STANDING OUT FROM THE CROWD

Watch the recording [here]

KEYS – A WEBINAR SERIES BY IPSOS

25th March 2021

GAME CHANGERS

Ipsos

AGENDA

INTRODUCTION
Jennifer Hubber Head of Ipsos Global Client Organisation

THE MOOD OUT THERE with a special focus on SOUTH EAST ASIA
Simon Atkinson Chief Knowledge Officer, Ipsos
Katharine Zhou Country Manager, Ipsos in Singapore

FIRST IMPRESSIONS MATTER
Colin Ho Chief Research Officer, Innovation and Market Strategy & Understanding, Ipsos

SERVICE WITH A SMILE
Fiona Moss Global Research Director, Customer Experience, Ipsos

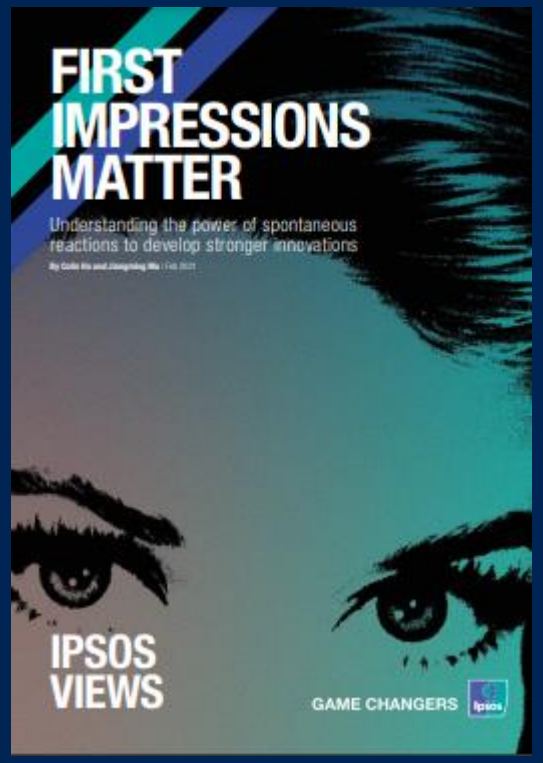
WE ~~DON'T~~ NEED TO TALK ABOUT ADS
Adam Sheridan Global Head of Products & Innovation, Creative Excellence, Ipsos

Follow this link to access the resources from all the webinars in our KEYS series

KEYS WEBINAR 25 MARCH 2021: **RESOURCES**

SOUTH EAST ASIA LATEST
Headline findings here
Download the **results**

IPSOS UPDATE
Explore our **monthly selection** of latest Ipsos releases here



FIRST IMPRESSIONS MATTER
Research **summary** here
Download the **white paper**

SERVICE WITH A SMILE?
Research **summary** here
Download the **white paper**
Listen to the **podcast**

WE DON'T NEED TO TALK ABOUT ADS
Research **summary** here
Download the **white paper**

THE MOOD OUT THERE

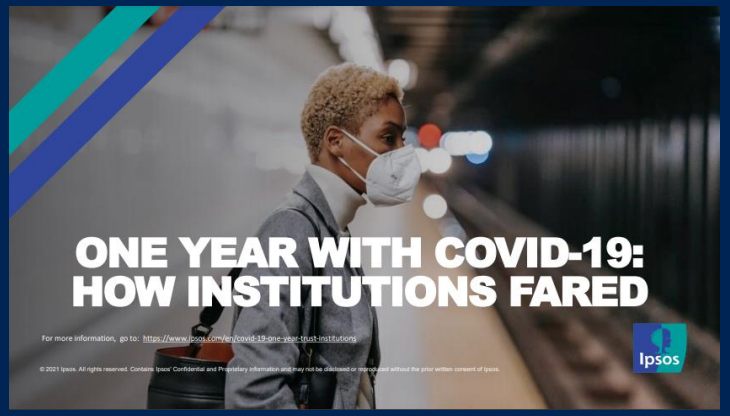
One Year On...

Simon Atkinson
Chief Knowledge Officer

GAME CHANGERS

Ipsos

ONE YEAR ON: **THREE NEW REPORTS**



Dealing with Covid-19:
public confidence in…

Governments ↓
***Local* Health professionals ↑**

8-country study
Details here

Has it made my community stronger?

Impact on our mental well-being?

29-country study
Details here

#

Gender pay gap a key issue…

…recovering from pandemic:
"things will revert to as they were before"

:

28-country study
Details here

IPSOS ESSENTIALS

Tracking consumer attitudes and behavior in a time of crisis

Phase 4, Wave 36:

Mar 11 – 14, 2021

16 countries

For further information, please contact our Essentials team at Essentials@ipsos.com

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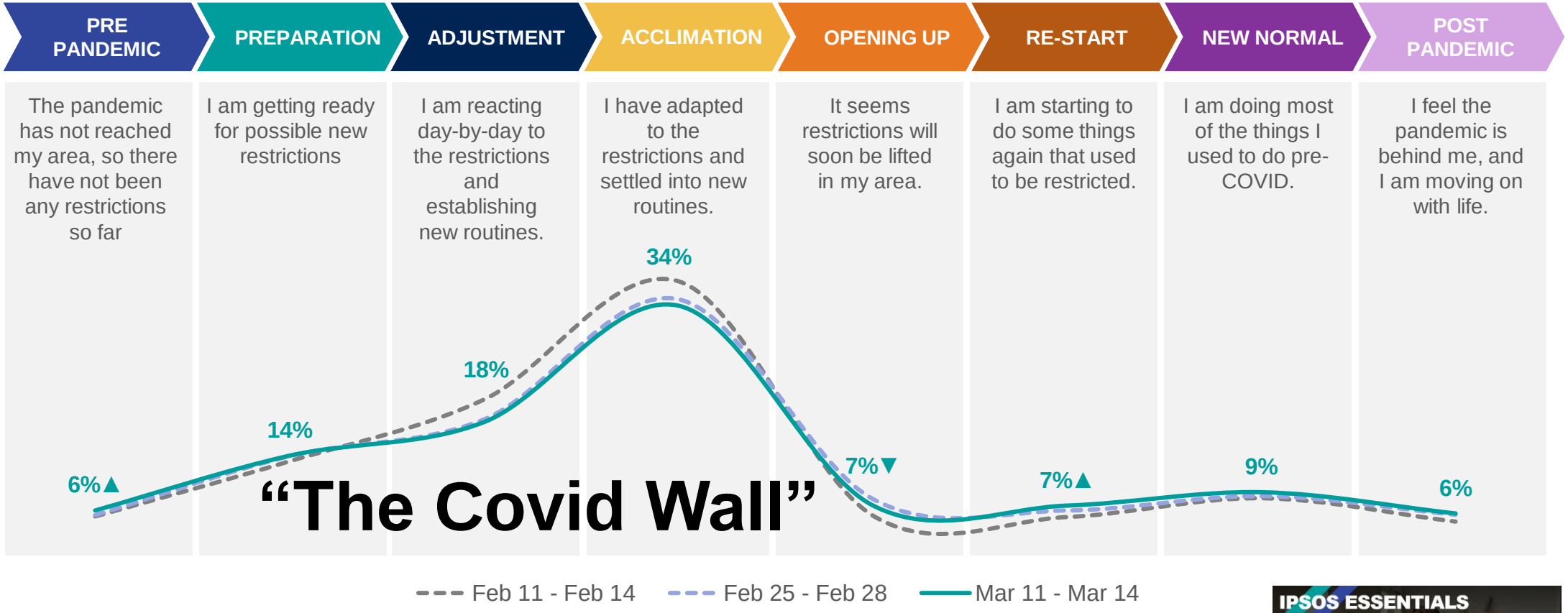
Ipsos

ONE YEAR ON: THE PANDEMIC RECOVERY CURVE

"Which one of the following phases do you feel best describes your current situation regarding the COVID-19 pandemic?" 11-14 March



Q. Which one of the following phases do you feel best describes your current situation regarding the COVID-19 pandemic?
Base: Feb 11 - Feb 14: 14528, Feb 25 - Feb 28: 14514, Mar 11 - Mar 14: 14508. **16-country study**
▼ or ▲ indicate change vs. previous wave (statistically significant @ 95% C.I.)

ONE YEAR ON: THE PANDEMIC RECOVERY CURVE

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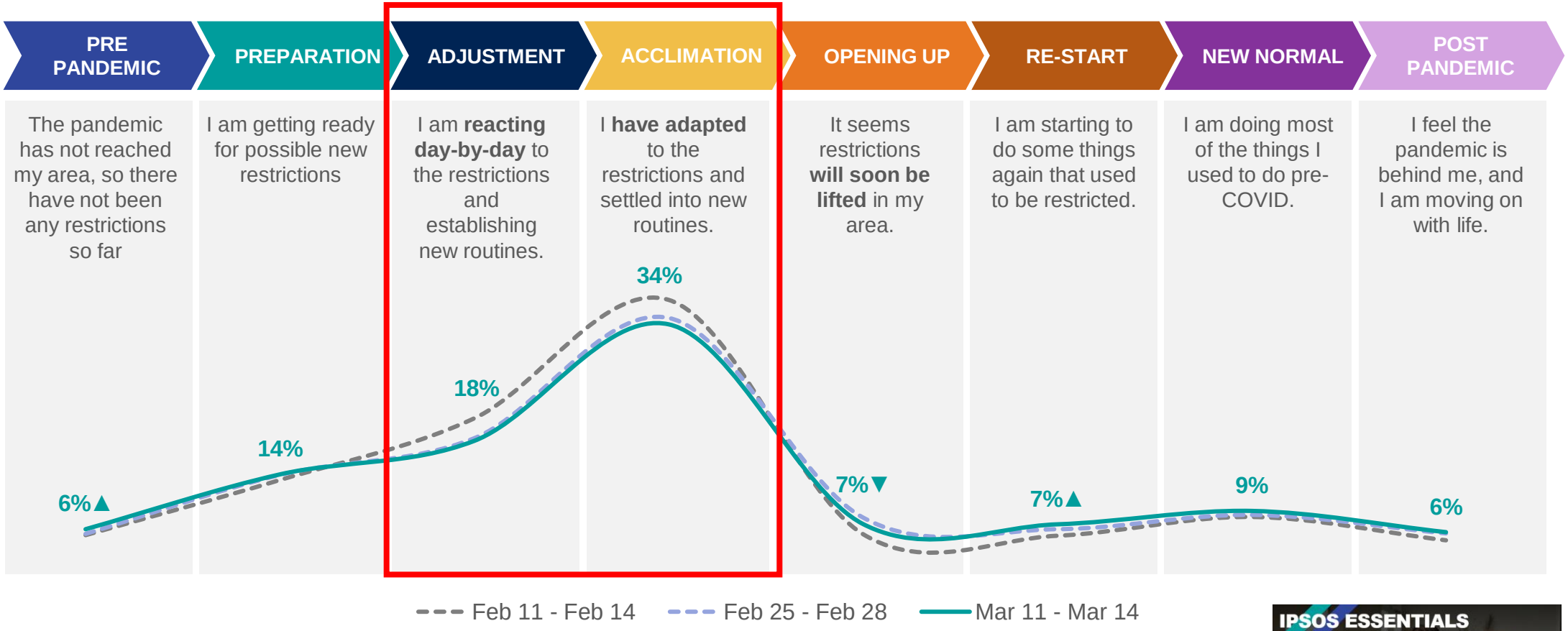

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▼ or ▲ indicate change vs. previous wave (statistically significant @ 95% C.I.)

