

INNOVATE YOUR INNOVATION

30 Giugno 2021



GAME CHANGERS



1. IPSOS. NEW UNDERSTANDING

David Parma : Managing Partner, Ipsos Strategy3

2. NEXTATLAS. FUTURE IN SIGHT

Elena Marinoni : Senior Trend Researcher, Nextatlas

3. TALKS WITH TOP INDUSTRY LEADERS

Barbara Cimmino : CSR Director, Yamamay - Inticom S.p.A

Marco Ferrari : CEO, Montenegro S.p.A

Alessandro Lazzaroni : General Manager, Burger King Restaurants Italia S.p.A

Marcello Gelo : Global Marketing Director, Mutti S.p.A.

4. INNOVATE YOUR INNOVATION – SO WHAT NOW?

David Bedarida : Head of Innovation, Ipsos

Luigi Conti : General Manager, Nextatlas

5. Q&A SESSION

INNOVATE YOUR INNOVATION

Ipsos. New Understanding



GAME CHANGERS



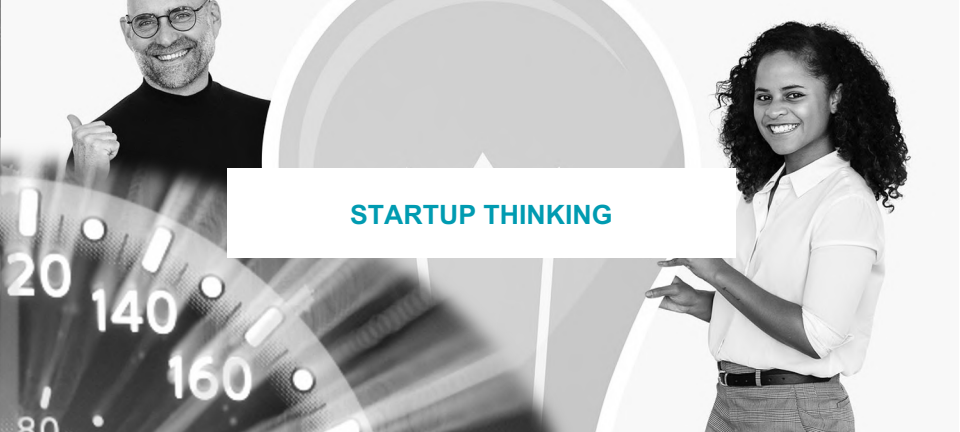


Il mondo Pre-Covid





PERSONE NON CONSUMATORI



STARTUP THINKING

Il mondo Post-Covid



DA OFFLINE A ONLINE A ONLIFE



TECNOLOGIE PER L'INNOVAZIONE

Le persone oggi sono consumatori sempre, costantemente esposti a stimoli

PERSONE NON CONSUMATORI

Noi siamo CONTEXTUAL & ADAPTIVE.

Adattiamo le nostre decisioni a ciò che sta accadendo intorno e dentro di noi.



People.**Markets**.Society.



