behaviours and attitudes to Covid-19 policies in your category
- **MARKET TRENDS EVOLUTION & VELOCITY**
Market trend mapping to surface the maturity and trajectory of rising topics and emerging needs
- **BRAND IMPACT & ACTION GUIDANCE**
Which brands are part of the social ecosystem and which emotions and associations are echoed?
What can we learn from successful brand engagement during the Covid-19 crisis?

HOW IT WORKS

We start off with scraping the relevant data universe specific for your insight needs with historic data to compare the conversation landscape before and after the Covid-19 outbreak. Afterwards we apply selected AI algorithms to perform a bottom up topic modelling to identify and analyse the key topics, emotions, trends and needs for your market and your relevant brand scope.

COVID-19 CONSIDERATIONS

- 100% online, mobile-optimized platform
- No travel or face-to-face required
- 24/7 access to fully profiled audience ready to answer critical business questions in real-time
- On-demand access to qualitative feedback and survey data
- Engage a dialogue with real consumers to hone in on the drivers of change in your market or communication ideas in a community environment with interactive and multimedia tools such as live chats, video focus groups, private blogs



ADD-ON OPTION A – LIVE TRACKER

Your always-on, real time access to a dedicated Synthesio dashboard based on the learnings and topic taxonomies from the Impact Explorer stage. This enables you to continuously track how your market and brand is impacted by the Covid-19 crisis.



ADD-ON OPTION B – SENSE CHECK

Engage a dialogue with real consumers to hone in on the drivers of change in your market or communication ideas in a community environment with interactive and multimedia tools such as live chats, video focus groups, private blogs.
Or fast check your concept on Ipsos Digital, our Ipsos DIY survey capability

Virtual Workshopping

OVERVIEW

Ipsos has a host of virtual workshopping tools to keep collaboration and co-creation in full swing even during the most turbulent times. Our expert consultants help execute for you.

Virtual workshops offer the opportunity to spread out workshop activity, giving people time to 'sleep on things' and do interim work.

Virtual workshops can be challenging as there is less energy from having everyone in a single room, so it is important to be creative in finding ways to drive energy into the workshop.

APPROACH

With **virtual workshopping**, you would make use of videoconferencing software, virtual whiteboards and voting apps, alongside more familiar tools such as Skype, file hosting and PowerPoint.

To make it an exciting engagement, we would consider posting physical props and materials to participants, or introducing energizers and games.

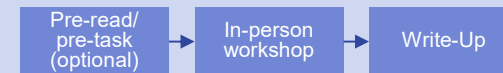
We use appropriate tools to run calls where you can move participants into sub groups for exercises. We run exercises in shared whiteboarding software like Miro which all participants can edit and tools like Mentimeter for in-between votings and direct visibility of results.

We use familiar tools like email, ppt and Google Drive to share material with participants which they may need to read for exercises. Leveraging systems they are already using can help get past the inevitable IT challenges that may otherwise exist.

COVID-19 CONSIDERATIONS

- Plan for multiple day mini sessions as opposed to day-long workshops to maximize engagement and prolific outcomes

TRADITIONAL MODEL



OPPORTUNITY WITH VIRTUAL WORKSHOP



Tips for a Successful Virtual Workshop

Given that Virtual workshops can be challenging as there is less energy from having everyone in a single room, it is important to **be creative** in finding ways to drive energy into the session.

Consider using **online quiz apps or online multiplayer games** to introduce fun emerging breaks into the workshop.

As preparation in advance of the workshop, encourage your network of participants to have coffee, water, or their preferred beverage as well as **healthy snacks** available.

Assign a **facilitator** to ping participants randomly throughout the workshop to keep them engaged and ready for action throughout the session.

Curation and Insight Cloud

OVERVIEW

In these times of information explosion and high share of unstructured data and at the same time the need of Speed and Agility lots of clients are looking into how to leverage existing knowledge and available studies in order to drive continuous consumer-centric learning. It's worth to identify what is already known.

Curation can help to answer the WHY? And the WHAT TO DO NEXT? Behind certain business questions. It is a service to extract consumer centric insights from multiple data sources and deliver rich story-telling to inspire activation.

APPROACH

AGILE ACCESS TO INSIGHTS ON DEMAND – ALL BROUGHT TOGETHER IN A CONTINUOUSLY DEVELOPING CLOUD OF DATA
DISTIL multiple data to insight

- Craft insights synthesized from multiple sources
- Unite data to find patterns, trends and bigger stories
- Refine insights in the lens of strategic objectives
- Assess and contextualize into meta-insights and learning

TELL – Share and promote learning across the organization using compelling story-driven outputs

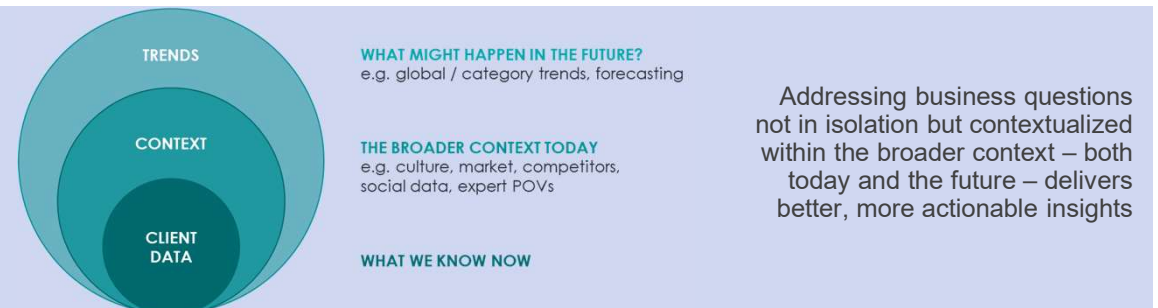
ELEVATE with stakeholders to inspire new thinking and activation

“A story is up to 22X more memorable than facts alone.”