THE MOOD OUT THERE: BY COUNTRY

Covid-19 #1 issue: **12 successive months**

27-country study: details here

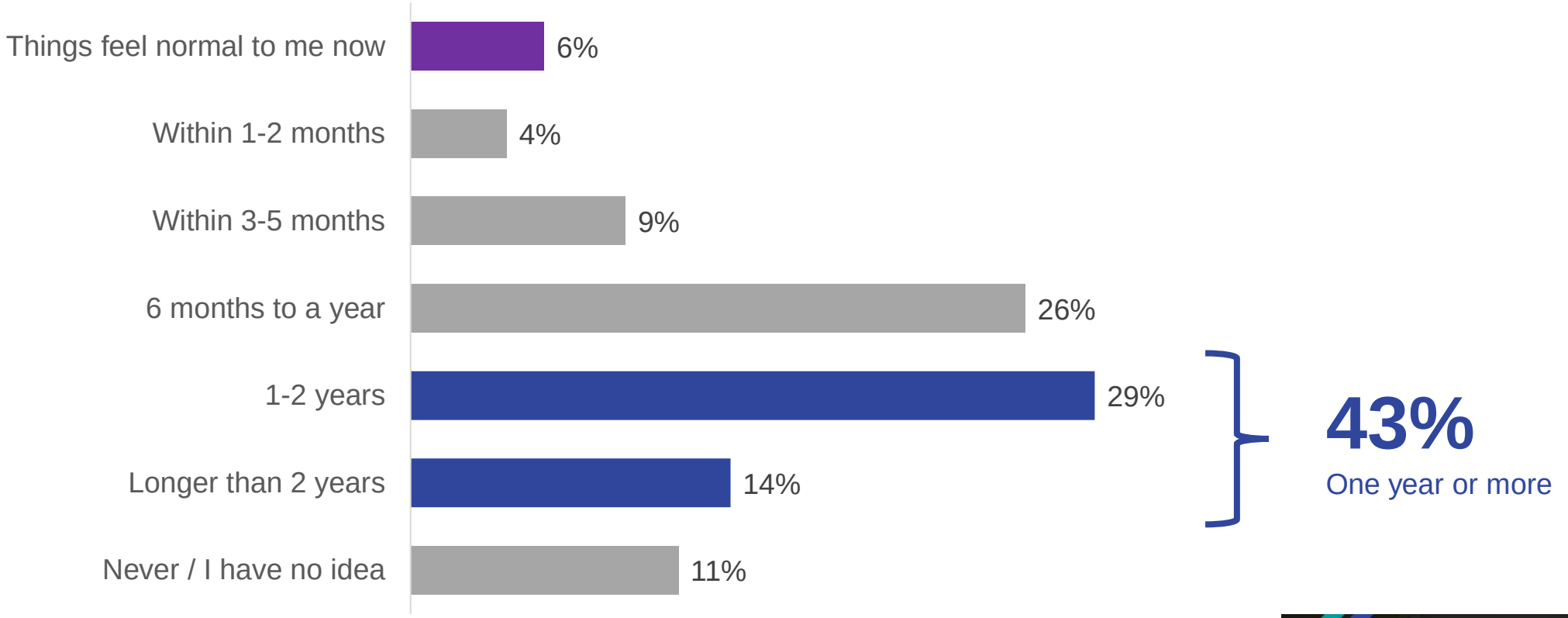
Global consumer confidence getting closer to pre-pandemic level

No significant month-on-month drop in consumer sentiment recorded in any market

March 2021 Ipsos Global Consumer Confidence Index

Concerns over new waves and variants still leave 4-in-10 saying it will be at least one year before things return to normal

Timeline to Normalcy



Q: How long do you think it will take before things feel like they are getting back to normal?
Base: Global Country Average:14508

LIVING THROUGH THE PANDEMIC

Spotlight on South East Asia

KEYS – A WEBINAR SERIES BY IPSOS

Katharine Zhou
Country Manager, Ipsos in Singapore

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LIVING WITH COVID-19

IN SOUTHEAST ASIA

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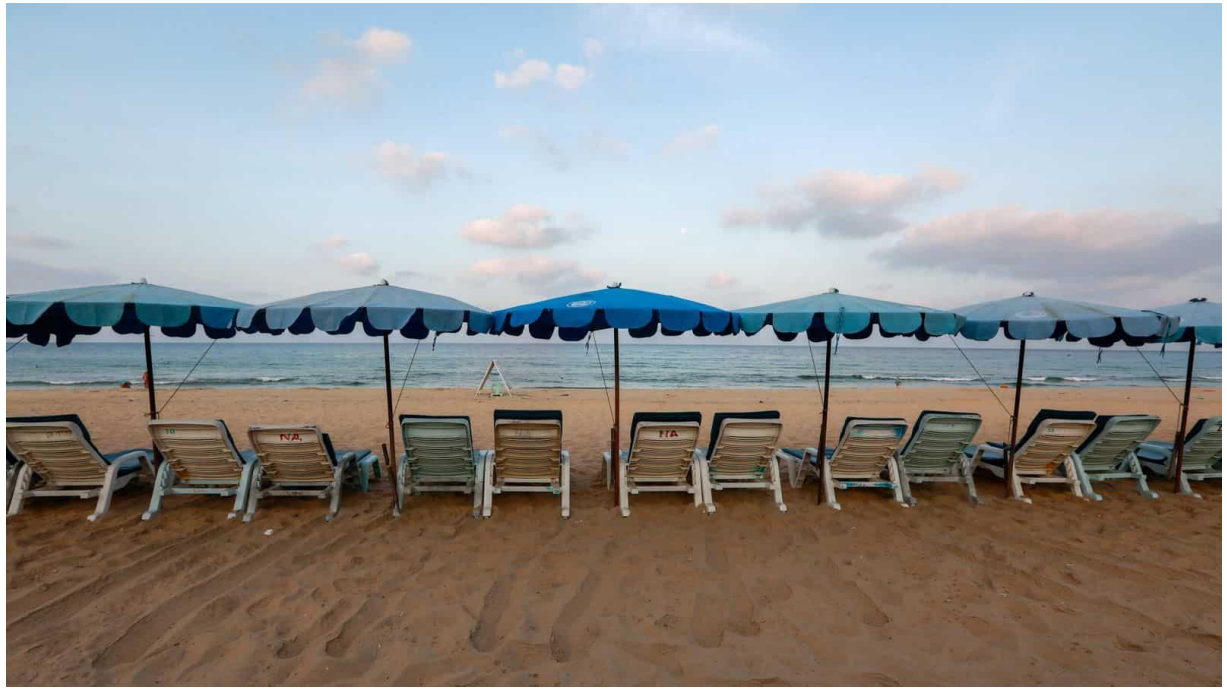
A few facts - South East Asia:

- 11 countries
- 665 million population
  (9% of world populations)
- 9 religions
- 5 time zones
- Highly diversified region
- 4th largest exporting region
  (after UE, NA, China)



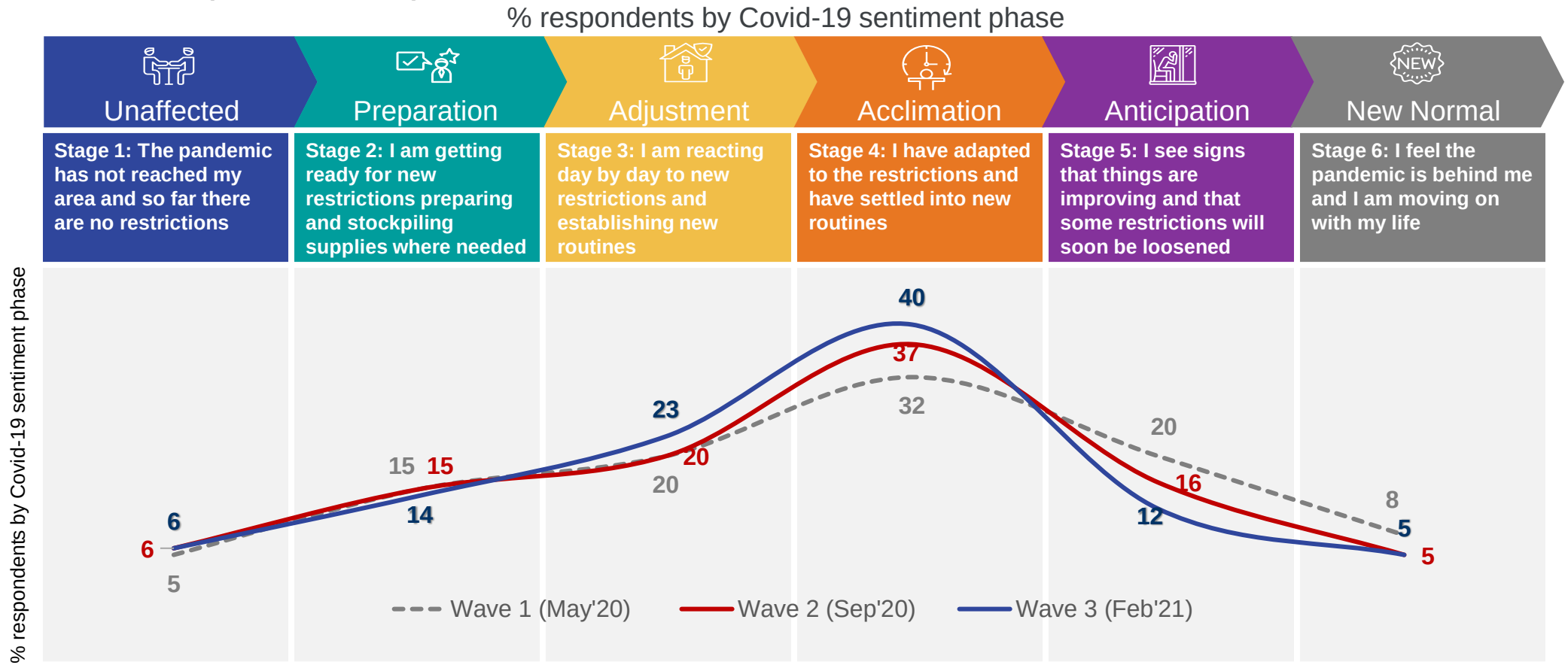
Ipsos Covid Tracker

- 3000 adults in SEA
- 6 markets
  - *Singapore*
  - *Malaysia*
  - *Indonesia*
  - *Thailand*
  - *Philippines*
  - *Vietnam*
- 3 Waves:
  - *May 2020*
  - *Sept 2020*
  - *Feb 2021*

NEW ROUNDS OF LOCKDOWNS AND SECOND WAVES HAS AN UNSETTLING EFFECT ON CITIZENS

Considering the current state of Covid-19 and the counter measures implemented in your country, how do you feel about the situation as it is now?

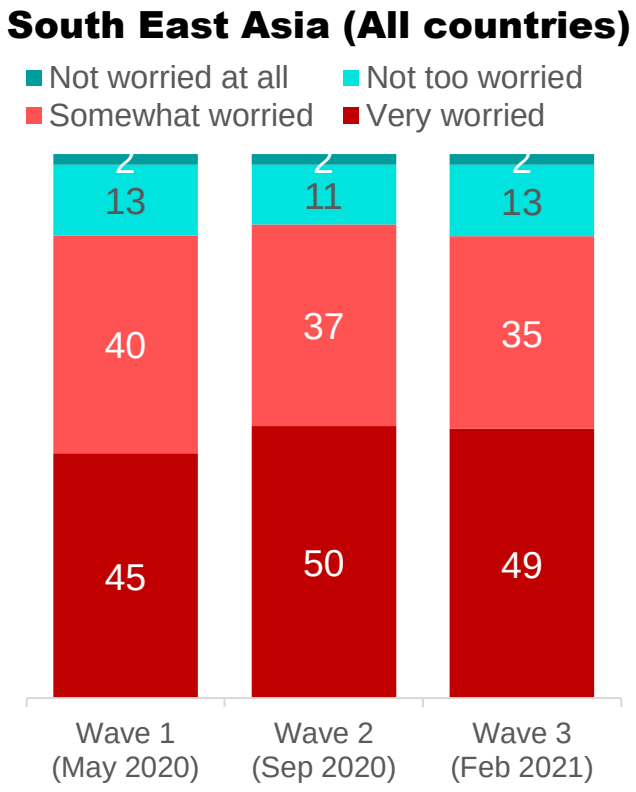
South East Asia (All countries)

