


# THE WORLD AT HOME

KEYS – A WEBINAR SERIES BY IPSOS

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10<sup>th</sup> June 2021



THE WORLD AT HOME

KEYS – A WEBINAR SERIES BY IPSOS

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GAME CHANGERS Ipsos

Watch the recording [here](#)

GAME CHANGERS



# AGENDA

## INTRODUCTION

Jennifer Hubber

Head of Ipsos Global Client Organisation

## THE NEW ROUTINES?

Simon Atkinson

Chief Knowledge Officer, Ipsos

## BUYING FROM HOME

Supriya Chabria

Global Lead, Digital Innovation, Ipsos

## ENTERTAINMENT AT HOME

Matt Carmichael

Vice President, Editorial Strategy, Ipsos in North America

## SPOTLIGHT ON MENA: WHAT'S COOKING?

Nabanita Mukherjee

Service Line Leader, Qualitative, Ipsos GCC

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# KEYS WEBINAR 10 JUNE 2021: RESOURCES



**WHAT WORRIES THE WORLD**  
[Download](#) the May results



**THE FUTURE OF WORK**  
by Ben Page & UK team  
[Watch](#) the analysis



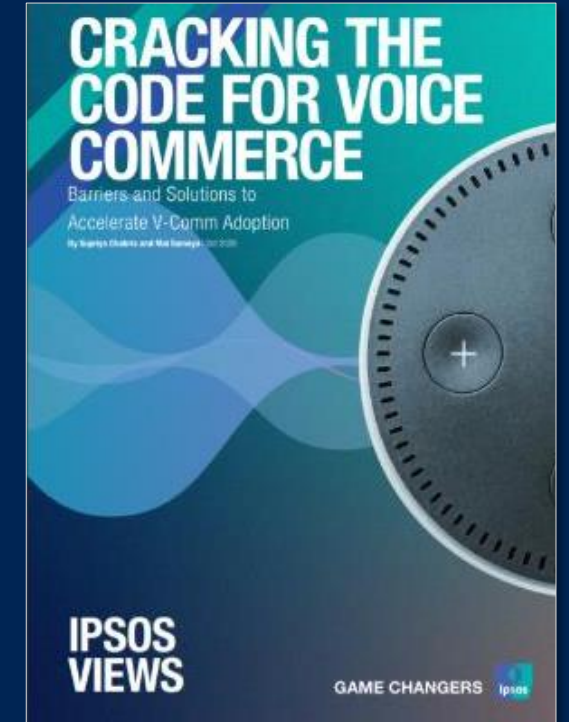
**IPSOS UPDATE**  
Explore our monthly selection of latest Ipsos releases [here](#)



**THE FUTURE OF ENTERTAINMENT IN THE US**  
by Matt Carmichael & team  
Online [here](#)  
[Download](#) the report



**PRODUCT SUBSCRIPTIONS WHITE PAPER**  
by Supriya Chabria  
[Download](#) the POV



**VOICE COMMERCE WHITE PAPER**  
by Supriya Chabria  
[Download](#) the white paper



# THE NEW ROUTINES?

**KEYS – A WEBINAR SERIES BY IPSOS**

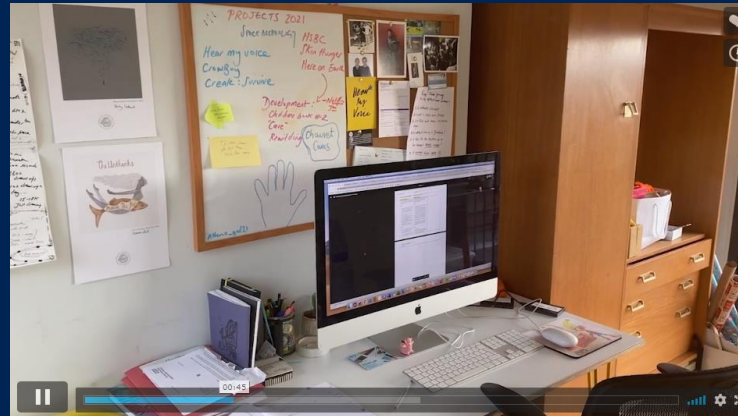
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**Simon Atkinson**  
Chief Knowledge Officer

**GAME CHANGERS**



# THE NEW ROUTINES?



The current context:  
*Where are we now?*

The last 18 months:  
*Different realities*

The next phase:  
*Opening up?*



# The current context: What Worries the World?



## Covid #1 concern

May 2020

71%

May 2021

42%

**“Global consumer confidence up  
for the eighth month in a row”**

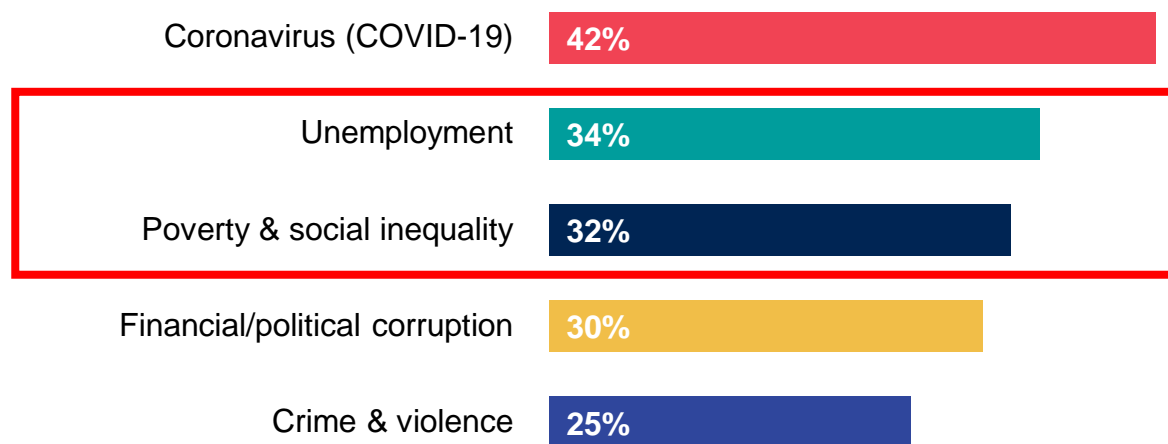
*(But still below pre-pandemic level)*

# What Worries the World?

## The big issues haven't gone away

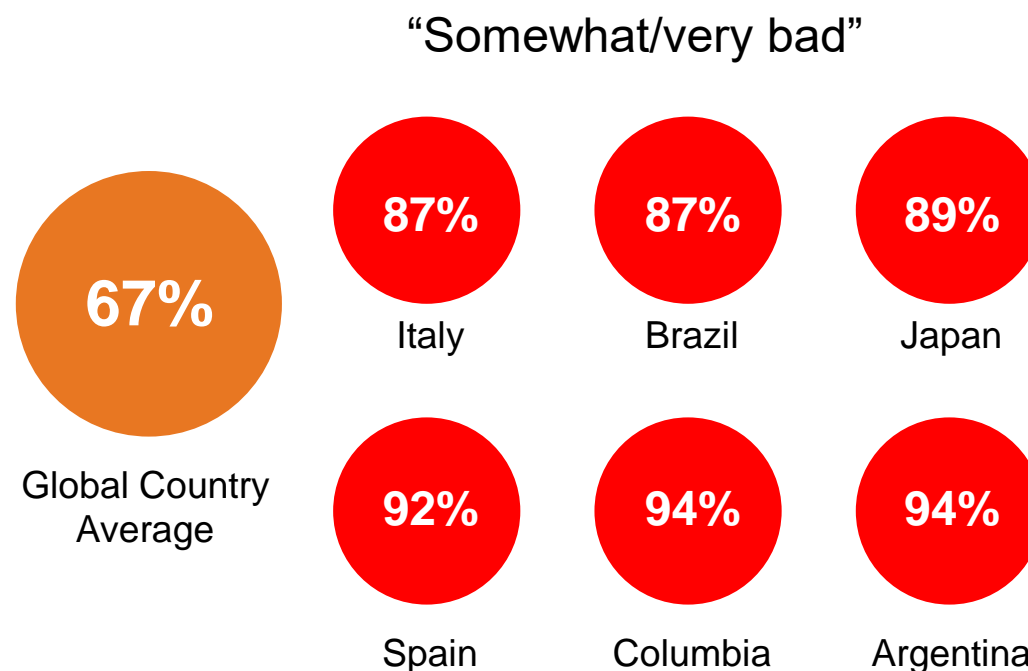
Q

Which three of the following topics do you find the **most worrying** in your country?



Q

How would you describe the current **economic situation** in your country?



**Base:** Representative sample of 19,070 adults aged 16-74 in 28 participating countries, April 23<sup>rd</sup> – May 7<sup>th</sup> 2021.

**Source:** Ipsos Global Advisor. *Global score is a Global Country Average. See methodology for details.*

Consumer Confidence results [here](#); What Worries the World [here](#)

# A multi-dimensional crisis

**“Very/fairly concerned”**

**I will be able to pay my bills**

**64%**

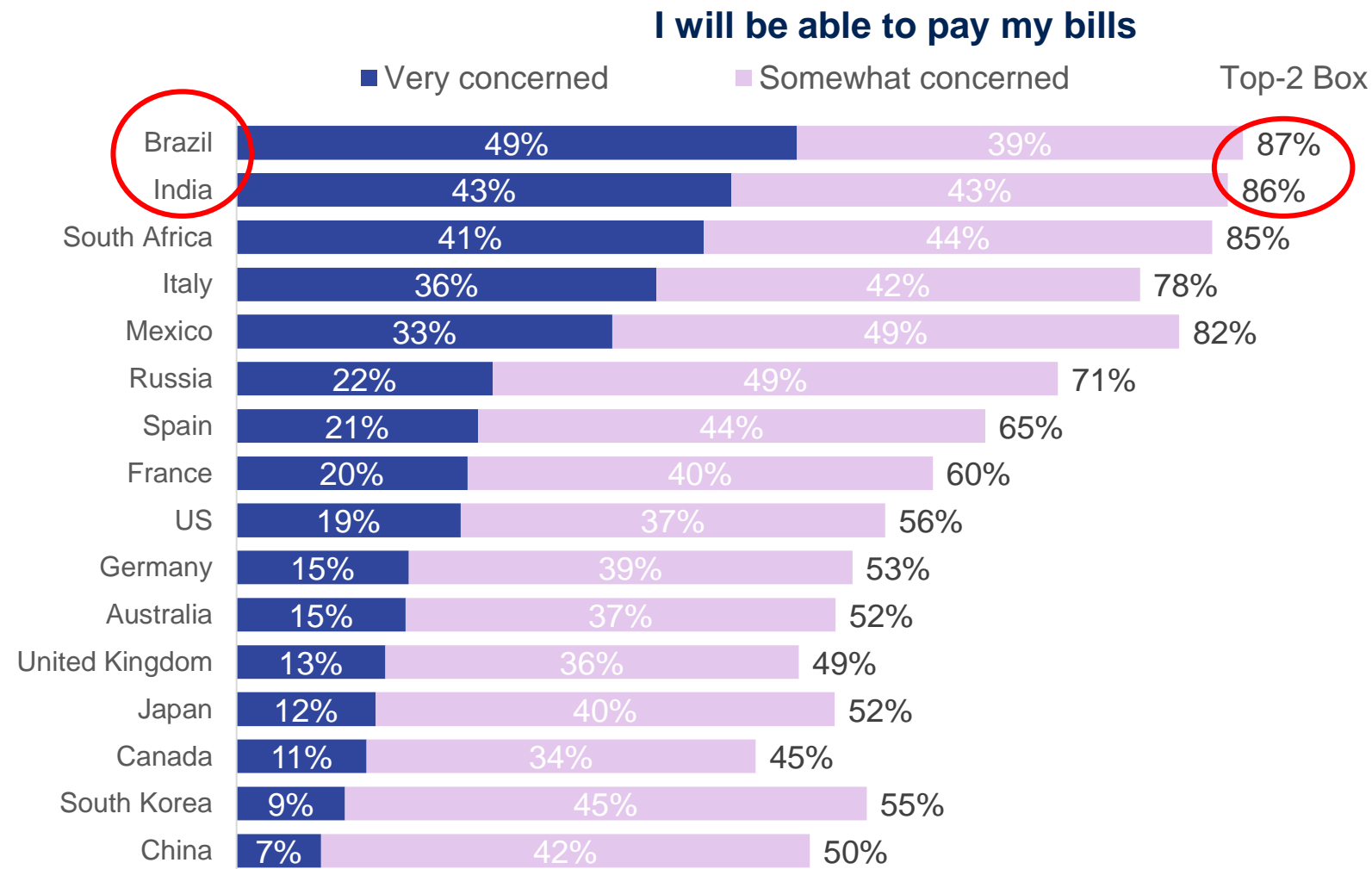
**I will be diagnosed with Covid-19**

**67%**

Q: Thinking ahead to one month from now, how concerned are you about each of the following?  
Base: Global Country Average:14498, AU:1000, BR:1000, CA:1000, CN:1000, FR:1000,  
DE:998, IN:1000, IT:1000, JP:1000, MX:500, RU:500, ZA:500, SK:1000, ES:1000, UK:1000,  
US:1000. Source:: Ipsos Essentials survey, May 20-23

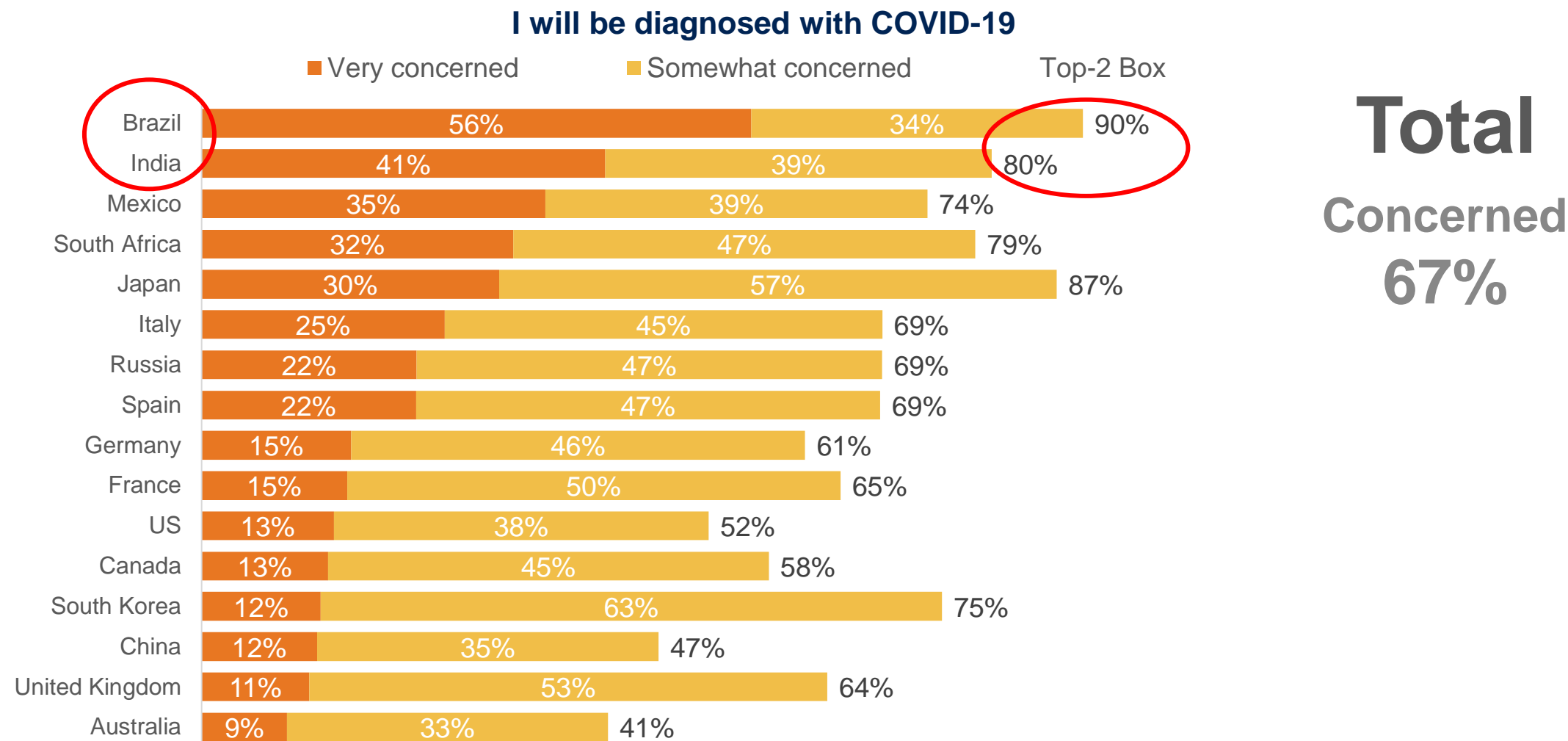


# Concern for ability to pay bills by country



Total  
Concerned  
64%

# Concern for being diagnosed with COVID by country



Q: Thinking ahead to one month from now, how concerned are you about each of the following?  
Base: 10 Global Country Average:13392, AU:975, BR:818, CA:974, CN:995, FR:884, DE:936, IN:835, IT:934, JP:992, MX:427, RU:437, ZA:454, SK:985, ES:923, UK:934, US:889

