CONVERGENT COMMERCE 2022



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KEYS – A WEBINAR SERIES BY IPSOS

17th November 2022

GAME CHANGERS



AGENDA

INTRODUCTION

Jennifer Hubber Head of Global Client Organisation, Ipsos

THE PUBLIC MOOD

Simon Atkinson Chief Knowledge Officer, Ipsos

EMBRACE THE CONVERGENCE

Alison Chaltas Global President, Path to Purchase, Ipsos

THE LATEST FROM CHINA

Patrick Xiang Marketing Director, Ipsos in China

THE RETAIL CONVERSATION

Allen Bonde Chief Marketing Officer, SIA & Synthesio, Ipsos

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QUESTION TIME

Do you have questions for our panellists?

Please send them by clicking on the'?' in the right pane.

You can ask your question at any time during the session.

CONVERGENT COMMERCE 2022





THE PUBLIC MOOD How are things right now?

Simon Atkinson

The story of the year

WHAT WORRIES THE WORLD?

Q: Which 3 of the following topics do you find most worrying in your country?

November 2022

GAME CHANGERS

COCEAN

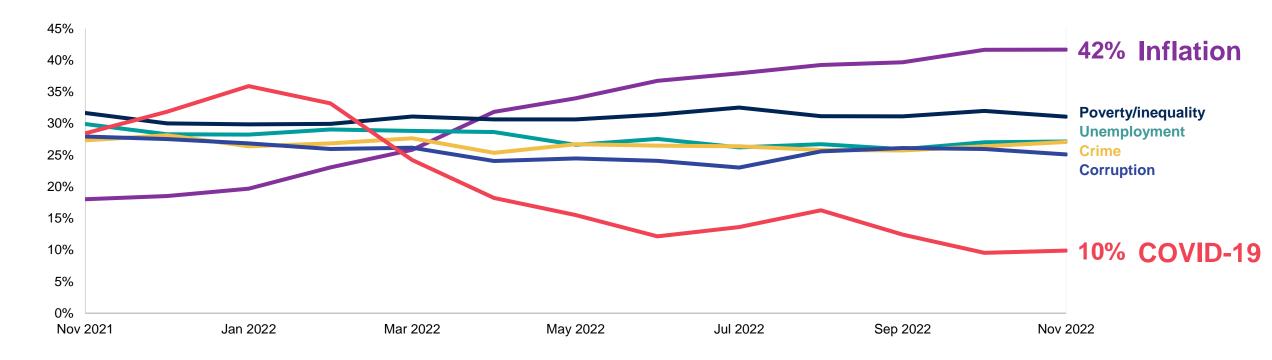


GAME CHANGERS Ipsos

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2022: a tale of crises

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



Base: Representative sample of c.30,506 adults aged 16-74 in 29 participating countries, October 2021 - October 2022. **Source:** Ipsos Global Advisor. *Global score is a Global Country Average. See methodology for details.*



CONSUMER CONFIDENCE



PRESS RELEASE

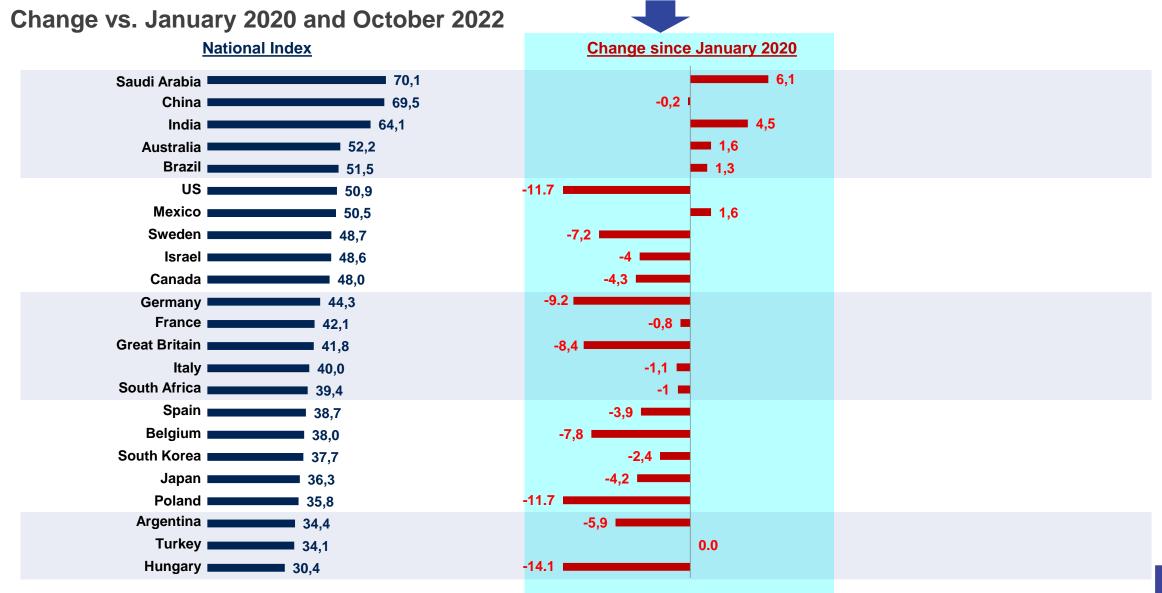
November 2022: Global consumer confidence continues to show stability All three sub-indices are stable as sentiment remains muted among the world's most advanced economies