Jennifer Aaker, General Atlantic Professor of Marketing,
Stanford Graduate School of Business

COVID-19 CONSIDERATIONS

- Insight Cloud is just incorporating existing research and owned data – the Curation could be done from everywhere – so no limitations due to COVID-19 circumstances



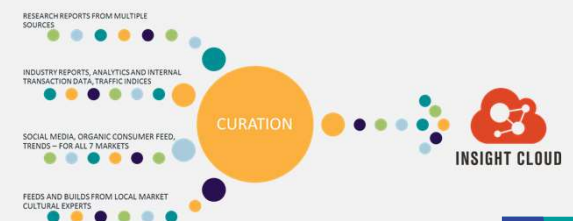
Case Study

Hospitality company needed to develop an ongoing learning program to:

- Share insights** and trends with stakeholders and build learnings over time
- Integrate **information from multiple sources**
- Activate insights** faster (e.g. for new product/service launches)

First, we developed a curation protocol to:

- Understand strategic areas of interest, use cases and consumption needs
- Create a common framework around the data, setup a bespoke Insight Cloud and develop an initial base of knowledge
- Embed in internal processes and train stakeholders



03.

QUALITATIVE AND USER EXPERIENCE

Stay close when you cannot
be close.

Keep your learning plan on
track with these approaches
that deliver qualitative and
workshop insight from afar.

Qualitative: No Travel? No Worries!

OVERVIEW

Ipsos UU has a full suite of digital tools, from web-cam platforms and apps that enable ethnographic research, to digital co-creation tools, we've got a solution for you. With our big global footprint, we are on the ground in 76 countries across the world, and here in Germany, with more than 60 qualitative researchers in 5 cities. We are here to help you keep your insights work on track!

Further, Ipsos Curation Services can help you make smart business decisions now by mining your existing data, and identify gaps so you can move faster once your research plans get back on track. Because this too, shall pass. Curation helps to answer "why" and "what to do next" by paring down and transforming disparate data and data types to clarify and identify business opportunities.

APPROACH

AppLife - In-the-moment input from consumers in their natural environment, including text, audio, photo, video.

Qualspace Online - The depth of a 1:1 with the convenience of online, on the respondent's terms, over a day or over time.

Virtual Intercepts- Intercept from online surveys, social media, or email campaigns and route to moderated 1:1 web-cam interviews

Video Immersion - Go in context without leaving your desk, with consumer videos that give insights into everyday reality and habits.

Passive with Reflective IDs - Observe behavior and delve into the "whys" by following passive video collection or metering with reflective interviewing.

Curation - Synthesize disparate data into insights for impact. IUU curators connect the dots amongst existing knowledge and identify actions to take.

COVID-19 CONSIDERATIONS

- We are offering a whole range of digital tools which allow effective interaction with your customers and consumers
- In accordance with government rules and ESOMAR guidance, we are currently not offering any face to face research
- As soon as F2F is possible again, we will maintain careful procedures to ensure that recruited respondents honor their commitment to attend your project



Case Study: Understanding Millennial Men

A personal care brand needed to explore relatable, unexpected moments when Millennial Men experience stress. We asked 20 men to share their stories around the moments, both big and small, they felt stressed.

AppLife enabled the consumers to respond as an event was unfolding, providing fresh emotions and stories. They were also able to share their thoughts via text, pictures and videos, which provided additional richness to the insights.

The mobile capability allowed the brand team to follow along, in real-time, throughout the consumer's journey

User Experience

OVERVIEW

Ipsos UX can support an increase in remote research and remote study oversight, due to our extensive experience in supporting a wide range of remote UX studies and our international presence and network of partners. Remote research and workshops have been daily business of our UX experts for many years.

APPROACH

We employ flexible UX research strategies for remote participant context:

- Use of online tools to allow interaction with prototypes remotely and/or participant exercises such as journey maps and card sorts
- Incorporation of video diaries to make stories come to life
- Creation of immersion-oriented video clips to showcase cultural aspects missed by being remote
- Schedule additional remote briefing time with moderator
- Provide mid-field debriefs as needed

COVID-19 CONSIDERATIONS

- You can rely on our expertise in remote research techniques
- In accordance with government rules and ESOMAR guidance, we are currently not offering any face to face research
- As soon as F2F is possible again, we will maintain careful procedures to ensure that recruited respondents honor their commitment to attend your project



Case Study: Language Quality Remote UX

An **app provider** asked us to evaluate the language quality of an app in eleven languages across ten countries in order to fix current issues and understand strategies for improved localization. In order to **quickly and efficiently** launch the research, the study was overseen remotely.

At kick off, Ipsos included **calls with each moderator** to ensure a detailed briefing on the discussion guide and a call with the moderators afterwards to debrief and provide guidance for the following sessions.

We issued a global integrated report from the individual country reports.

04.

FAST & AGILE TOOLS

When change happens fast,
gain quick answers to
business issues surfacing
during this turbulent time
when behaviors may be
modified due to health and
economic issues.

Online Communities

OVERVIEW

Ipsos online communities help you stay connected to your consumers with ease and efficiency, especially in the face of travel restrictions and other current face-to-face research challenges. Through a combination of proven engagement tactics and analytical rigor, our online communities deliver both qualitative and quantitative learning opportunities, quick-turn or longitudinal insights, and flexible project execution from syndicated to bespoke; for single country and multi-country projects.