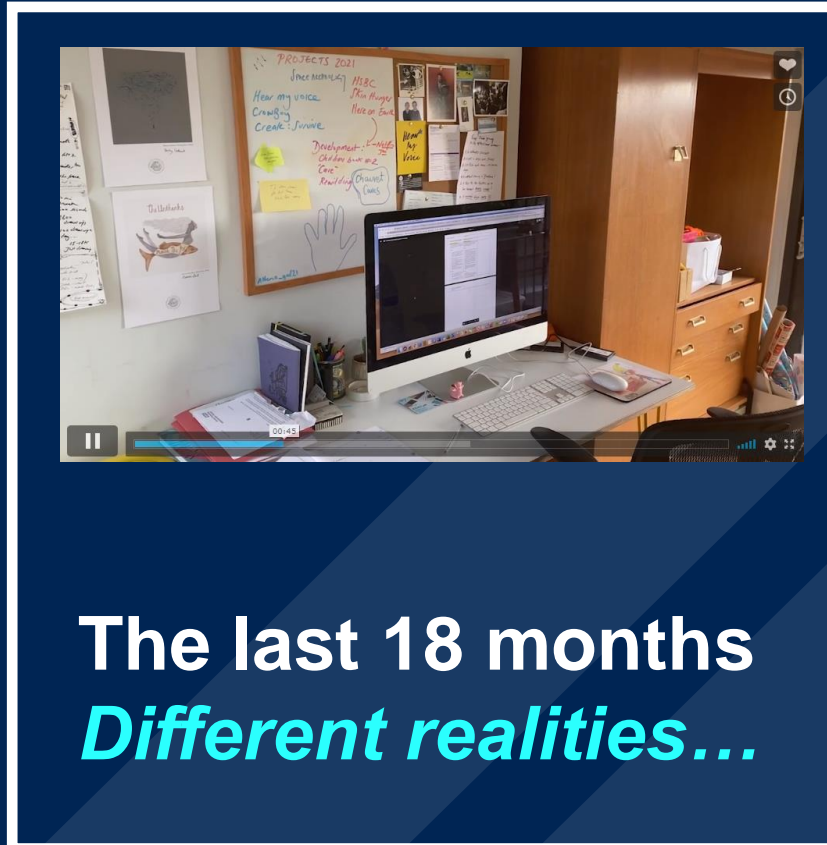




# THE NEW ROUTINES?



The current context:  
*Where are we now?*

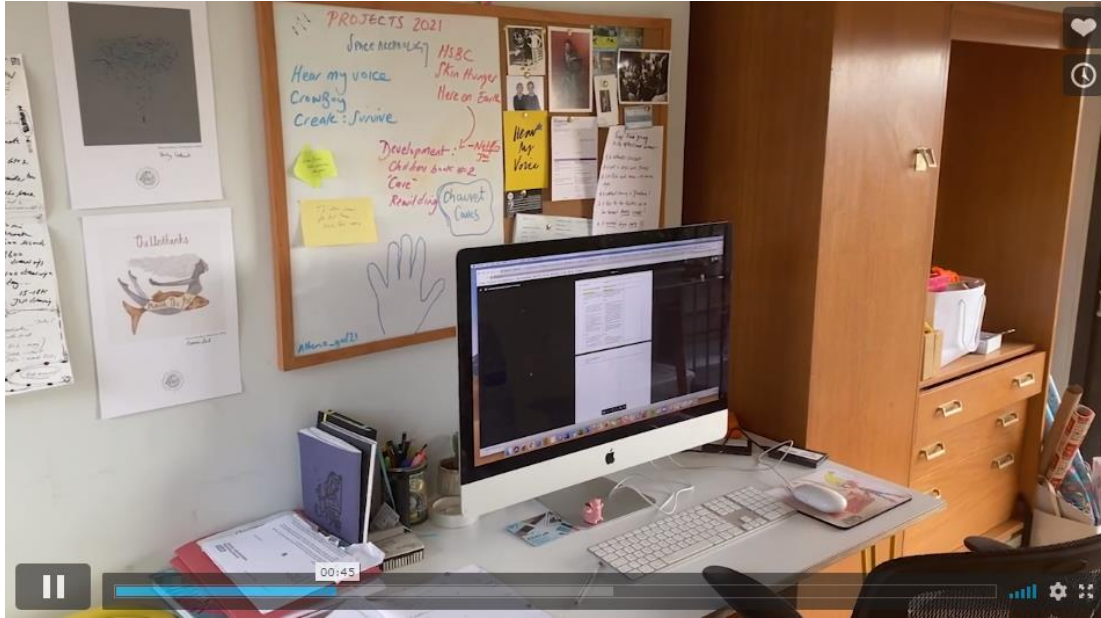


The last 18 months  
*Different realities...*



The next phase:  
*Opening up?*

# THE LAST 18 MONTHS



## Different Realities

Contact [ethnography@ipsos.com](mailto:ethnography@ipsos.com) for further information



# THE NEXT PHASE



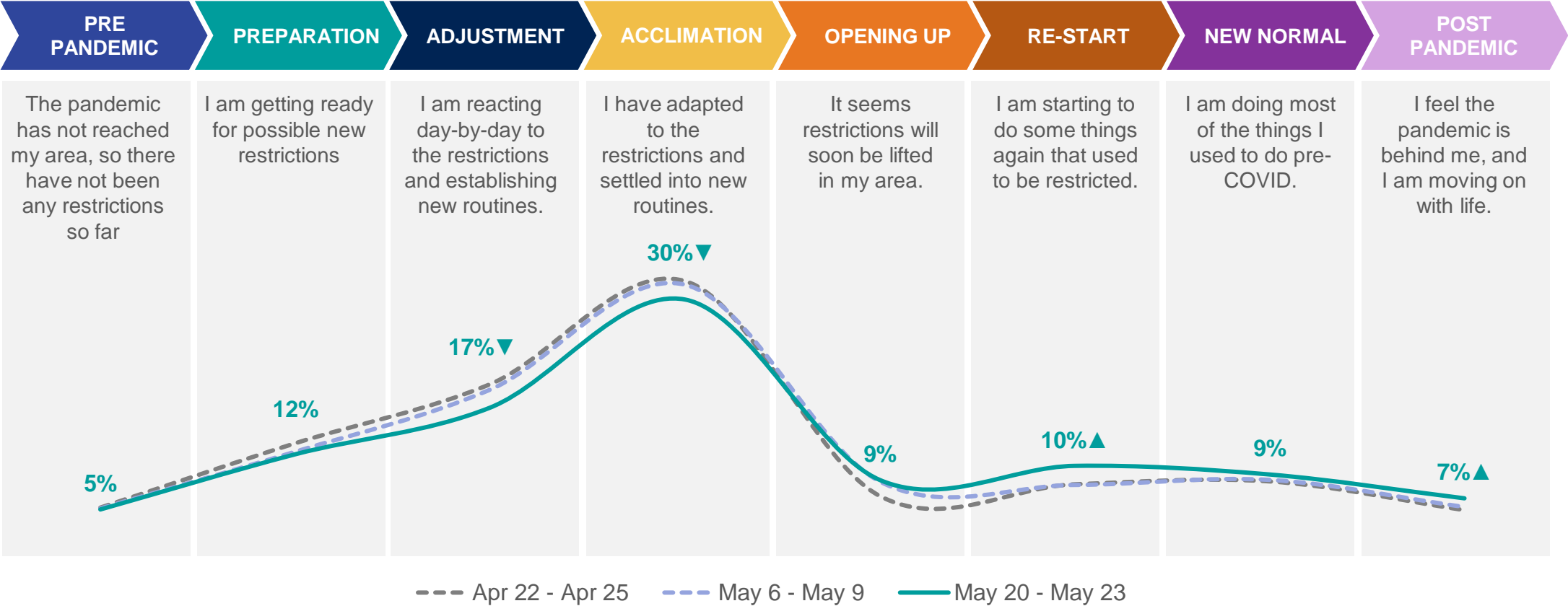
**May results**  
**16 countries**

*For further information, please  
contact our Essentials team at  
[Essentials@ipsos.com](mailto:Essentials@ipsos.com)*



# The Pandemic Recovery Curve: self-assessments (16 countries)

“Which one of the following phases do you feel best describes your current situation regarding the COVID-19 pandemic?”

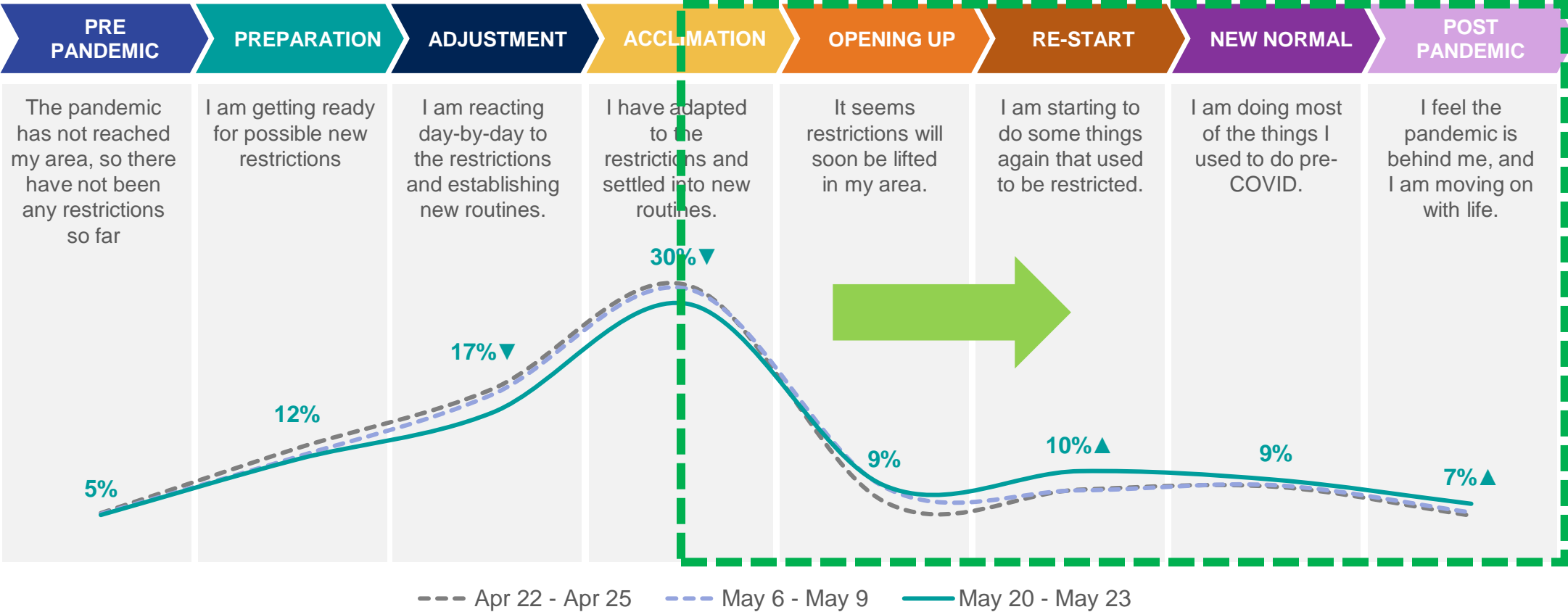


Q. Which one of the following phases do you feel best describes your current situation regarding the COVID-19 pandemic?  
Base: Apr 22 - Apr 25: 14507, May 6 - May 9: 14506, **May 20 - May 23: 14498**  
▼ or ▲ indicate change vs. previous wave (statistically significant @ 95% C.I.)



# Globally, there has been a shift to restarting over the past month

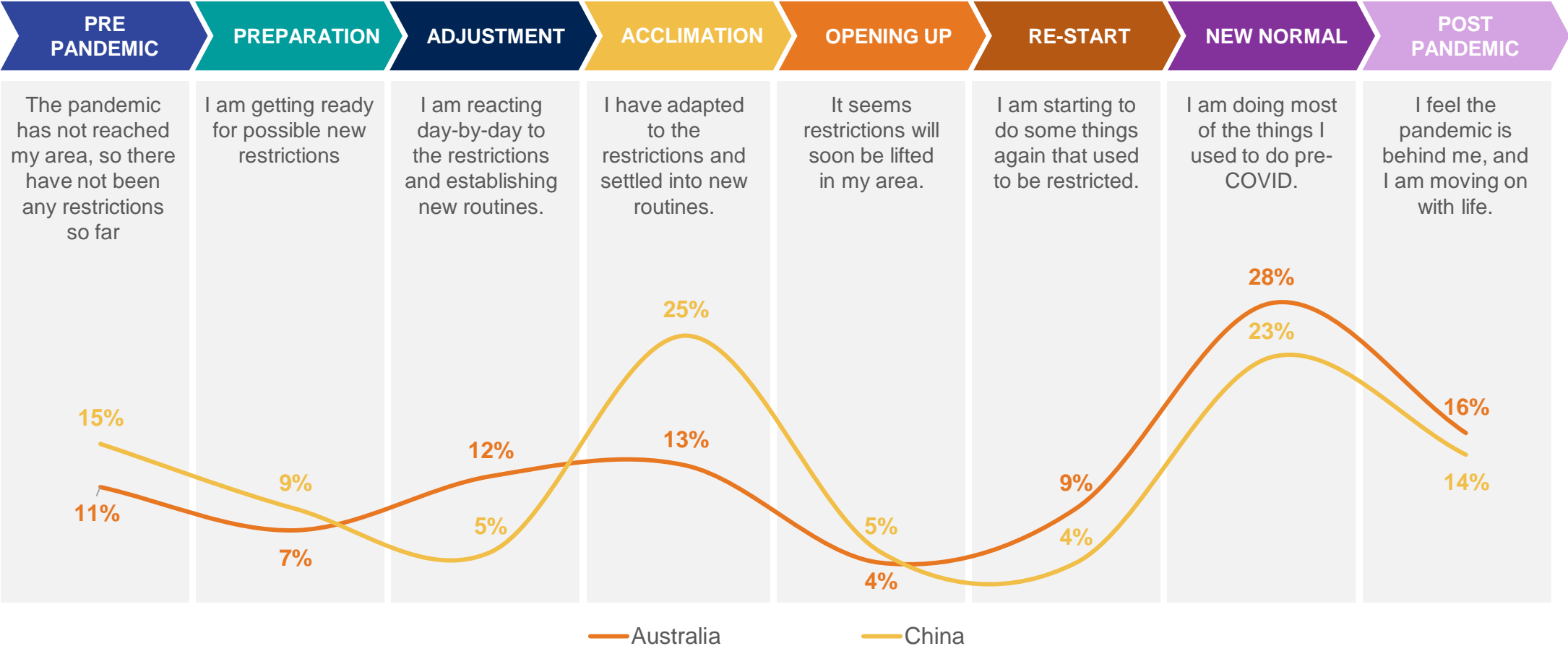
“Which one of the following phases do you feel best describes your current situation regarding the COVID-19 pandemic?”