Washington, DC, November 16, 2022 — Ipsos' Global Consumer Confidence Index this month reads at 45.5, virtually unchanged (-0.1 point) for the second consecutive month and continuing to sit at its lowest level in more than a year. In addition, the Expectations, Investment, and Jobs' sub-indices show little movement from October.

The Global Consumer Confidence Index is the average of all surveyed countries' National Indices. This month's installment is based on a monthly survey of more than 17,000 adults under the age of 75 from 23 countries conducted on Ipsos' Global Advisor online platform. This survey was fielded between October 21 and November 4, 2022.

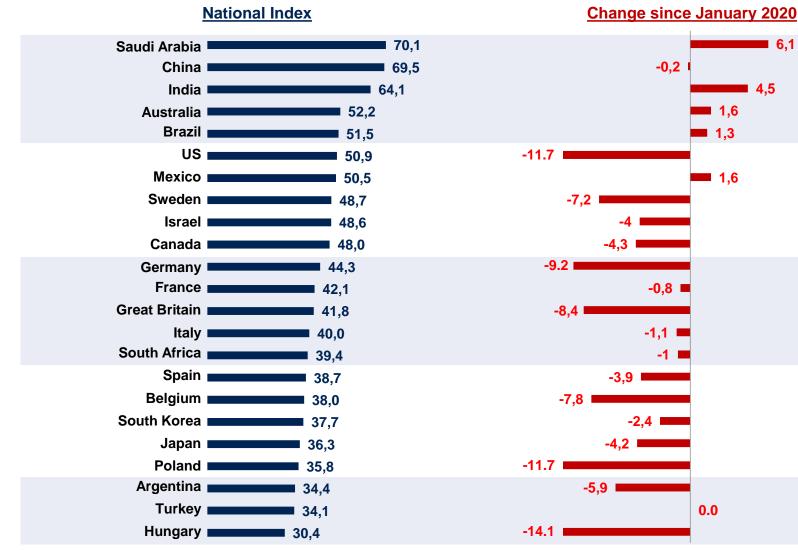


CONSUMER CONFIDENCE November 2022



CONSUMER CONFIDENCE November 2022

Change vs. January 2020 and October 2022



16 out of 23 countries are showing lower scores than in **February**

6.1

4.5

1.6

1.3

1.6

-1

0.0



Spotlight on Europe

COCEAN

WHAT WORRIES THE WORLD?

Q: How would you describe the state of the economy in your country?