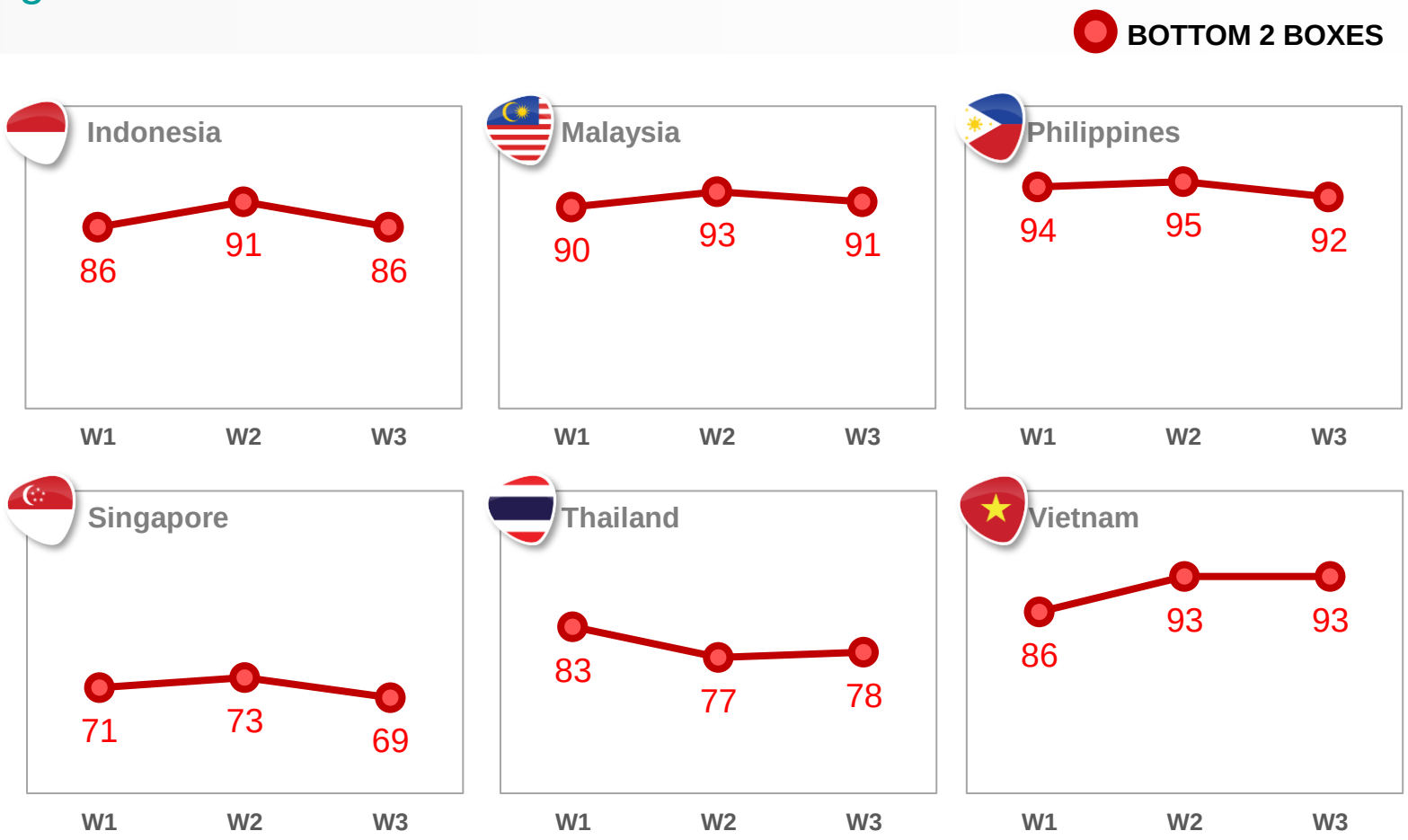


 © Ipsos | Study conducted 4-15 February 2021 among 3,000 Adults Aged 18 years and above (500 per country)

AND CONCERN ABOUT CONTRACTING COVID REMAINS RELATIVELY HIGH ACROSS SEA

Are you worried about contracting Covid-19?





 © Ipsos | Study conducted 4-15 February 2021 among 3,000 Adults Aged 18 years and above (500 per country)

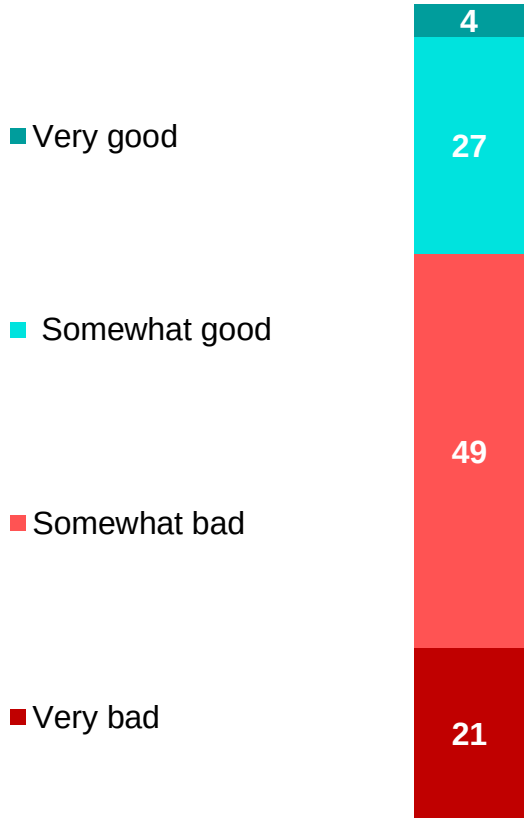
THE STRAITS TIMES SINGAPORE

S'poreans least worried among S-E Asians about getting Covid-19, but less secure about jobs: Poll

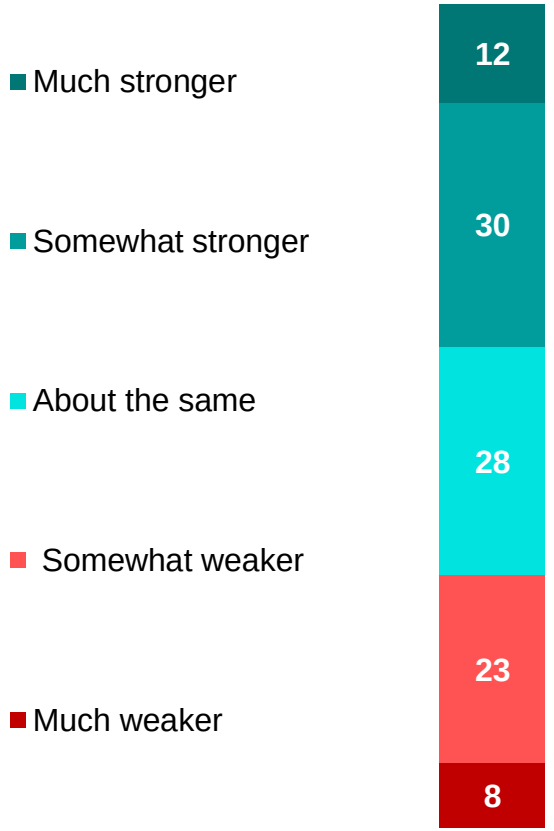
Source: Ipsos Survey SEA covid Tracker

STRONG FEELING OF ECONOMIC DOWNTURN BUT PEOPLE REMAIN MORE POSITIVE ESP IN VIETNAM AND SINGAPORE

How would you describe the current economic situation in your country? It is …



Looking ahead six months from now, do you expect the economy in your local area to be ...



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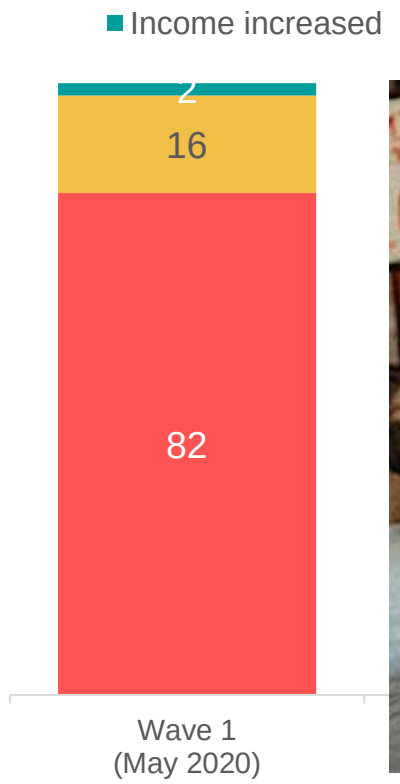
OBVIOUS CONCERN ON HOUSEHOLD INCOME DECREASE

What is your current household income compared to before the Covid-19 pandemic?

South East Asia (All countries)



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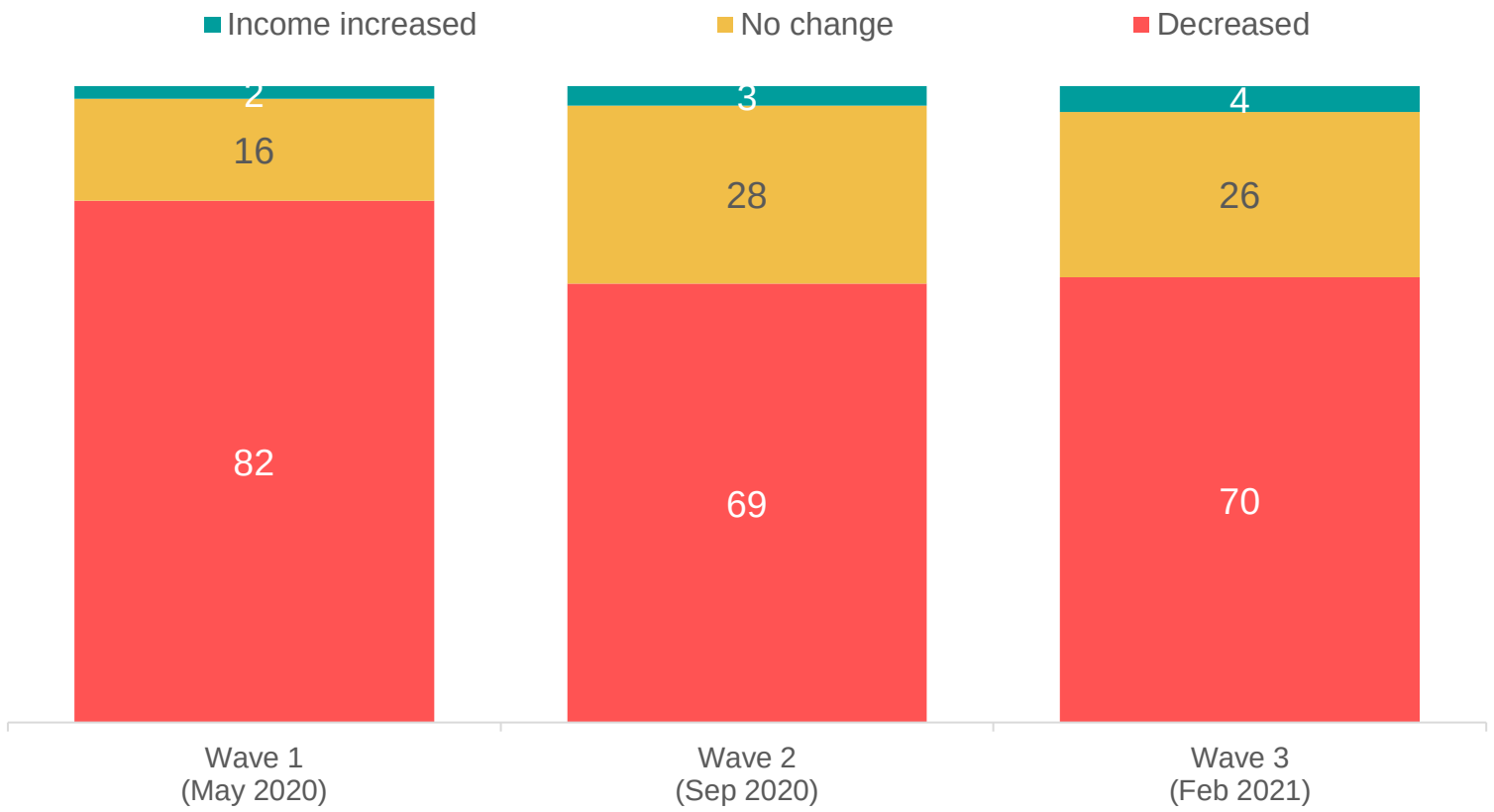
HOWEVER, INCOME DECREASE TREND SEEMS STABILIZED IN THE PAST 6 MONTHS

What is your current household income compared to before the Covid-19 pandemic?