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Base: Apr 22 - Apr 25: 14507, May 6 - May 9: 14506, **May 20 - May 23: 14498**  
▼ or ▲ indicate change vs. previous wave (statistically significant @ 95% C.I.)

# Australia and China have successfully controlled the spread of the virus which has allowed many citizens to live ‘normally’ for some time

Phases by Country: Australia and China

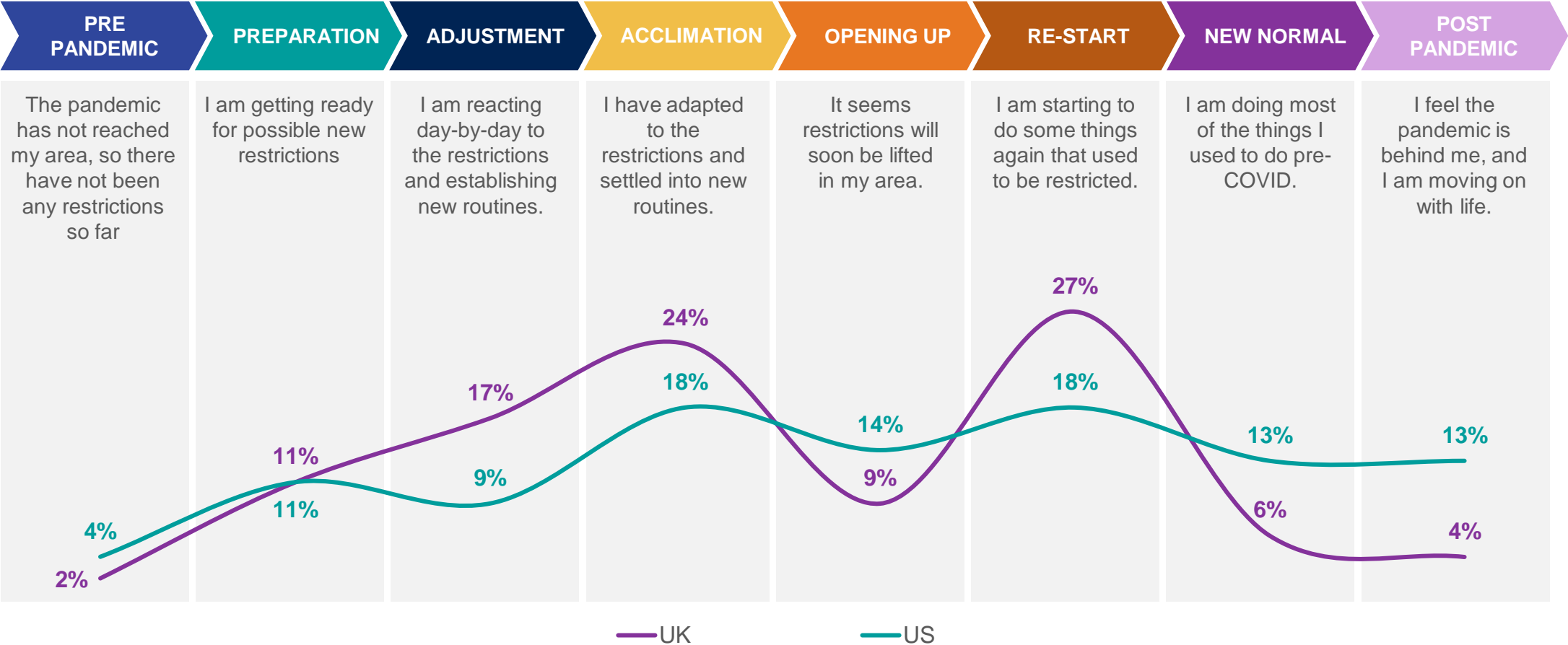


Base: Australia: 1000 China: 1000



# The US and UK are following suit, edging closer to ‘normality’

Phases by Country: The UK and US



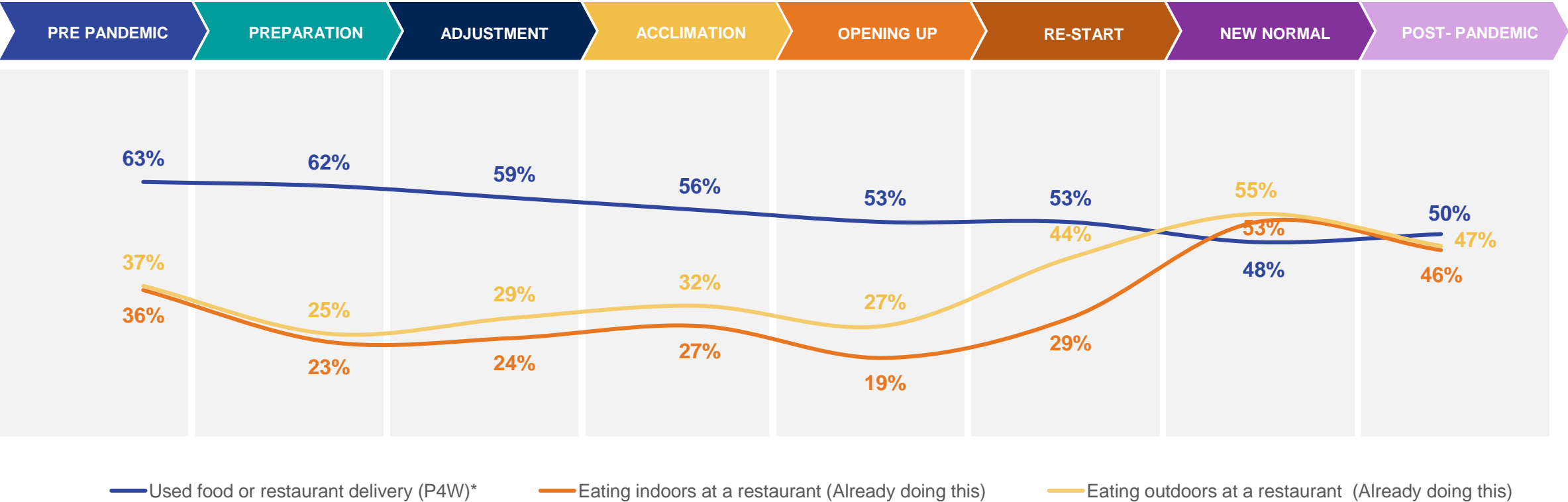
Base: UK: 1000 US: 1000





# Restaurants show signs of recovery; delivery is likely to continue

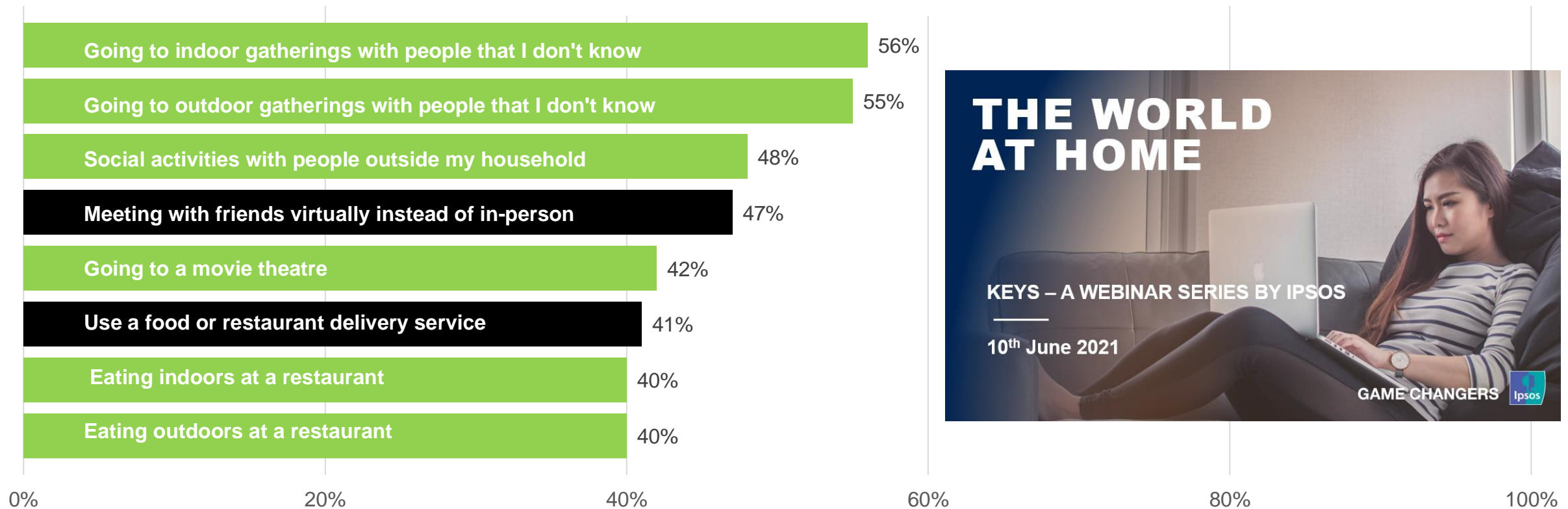
Phases: Past 4 Week Food Delivery Usage and Participation in Dining at a Restaurant  
(% Past 4 Weeks, % Already Doing This)



# A fluid situation; many still concerned about doing what they did before

***“I would personally prefer to avoid this activity in the future”***

(Top-2 Box Agreement)



Q: (T2B Summary) Based on what you know today, to what extent do you agree with the following statements about this activity?

Base: Varies by activity

# HOW WE BUY

## KEYS – A WEBINAR SERIES BY IPSOS

**Supriya Chabria**  
Global Lead, Digital Innovation

**GAME CHANGERS**





# BUYING FROM HOME

Supriya Chabria

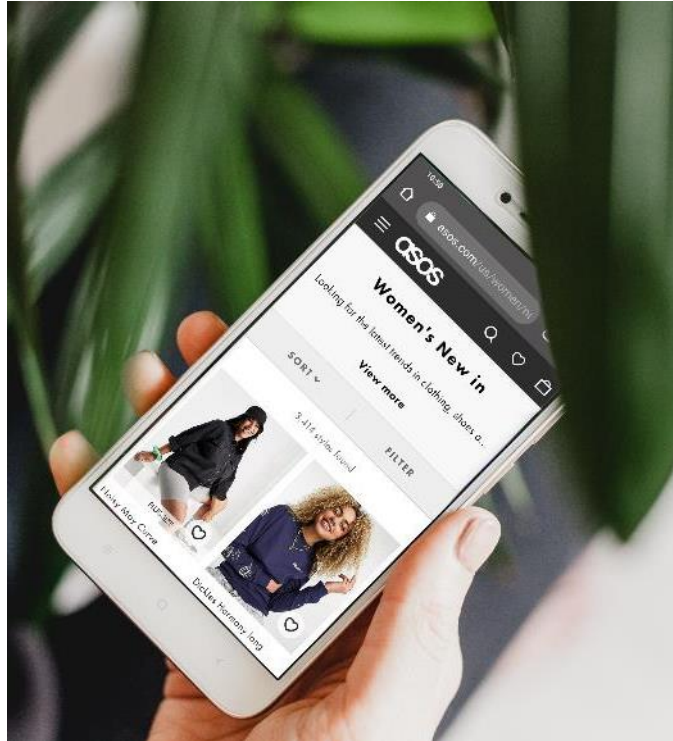
Global Lead, Digital Innovation

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# A Window of Opportunity for New Ways of Buying...



**Mobile Commerce  
(M-Comm)**



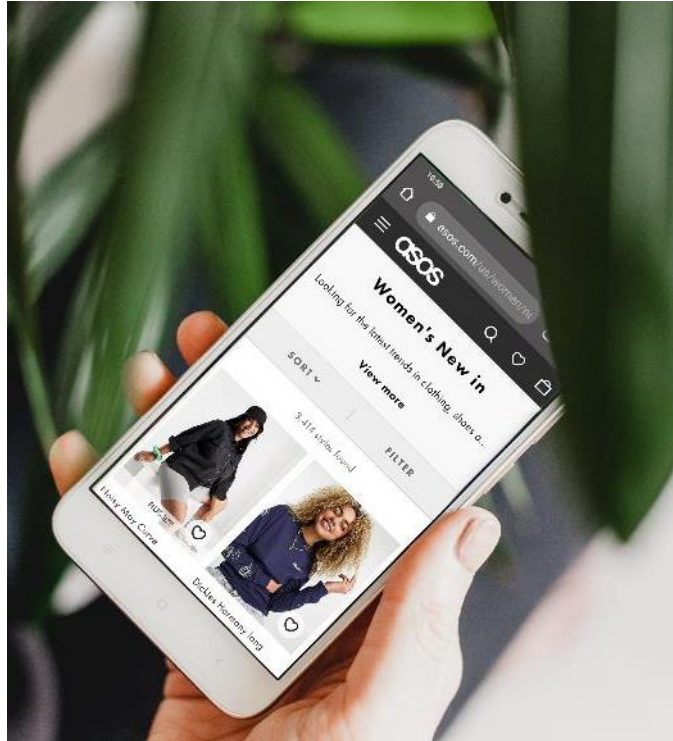
**Product  
Subscriptions**



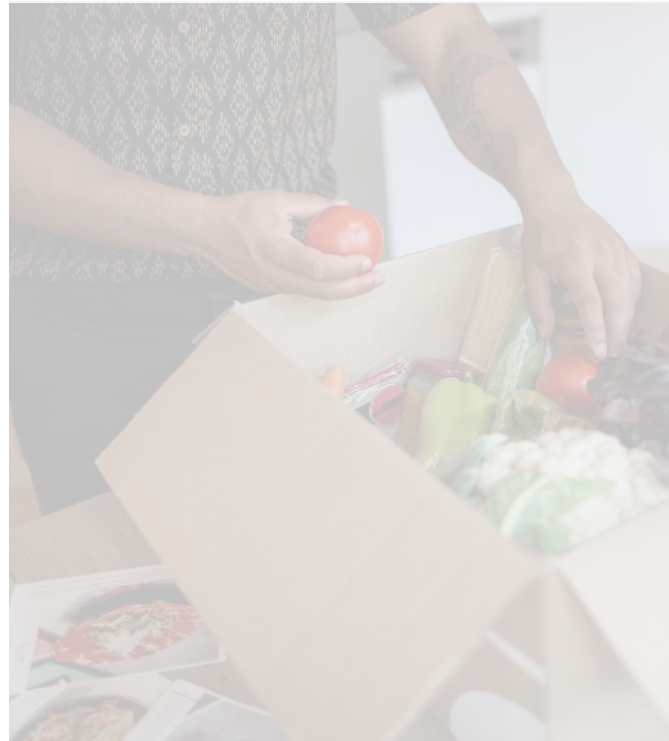
**Voice Commerce  
(V-Comm)**



# A Window of Opportunity for New Ways of Buying...



**Mobile Commerce  
(M-Comm)**



**Product  
Subscriptions**



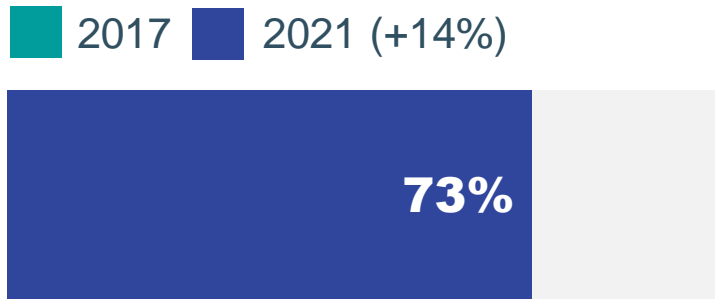
**Voice Commerce  
(V-Comm)**



# Mobile Commerce – Here to Stay!



Global share of M-Commerce  
within E-Commerce



Source: <https://www.statista.com/statistics/806336/mobile-retail-commerce-share-worldwide/>

The question is **not if** you should play,  
it's **how** you should play!