November 2022

GAME CHANGERS

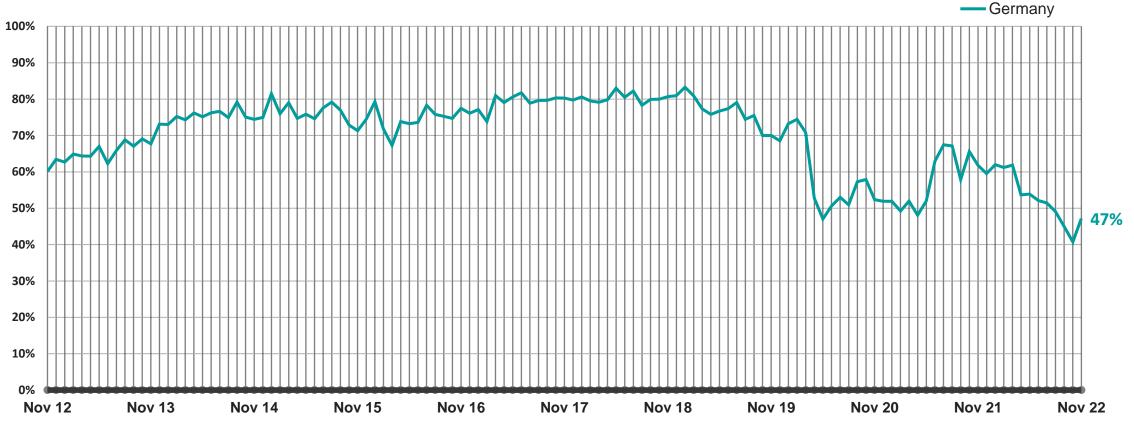


GAME CHANGERS IP



CURRENT ECONOMIC SITUATION: GERMANY





Base: Representative sample c. 1000 adults aged 16-74 in Germany, 2012 - 2022. **Source:** Ipsos Global Advisor. *Global score is a Global Country Average. See methodology for details.*

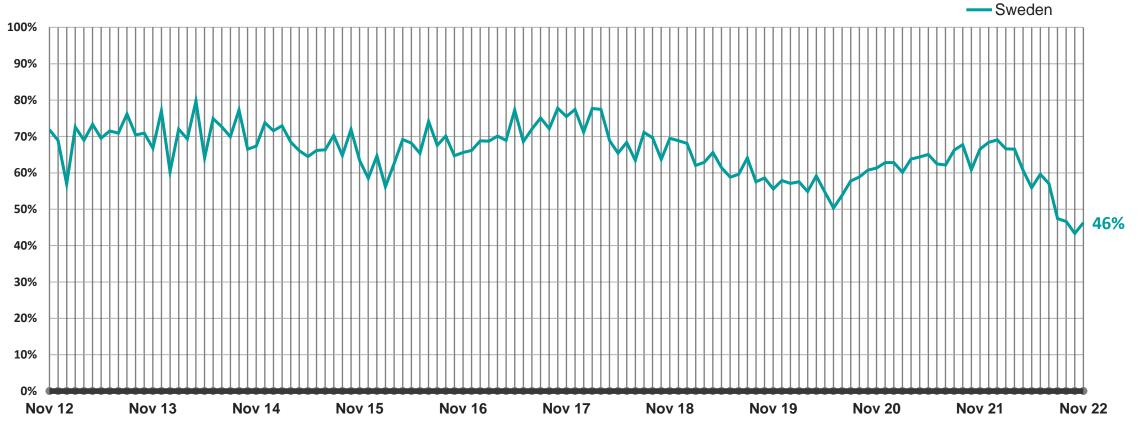
11 - © Ipsos | What Worries the World

Filter: Country: World | Current Wave: Nov 22



CURRENT ECONOMIC SITUATION: SWEDEN





Base: Representative sample c. 500 adults aged 16-74 in Sweden, 2012 - 2022.