APPROACH

Online communities vary in length, number of participants, and range of activities, but they can be classified broadly as follows:

- Instant – from 1-2 weeks, with 15+ participants – looking at a “point-in-time.”
- Pop-up – 3 weeks - 6 months, 50+ participants – short-term, in-depth exploration.
- Ongoing – 6+ months, 500+ participants, used to inform multiple research objectives over time.

With leading sample quality procedures and best-in-class access, we ensure you are connected to authentic and engaged respondents through the course of your project.

Our integrated qual/quant platform includes a range of activities such as:

- Discussions
- Blogs & Diaries
- Live Chats & Video Focus Groups
- Co-Creation and Ideation Tools
- Robust Quantitative Surveys

COVID-19 CONSIDERATIONS

- 100% online, mobile-optimized platform
- Available in 36 languages
- No travel or face-to-face required
- 24/7 access to fully profiled audience ready to answer critical business questions in real-time
- On-demand access to qualitative feedback and survey data

A SAFE AND WELCOME SPACE IN THE FACE OF COVID-19

Community members are actively voicing their concerns and sharing their changing habits in relation to the health crisis. At the same time, as many countries around the world put quarantines and social distancing measures in place, the community is seen as a haven for connecting with others, underscoring the richness and depth of information respondents are willing to provide.

“Please do as many activities as possible, so you can keep us busy, helping us to pass our time at home! A great virtual hug to all of you!” – Community Member from Italy



Case Study: COVID-19 Syndicated Community Discussion

With over 700 responses in 24 hours, our U.S. syndicated discussion has yielded rich insights around evolving perceptions and habits:

- **Mixed Messages from Media Fueling Confusion and Fear:** *“The situation feels very chaotic and scary because of all the unknowns. There aren’t any definite ways to control or treat the virus yet. We are all just doing our best and waiting for the worst, in a way.”*
- **Rapidly Evolving Shopping Habits:** *“I will have to spend more time shopping, will add to my stockpile of water, food and supplies, and I will have to shop around more since stock is out.”*

DUEL Screening & Assessment Tool

OVERVIEW

In a highly volatile environment, DUEL is a simple, practical tool designed to provide responses to right-caliber strategies.

Consumers spend less than 7 seconds to purchase a product in-store, which is why marketers need a screening solution that mimics how consumers make decisions: Fast, intuitive, and choice-based.

Also applied to Fast Pack – A device agnostic screening tool that reflects consumer shopping experience.

APPROACH

DUEL provides a gamified consumer experience putting stimuli into a fast and intuitive choice exercise.

Designed to work with any type of simple marketing proposition: **Claims, varieties, names, and visuals.**

BeSci powered:

- Tournament-like game.
- Fast, intuitive choice mimicking real life.
- No scales or ratings.
- A 5-minute questionnaire on any device.

Direct and Indirect Measures

- Direct measure from choice to preference.
- Indirect punch measure from response time reveals conviction of choice.
- Preference and Punch are combined into a single metric reflecting appeal and passion.

Agility with Substance.

- Validated with strong innovation legacy.
- 45,000 stimuli tested.
- Best-in-class sample quality with built-in AI fraud detection.

COVID-19 CONSIDERATIONS

- 100% online, mobile-optimized platform
- No travel or face-to-face required
- 24/7 access to fully profiled audience ready to answer

AGILE

Available in DIY and researcher-assisted service.

NEURO 7 BESC

To understand appeal and passion.

A next generation early-stage screener that leverages learning from BeSci and Cognitive Psychology to capture both explicit and indirect consumer response.



Case Study: Mars Occasions DUEL Research

MARS wanted to create new purchase occasions with the introduction of M&M's Candygrams and wanted to test messaging that coincides with specific M&M's characters.

We utilized our online device agnostic design utilizing the Ipsos DUEL Testing Methodology. Each respondent evaluated different messages in a 'tournament style' test.

76 messages were tested overall. Each message was developed for an overarching occasion, 11 in total, and was accompanied by a simple pack design.

The M&M's brand launched 36 themed package designs with messages ranging from, "You make mama proud," to "Congrats on that thing you did," and "I love being socially awkward with you".

Omnibus - multi topics overnight

OVERVIEW

Ipsos Omnibus is a very fast, flexible and cost-effective tool to obtain fast responses on simple marketing questions.

- Response time from overnight to a few days
- Focus on specific targets as needed
- Possible custom Omnibus for low-incidence categories

APPROACH

Ipsos Omnibus can be leveraged for a broad range of topics:

- Reputation tracking
- Crisis Management
- Attitude, usage, awareness of brand or service
- Videos/ images
- Trackings
- Concept, message tests

IPSOS OFFERS

- Overnight in DE, F, UK
- Fast data delivery in over 20 other countries.

COVID-19 CONSIDERATIONS

- Provides quick responses to right-caliber strategies in highly volatile environment
- 100% online, mobile-optimized platform
- No travel or face-to-face required
- Fully profiled audience ready to answer critical business questions with fast turnaround

PROVIDING SPEED: OVERNIGHT OMNIBUS

- Overnight Ipsos Omnibus in DE, F and UK
- Send a question before 10pm ET, full results by 5pm ET next day



Omnibus Application

Our mission is to provide omnibus research with:

- Speed
- Affordability
- Flexibility/Agility
- Attention to Detail
- Great Customer Service

Potential questions for quick turnaround research:

- Awareness of COVID-19 activity
- Reactions to Brand response to COVID-19
- Adherence to #stayhome
- Concern about which family members
- Reaction to actions at the state level
- Concerns about availability of specific categories/brands
- Concerns about product quality
- Concerns about food supply
- How long expected to be impacted
- More concern about COVID or the economic situation

Ipsos Digital – Fast Facts

WHAT IS IPSOS.DIGITAL/ FAST FACTS?