## Too many players

Gain and sustain attention

## Strong giants – Amazon!

Independent app or list on e-comm?

## Unforgiving audience

Make it a memorable experience



# Memorable & Personalized Experiences Stick

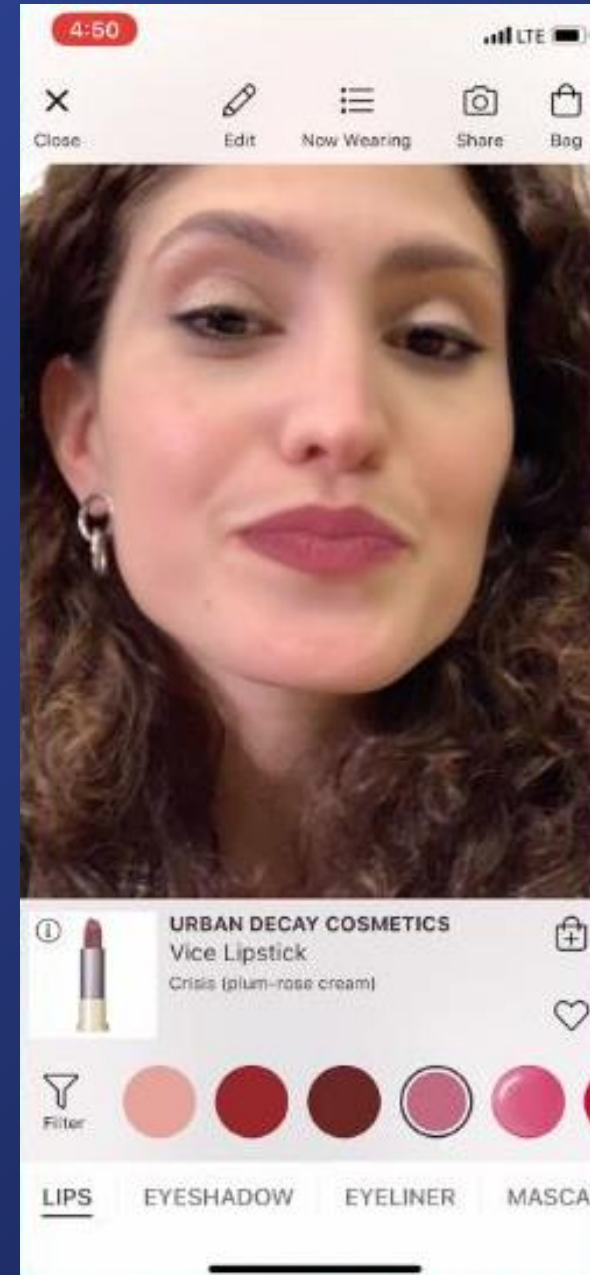
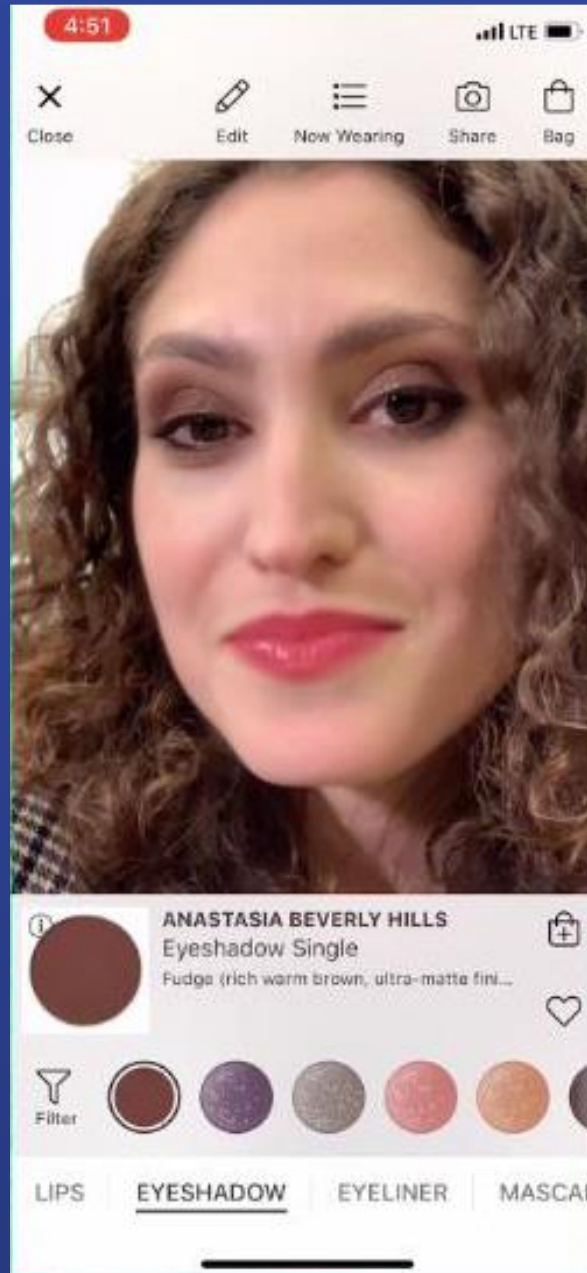






## The Endowment Effect

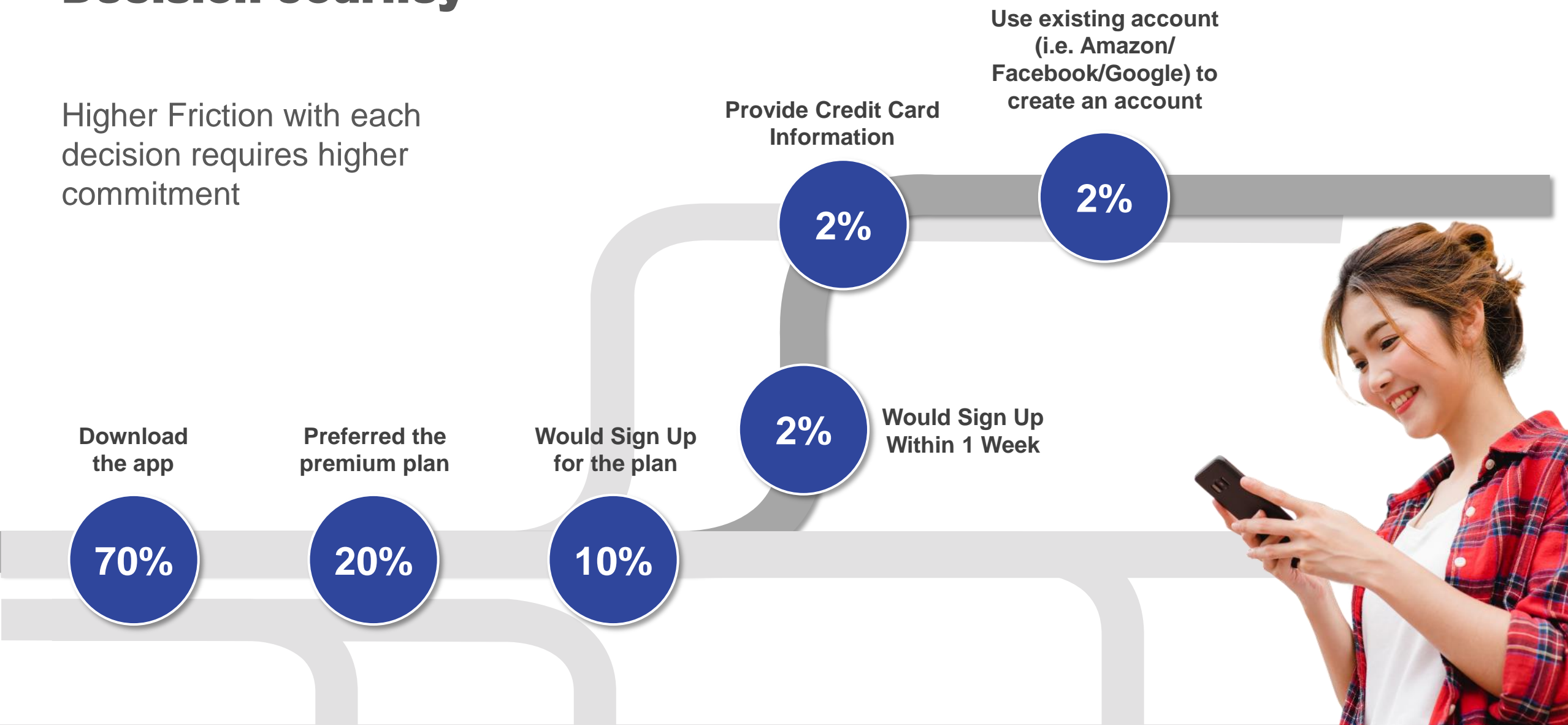
*“People are more likely to purchase an item when they feel ownership over it than when they feel like they have no ownership.”*



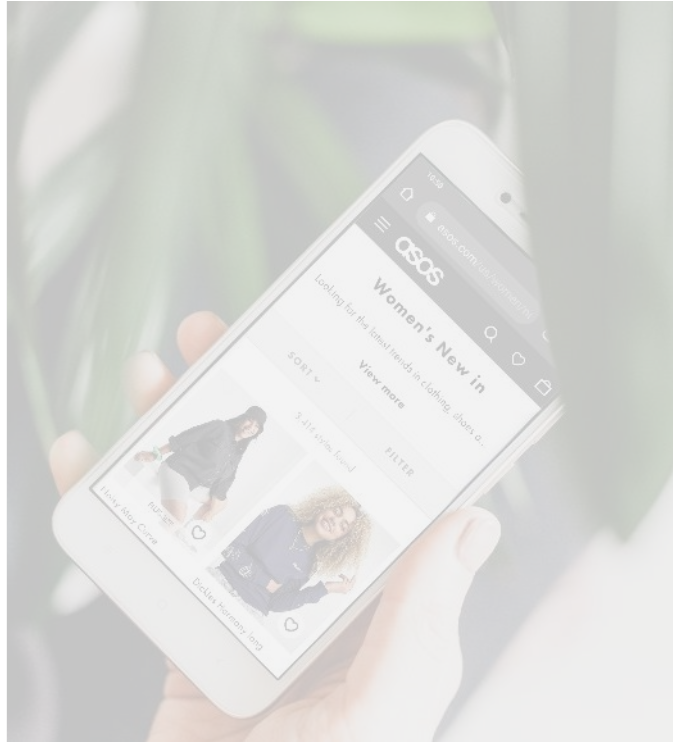


# Decision Journey

Higher Friction with each decision requires higher commitment



# A Window of Opportunity for New Ways of Buying...



**Mobile Commerce  
(M-Comm)**



**Product  
Subscriptions**

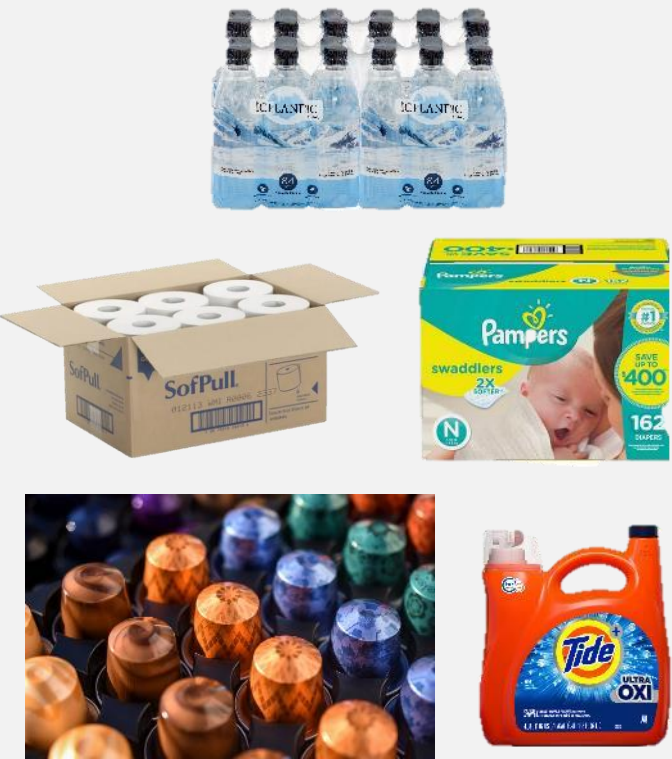


**Voice Commerce  
(V-Comm)**

# Product Subscriptions – 2 Types

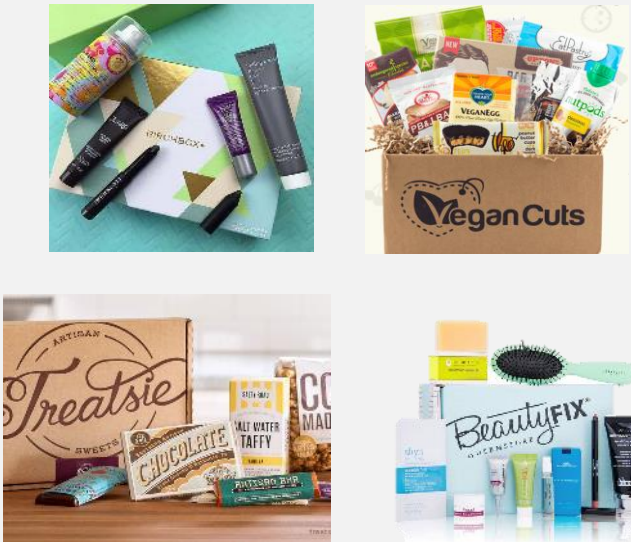
## Replenishment –

Recurring order of the same product

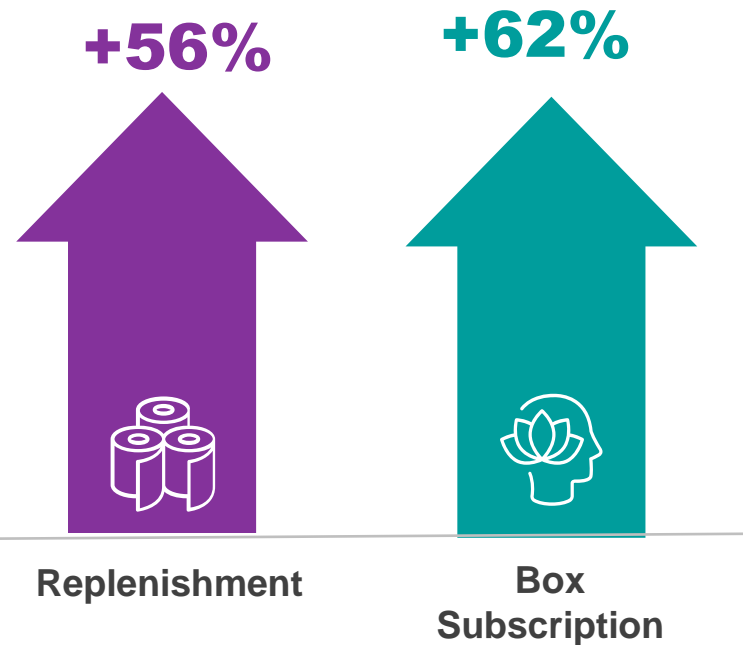


## Box Subscriptions –

A new Variety in each box



*Usage of both replenishment and subscription boxes rose since the start of the pandemic*