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

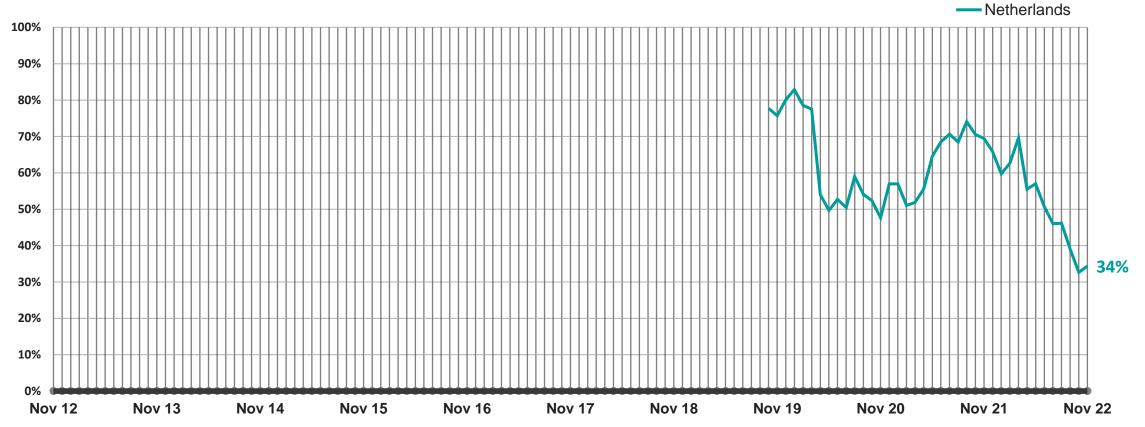
12 - © Ipsos | What Worries the World



Filter: Country: World | Current Wave: Nov 22

CURRENT ECONOMIC SITUATION: NETHERLANDS





Base: Representative sample c. 500 adults aged 16-74 in Netherlands, 2012 - 2022.

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

13 - © Ipsos | What Worries the World

Filter: Country: World | Current Wave: Nov 22



THE
PUBLIC MOODWhat's Happening this month?

THE PUBLIC MOOD What's Happening this month?





THE COP 27 MEETING





THE COP 27 CONTEXT





COP 27: PUBLIC ATTITUDES

68% globally are willing to accept new policies encouraging sustainable technology adoptions

Incentives, discounts and other inducements are most supported policies to help tackle climate change in new global study ahead of COP27

4 November 2022 Society / Sustainability / Climate change / Environment



STRONG SUPPORT FOR THESE POLICIES

GLOBAL VIEWS ON SUSTAINABILITY

	Strongly/ tend to support	Neither support nor opp	pose	Strongly/ tend to oppose	
Government spending on subsidies to make environmentally friendly technologies cheaper (e.g. solar panels, electric vehicles)		68	8%	16%	10%
Changing product pricing to make environmentally friendly products cheaper and environmentally damaging products more expensive		59%	2	0%	15%
Incentives for investing in green financial products and services (e.g. pensions)		59%		22%	10%



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SOME SUPPORT FOR THESE POLICIES

GLOBAL VIEWS ON SUSTAINABILITY



Banning petrol/ gas and diesel powered vehicles from the central areas in cities and towns to create vehicle free zones	37%	25%	31%
Higher taxes on red meat and dairy products	29%	24%	40%
Higher taxes on non-renewable energy sources such as gas and oil for heating and cooking to make them more expensive	29%	22%	42%



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DIGGING DEEPER: WHO CARES?

ENVIRONMENTAL SUSTAINABILITY: WHO CARES?

A segmented landscape of engagement, challenges and opportunities

November 2022

Authors: Dr. Pippa Bailey, Chris Murphy and Steven Naert

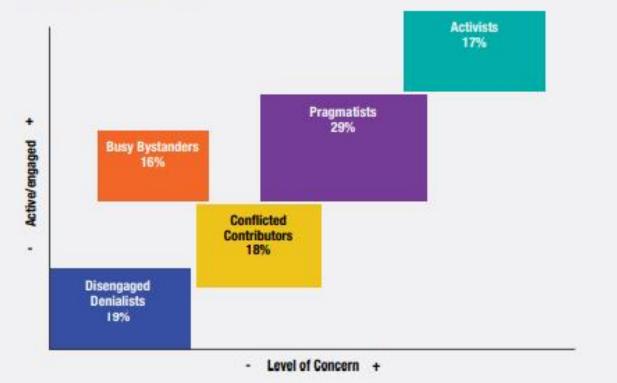




lpsos

SEGMENTING THE POPULATION

Figure 2: Overview of segments across two dimensions – level of concern and action/engagement



Base: 10,000 adults aged 18-74 in Canada and the United States and aged 16-74 in Australia, Brazil, China, France, Germany, Italy, Spain, India, Japan, Mexico, South Africa, South Korea, and the United Kingdom. Source: Ipsos Essentials