It is a fully fledged DIY system to get your answers very fast. Via the IPSOS owned online panel, you will have access to panellists in many markets globally. You will get access to a user friendly dashboard and data in SPSS format.

WHAT MAKES US UNIQUE?

Technology: Truly end to end application. Define the sample, build the questionnaire, launch the study and see automatically produced reports (dashboard, ppt, pdf and cross tabulation tool).

Researchers: Offer access to Ipsos Experienced, Specialised and Global reach of Researchers.

Respondents: The art of managing panels. Access to Ipsos' worldwide network of online respondents. High quality and targeted.

SPEED IS GUARANTEED:

1. Set up your study – Field country, respondents, length of questionnaire, survey area and targeted audience
2. Build your questionnaire and add the questions you want to ask linked through logic conditions
3. Pay and launch!
4. Results Portal

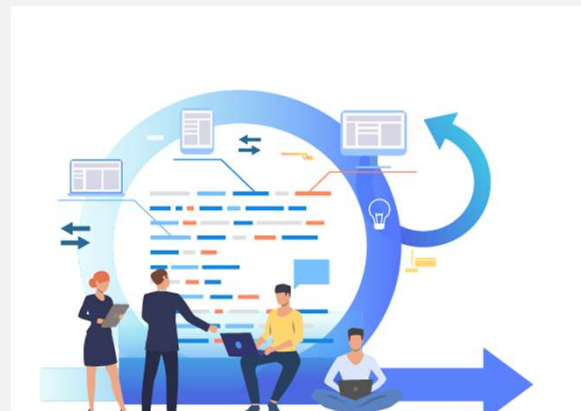
COVID-19 CONSIDERATIONS

- Fully DIY from home or your office
- 100% online, mobile-optimized platform
- No travel or face-to-face required
- Full access to Ipsos panels, quick access to data, real time dashboards

AVAILABLE GLOBALLY

Available in Germany, Italy, Spain, UK and US

Australia, Brazil, Canada, Chile, Denmark, Netherlands, Norway, Poland, Russia, South Africa, Sweden



INSTANT VISUALIZATION OF THE RESULTS

Offering an automatic and integrated dashboard, native ppt, pdf, SPSS and a cross tabulation tool for the clients who want to dig deeper in the data themselves.

https://youtu.be/N6QL_XZ-Drl

Ipsos Coronavirus Tracker

OVERVIEW

The coronavirus has impacted markets, behaviors and lives. Understanding how citizen and consumer opinions and behaviors are evolving is crucial to managing effectively and understanding the appropriate response.

APPROACH

Ipsos has been conducting a global tracking since early February, monitoring and understanding drivers of change in six areas:

- Purchase metrics and intentions
- Social issues and response to actions
- Incidence of counter-measures
- Behavioural and attitudinal measures
- Responsibility and credibility
- Long-term outlook

Given the rapidly evolving nature of the circumstances, the polling and survey will be adapted accordingly

COVID-19 CONSIDERATIONS

- Provides quick responses in highly volatile environment
- 100% online, mobile-optimized platform
- No travel or face-to-face required
- Fully profiled audience ready to answer critical business questions with fast turnaround

INFORMATION COLLECTED AND DELIVERED ON A WEEKLY BASIS

- Survey is conducted online
- Each wave fields 1,000 respondents in core countries
- General adults population in most countries
- Core countries are Australia, Brazil, Canada, France, Germany, Italy, Japan, Mexico, Russia, Spain, United Kingdom, United States of America*

DELIVERABLES INCLUDE:

- Weekly full report and analysis with the results of the past four waves
- The reports are intended exclusively for your own use in your company

You can add extra questions to the waves. Ask for prices and handling.



INTERESTED?

Contact your Client Officer for details on timing, deliverables, and pricing.

05.

QUANTITATIVE CONSIDERATIONS IN TURBULENCE

Consider methodological implications for research, including brand health as well as communications and product testing.

Brand Health Research

OVERVIEW

Our brand health tracking offer can collect, deliver, and service our clients via online and digital connectivity, thus experiencing no disruption during crises. We have fielded over **16.4 MILLION** Brand Value Creator (BVC*) interviews with over **76,000** brand observations in **100+ countries** in **150+ categories**.

In fact, the tracking tool is the perfect instrument to gauge sentiment and monitor the effect of the current situation on brand health. Now more than ever is a time to have a pulse on your brand and the competition to understand consumer sentiment.

APPROACH

For continuous or wave tracking programs, we can add specific questions to address any current client issues that arise as a result of this pandemic— for example, behavior and lifestyle change in habits. Results can be delivered in a matter of days.

One module to consider adding is Brand Mental Networks to understand unique associations of a brand either via survey-based or social data. This provides learning on what is top of mind for consumers and whether or not there are any concerning associations that could negatively impact a brand's equity.

We also offer Ipsos Omnibus services as a fast and cost-effective option to get a quick pulse on any issue. The omnibus approach would be ideal for:

- Topical issues, burning questions, market activities, pre-post evaluation, target profiling, usage and attitudes, behaviors and lifestyles, etc.

COVID-19 CONSIDERATIONS

- 100% online
- Diagnostic questions related to fear and experience with COVID-19 should be added so the results can be analyzed among those affected versus not affected



BRAND MENTAL NETWORK



Case Study: Brand Mental Network Insights

Our retail client was interested in understanding what they really stand for among their primary shoppers.