Frammentazione dei media



1 Consumatore su 2 si aspetta di cucinare a casa più di quanto facesse prima



Il 36% acquisterà maggiormente prodotti freschi



Il 14% ordinerà asporto o delivery più di prima



Il 28% andrà al ristorante di più rispetto al periodo prima del Covid

Nuovi comportamenti e abitudini

La rapida ascesa della digitalizzazione ha aumentato la complessità

PERSONE NON CONSUMATORI

Pre-Covid
2019

Covid
2020

82%

Penetrazione internet

84%

58%

Penetrazione
dei social media

68%

77%

Penetrazione e-commerce

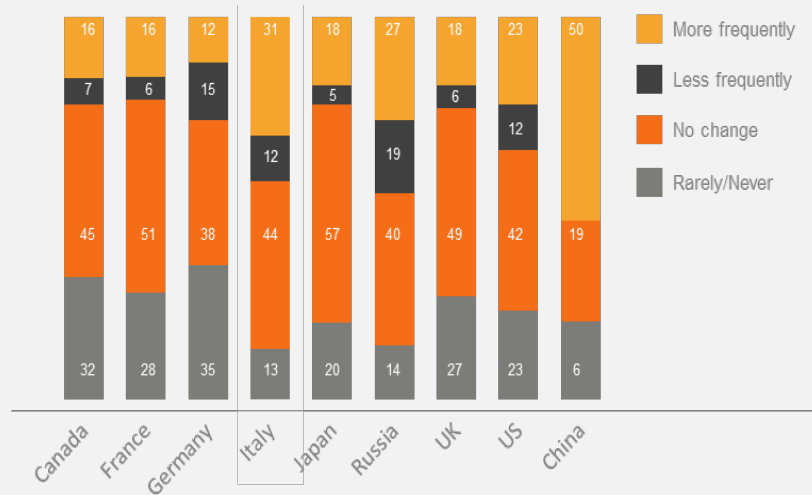
80%

6:00

Tempo medio giornaliero
speso su internet

6:22

Utilizzate l'e-commerce per acquistare prodotti che normalmente acquistate in negozio con maggiore o minore frequenza rispetto a un mese fa?



Si assiste sempre più ad un'ingerenza dei temi societal nel Marketing

PERSONE NON CONSUMATORI



63%

E' giusto che marchi e aziende agiscano in prima persona rispetto a questioni sociali rilevanti, oltre a vendere prodotti o a offrire servizi

58%

Sono molto attento ai comportamenti in ambito sociale da parte di marche e aziende

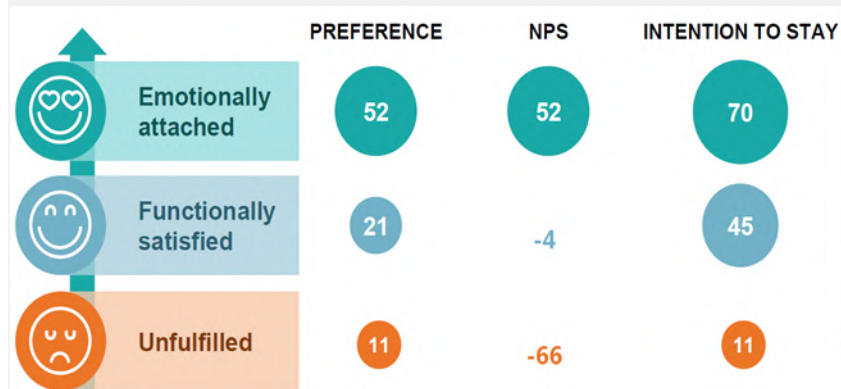
84%

Le marche e le aziende devono ascoltare e farsi aiutare dalle persone ad agire in modo responsabile per il bene delle comunità e dei territori

In questo contesto l'esperienza che viene offerta è fondamentale

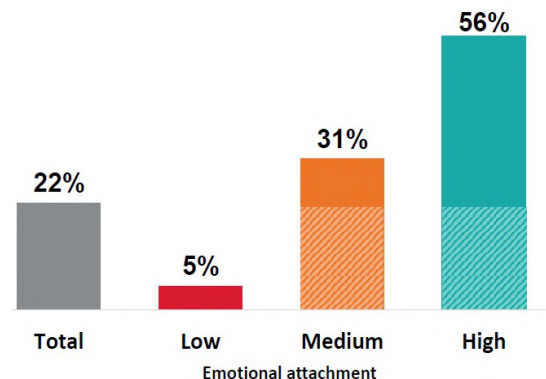
PERSONE NON CONSUMATORI

La soddisfazione funzionale non basta



E le persone che hanno un legame emotivo con il brand sono più propense a perdonare

Intention to Stay following a negative experience overall and by emotional attachment



Riunire il meglio del mondo fisico e digitale per creare una customer experience molto più completa e soddisfacente

DA OFFLINE A ONLINE A ONLIFE

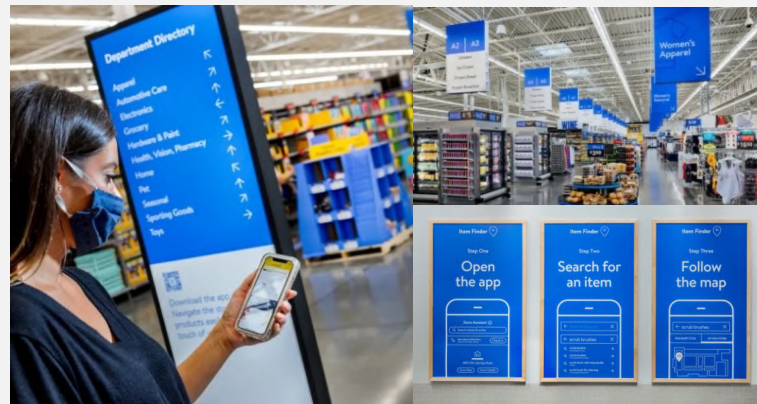
WOOLRICH®

Superamento delle restrizioni agli ingressi negli store grazie ad un innovativo sistema di booking online che dialoga con il CRM per aumentare gli standard e la qualità del servizio.