CONSUMER PROFILING

Figure 3: Overview of segments

Activists (17%)	Pragmatists (29%)	Conflicted Contributors (18%)	Busy Bystanders (16%)	Disengaged Denialists (19%)
Skewed to be slightly younger and more female. Believe the environment is at a critical stage and the world must act now. Will compromise lifestyle for environment.	Skewed to be slightly older and more affluent. Concerned about the environment. Will take action through low-cost, home-oriented actions, but will compromise if necessary.	Financial situation takes precedence over their environmental concern. Skewed to be slightly less educated. Likely to support community-based policies/services and welcome	Skewed slightly to be married, employed Millennials. See many barriers to action on climate change, believing it to be inconvenient, expensive and not a priority.	Environment is either not a concern, not an immediate one, or it is largely overblown. Less inclined to take action. Some believe that companies should not focus on this.
As consumers, they are a key audience for sustainable products and services. It is the lead benefit and they are willing to pay more for it.	Likely to embrace new products/ policies if they are easy to adopt. They are not deterred by cost when deemed reasonable.	government intervention. Sustainability should be presented as a co-benefit, as they are not willing to pay more for ethical/	More likely to engage with frictionless products and services in the sustainability space. Convenience and routine are	Limited 'care' towards the environment. Possible to win over by initiatives with sustainability as a co-benefit.
Supporting local is important to them.	Pragmatists look to buy domestic products over foreign-made ones and supporting local is important.	sustainable products – price prevails. They'll look for companies to limit	prevailing factors in their choice. Can be enticed by companies conserving energy and that offer	A quarter do not believe companies should focus on limiting their environmental impact. Those who do believe look for them to conserve
They'll look for companies that direct efforts towards sustainability in production.	Companies can entice by using reusable energy and recycled materials in products/packaging.	their contribution to chemical pollution.	products/packaging that use recycled materials.	energy and use recycled materials in products/packaging.
Source: Ipsos			ENVIRONMENTAL SUSTAINABILITY:	

WHO CARES? A segmented landscape of engagement, challenges

and opportunities

Authors: Dr. Pippa Bailey, Chris Murphy and Steven Naert

lpsos

November 2022

IPSOS VIEWS

ESG SERIES

THE PUBLIC MOOD What's Happening this month?









THERE'S LOTS GOING ON ONLINE





THERE'S LOTS GOING ON ONLINE









Internet users' trust in the Internet has dropped significantly since 2019

TECHNOLOGY Online users want better control over how their personal data is collected, used and sold.

& TELECOMS

14 November 2022 Society / Internet / Data Privacy / Social Media / Technology



Only six in ten (63%) Internet users on average across the 20 countries said they trust the Internet

That is down 11 points since a similar survey was conducted in 2019. The singular exception is Japan, which showed a 7 percentage-point increase in trust. But Japan is the rare exception, as the findings reveal that Internet trust shrunk by double-digits in India (-10 points), Kenya (-11), Sweden (-10), Brazil (-18), Canada (-14), the United States (-12), and Poland (-26).



Privacy was a major concern for those surveyed. Seventy-nine percent express worry about their online privacy. Only 50% felt online security is adequate.

Many felt Internet governance is lacking. Slightly more than half of the respondents (57%) believe the Internet is effectively governed. But fewer than half in Great Britain (45%), the U.S. (45%), France (41%) and Israel (34%) feel that way.



AGREEMENT W	/ITH STATEMENT: OVERALL, I TRUST THE INTERNET			
				2019 n=(25,229)
STRONGLY AGREE	SOMEWHAT AGREE TOTAL AGREE			Total
Total	10% 53%	63%		74%
India	33% 46%		79%	89%
Indonesia	22% 55%		77%	85%
Mexico	60%		76%	85%
Kenya	18% 52%		70%	81%
Spain	11% 59%		70%	N/A
Singapore	6% 62%	6	67%	N/A
South Africa	14% 49%	63%		72 %
Sweden	7% 56%	63%		73%
Australia	10% 53%	63%		67 %
Turkey	14% 49%	62 %		65 %
Republic of Korea	5% 57%	61%		66%
Great Britain	6% 55%	61%		70%
Germany	6% 54%	61%		70%
France	7% 52%	59 %		61%
Brazil	7% 52%	59 %		77%
Japan	2 [°] /57%	58%		51%
Canada	4% 53%	57%		
United States	7% 47%	54%	TRUST IN THE	
Israel	5% 49%	53%	INTERNET	010010110100
Poland	4% 46% 50%			ADDIST PHOTO
	otal respondents 2020 (n=14519) ; 2019 (n=25,229); w much do you agree or disagree with the following statements			

November 2022

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THE PUBLIC MOOD What's Happening this month?