We used Text Analytics to uncover salient themes using a bottom-up approach. We produced both brands and category maps enabling us to identify the unique and shared associations across the retail landscape.

Color coding and size of bubble were easy to evaluate to determine dominant category themes and the retailer's positioning on the important themes in the industry.

Accelerator Labs for Innovation and Creative

OVERVIEW

Labs accelerate decision-making at any stage of the innovation life cycle and can be executed (in person or) fully online. They eliminate the trade-off between rigor and speed.

Speed teams use labs to identify in a single day which ideas, concepts, copy, packaging to move forward.

When applied to creative, ads pre-tested with the benefit of Creative|Labs have more potential for above average business impact (138 index).

APPROACH

Remote client participation is already available:

- Quant data shared electronically (e.g. live via Google Docs, or via Excel immediately after each session)
- Qual streamed over FocusVision
- Video conferences replace debriefs to engage with stakeholders throughout the day

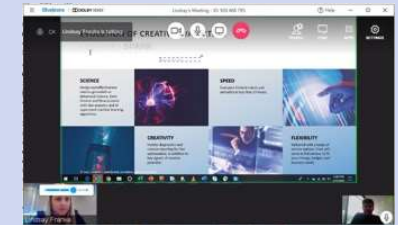
We have a final back-up for full remote Lab sessions:

- Supplier hosts a remote session with the recruited participants for the Lab.
- Quant happens virtually, but in real-time during the allocated session timing
- Data available immediately
- Qual viewed online with moderator
- Debriefs via video conference with full advisory experience and digital whiteboarding
- Same Day learning

COVID-19 CONSIDERATIONS

- While accelerator labs are of course also available for in person exchanges, we are not offering face to face research at the very moment due to recommendations from ESOMAR and the government
- We do have, however, experience in 100% virtual environments for innovation and creative labs

VIEW OF CREATIVE STIMULI IN BLUEJEANS SCREEN



Case Study: Accelerator Labs

A market-leading CPG brand needed artwork guidance to move into an adjacent area, driving breakthrough and brand linkage. Identified winning route and aligned multi-functional team to artwork optimization.

A leading tech client holds regular labs as a campaign element decision-making vehicle across projects.

One OTC client cracked its creative in a single lab after 3 years of lackluster copy, while cutting research spend by 50%.

Assessing real life performance of digital creatives

OVERVIEW

Successful brands are staying always close to their target group with strong communication – even in hectic times like in the current pandemic.

Digital communication channels are very appropriate to reach consumers at their home – therefore, it makes a lot of sense to use this channel in current times even more.

Connect:Digital provides quick transparency about the performance of your ad – in the digital wildness.

Additionally, concrete potential to optimize a digital video will be delivered.

APPROACH

Ads are served and evaluated in live digital platforms like Facebook and YouTube.

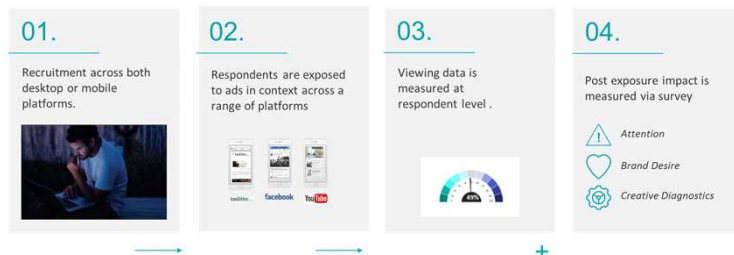
Ads are evaluated by consumers, in the moment, on computers and smartphones.

View metrics and **brand metrics** are measurement simultaneously:

- Do people choose to view the ad or skip and for how long?
- Does the ad trigger **attention** and build **brand desire**?

Consumers are exposed to the ad in live digital platforms and they are asked if they remember the video.

The impact of the ad on brand desire is measured indirectly (we do not ask viewers to answer how they feel about the brand and about the communications impact – they simply will not give a reliable answer). Instead, we work with an experimental design.



COVID-19 CONSIDERATIONS

- Ipsos Connect:Digital is done online and is not restricted by the current pandemic.

Case Study: Sir Elton John and Snickers



Snickers is expanding on the 6 years of success with their “You’re not you when you’re hungry” campaign by enlisting the talent of Sir Elton John to win a rap battle.

Brand Attention:

The rap challenge with Elton John is a successful ad in capturing branded attention.

Brand Desire:

Viewers see Snickers is a brand they feel is unique compared to other chocolate products.

Creative Diagnostics:

The ad is highly entertaining and is something consumers would talk about with their friends.

With more than 500k views on YouTube after 3 months, the ad achieved good success. Still it didn’t reach the number of views generated by previous Snickers ads.

Innovation during the Crisis

OVERVIEW

It is important to ensure your innovation, pricing and mix strategies are equipped for today's market realities and pandemic crises. There is no need to stop doing Innovation research, but the context of your questions must be adapted.

You may want to consider the following questions:

- Do people need **new products and services** to thrive in a self-quarantine world?
- Is the **messaging** around my product appropriate given the current mood?
- In a stockpiling climate, do I have the **right mix of products** in the market?
- Is the **pricing** for my product optimal given shifts in demand and product shortages?
- Will **cost-saving changes** to my product be noticed by my customers?
- How will **sales** of my new launch be impacted by a cut to marketing support?