Walmart*

Riprogettazione dei propri store per fornire un'esperienza unificata di shopping nella quale la APP e il negozio stesso parlino lo stesso linguaggio.



L'uso delle tecnologie per conquistare il consumatore e diventare più tempestivi nei processi di Innovazione

TECNOLOGIE PER L'INNOVAZIONE

BLOCKCHAIN

Per una maggiore
trasparenza e tracciabilità



5G / IoT

Per nuove esperienze
digitali

Uber



AI / ML

Per migliorare l'efficienza



ANALYTICS

Per un uso profondo
e consapevole dei dati



Questi cambiamenti comportano la necessità di un nuovo metodo Startup Thinking

STARTUP THINKING

LEADERSHIP



ORGANIZZAZIONE

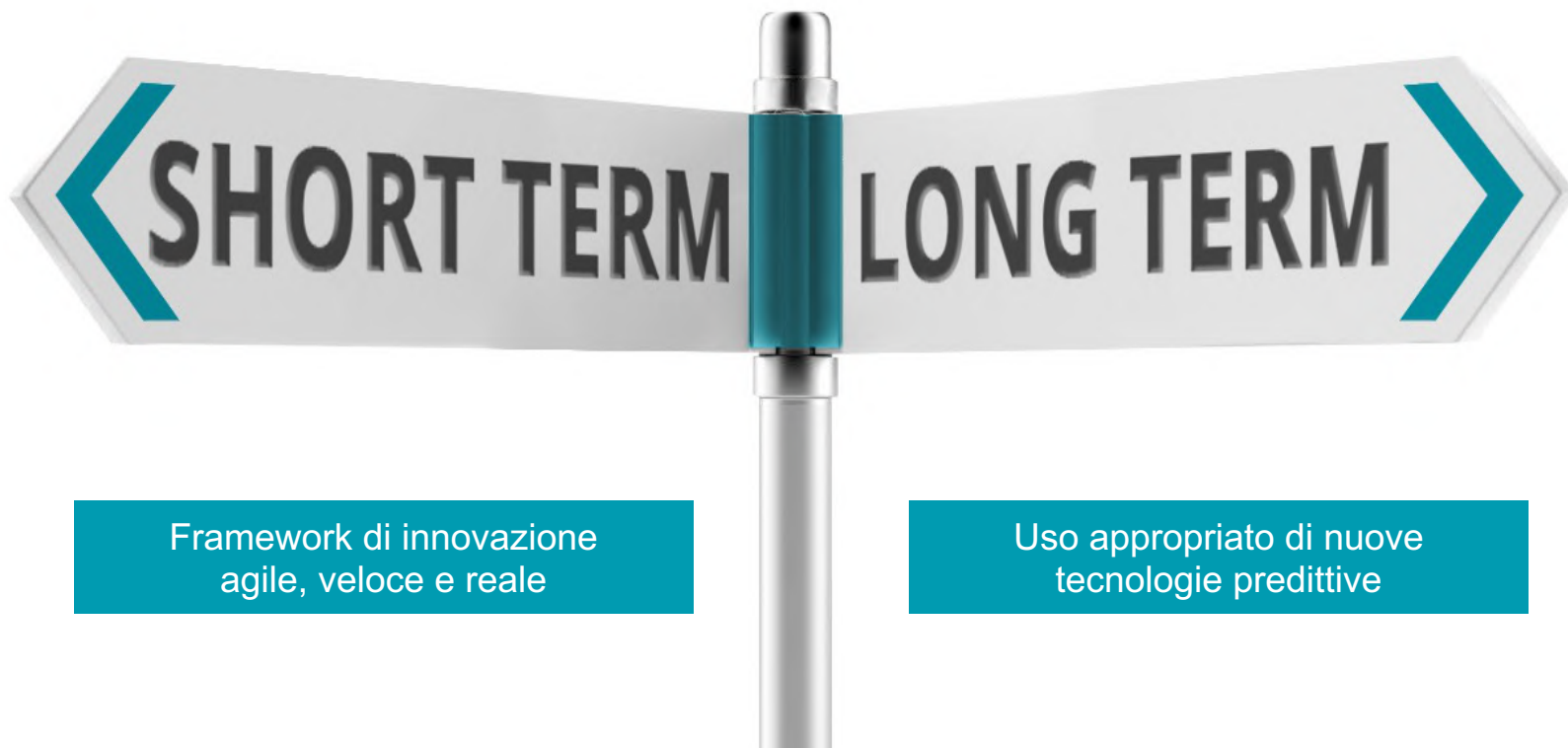


NUOVI EQUILIBRI



INCLUSIVE, PERVASIVE, FAST, REACTIVE

Qual è la sfida?



Nextatlas. Future In Sight



GAME CHANGERS



01.

The Future

Realness
Diversity
Inclusivity
#EthicallySourced
Development
Awareness
Science
Sustainability
Circular Research
#ReduceReuseRecycle
Ecosystem

#NewMedia
#Onlife
Omnichannel
#CustomerExperience
Technology
Startups
#OpenInnovation

02.

The Digital

AI Digital
AR VR
Virtual
Platforms

The Driving Forces of
Innovation

03.

The People

Worklife
#EmployerBranding
#SocialImpact
Leadership
Business
NextGen

Support
#LocalCommunity
Activism
Collaboration
#Entrepreneurship
Ideas
Creativity

01.

Sustainability's Next Move?

THE FUTURE

The term “sustainability” is now largely considered as a blanket term. There is an **increasing demand for a more articulated and granular vocabulary to make the topic more specific and verifiable**. Sustainability is gaining new meanings: the principles of **regeneration and circularity** are paving the way for a net-positive future.