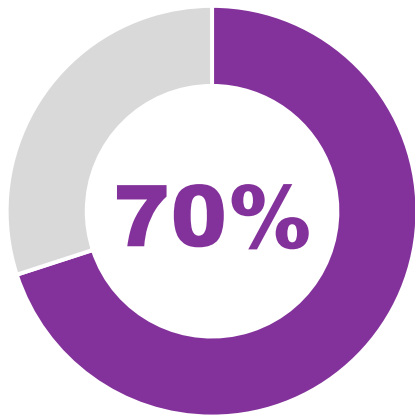


Source: Ipsos survey among 1,000 respondents in the US, Jan 2021

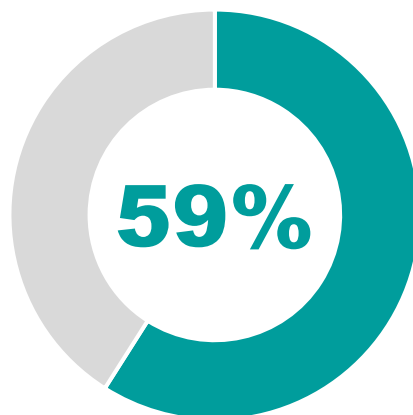
# Convenience – The Need of the Hour

*Convenience is the most important factor for consumers in choosing subscription models*

% Agree



Replenishment



Box Subscription

Source: Ipsos survey among 1,000 respondents in the US, Jan 2021



As restrictions lift,



**Less emphasis on convenience for some categories**

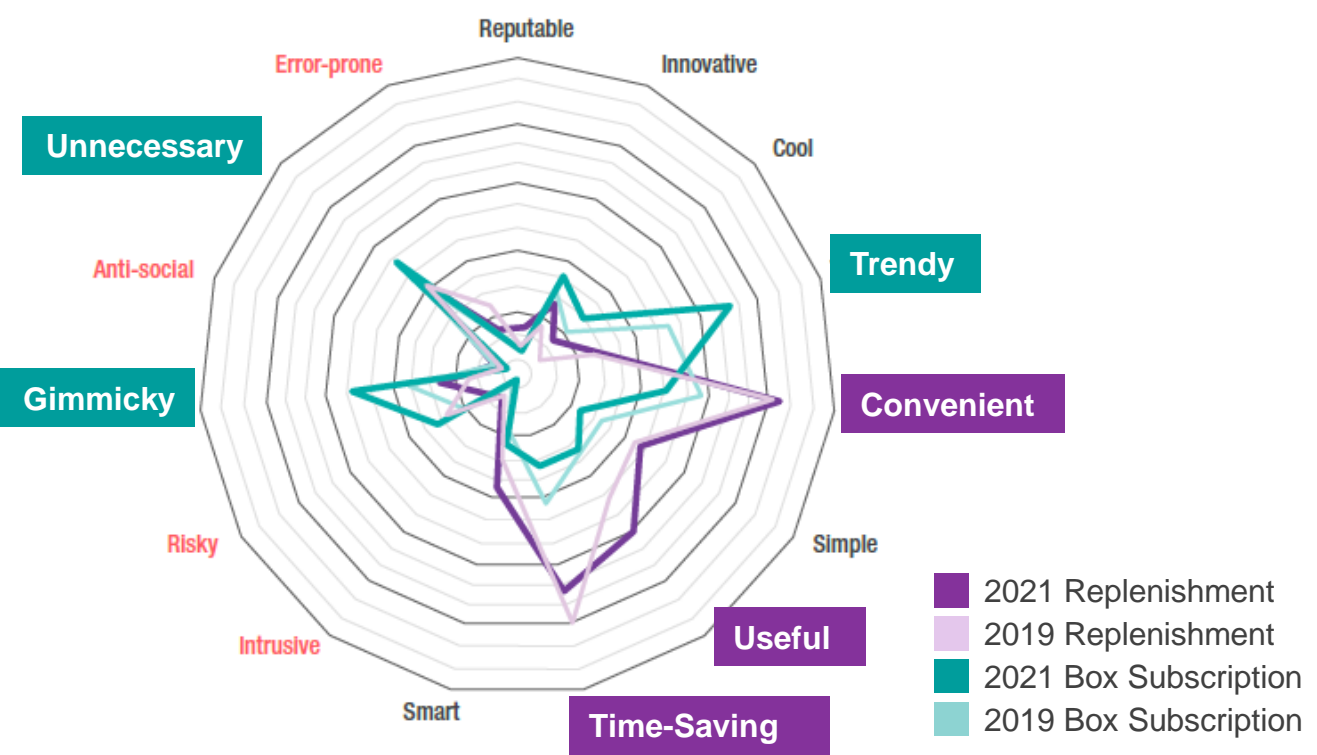


**More emphasis on the overall experience of shopping for variety**



# Box Subscriptions Continue to be Seen as Trendy

Adjectives used to describe subscription services



Source: Ipsos survey among 1,000 respondents in the US, Jan 2021

# Replenishment – Here to stay!

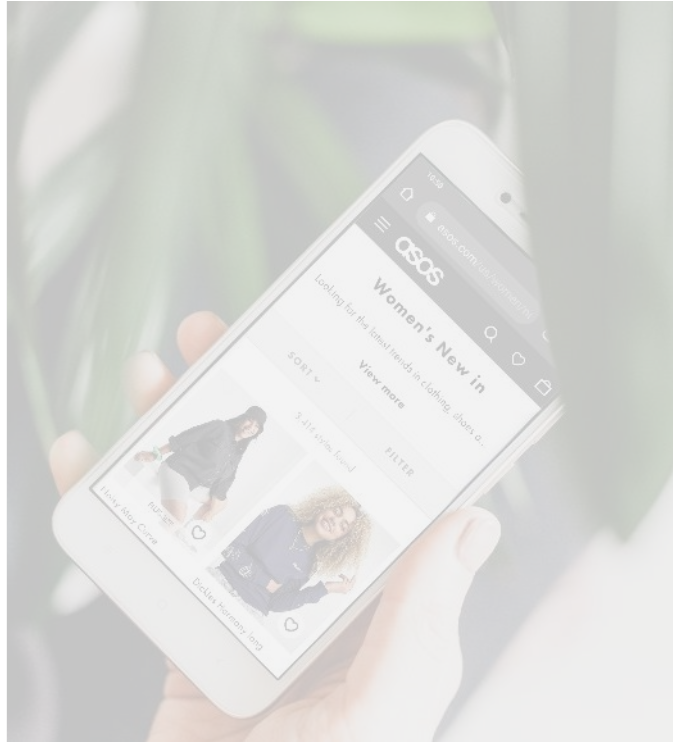


  
**25-45%** of category sales for fast moving products

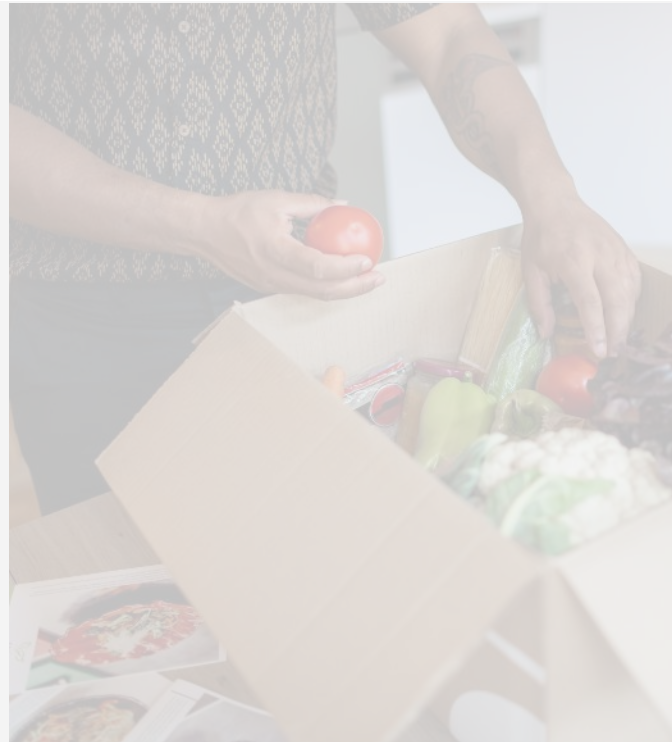
  
 Subscribers' worth **2-2.5X** the value of an average customer

Source: WARC, Are subscription services really the holy grail of e-comm?, May 2021

# A Window of Opportunity for New Ways of Buying...



**Mobile Commerce  
(M-Comm)**



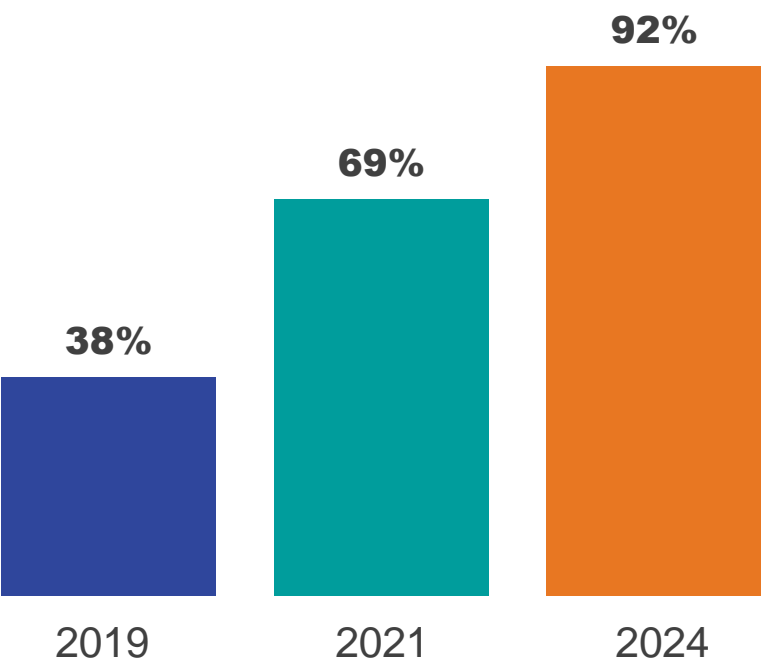
**Product  
Subscriptions**



**Voice Commerce  
(V-Comm)**

# Voice Commerce – Expected to be a way of life

*Help me make retail purchases*



Source: Ipsos survey among 1,000 respondents in the US, Jan 2021



## Consumer benefit

In the moment, smart recommendations



## Retailer benefit

Push competition behind the scenes



# Challenges for Voice Commerce



## Errors

People want an error free experience, especially since its tied to money



## The Invisible Gap

We can't see the product in their cart and/or see additional details. Adding a feeling of distance from the product or the invisible gap.



## Context

Contextualizing decisions by comparing options makes us confident. Context is important during and post purchase.

# Barrier Can be Broken

Saved Item (price drop) Concept

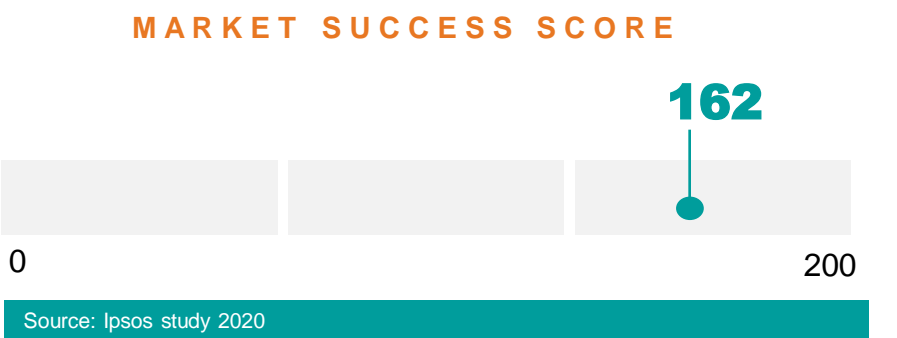
Alexa can let you know when there's a price drop with saved items in your wish list.



**YOU:** More details  
**Alexa:** Your Bose Soundlink Wireless II Headphones in your wish list are on sale from \$160 to \$120. Would you like to order?  
**YOU:** Does it come in the colour black?  
**Alexa:** Yes that's in stock  
**YOU:** Okay, order me the headphones  
**Alexa:** Order placed, it will be delivered in the next 3 days

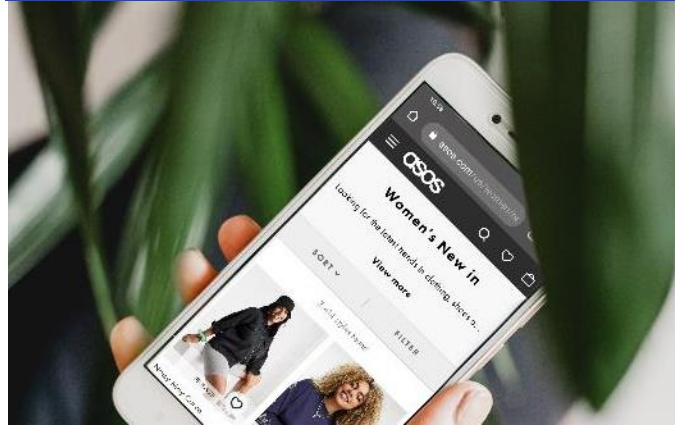
Note - Respondents were shown offers with Alexa as an example but were prompted to think about the voice assistant they most preferred.