APPROACH

Ipsos offers comprehensive services that are safe for you and your customers and quickly deliver answers to your critical questions. Further, our studies can nearly all be executed online – keeping things safe.

Respondents are able to participate in engaging online surveys designed to replicate real-life behavior from the convenience of their homes, allowing us to reach a representative sample of your consumers regardless of quarantine measures.

You also have the flexibility of adding a video-capture approach onto any Innovation research (i.e. Concept, Product, Pricing, etc.) that you design.

Specifically, we can stay close to your consumers via employing our P360 video-led approach. Specially-screened respondents are given “task-based” research assignments depending on learning agenda via an interactive mobile app.

Feedback is video-based and uploaded in real time to a video analysis platform. You will get deeply contextualized insight into product experience – qualitative and quantitative – including consumer language, functional and emotional benefits, and issues that might have been missed in a traditional survey. [see Case Study box for more information.]

COVID-19 CONSIDERATIONS

- Ipsos Innovation services are done online and like that are feasible at any time



Case Study: Beverage Usage Moments P-360

Our beverage client had not conducted competitive benchmarking in several years and was experiencing a decline in share. The team was concerned with declining product quality yet some in the team also worried their brand was losing relevancy in key regions.

Ipsos leveraged P360° to capture the real consumer voice & behavior through video.

Respondents were engaged via “tasks” as opposed to traditional surveys. Over a week, consumers recorded tasks including a kitchen tour, unboxing the products, preparing & consuming them and sharing any moment they or the family consumed the beverage.

50 respondents provided over 152,000 spoken words via the task videos.

Censydiam Metaphors

OVERVIEW

Our Censydiam Metaphors approach can help you understand underlying consumer motivations and brand perceptions, which is critical information to have in turbulent times.

Our approach will connect you to consumers through **visual images** and **natural conversations**, instead of closed-ended attribute ratings questions.

APPROACH

Using a device agnostic survey, respondents scroll through a set of pictures and are asked to select up to five pictures to help them express how they feel about a product in a given situation. Next, respondents explain what these pictures represent to them. We use automated translation and text analytics to process the open-ended responses.

Censydiam Metaphors is a unique approach that is:

- More Intuitive: Uses a projective technique that helps respondents avoid rational thinking
- More Emotional: Spontaneous reactions to images yields a deeper understanding of feelings, moods, and emotional experiences
- Scalable: Leverages Ipsos' validated Censydiam framework and can be conducted globally

COVID-19 CONSIDERATIONS

- 100% online, mobile-optimized platform
- No travel or face-to-face required



Case Study: Censydiam Metaphors

We leveraged Censydiam Metaphors to get a deeper understanding of women in the Asian beauty market.

Our overarching question was: What is the experience of being a woman today in China, Japan, and Korea – their aspirations, motivations, struggles and triumphs?

Our metaphor elicitation approach grouped women into six consumer segments.

- Based on just two survey questions, we were able to:
- Develop platforms
- Identify values
- Uncover the rich and real language that consumers use when talking about the category

Car & Mobility Clinics

OVERVIEW

Can't travel? The Ipsos Car & Mobility Clinics team can help. Ipsos offers safe ways to help and provide insight using online approaches. We have the experience and tools to conduct online automotive and mobility research, as well as deliver and advise in a fully remote and digital environment.

All of our employees are fully operational and equipped with the latest secure technology to work remotely as needed with no interruption of delivery.

APPROACH

Ipsos is accustomed to staying connected and collaborating in a digital fashion, with our German staff spanning offices in multiple locations across the country, as well as remote leadership and support.

Video technology is a conduit to live, humanized interaction. We can use any platform you prefer: Teams or Skype.

We can support your learnings needs across our Pre Clinics, Digital Clinics and Mobility Navigator offerings.

PRE CLINIC:

- Digital evaluation of insights, ideas and concepts with consistent KPIs across the entire purchase life-cycle
- Live-stream video consultation with you and your teams for study design and analysis and activation of results

DIGITAL CLINIC:

- Online digital clinic environments for your less sensitive prototypes
- Utilize the same clinic KPIs via an online survey
- Leverage our robust online qual toolkit for deeper consumer engagement
- Live-stream in-person sessions or record/ upload sessions within a few hours using our video platform to maintain close and instant engagement
- Use virtual meeting platforms for real-time consultation with our team

COVID-19 CONSIDERATIONS

- At the moment and based on the regulations of our government and the recommendations of ESOMAR and other institutions, we are not carrying out car and mobility clinics in a F2F environment
- Instead, we are offering virtual clinics environments and digital evaluations of concepts, messages and ideas and make use of the full virtual toolkit including video, voice, eye tracking and others



Mobility Navigator Syndicated Research

Syndicated industry insights via our robust Mobility Navigator survey

- Existing 60K interviews within 10 key countries across 3 “CASE” modules:
- Module 1: Connected Car/Self Driving
- Module 2: Electrification
- Module 3: Shared Mobility

We are preparing to launch Module 0, focused on monitoring the impact of Covid-19 on new car purchases, impact of features people are looking for in a new vehicle (germ filter) and transportation behavior (perhaps more driving vs. public commuting)

06.

IMPACT ON SHOPPERS

Evaluate your shopper/customer data and systems to help manage your business through the global coronavirus epidemic to ensure de-risking long-term customer impacts.

Customer Experience

OVERVIEW

Organizations can look to their CX data and systems to help manage their business through the global coronavirus epidemic as well as to ensure de-risking long-term customer impacts.