Sustainability's Next Move?

THE FUTURE

Regenerative Circularity | Macro Trend

MONITORED SINCE APR, 2020

Over the decades, **the term “sustainability”** has sparked quite **a lot of dissatisfaction** for being a blanket term.

A promising candidate set to replace “sustainability,” especially with regard to environmental discussions, is “regenerative.” But even more, **regenerative thinking is integrating circularity-driven approaches to build an environmentally responsible fabric stretching from agricultural infrastructure to consumption models.**

A new era of “Regenerative Circularity” is coming, where **restoration, resilience, and adaptation** will be used as values to guide a net-positive impact on the planet.

+18%

Predicted Growth
NEXT 6 MONTHS

Sustainability's Next Move?

THE FUTURE

Regenerative Circularity | Macro Trend

Top Industries

10% Agriculture&Agribusiness

8% Beauty&Cosmetics

8% Fashion & Accessories

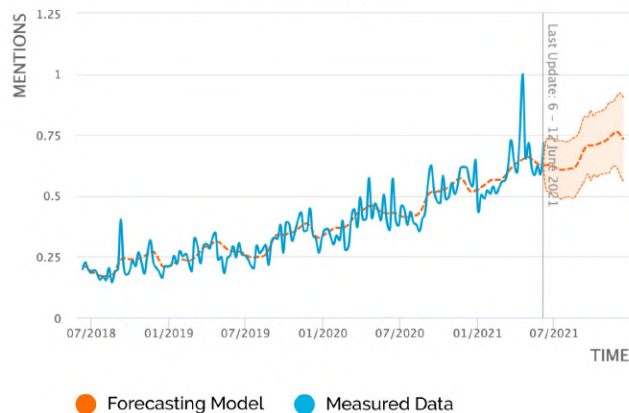
6% Packaging & Graphics

6% Craft

Main Tags



Timeline



Sustainability's Next Move?

THE FUTURE

Insights To Action

Regenerative

is predicted to steadily grow
(+32%)
over half a year

INSIGHT

Home and furniture design keep finding new outlets for **recycled and scrap materials**

INSIGHT

Interest in “ecosystem restoration” — one of the key strategies to tackle the climate crisis — **is on the rise**

INSIGHT

Creative reuse of by-products, waste materials and unwanted products keeps spreading in Fashion

INSIGHT

“Upcycling”, a new technique of making food using discarded ingredients, is gaining momentum

02.

Ready for the Metaverse?