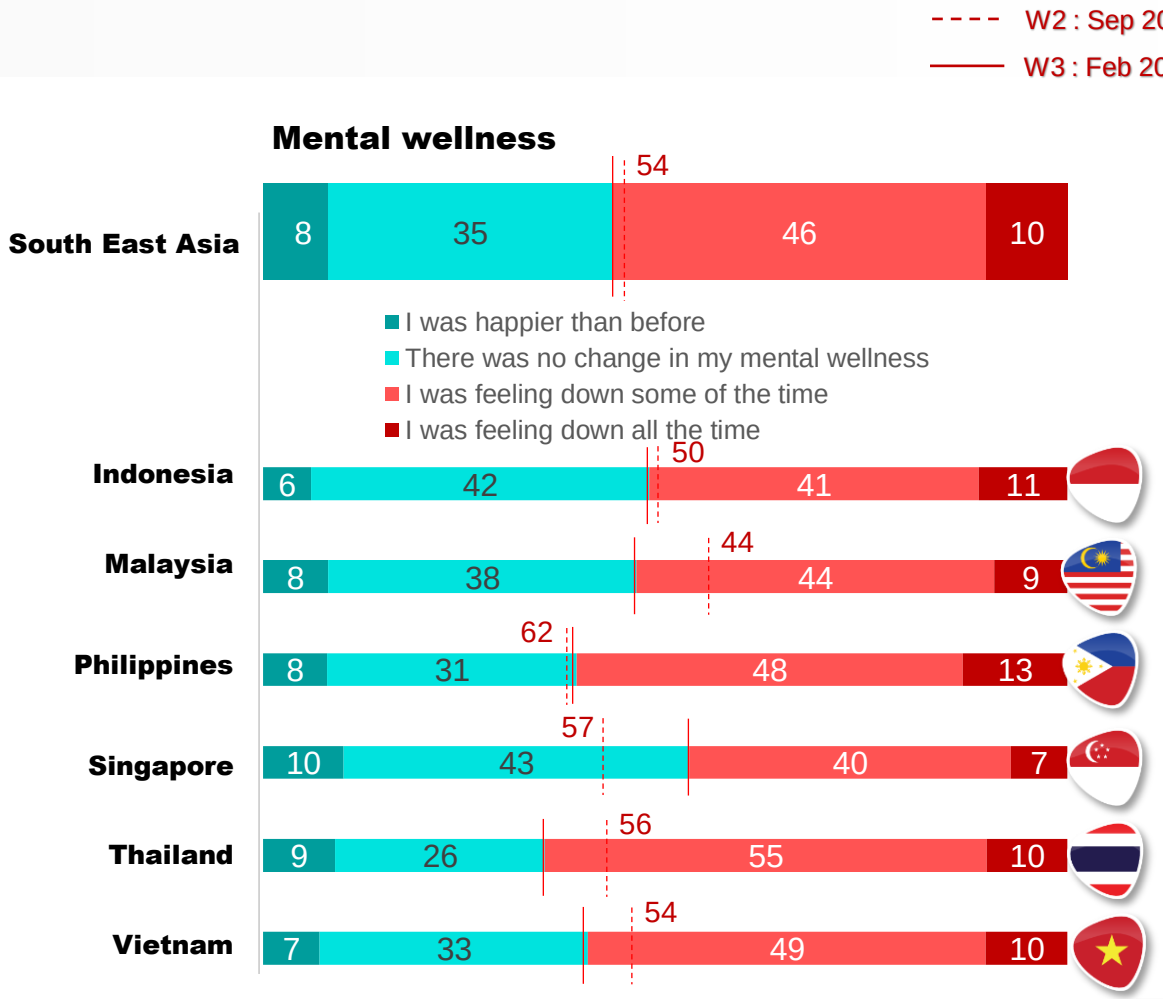
South East Asia (All countries)



 © Ipsos | Study conducted 4-15 February 2021 among 3,000 Adults Aged 18 years and above (500 per country)

CLEAR CHALLENGE ON MENTAL HEALTH
ESP TRENDING WORSE IN MALAYSIA AND THAILAND

Since the beginning of the Covid crisis, how do you feel staying more at home have impacted your mental wellness?



 © Ipsos | S r country)

ACROSS SEA PEOPLE ARE STILL CAUTIOUS, BUT CATCH UP ON SMALL THINGS

When would be the earliest time you would be comfortable with doing each of the below activities?

South East Asia (All countries)

	Immediately	March 2021	April-May 2021	June-July 2021	August 2021 or later
Visit friends or family in their homes	**36%**	15%	16%	10%	24%
Use public transportation	**33%**	18%	17%	12%	19%
Go to a restaurant	**28%**	18%	18%	12%	25%
Go to a gym/sports facility	21%	13%	16%	14%	**37%**
Travel domestically	19%	9%	14%	15%	**43%**
Join a cultural event/gathering	14%	12%	17%	16%	**42%**
Travel to another country	9%	3%	6%	8%	**74%**

 © Ipsos | Study conducted 4-15 February 2021 among 3,000 Adults Aged 18 years and above (500 per country)

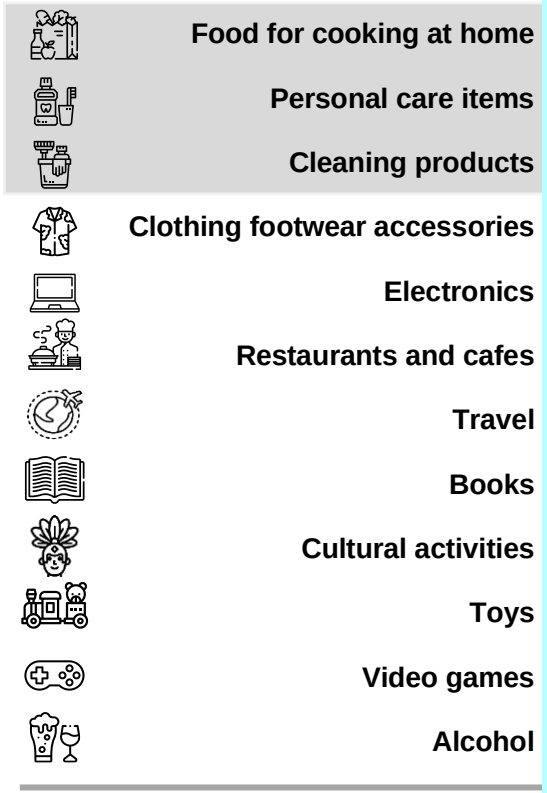
ST
SINGAPORE'S FIRST CRUISE
TO NOWHERE AMID COVID-19

GirlStyle
STAYCATIONS FROM $100/NIGHT
Now Open For Bookings Again

PLAN/WILLINGNESS TO SPEND BY CATEGORY

When the period of movement restrictions is over, do you plan to spend more, less or the same amount of money on the below items or activities, as compared to before the Covid crisis?

South East Asia (All countries)



- Consistent strong spending on **groceries, cleaning and personal care products**
- Slight more positive trend on **restaurant, clothing and travel**
- Big tickets such as **electronics** remain low
- **Singapore and Vietnam** showing more positive signs

 © Ipsos | Study conducted 4-15 February 2021 among 3,000 Adults Aged 18 years and above (500 per country)

- *We are getting more used to live with covid-19*
- *Remain highly cautious, but with more positive outlook on economy & our daily life*
- *Mental health reamins concerning*
- *Singapore and Vietnam shows more positive trend*

Let’s stay Hopeful!