Bridges invisible gap with benefits	
Contextual	



# Conclusions

## Mobile Commerce



Here to stay  
Rigor is key  
Memorable, personalized experiences

## Product Subscriptions



Replenishments will stick  
Box subscriptions may fade

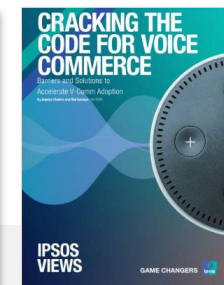
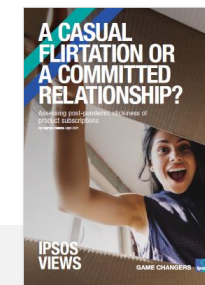
## Voice Commerce



Could be our new normal... if executed well

For more information on any of these topics check out our papers:

[Link](#)



[Link](#)



# ENTERTAINMENT AT HOME

KEYS – A WEBINAR SERIES BY IPSOS

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**Matt Carmichael**

Vice President, Editorial Strategy,  
Ipsos in North America

**GAME CHANGERS**





# ENTERTAINMENT AT HOME

## The view from my couch

Matt Carmichael

6/11/2021

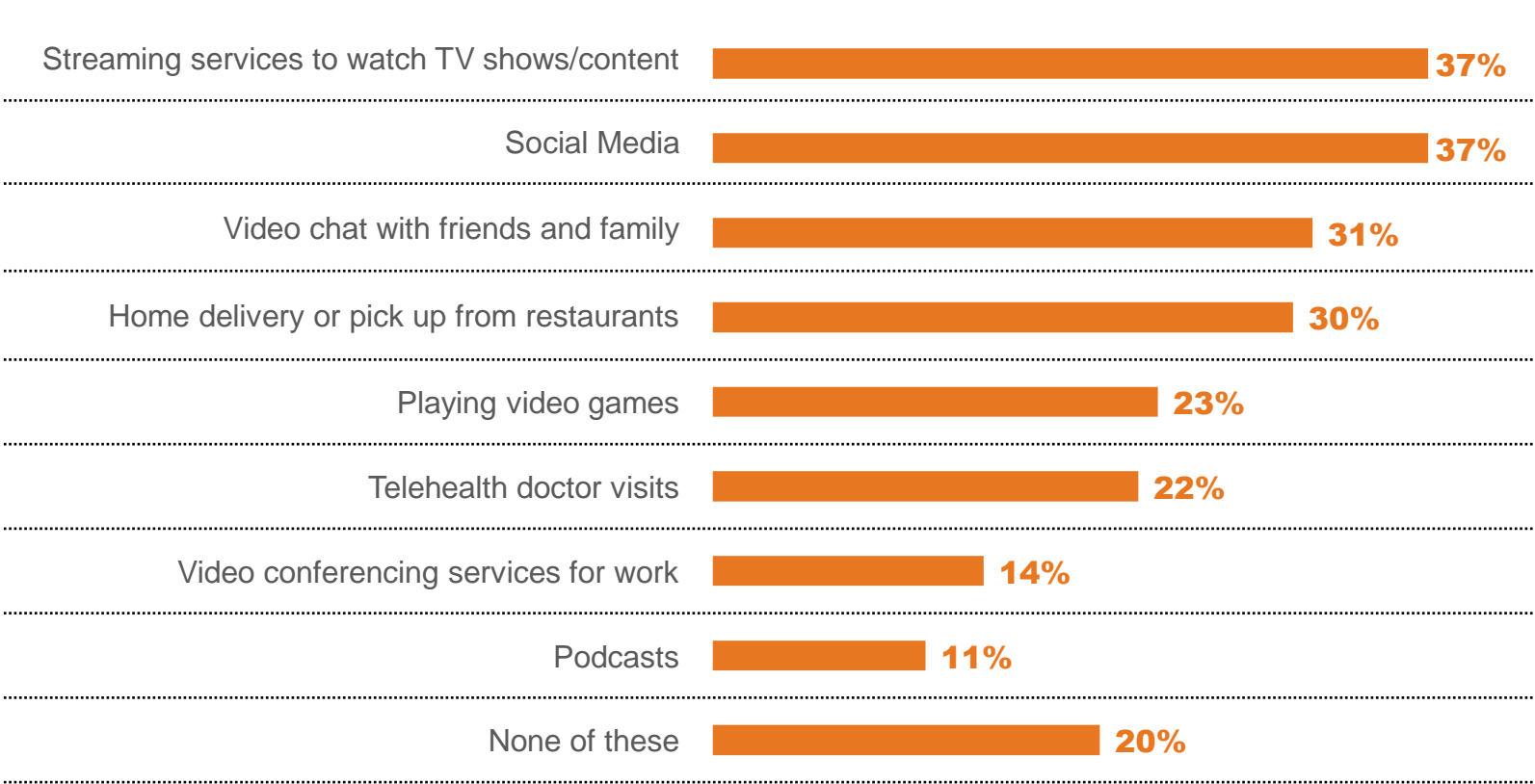
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GAME CHANGERS



# In the beginning, we turned to our devices and screens for entertainment

Q. Which of the following are you currently using or doing more now as a function of the COVID-19 crisis? (More)



Source: The Ipsos Coronavirus Consumer Tracker, fielded April 27- 28, 2021 among 1,115 U.S. adults

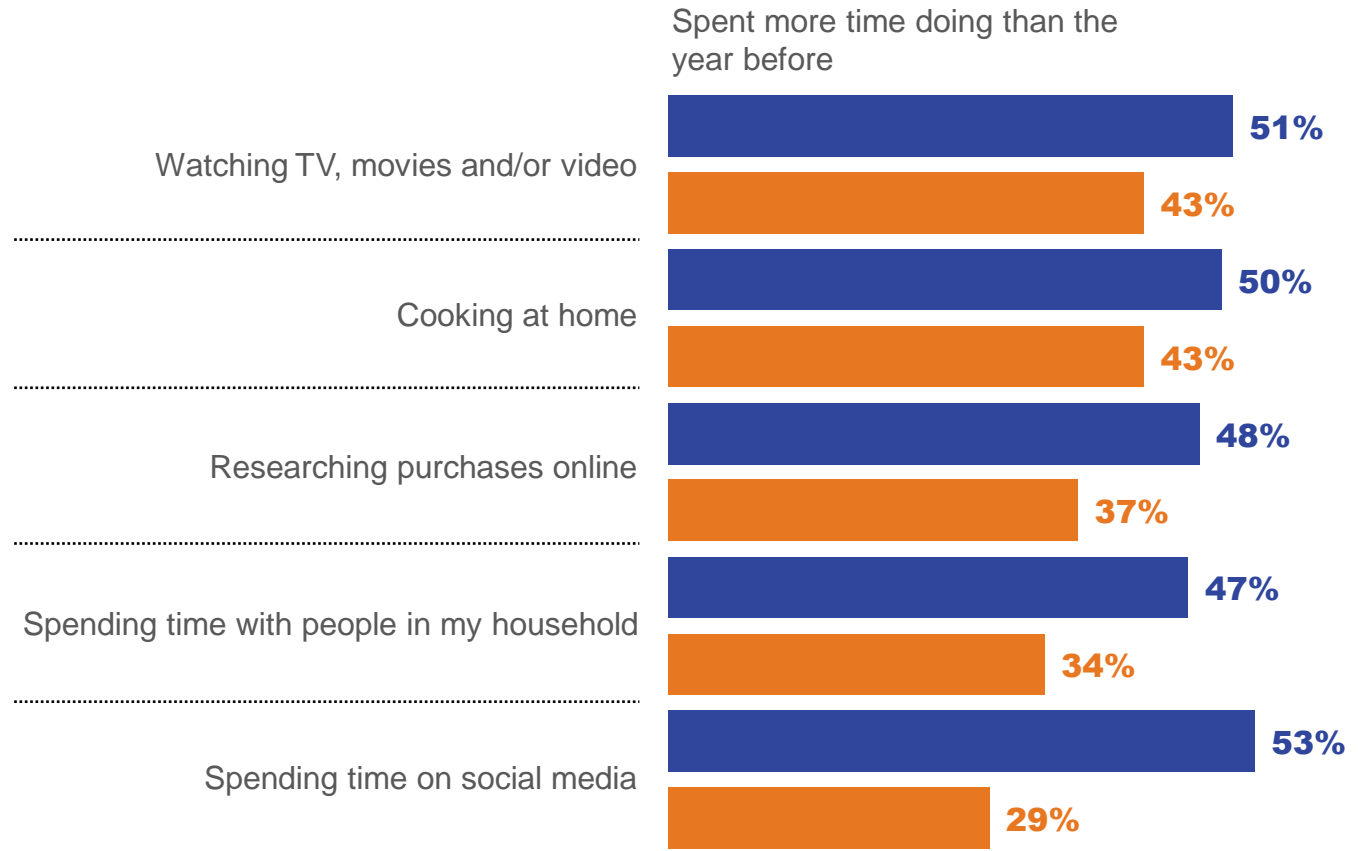




# This was a **GLOBAL** trend, and crossed generations

## Top 5 Activities – Largest Shift Towards

■ Gen Z vs. ■ Boomers



Source: Ipsos Global Essentials. Q: Thinking about the past 12 months, which of the following activities have you spent more time or less time doing than the year before? Base: 14498

# The pandemic forced a generation to upskill

This is an actual photo my mom texted me from her phone.

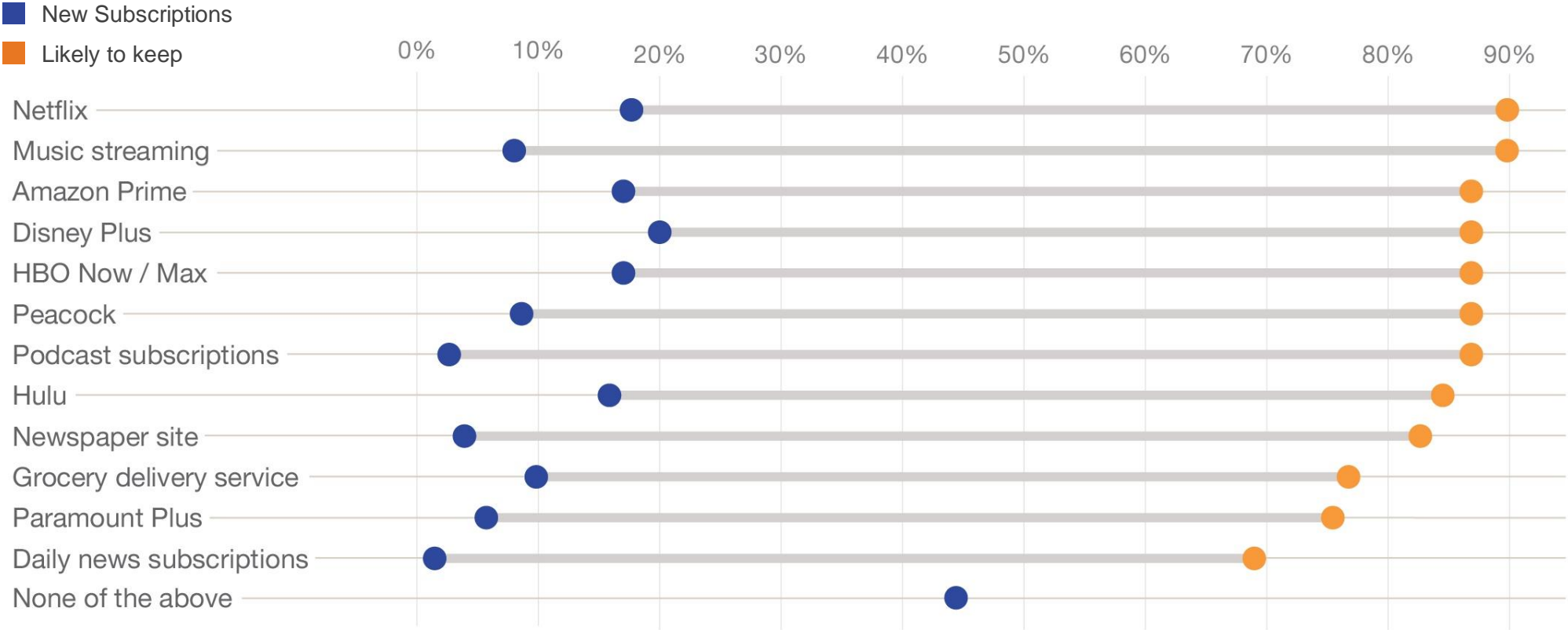
Photo credit: Pamela Carmichael



# Media is now pervasive... and we're not going back

## What people subscribed to for the first time vs. what they are likely to keep post-pandemic

Q. Which of the following subscription services did you sign up for the first time in 2020? How likely are you to keep subscribing to this service once pandemic restrictions are fully lifted?



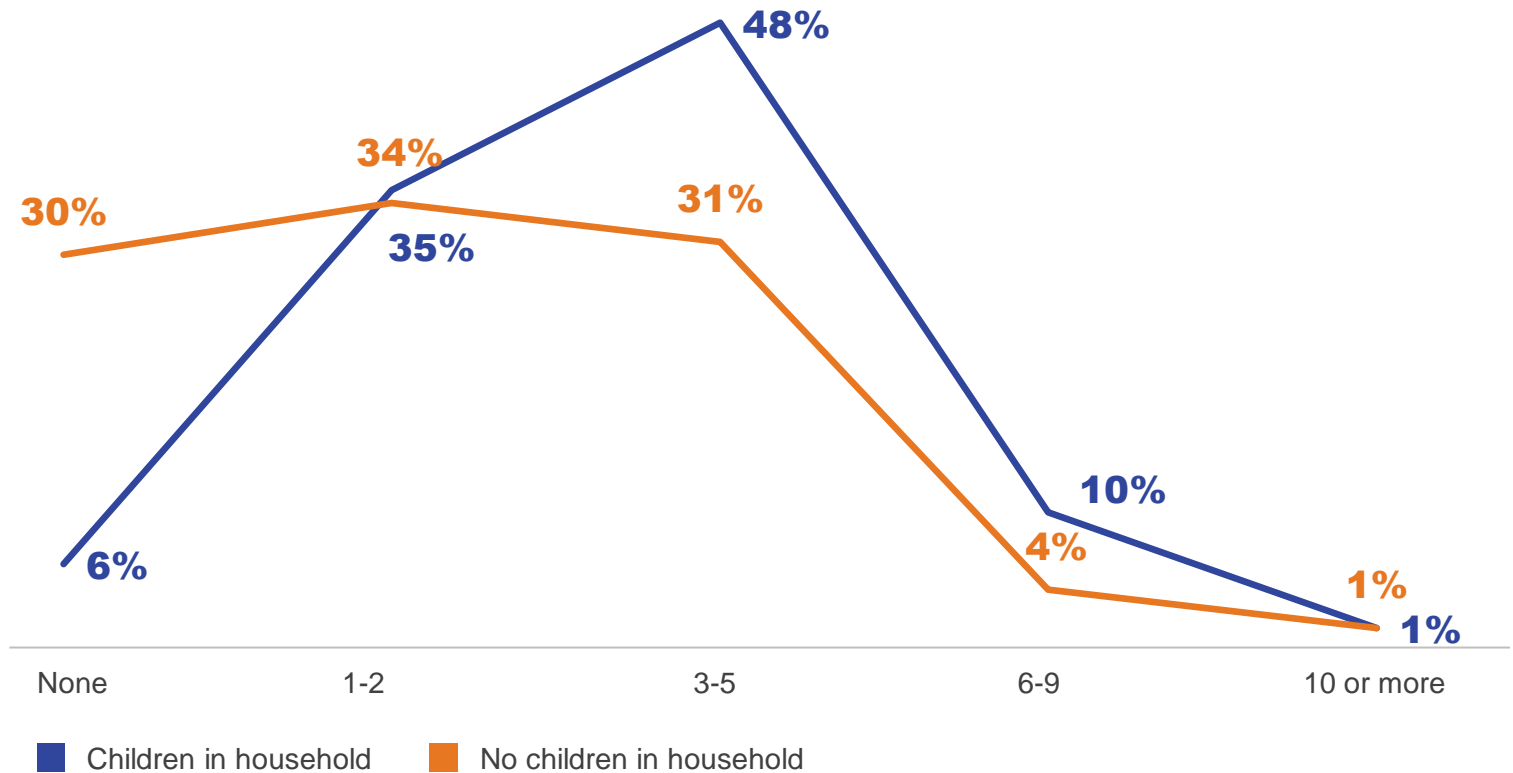
Source: Ipsos survey conducted Apr. 15-19, 2021, among 1,284 U.S. adults