THE DIGITAL

Tomorrow's internet will be **persistent, spatial and shared**, manifesting in gamified 3D virtual spaces **that will blur the boundaries between digital and physical worlds.**

Ready for the Metaverse?

Metaverse Worldbuilding | Macro Trend

MONITORED SINCE APR, 2021

Often described as the Next Internet, **metaverse** — a combination of the prefix “meta” (meaning beyond) and “universe” is in its genesis. **Some of the metaverse’s main ingredients currently exist**, such as ubiquitous networking, cryptocurrencies, and VR and AR technologies.

In this shared and **persistent 3D virtual spaces that seamlessly blend into the physical world**, consumers’ relationship with the digital world is set to change — opening the gates for a whole set of **opportunities for businesses to attract and engage with customers.**

+17%

Predicted Growth
NEXT 6 MONTHS

Ready for the Metaverse?

THE DIGITAL

Metaverse Worldbuilding | Macro Trend

Top Demographics

Millennials



Gen z



Gender Expression

Male / Masculine



Female / Feminine



Top Interests & Lifestyles

Tech Geeks



Art Lovers



Top Values

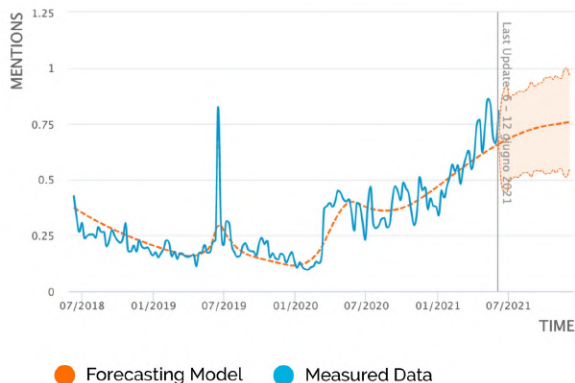
Ecoconscious



Experimenters



Timeline



Ready for the Metaverse?

THE DIGITAL

Insights To Action

Metaverse

is predicted to steadily grow
(+57%)
over half a year

Crypto

is predicted to steadily grow
(+48%)
over half a year

INSIGHT

Retailers are experimenting with **gamification & enhanced media** to reach consumers

INSIGHT

Social VR app “VRChat” — which lets VR and non-VR users connect to chat and explore worlds — **has surged in popularity amidst the pandemic**

INSIGHT

Gen Zers are driving the rise in the **collectibles market**

INSIGHT

NFT has been reheating the **desire of owning things, especially digital objects**

03.

Who's Shaping The Future?

THE PEOPLE

The future is an intergenerational matter, and will be shaped by a **constant exchange between older and younger generations**. But, **Gen Zers** are having a crucial role in it: they **want to change the status quo and are not afraid to speak up**.

Who's shaping the Future?

Loud Generation | Macro Trend

MONITORED SINCE JUL, 2020

Gen Zers are digital natives who easily navigate and cross-reference the many online sources of information and are not afraid to speak out or take action.

The digital world is where they **not only raise their voices to change the status quo** but also where they **feel free to express themselves, and to be creative and bold.**

Ready to start and lead their own projects, and even businesses, they are vocal about their aspirations and are taking the matter into their hands.

+25%

Predicted Growth
NEXT 6 MONTHS



NEXTATLAS

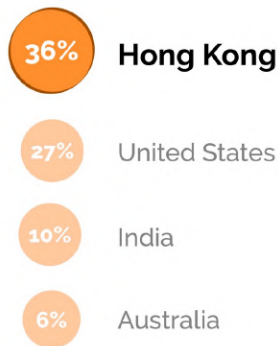


Who's Shaping the Future?

THE PEOPLE

Loud Generation | Macro Trend

Top Countries



Gender Expression

Female / Feminine



Male / Masculine



Top Values

Tech Geeks



Health Conscious



Main Tags



Who's Shaping the Future?