During the disruption, how can organizations de-risk by:

- Deeply and quickly understanding customers and employees' needs?
- Curate and provide right sized and possibly, improved experiences? Gain customers and loyalty?
- Use the data and information from VOC programs most effectively to drive action?
- Using CX insights to inform strategy, develop workforce plans to meet customer needs?
- Activate customer centric behavioral and policy change in the organization and with employees?
- Avoid losing ground in growth, innovation and improvement goals once things move to recovery?

APPROACH

Ipsos CX understands how to help you de-risk during disruption.

The key is to act now and make maximum use of existing CX programs to inform strategies, action and risk mitigation plans.

- Our **Research and Insights** teams can help you get a handle on your customer needs and the insights needed to be responsive quickly.
- Our **VOC Experts** can help you review and update your surveys to collect newly needed data and help review feedback to identify trends and impacts.
- Our **Analytics teams** can help mine existing data, update CX targets, manage churn prediction, understand cost-to-serve and model linkages which help to drive the right business impact.
- Our **XM Platform Experts** can help understand and implement changes that can need to be made to support business change—e.g., surveys, reporting, and dashboards.
- Our **Advisory team** can help you define and activate your CX strategy refresh, operational improvements and risk mitigation plans.
- Our **Industry Experts** can help ensure your response and action plans are right fit for your industry and competitive base.

COVID-19 CONSIDERATIONS

- 100% online, mobile-optimized platform
- No travel or store entry required



Five CX Actions to De-Risk in Crisis

1. STAY CONNECTED: Taking specific actions using your existing programs is critical to staying close to your customers and employees.

2. USE CX ANALYTICS: Perform analytics using existing data. Update CX targets, manage churn prediction and action, reduce cost to serve, understand changes in scores and needs, model revenue leakage.

3. MANAGE YOUR COSTS: Drive operational improvements using your VOC data as it will allow you to understand where and how to cut cost through operational efficiency.

4. PLAN AHEAD: Use benchmarks and CX data to understand changing customer needs and behaviors.

5. ACT NOW: Developing your risk mitigation plan and activating it now is critically important.

Virtual Store Research

OVERVIEW

Ipsos is a leader of virtual shopping experience and operates an established shopper research consultancy. Instead of designing and executing controlled store tests requiring in-store installations, Ipsos can support your store research needs via virtual store design options, including 2D Shelf, 3D Shelf/Store, Immersive VR, and eCommerce.

During the pandemic with significant households being quarantined and shopping online, we can help answer:

- What is the optimal online assortment? What are the implications for improving online store navigation?
- Which scenario is superior in terms of conversion, speed of shop and basket size?
- How should digital communication touchpoints be prioritized?
- Where should digital content be located to maximize conversion?
- What is the optimal combination of price and pack size in the online environment?

APPROACH

With **Simstore**, we create highly realistic recreations of all kinds of shopping environments and can use different technology platforms depending on the business question.

Our **2D Virtual Shelf** design is used for plan-o-gram testing, decision trees and assortment.

Our **3D Virtual Shelf, Aisle or Full Store** testing is used for larger or multiple categories/aisles.

We partner with InVRsion when a completely **immersive VR experience** is required.

Our Simstore approaches can assist our clients with:

PRODUCT ASSORTMENT

Evaluate the impact of adding or delisting SKUs on shopper satisfaction and sales by channel and retailer.

PLANOGRAM

Understand the shopper decision tree and evaluate the impact of shelf organization on category and brand sales.

PRICE

Analyze the impact of price changes, and simulate price change impact on shopper perceptions, sales, and profit.

PROMOTIONS AND POS

Optimize the content, location, and format of in-store POS materials and assess their impact on ease of navigation and sales.

COVID-19 CONSIDERATIONS

- 100% online, mobile-optimized platform
- No travel or store entry required



Case Study: Simstore Assortment Research

- A Personal Care manufacturer needed to determine which assortment scenario had the potential to drive category and brand sales.
- Our Simstore platform provided an understanding of time to find the correct product, total sales, segment sales, and aligned with desired brand imagery.
- From the research, our client learned that Scenario 3 provided an optimal shelf for driving category sales, increasing brand share, and improving shopper satisfaction.

Omnichannel | Digital Touchpoints

OVERVIEW

At a time when shopping habits are disrupted with stockpiling and channel migration to eCommerce, you need tools to adjust strategies, and put brands on path to take advantage of emerging opportunities.

Our Shopper practice has solutions for both: **In-Store Conversion** (i.e. In-store and virtual store research methods to optimize in-store conversion & added services) and **Digital & eCommerce Conversion**

(i.e. deep drill-down on the e-commerce customer developing the right advanced strategy and tactics).

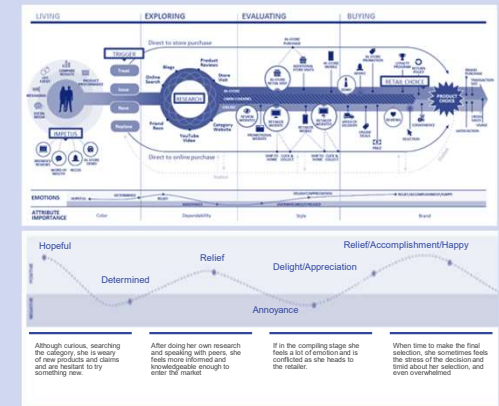
APPROACH

By leveraging our **LIFEPATH** offer, we can design and execute omnichannel/digital touchpoint research. We will map the shopper journey and guide your team on understanding how you can influence the following phases of shopper decisions: Living, Exploring, Evaluating and Buying.