FIRST IMPRESSIONS MATTER

KEYS – A WEBINAR SERIES BY IPSOS

Colin Ho
Chief Research Officer,
Innovation and Market
Strategy & Understanding

GAME CHANGERS

Ipsos

FIRST IMPRESSIONS MATTER

Understanding the power of spontaneous reactions to develop stronger innovations

Colin Ho

GAME CHANGERS

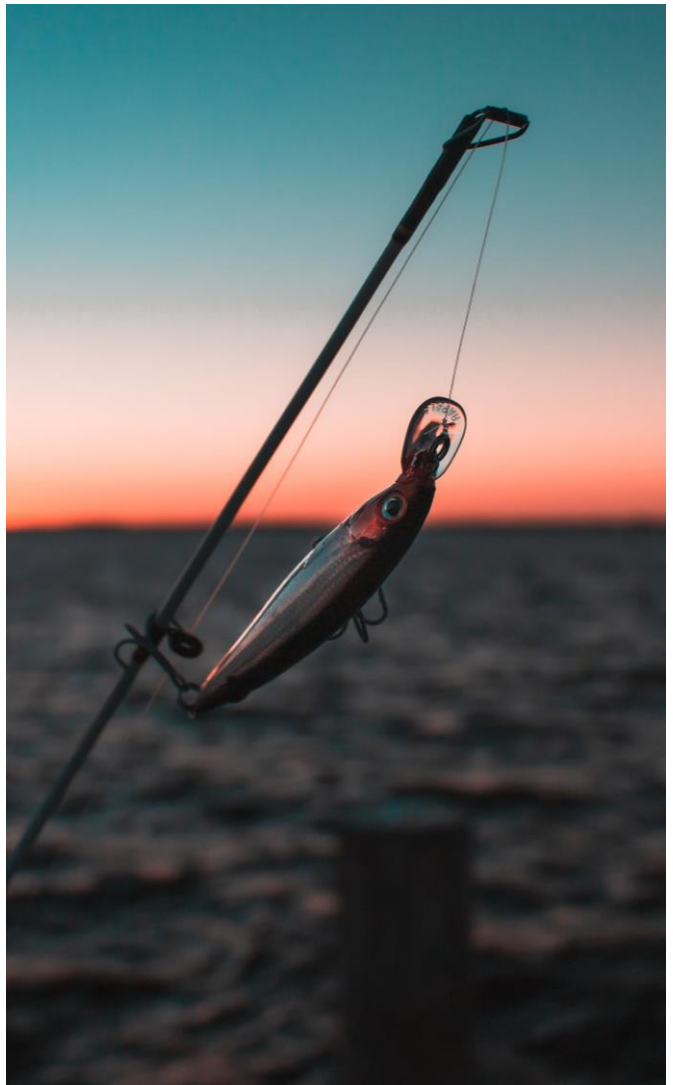
Ipsos

FIRST IMPRESSIONS COME BEFORE PURCHASE

WE ARE HERE TO MAKE A CASE FOR FIRST IMPRESSIONS

Predictive Value

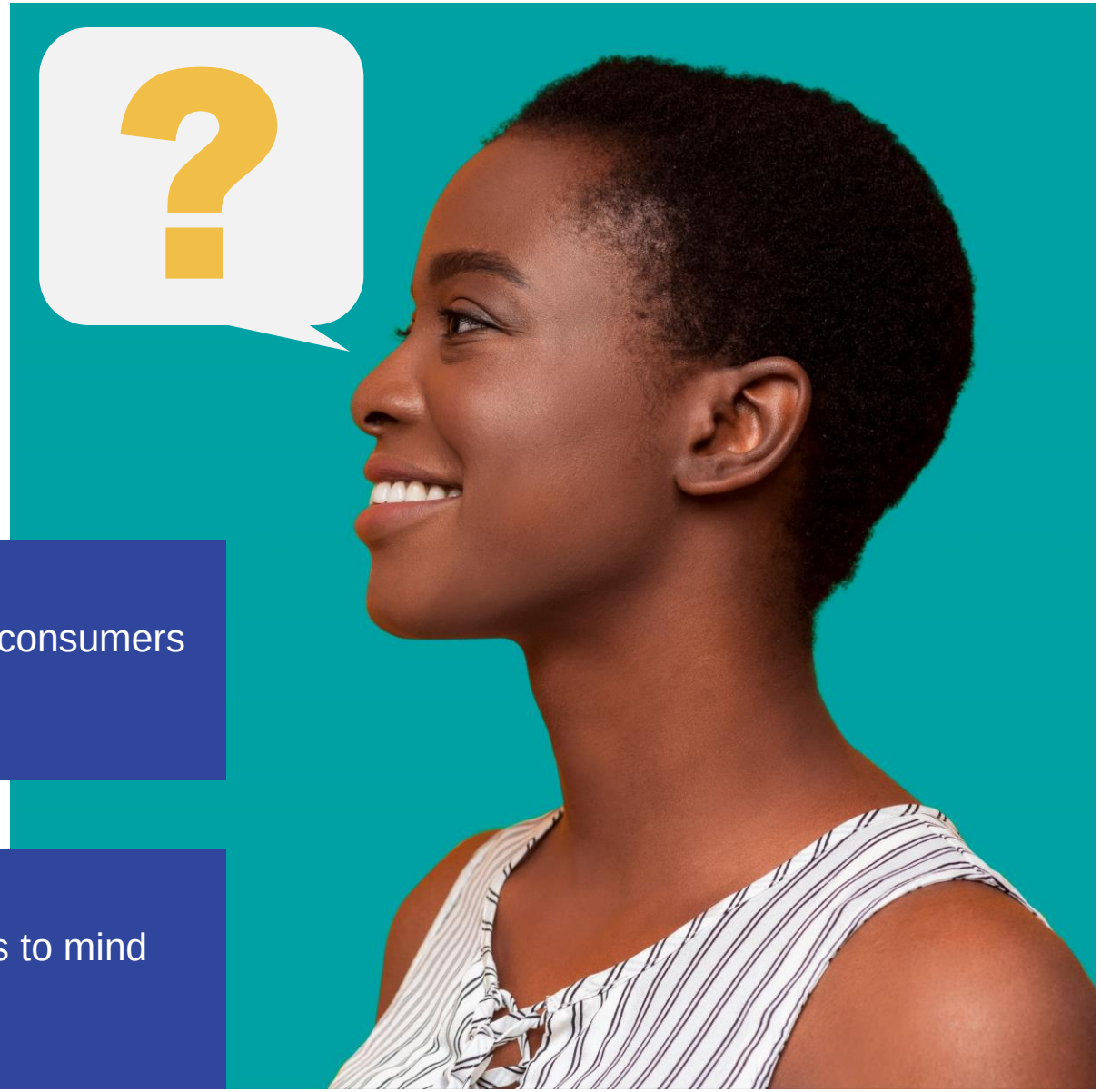
Insights



THE RED METRICS ARE THE FOUNDATION OF IPSOS' APPROACH TO EVALUATING INNOVATIONS…

We wanted to understand if first impressions would provide incremental prediction and additional insights

CAPTURING FIRST IMPRESSION

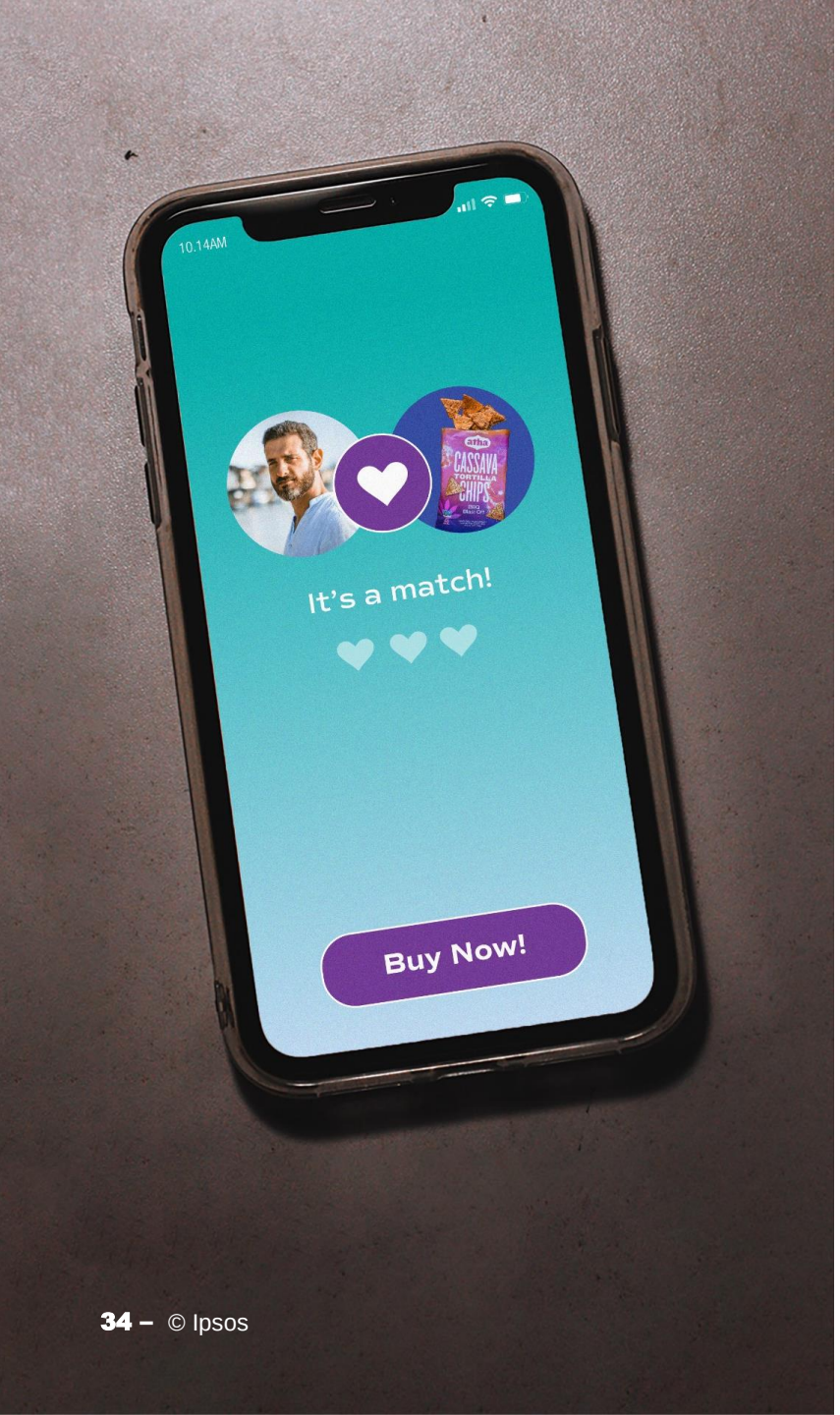


Implemented immediately after consumers see the concept

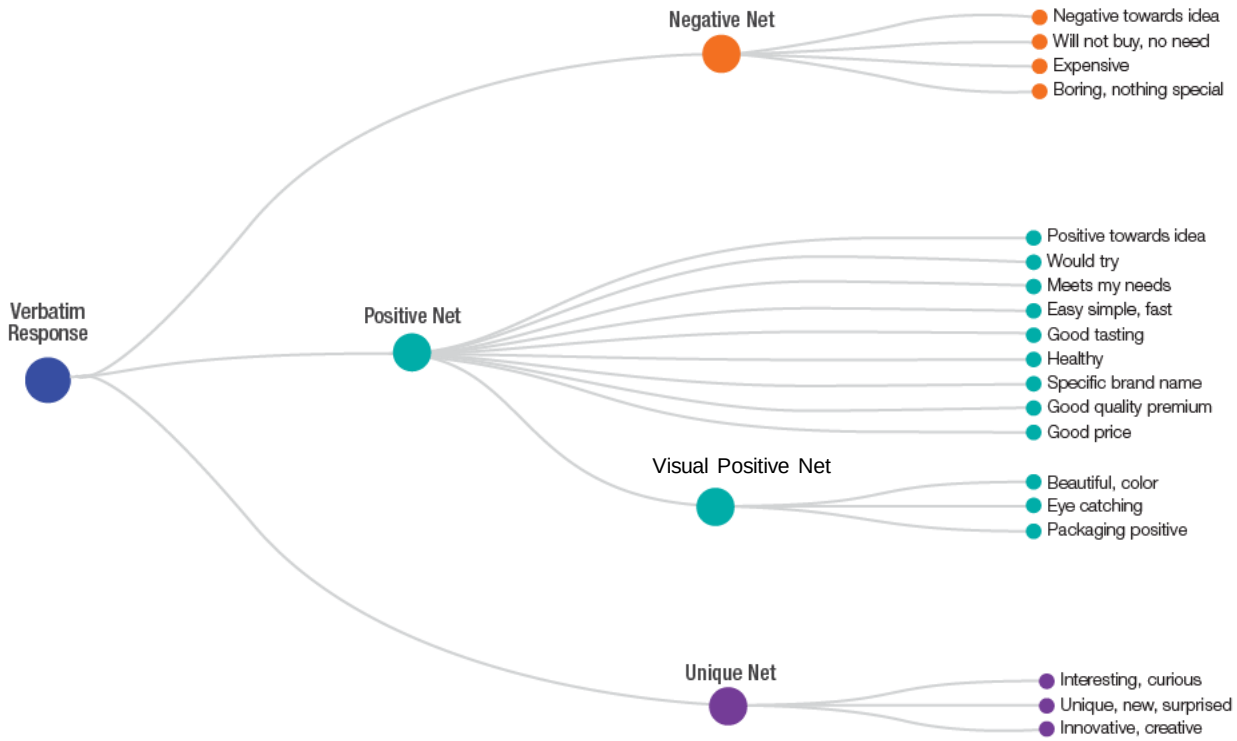
Able to capture whatever comes to mind or how consumers feel

OUR FINDINGS

1



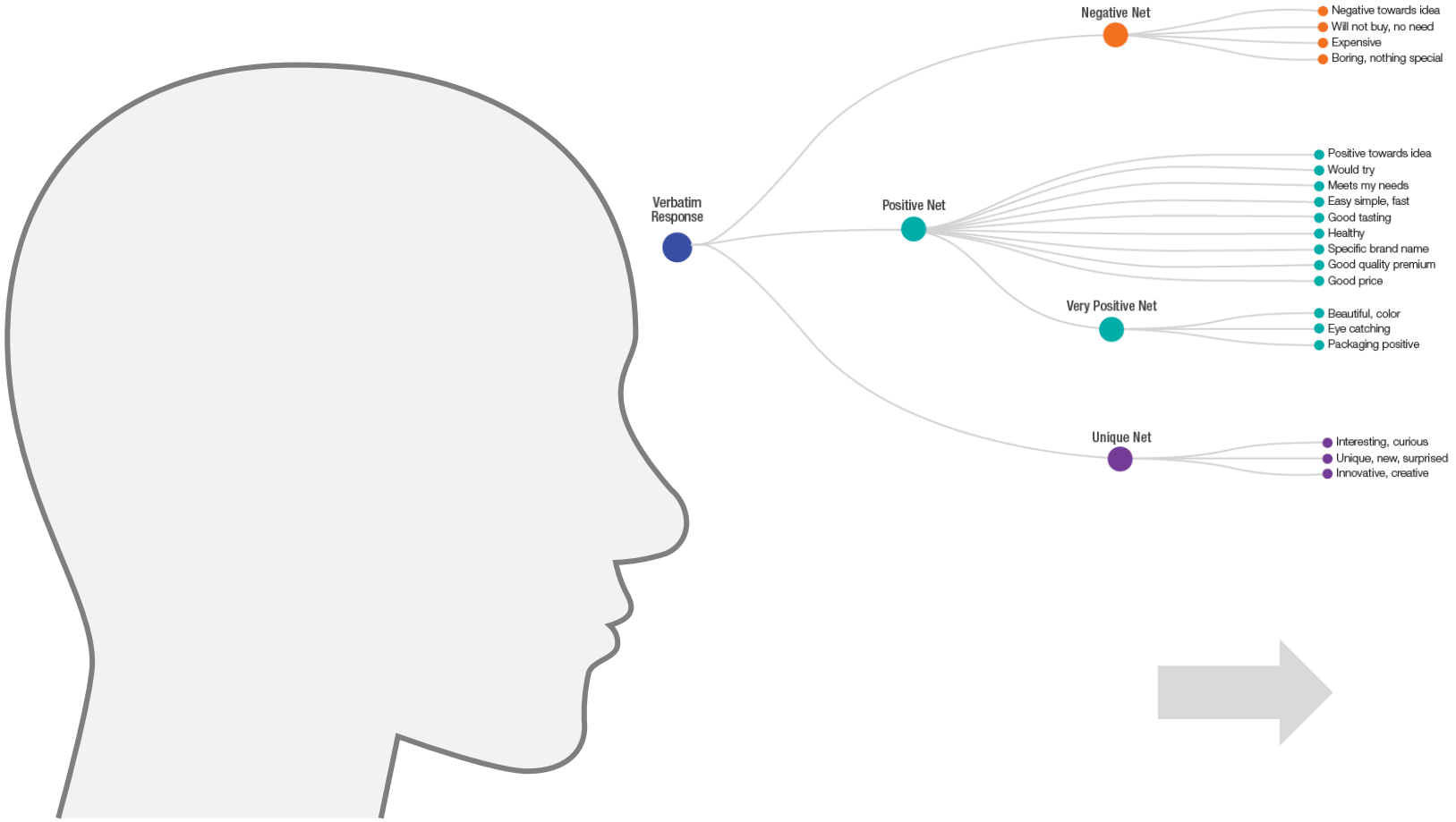
THE CONTENT OF FIRST IMPRESSIONS



*Source: **4,500** respondents to **300 concepts** tested across a variety of product categories) from 13 countries*