THE PEOPLE

Insights To Action

Contentcreators

is predicted to steadily grow
(+52%)
over half a year

Entrepreneurial

is predicted to steadily grow
(+29%)
over half a year

INSIGHT

The “**Passion Economy**”, creatives using digital platforms to **monetize their unique skills**, has been **accelerated by the coronavirus crisis**

INSIGHT

Everybody's trying to **make money with content** creators, **cryptocurrencies** are the **hip way** to do it

INSIGHT

Young Workers response to future **economic uncertainty is learning and improving skills**

INSIGHT

Mentorship is emerging as an **effective way to re-connect** people from **different generations**

Talks With Top Industry Leaders

yamamay



GAME CHANGERS

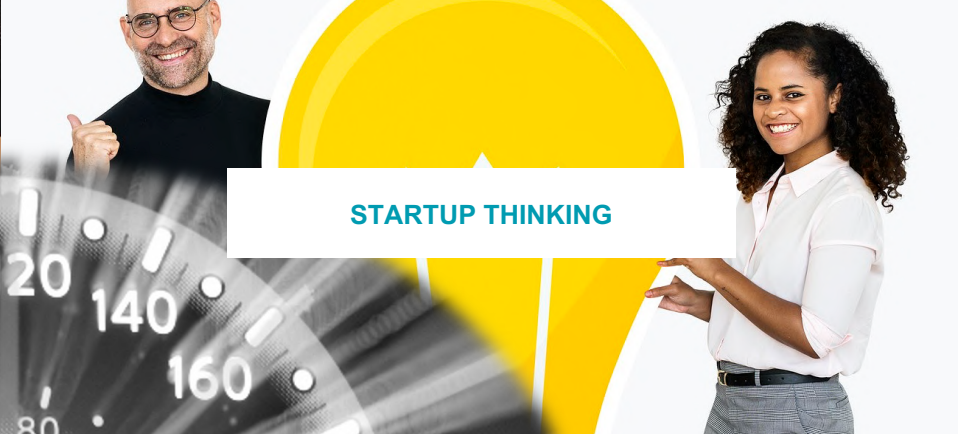


Innovate Your Innovation

So What Now?

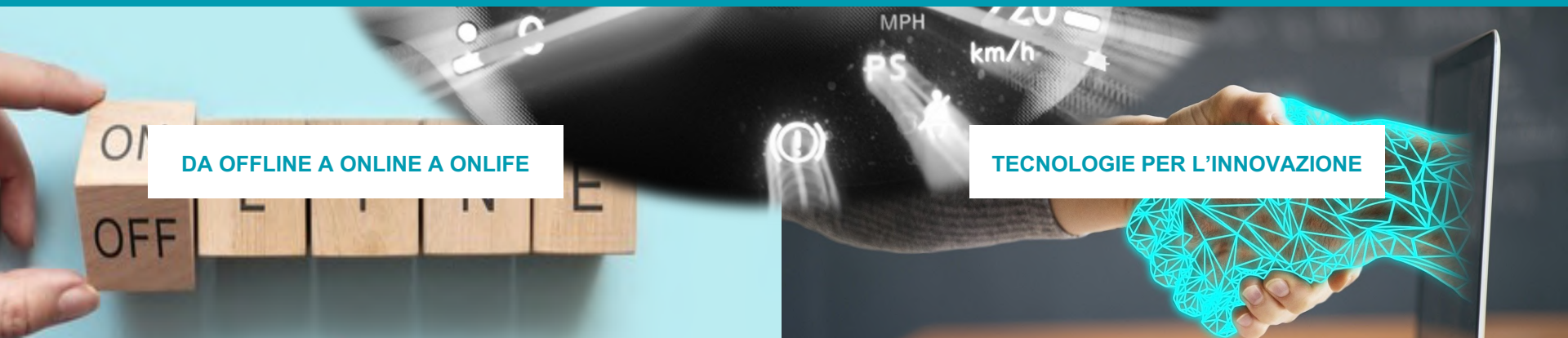


PERSONE NON CONSUMATORI



STARTUP THINKING

Nuovo processo e idea di innovazione



DA OFFLINE A ONLINE A ONLIFE

TECNOLOGIE PER L'INNOVAZIONE

E' arrivato il momento di cambiare

94%

of global executives
are dissatisfied
with their organization's
innovation performance



85%

of new launches fail
the first year of their
marketing lifecycle

“

We innovate by starting with the customer and working backwards. That becomes the touchstone for how we invent.

Jeff Bezos, CEO Amazon

”

Per adeguarsi ai cambiamenti in atto e attivare un processo di innovazione efficace bisogna considerare due componenti

ESTERNA

Cambiare la Prospettiva



Human centric

INTERNA

Ridiscutere il processo



Inclusive & Agile

Partire dal punto di vista delle persone e dai loro bisogni...