Especially with the shift to online buying, you will benefit from the Touchpoint Drivers output to guide you on where to prioritize and how to maximize your marketing spend. Further, we will capture the emotional moments for shoppers so you can leverage an emotional connection at the relevant Inflection points. An Inflection moment is a critical point in time along the shopper journey where a perspective buyer qualifies, either consciously or non-consciously, their intent to move forward, stall or change their progress toward a potential purchase

COVID-19 CONSIDERATIONS

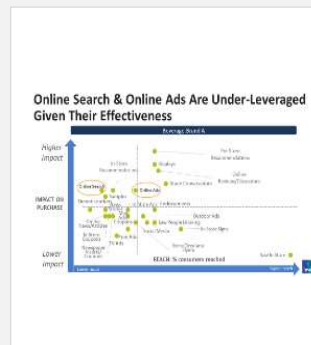
- 100% online, mobile-optimized platform
- No travel or store entry required



Case Study: Omnichannel/Digital Touchpoints

Across numerous CPG and Retailer clients, we have conducted Digital Touchpoint research. We have used our Ipsos Bayesian Net modelling to identify which digital levers to push to drive purchase. Further we have plotted the digital marketing activities to assess how Reach is contrasted against impact for an overall strategic view of performance.

Clients are allocating marketing dollars against activities with the greatest conversion potential.



Passive Behavioral Measurement

OVERVIEW

Ipsos' Behavioral Data Group enables you to *get intimate* with the consumer through passive digital observation during times of pandemic crisis. We track and unpack the multi-device pathways - combined with real-world, non-digital behavior - to deliver an unprecedented and unified understanding of the pathways and decisions prospects and customers make in their engagement with your organization.

This includes touchpoints, activities, and content, and its correlation with business outcomes (purchase, usage, attitudes, perceptions).

APPROACH

Through a unique and extremely rich data-generative approach, Ipsos BDG captures digital data on tablets, PCs, and smartphones.

More than 50 key measures are captured across apps, websites, search engines, in-app videos, text messages, calls, and device & system information.

Key business solutions include:

- Digital and customer journey clarification and quantification in both the digital and non-digital environments.
- Path to purchase that unites the digital and non-digital behaviors that lead to optimal conversion, adoption and penetration.
- Digital media consumption and influence in a cross-media context.
- Mobile phone usage and its related influence on either (or both) attitudes and subsequent behaviors.

COVID-19 CONSIDERATIONS

- Critical as channel migration disrupts traditional journeys
- Can be 100% online
- No travel or face-to-face required

Video Game Case Study



Video game purchases follow YouTube gaming videos 2.3 more times than the competing video platform, Twitch. Gamers are constantly searching for information about your titles, even outside of launch, so make sure you are present.

Electronics Case Study



TV buyers who are in the evaluating phase spent 16.1 minutes on manufacturers web sites. In the early exploring phase, TV buyers spend most time on review sites (16.5 minutes) while spending only 3.9 minutes on manufacturer websites.



Case Study: OmniChannel Behavior

- A large CPG company aims to better understand the shopping behaviors of people who regularly shop/buy groceries digitally or online.
- This research allowed them to observe the passively monitored behaviors of these shoppers in the online environment, combined with a broader understanding of their motivations and omni-channel shopping behaviors, captured via respondent diaries.

Key Features:

- Passive observation with diaries: Websites, apps...
- Receipt Capture.

Mystery Shopping COVID-19 Mystery Digi-Shops

OVERVIEW

The unprecedented growth in the use of digital channels – including online/website, apps, live chat, social media, and even email – as a result of the COVID-19 crisis, has placed enormous logistical burdens on companies. At a time when customers are heavily dependent on brands' digital interfaces, delivering customer experiences which live up to the brand promise matters more than ever before.

APPROACH

Ipsos' mystery shopping **Digi-Shops** assess brand performance across the customer digital journey, end-to-end, or in part; standalone, or as a component of a larger omnichannel solution. Our digital-savvy mystery shoppers, selected to match your customer profile, are trained, tested and managed to assess:

Brand / Legal Compliance

Including 3rd party

- Is brand represented correctly?
- Are products / services listed, with correct images and information? Easy to find and available?
- Are pricing and promotions correctly displayed?
- Are legal requirements being communicated accurately – and adhered to?

Human / AI Communication

- Are responses provided in timely manner? Accurate and informative?
- Is messaging aligned and consistent across channels?
- How effective is issue resolution?
- Are agents professional? Showing empathy in sensitive situations?

Ordering & Payment

- Is product / service selection, ordering, and checkout working? Chosen payment method available and successful?
- Is multi-factor authentication active?
- Are order / payment issues user or tech-driven?
- Is brand visible and accessible on payment screen?

Product Delivery

- Are orders received on time and to specification?
- Are non-contact delivery instructions followed?
- Is 'driver' friendly and professional?
- Is support helpline available and able to resolve queries?
- Does return process match brand promise?

COVID-19 CONSIDERATIONS

- At the moment and based on the regulations of our government and the recommendations of ESOMAR and other institutions, we are currently not carrying out physical mystery shoppings
- Instead, we offer Mystery Calling or Digital Mystery Shopping

KEY BENEFITS:

Get answers to your business questions quickly

- How is the surge in usage of digital channels impacting **customer experience**?
- What is the resultant **impact on other channels**? How are your contact centres faring with the additional load?
- Are your **third party providers** continuing to meet their obligations?
- How do you stack up against other organisations; in your sector and beyond?
- What is the impact on customer, operational and financial **KPIs**?
- Where do you need **focus** now, with what **outcome**?
- And, how do you prepare for the world as it is **now, and will be**?

FOR MORE INFORMATION, PLEASE CONTACT:

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