 © Ipsos

FIRST IMPRESSION IMPACT ON RELEVANCE AND DIFFERENTIATION

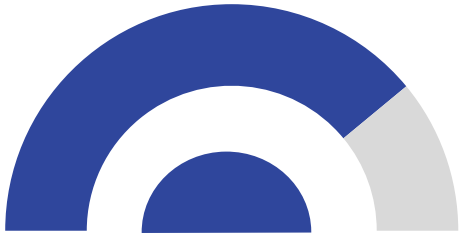


BOTH POSITIVE AND NEGATIVE IMPRESSIONS MATTER

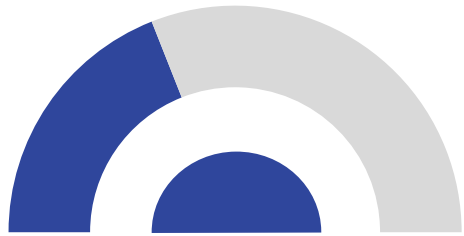
"Quick, convenient. Bad for you"

"It sounded pretty good, but the pictures of the food were not appetizing"

"Convenient, but may not be enough food to satisfy your appetite and expensive"



Positive



Positive & Negative

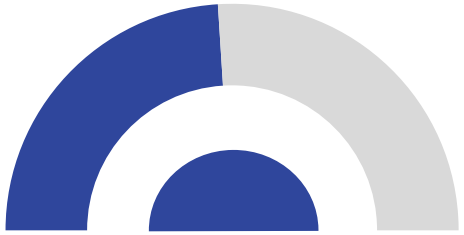
Source: 4,500 respondents to 300 concepts tested across a variety of product categories) from 13 countries

 © Ipsos

LOOKING GOOD HELPS DIFFERENTIATE

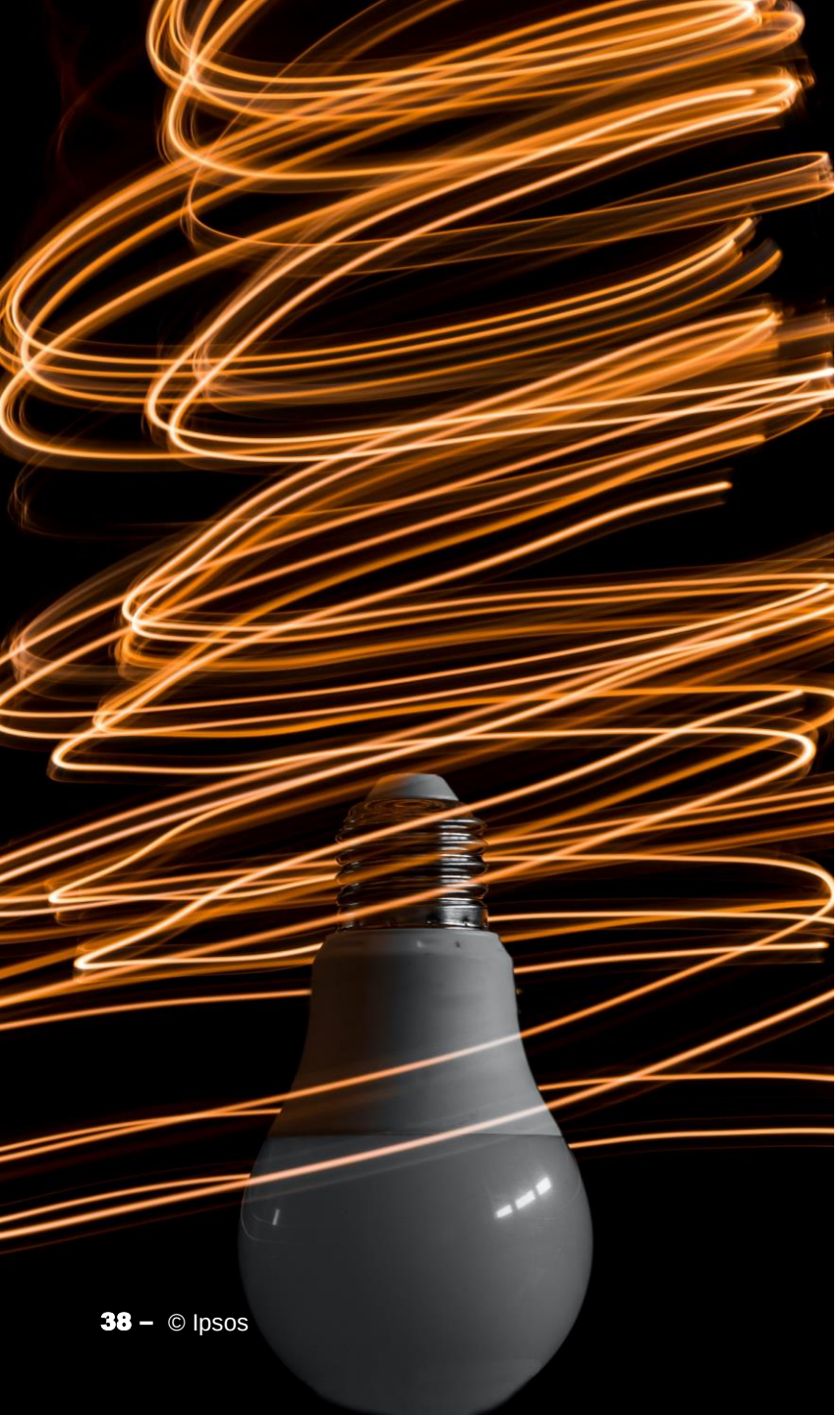
“Beautiful packaging design”.

“Good design. Good colour. Attract attention”



Beautiful, Eye Catching

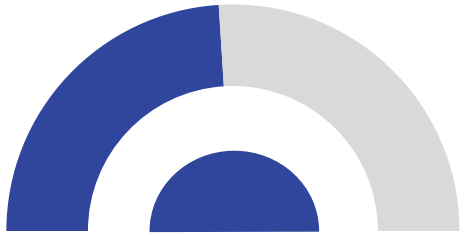
Source: 4,500 respondents to 300 concepts tested across a variety of product categories) from 13 countries



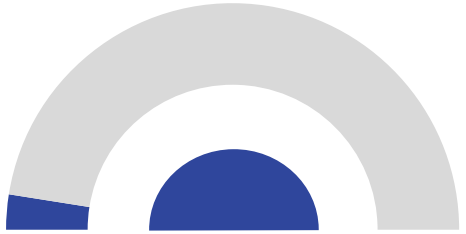
BE INNOVATIVE NOT JUST NEW OR INTERESTING

"Innovative product and a little more "natural" than the current ones."

"Original, new frozen mixes on the market according to recipes from different countries."



Innovative



New, Interesting

Source: 4,500 respondents to 300 concepts tested across a variety of product categories) from 13 countries

 © Ipsos

FIRST IMPRESSIONS MATTER: **KEY TAKEAWAYS**

Understand if there are any Negative Barriers –
capturing “positives” is only half the picture.

Looks Matter –
leverage your package and product design to differentiate yourself

Be Innovative –
it is not enough to be new or interesting

SERVICE WITH A SMILE

KEYS – A WEBINAR SERIES BY IPSOS

Fiona Moss
Global Research Director,
Customer Experience

GAME CHANGERS

Ipsos

SERVICE WITH A SMILE?

Delivering customer experience in the face of mask wearing

Fiona Moss

26 March, 2021

GAME CHANGERS

Ipsos

Customer Experience meets Neuroscience.

 © Ipsos | Service with a smile?

71%

of Americans report wearing a mask *at all times* when they leave home.

Source: https://www.ipsos.com/en-us/news-polls/axios-ipsos-coronavirus-index;

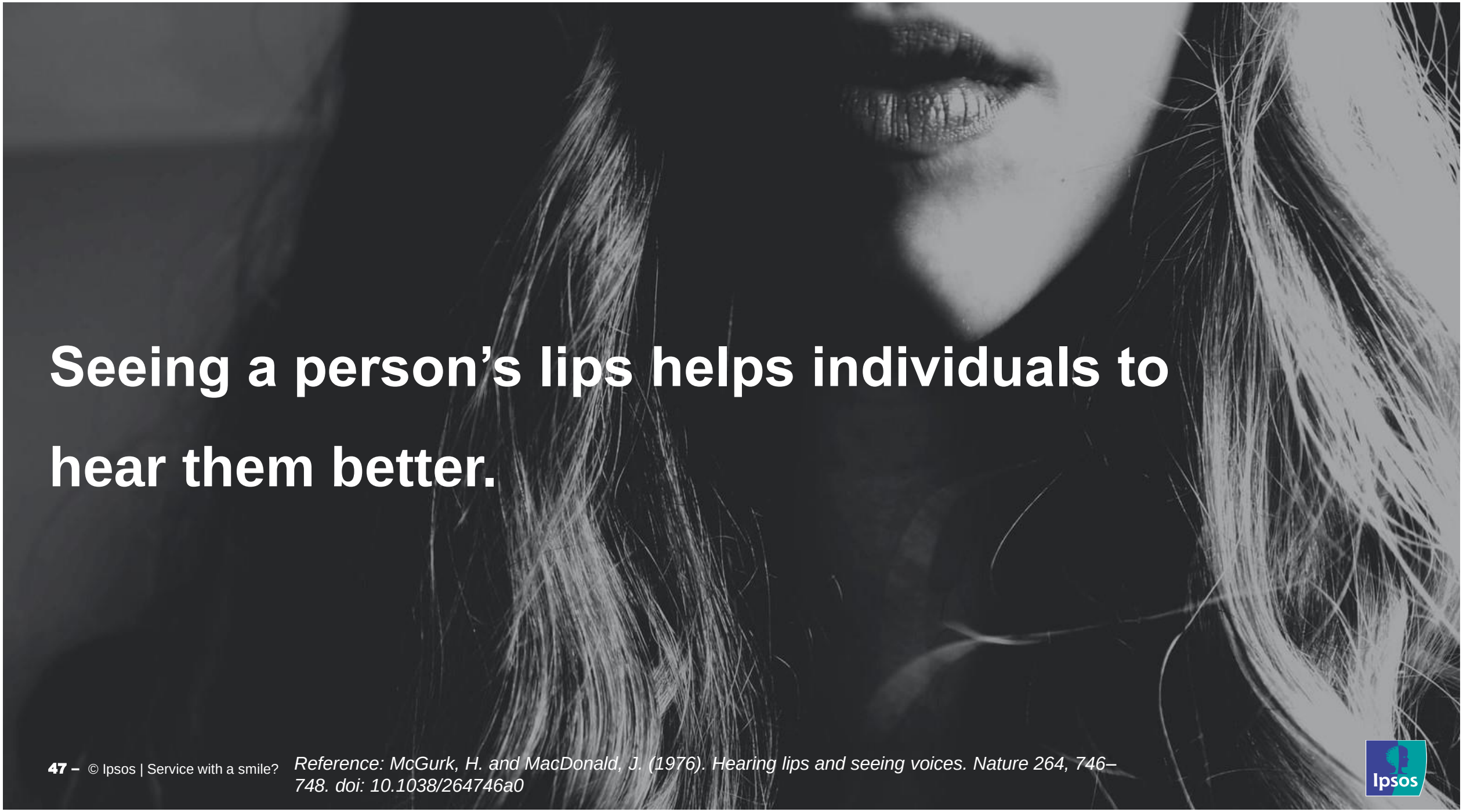
SERVICE WITH A SMILE

1

Why face perception matters

Face perception plays a critical role in social interactions.

Reference: Haxby, J.V., Hoffman, E.A. and Gobbini, M.I. (2002). Human neural systems for face recognition and human communication. Society of Biological Psychiatry



 © Ipsos | Service with a smile?