Marketing



INTENZIONE
D'ACQUISTO

CATEGORIE
PRE-DEFINITE

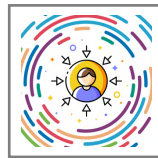
Persone



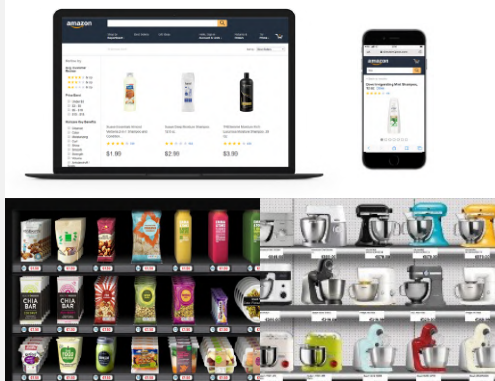
RELEVANCE
EXPENSIVENESS
DIFFERENTIATION

COMPETITIVE SET
INDIVIDUALE

...e comprendere a fondo i loro processi decisionali



Realismo e osservazione



Engagement



Un processo interno agile e accessibile senza compromessi



AGILITÀ



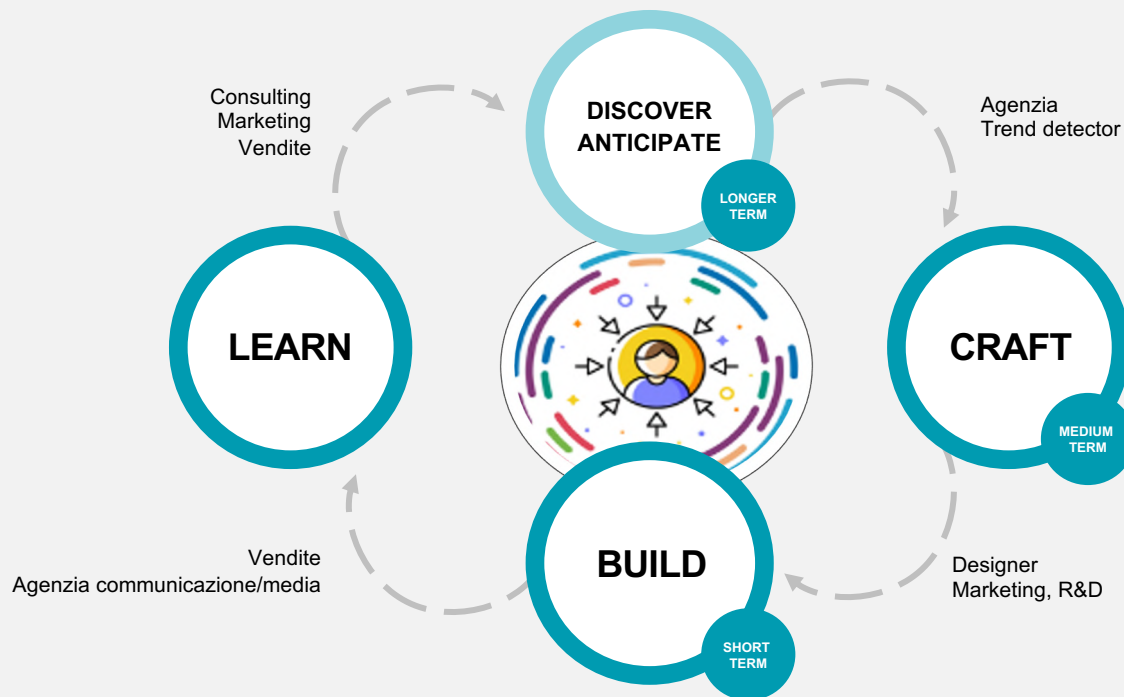
ACCESSIBILITÀ



SICUREZZA



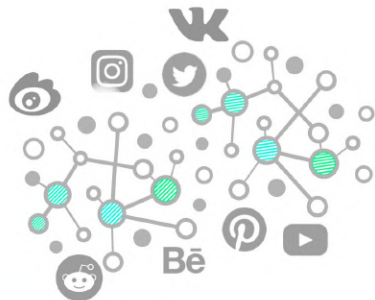
Co-create un nuovo Framework di innovazione



*“ Without data, you're just
another person with an opinion. ”*

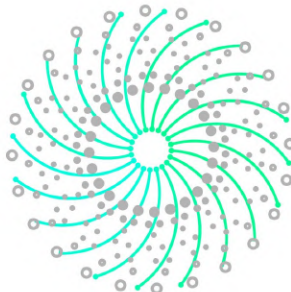
— W. Edwards Deming

Observe. Predict. React.