# What drives streaming subscriptions?

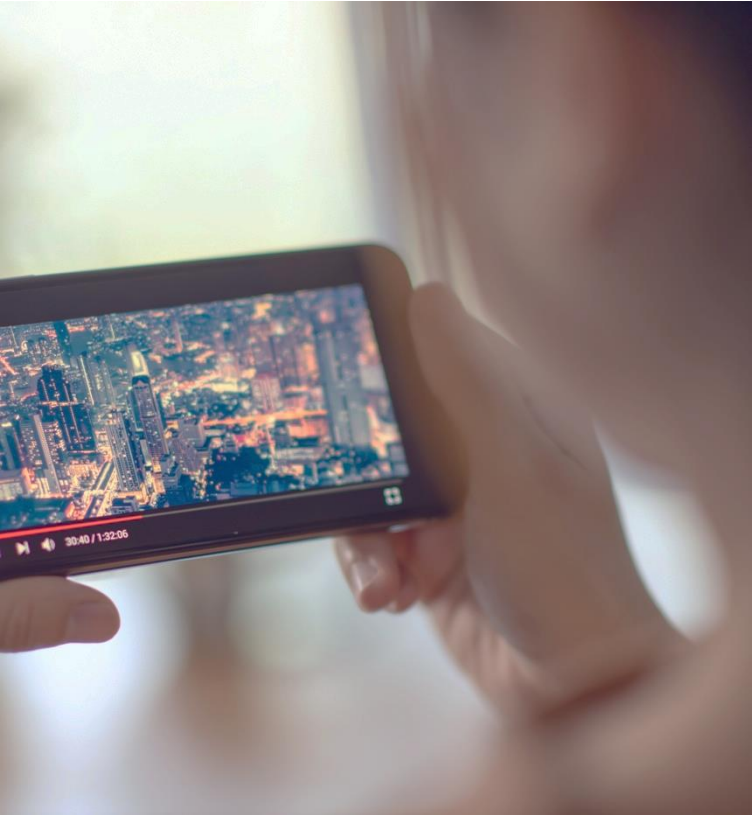
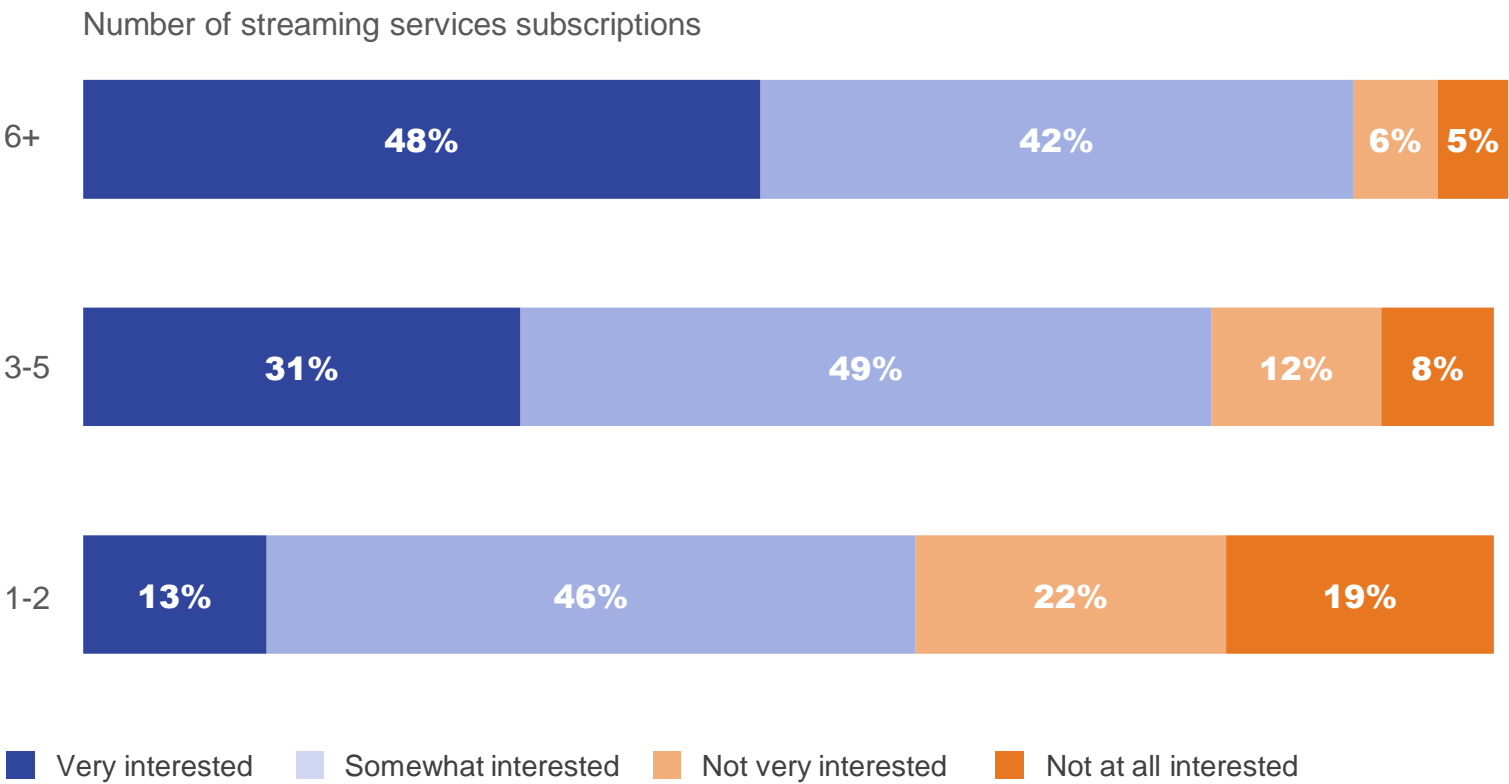
Q. How many streaming video services in total, including those that are free, do you or your household subscribe to or use regularly?



Source: Ipsos survey conducted Apr. 15-19, 2021, among 1,284 U.S. adults

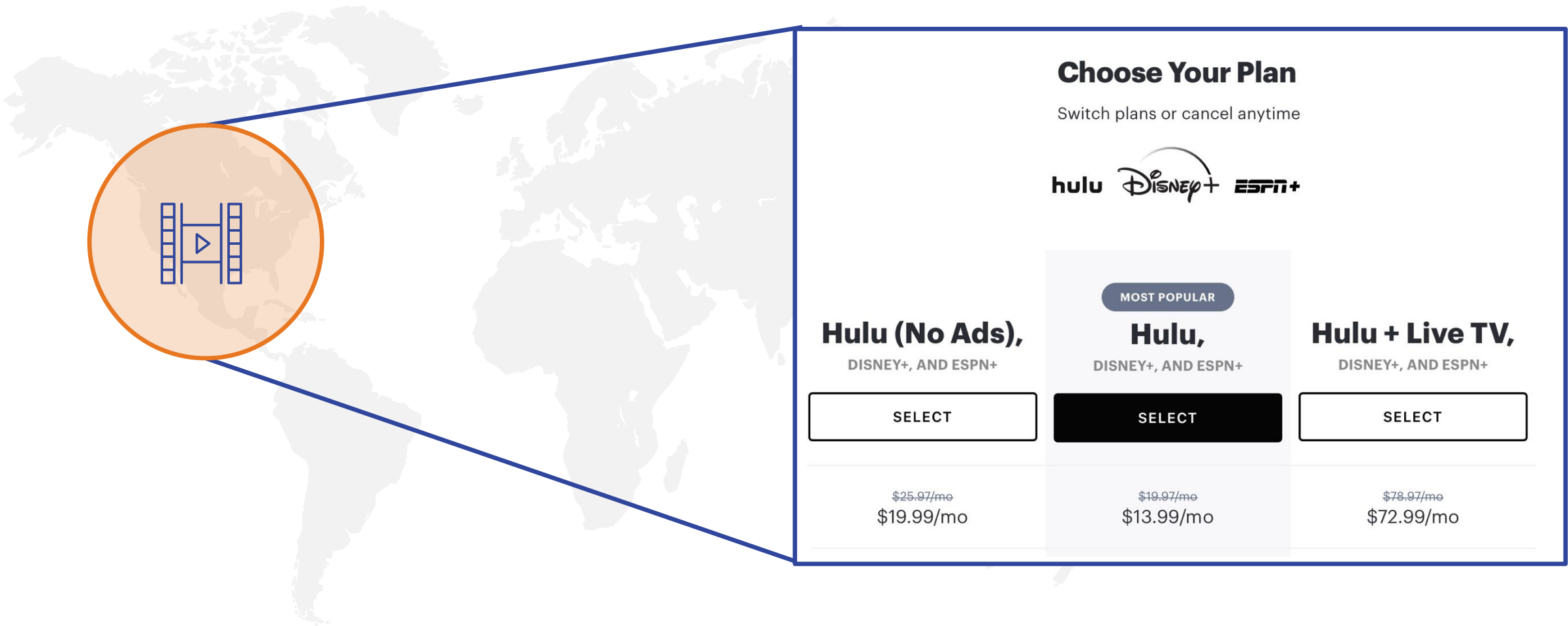
# Who is more likely to want a streaming bundle?

Q. How interested would you be in a service that bundles multiple streaming services?



(Source: Ipsos survey conducted Apr. 15-19, 2021, among 1,284 U.S. adults. )

# In the U.S., bundling is already starting

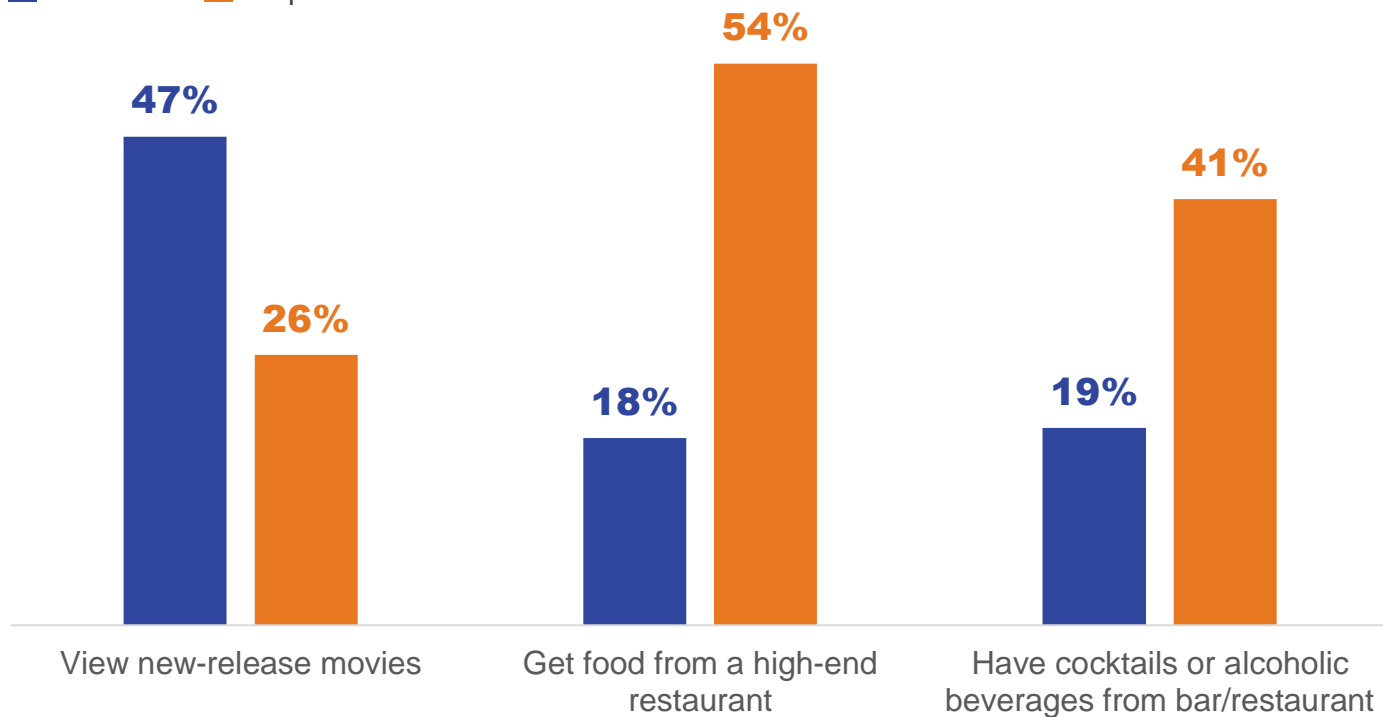




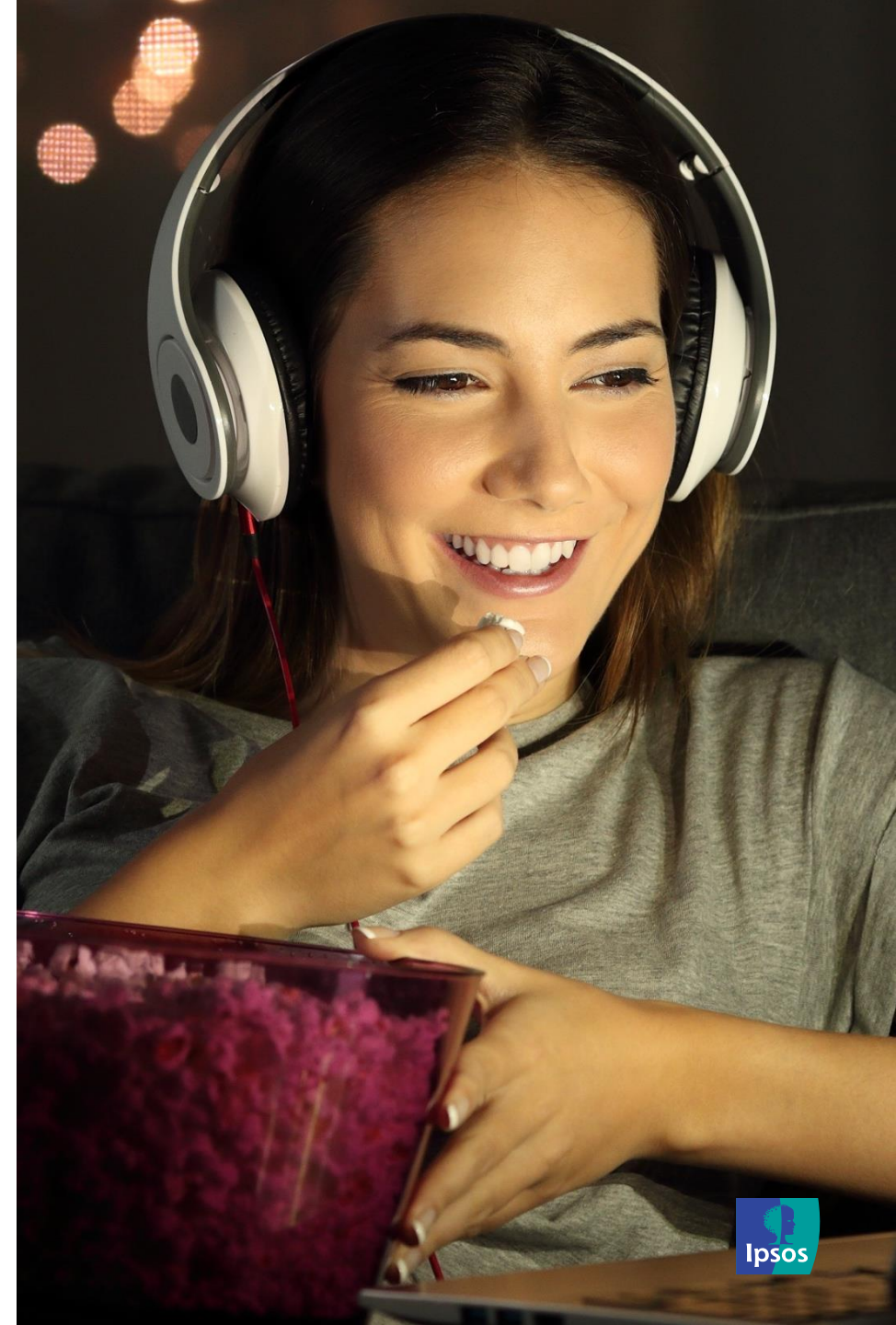
# New releases at home? Sure. Doctors? Not for everyone.