Reference: McGurk, H. and MacDonald, J. (1976). Hearing lips and seeing voices. Nature 264, 746–748. doi: 10.1038/264746a0

SERVICE WITH A SMILE

2

The impact of wearing face masks on the Customer Experience

SIX EMOTIONS WERE TESTED

Disgust

Sadness

Surprise

Fear

Happiness

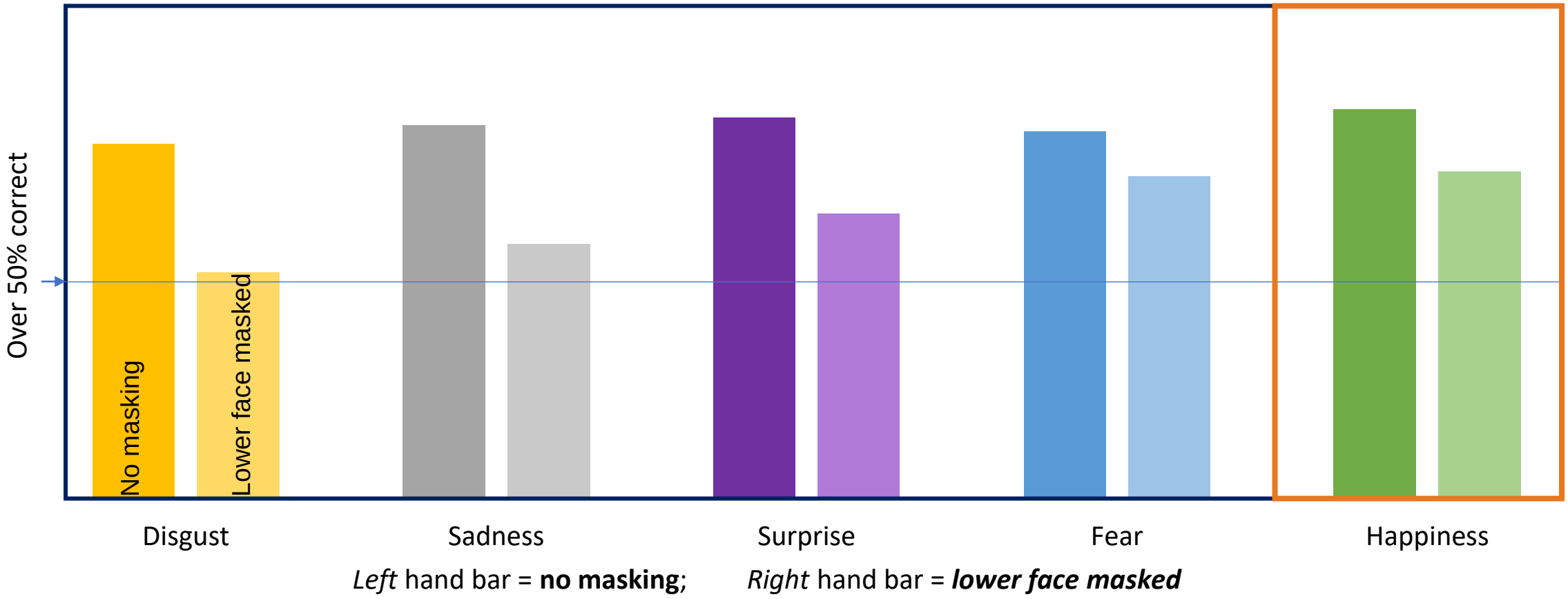
Anger

 © Ipsos | Service with a smile?

Face masks do not impact our ability to recognise anger.

FACE MASKS SIGNIFICANTLY IMPACT OUR ABILITY TO RECOGNISE THE REMAINING FIVE EMOTIONS

Percentage **correctly** identifying each emotion



Left hand bar = **no masking**; *Right* hand bar = ***lower face masked***

Source: Center for Applied Research in Decision Making at Temple University/Ipsos R&D. All respondents (290)

Masked smiling faces are rated as less warm and less likable than their unmasked counterparts.

THERE IS ALSO A TANGIBLE IMPACT ON THE CUSTOMER EXPERIENCE

28%

of customers said that wearing a mask prevented them from, or made it harder to achieve what they wanted to do.

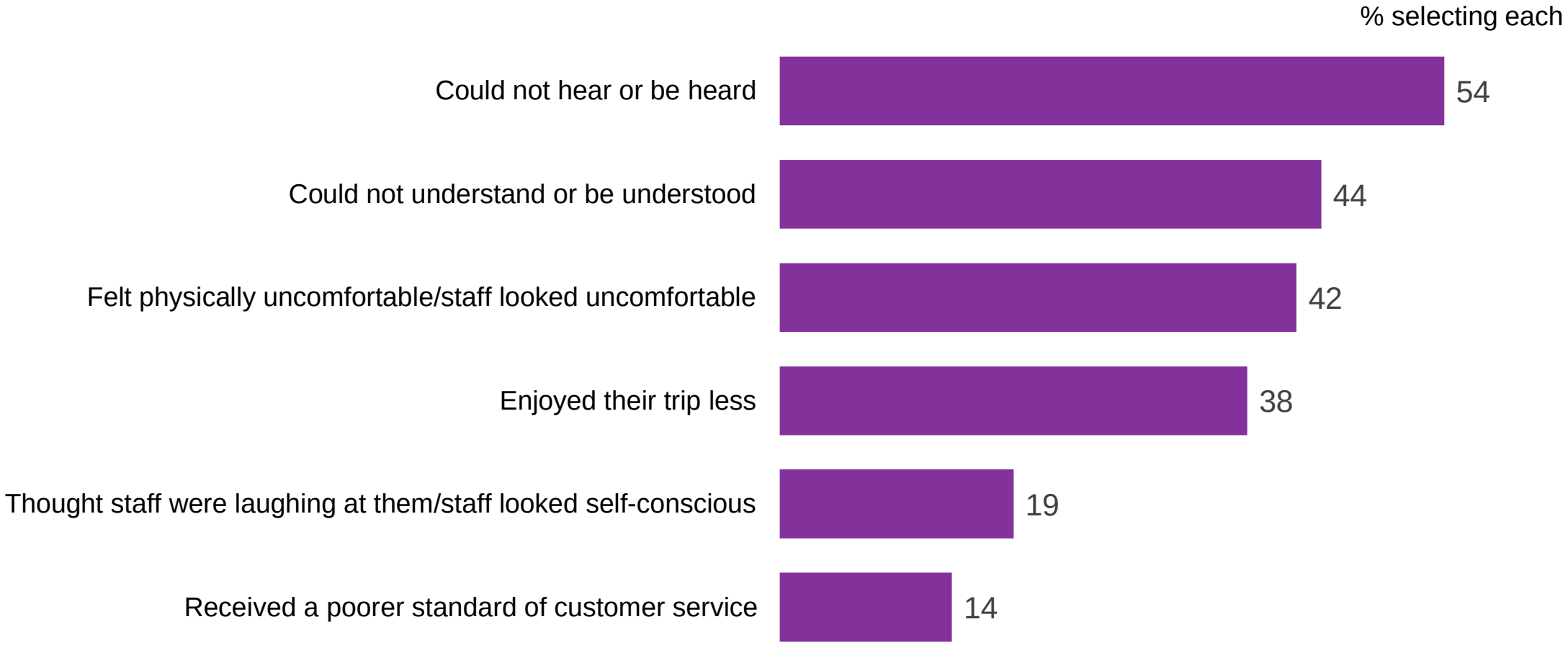
43%

reported at least some detriment to their trip as a result of wearing a mask.

 © Ipsos | Service with a smile? Source: Center for Applied Research in Decision Making at Temple University/Ipsos R&D. All respondents (290)

COMMUNICATION IS MOST COMMONLY IMPACTED

Which, if any, of the following happened as a result of you/the staff member wearing a face mask?



Source: Center for Applied Research in Decision Making at Temple University/Ipsos R&D. All respondents who experienced some detriment to their trip as a result of wearing a mask or staff wearing a mask (126)

© Ipsos | Service with a smile?

SERVICE WITH A SMILE

3

Mitigating the impact of face masks

DESIRED INTERVENTIONS

Which of the following would have made it easier to achieve what you wanted to do?

Source: Center for Applied Research in Decision Making at Temple University/Ipsos R&D. All respondents who experienced some detriment to their trip as a result of wearing a mask or staff wearing a mask (126)

 © Ipsos | Service with a smile?

TIPS TO MITIGATING ISSUES

Voice/Sound

Speak more **slowly**, and in some cases more **loudly**.

Manage the **level of noise**, including how loud music is played.

Environment

Visual aids, such as **posters** and **interactive devices** can guide customers.

Body Language

Help communication with relevant and **engaging gestures**.

Eye contact

Make use of the **appropriate** amount/form of **eye contact**.

 © Ipsos | Service with a smile?

Adjusting to meet consumer needs now will help build strong customer relationships – regardless of masks.

THANK YOU

GAME CHANGERS

WE ~~DON'T~~ NEED TO TALK ABOUT ADS

KEYS – A WEBINAR SERIES BY IPSOS

Adam Sheridan
Global Head of Products and Innovation,
Creative Excellence

GAME CHANGERS

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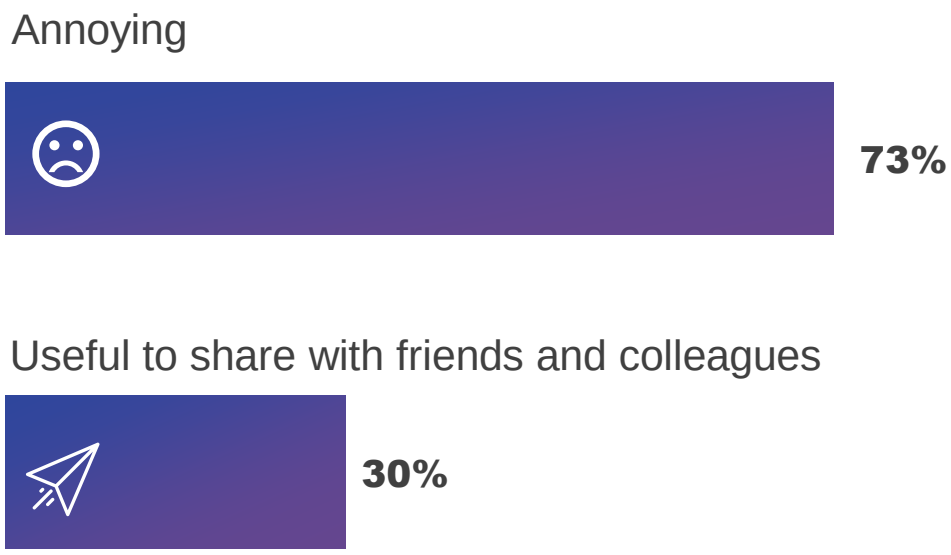
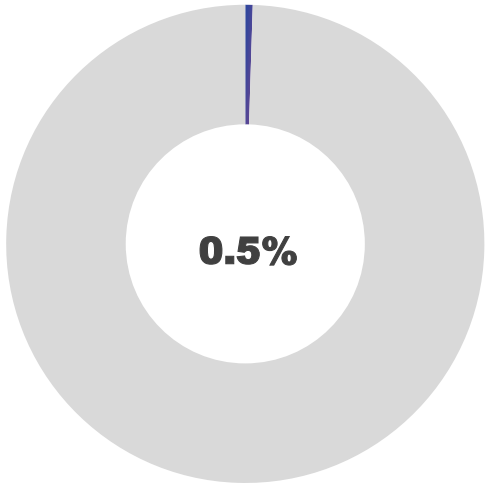
WE NEED TO TALK, JUST NOT ABOUT ADS

People get more annoyed by advertising than find it a source of information to share[1]



In any given week, less than 0.5% of Facebook fans engage with the brand they are fans of[2]



Source: 1. Ipsos Global Trends Data 2020. Sample of n=22,114 across 33 countries. (https://www.ipsosglobaltrends.com/).
2. Facebook Fans: A Fan for Life?, Admap, May 2012. Karen Nelson-Field and Jennifer Taylor.