Data Source
Smarter

Nextatlas scouts and analyses the data of **industry specific innovators** and **early adopters** across multiple **social-web sources**.



Data Analysis
Faster

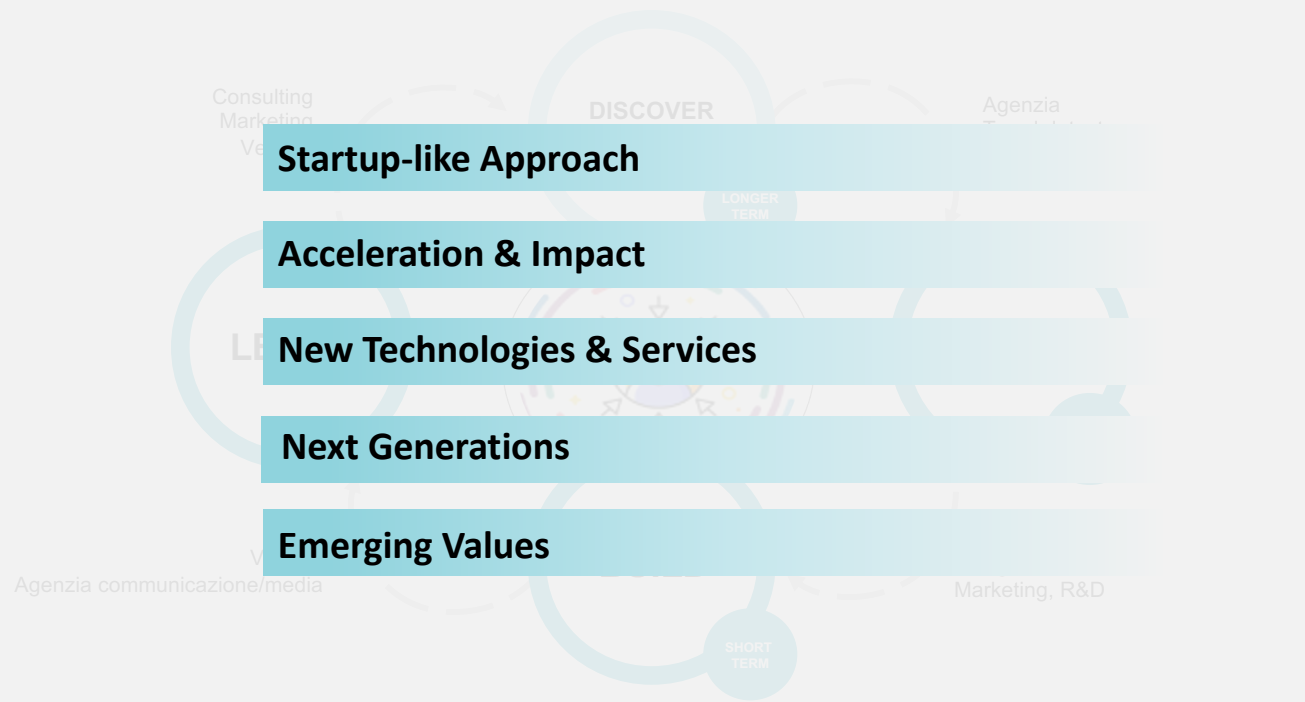
Nextatlas applies **AI and Machine learning** to **Content and Visual Analysis** to generate **automated insights** that are further enhanced with **expert curation**.



Foresight
Better

Nextatlas **predicts patterns and behavioural shifts** and visualizes **trends and insights** in easy to use formats.

“Future Proof” Innovation



Startup-like Approach

Acceleration & Impact

New Technologies & Services

Next Generations

Emerging Values

Q&A Session



INNOVATE YOUR INNOVATION



David Bedarida

Head of Innovation
| Ipsos

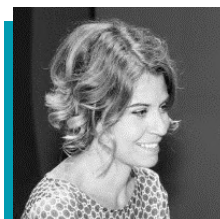
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