Q. Given the choice, assuming both were equally safe or possible, would you rather do the following in person or at home?

■ At home ■ In-person

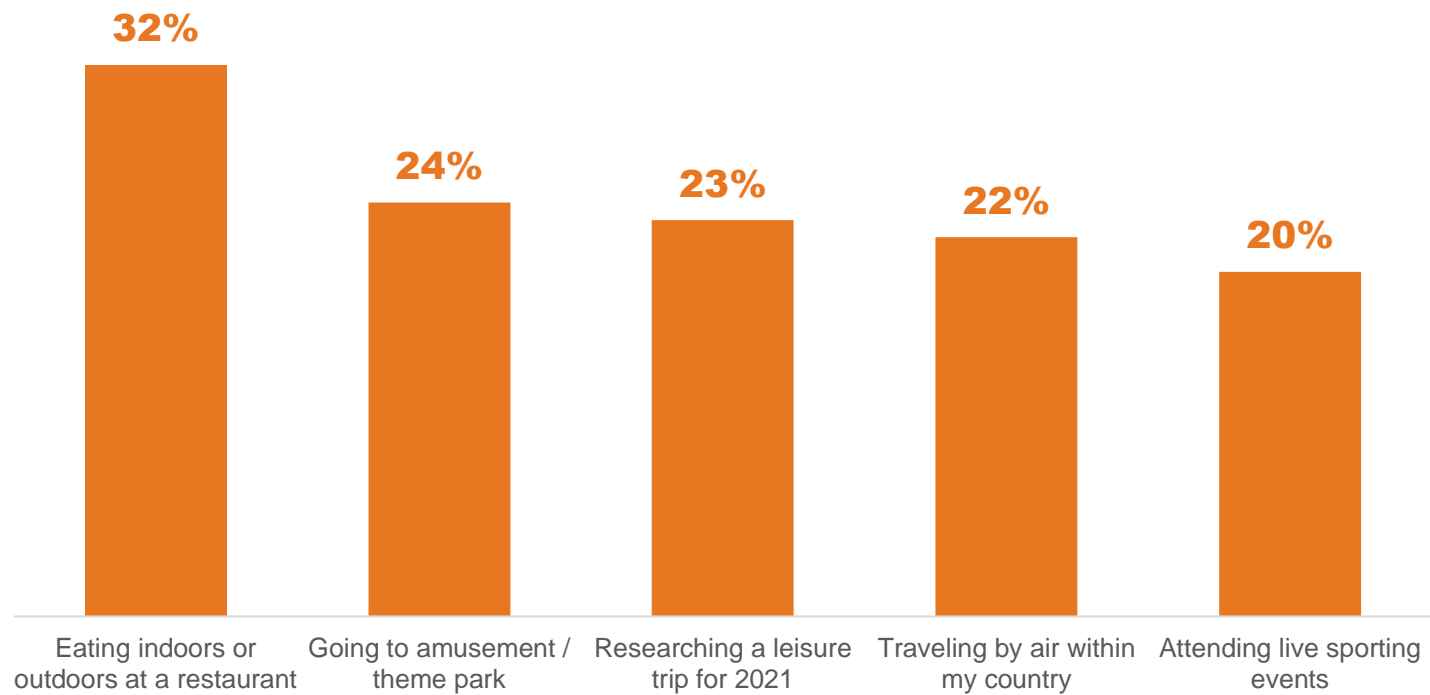


Source: The Ipsos Coronavirus Consumer Tracker, fielded Apr. 27-28, 2021, among 1,115 U.S. adults



# Those who have plans to look forward to also have a brighter outlook on a return to travel and leisure activities

Activity Participation by Future Plans (Within 3 Months)



Source: Ipsos Global Essentials. Q: (I have things planned that I'm looking forward to (e.g. visits with family/friends, activities, etc.)) / Base: Have things I'm looking forward to (T2B Agree)





# The “Yes, and...” economy



“It’s back with the old,  
**still with the new.**”



# THANK YOU!

**Matt Carmichael**

VP editorial, North America

[Matt.Carmichael@Ipsos.com](mailto:Matt.Carmichael@Ipsos.com)

@mccarmichael



# MENA AT HOME

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Nabanitha Mukherji

GAME CHANGERS





# MENA AT HOME

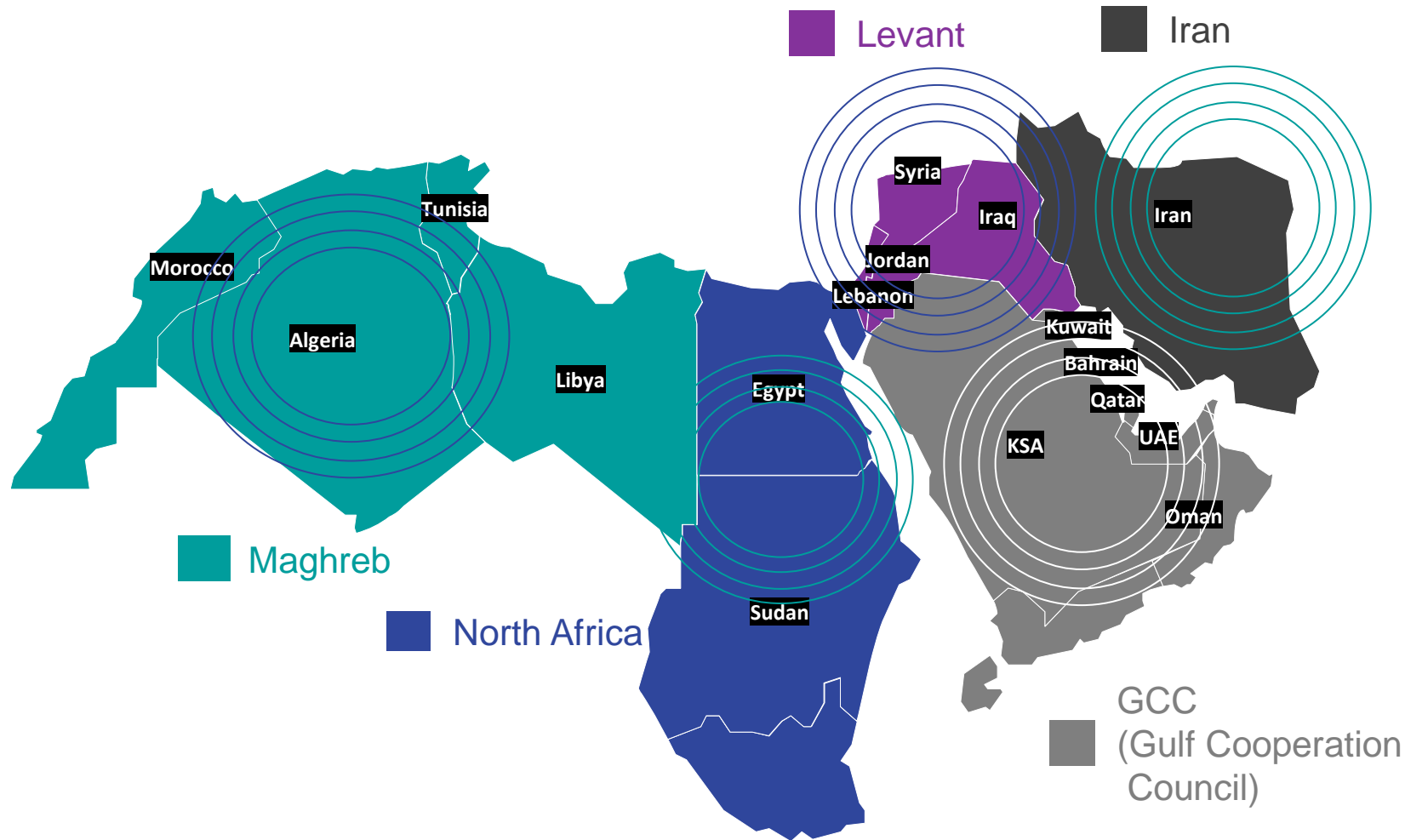
## WHAT'S COOKING?



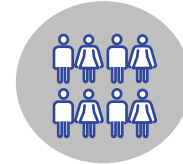
KEYS – an Ipsos webinar series  
Nabanita Mukherjee *(Regional Head of Qualitative GCC)*



# MENA IS A COMPLEX REGION COMPRISING OF MANY SUB-REGIONS



**USD 3.6 Trillion** - A GDP that could make it the 4 largest economy in the world



**489 Million** - Comparable to that of the EU. Larger than North America



**\$28,719** - A GNI per capita (PPP) higher than Russia, the Balkans and comparable to Central Europe

# ...HOWEVER, MENA REMAINS 'A TALE OF TWO REGIONS'

## The GCC has some of the richest countries in the world

**\$57,710**

GNI PPP – higher than countries like the UK / France / Canada

**51%**

Of the total GDP of MENA

**11%**

Of the total population of MENA



## The rest of MENA has largely struggling economies

**\$11,561**

GNI PPP – in line with countries like Namibia / Georgia

**49%**

Of the total GDP of MENA






**89%**

Of the total population of MENA

# KEY HIGHLIGHTS IN THE MENA REGION



## RISING LEVEL OF DIGITAL CONNECTIVITY

	Mobile Pen.	Smart Phone Pen.
 KSA	129%	68%
 UAE	200%	99%
 Egypt	93%	40%
 Jordan	120%	56%
 Global Average	45%	42%

## MEGA EVENTS TO SHOWCASE REGION



### Mega Global Events

- The Expo later this year in UAE & World Cup in Qatar – both positioned as MENA wide events – showcasing the region to the world

## RAPID VACCINATION PROGRAMS

Widespread Vaccination Coverage  
(~80% of total population)

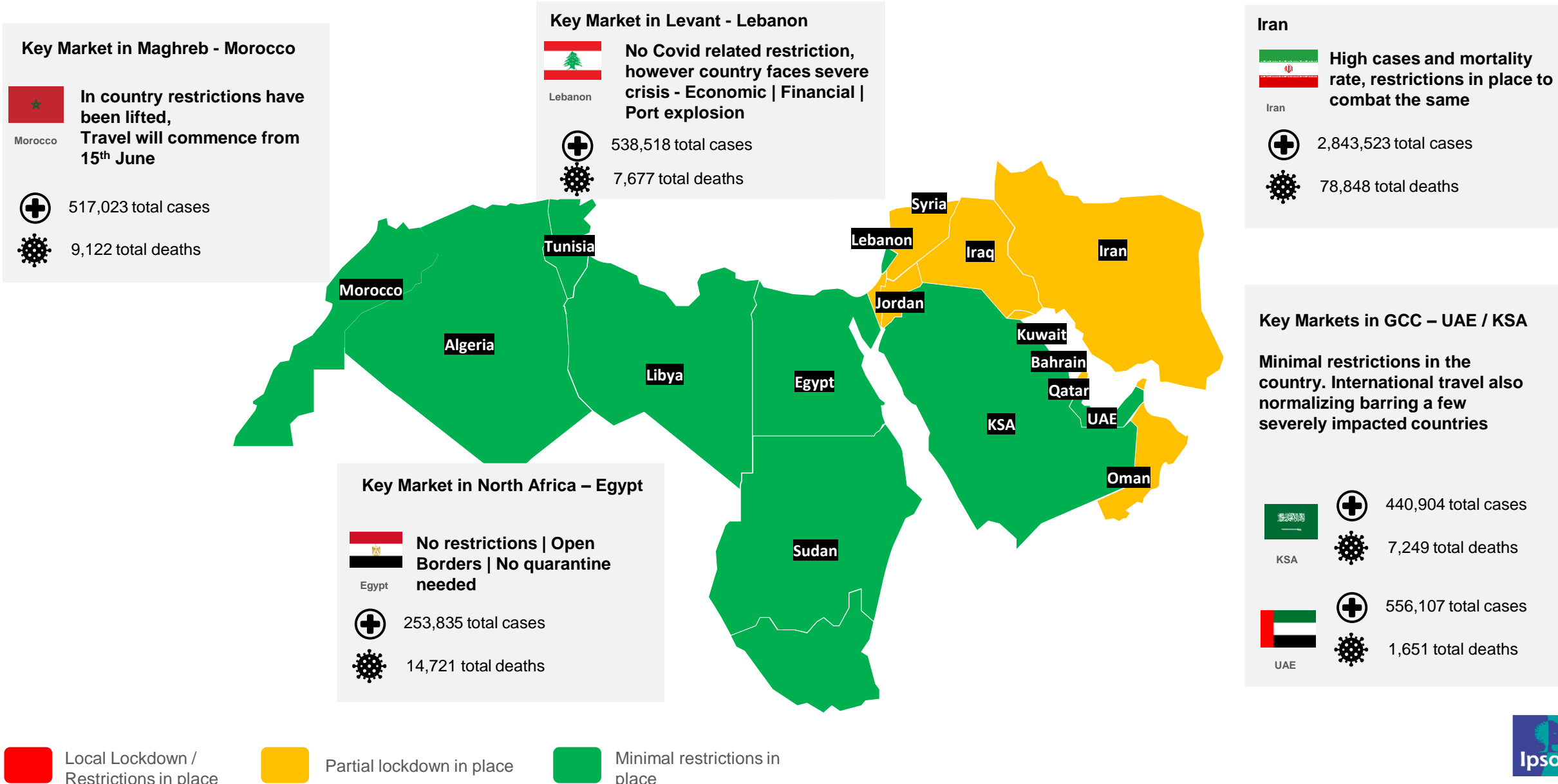
*Faster than most regions in the world*





Let's now zoom in on  
the Covid-19  
pandemic in MENA...

# SNAPSHOT OF THE CURRENT PANDEMIC SITUATION IN MENA



So what's cooking in  
MENA?





# #1. EATING CONSCIOUSLY

Eating Healthier | Balanced | Nutritious and Immunity Boosting Food



54%  
are eating healthier



52%  
are eating more immunity boosting foods



45%  
are eating more balanced meals



## #2. FINDING THEIR CULINARY CAPABILITIES

Harnessing and Sharpening their culinary skills



81%

are trying new recipes



57%

are personally preparing their own meals



49%

watched food & cooking channels



Chef Manal El Alam – Popular Arabic Chef

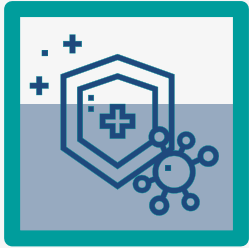
# #3. EXPLORING UNFAMILIAR TERRITORY

Openness to trying different brands



48%

tried new types or brands of food & beverages during the pandemic



56%

Say they will continue using new food types or brands moving forward





## #4. SHOPPING CLOSER TO HOME

Online shopping and neighborhood stores – the safe bet



39%

neighborhood stores / Baqala's



33%

online



# SUMMING UP

## What's cooking in MENA at home?

- In the MENA region, food has played multiple roles
  - **A source of pride**
  - **A unifier**
  - **A symbol of their hospitality (A very strong Arab value)**
- Therefore a lot of emphasis on **Traditional Cuisine, Variety, Quantity, Large Displays, Visual Presentation, Best cuts etc**
- **Covid & Being at Home** has shown some shifts in the codes of Food such as
  - Focus on the **health / nutrition aspect** instead of the Variety or Quantity
  - **Shifting the focus to cook for self / own family** instead of hosting
  - **Adapting the cuisine to include newer dishes**



**THANK  
YOU!**