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Getting people to talk about ads is really hard

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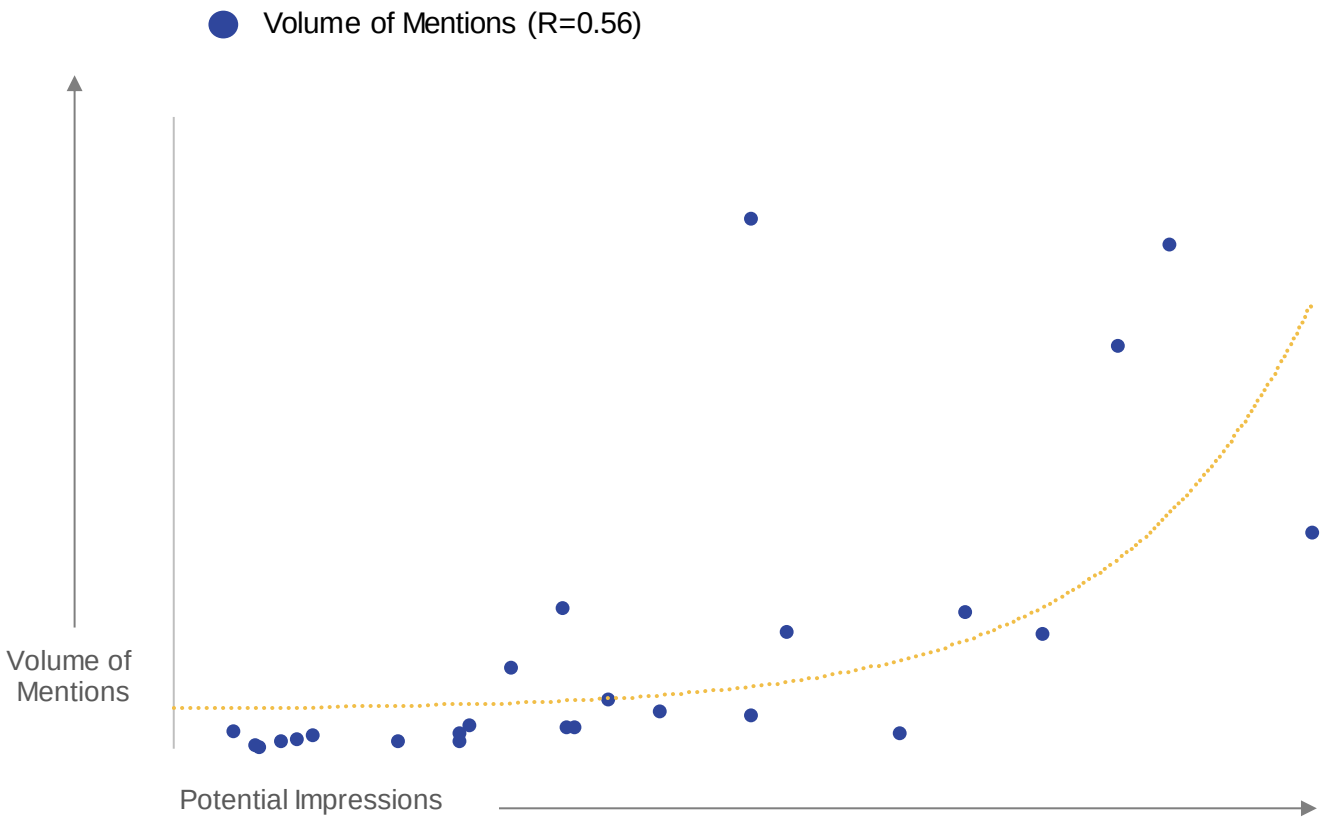
If you talk about something, you've processed it, and it's generated a reaction that's worth talking about

Getting people talking online means more potential reach



Source: Synthesio Volume of Mentions tracked for n=36 video ads between 2019-2020

Synthesio Potential impressions: total aggregated reach of all posts where the audience base is duplicated per post from one user, meaning one person may see multiple impressions of the same post.

What types of traits are shared by ads that get talked about?

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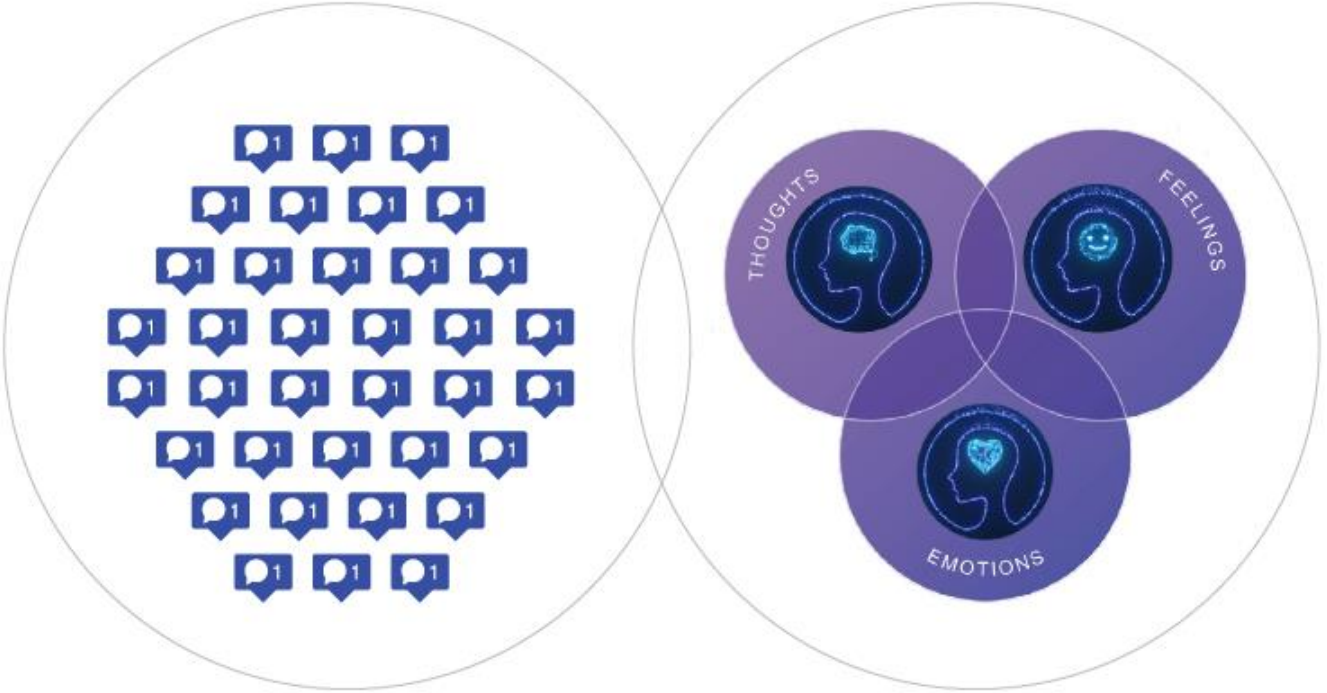
IPSOS RESEARCH PROGRAM TO DISCOVER THE TRAITS



synthesio
AN IPSOS COMPANY

CREATIVE|SPARK

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What did we find out?

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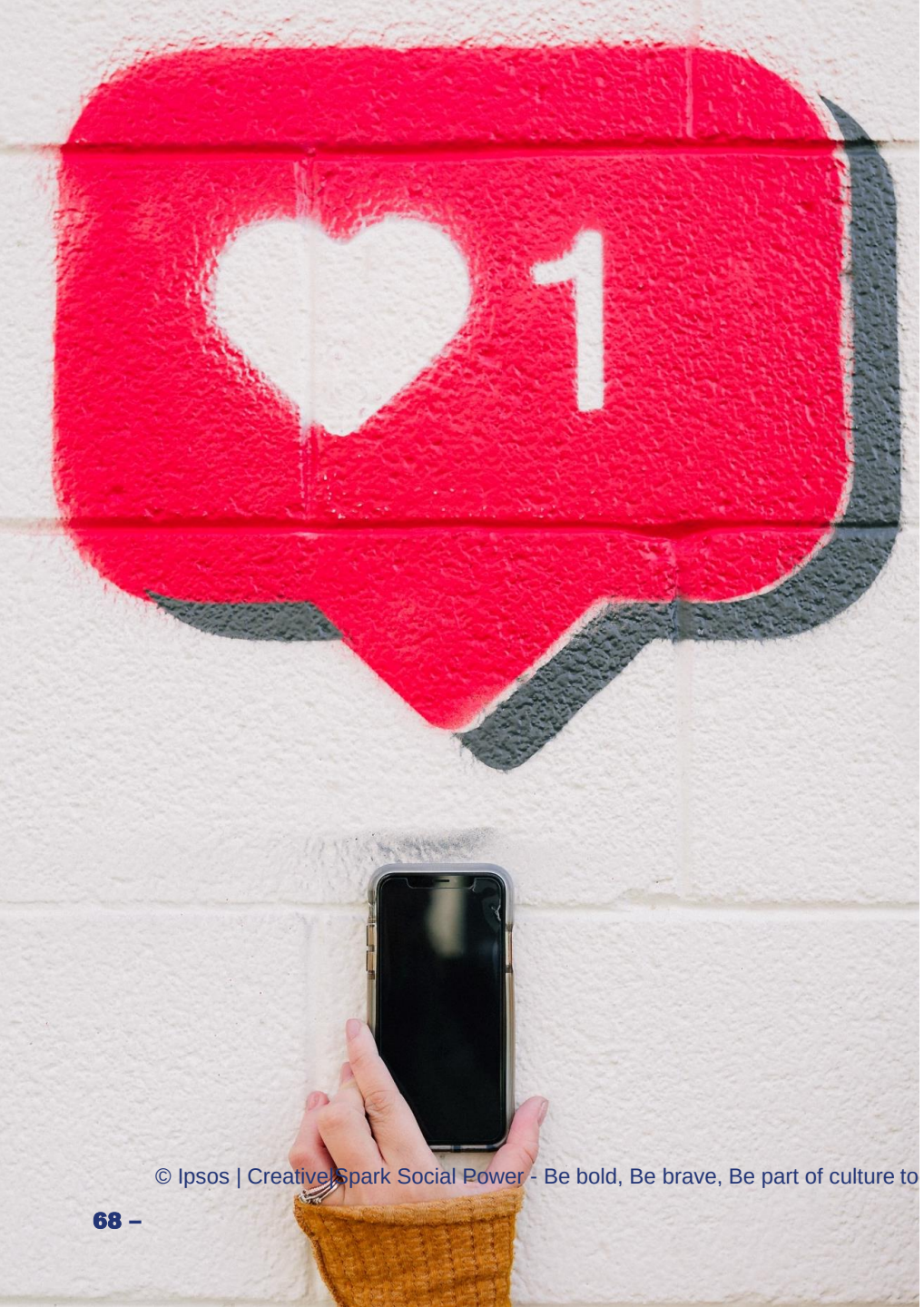

4 KEY TRAITS ADS NEED TO GET TALKED ABOUT ONLINE

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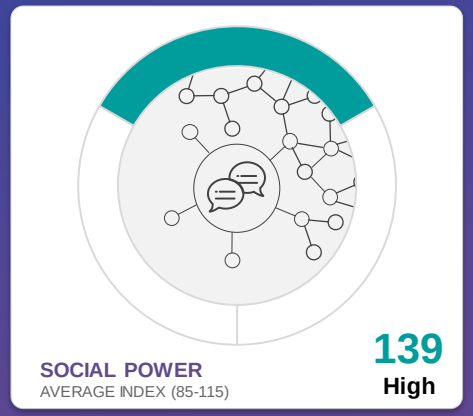
CREATIVE BRAVERY

Nike Dream Crazier



Social Power driven by a combination of :

Cultural Impact:
a creative seen as empowering women, inspiring and positive.

Controversy:
on the other end, the *expressed feminism is polarizing* to part of the audience.

Inspirational. Standing. Awesome. Good crazy. Fighting.

It's empowering for women

This can also be for men, I liked the ad but please stop dividing us

It's a nice message but all the feminist stuff is getting annoying seeing all the time

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= higher/lower than benchmark (index thresholds or sig. testing to norm/PAR @ 90% CL)

1. Cultural Impact

2. Creative Bravery

3. Positive Feelings

4. Don’t be Afraid to Create Controversy

“

Think about delivering an experience worthy of discussion that your brand is part of, rather than an ad that simply sells your product.

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