THE WORLD CUP

ATTITUDES TOWARDS THE FIFA WORLD CUP 2022 IN QATAR

A 34-country survey

For more information: www.ipsos.com/en/2022-fifa-world-cup-global-advisor

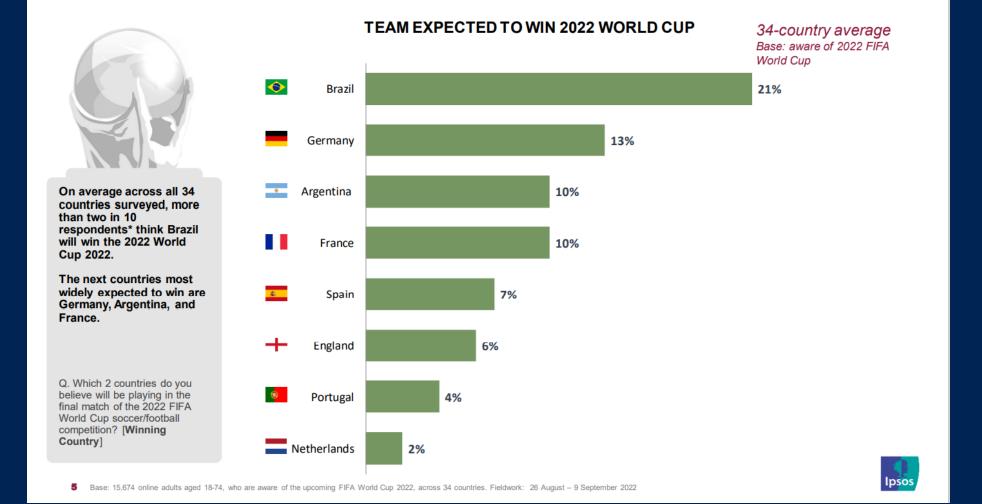
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THE WORLD CUP



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DIVING DEEPER ON NATION BRANDS

The Anholt-Ipsos Nation Brands Indexsm

November 2022

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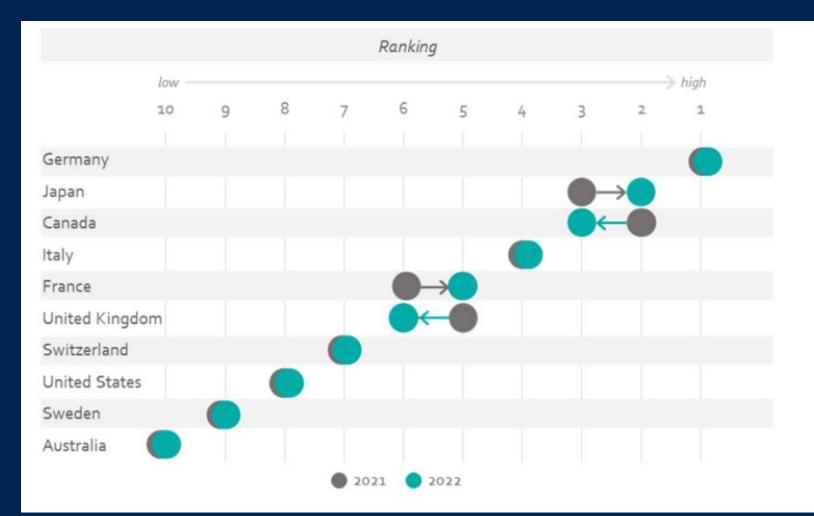
Nation Brands Index 2022: Germany finishes first again with Japan and Canada rounding out the top three nations

Germany finishes in first place again, while Japan overtakes Canada for second place — its best performance since 2018, when it also ranked second. Japan sees strong reputational rankings on the Exports, Tourism, and Culture indices. The United Kingdom's ranking drops again in 2022, moving from fifth to sixth. Russia's ranking falls to the bottom three nations.

2 November 2022 Anholt Ipsos Nation Brands Index / Reputation / Tourism / Economy



DIVING DEEPER ON NATION BRANDS

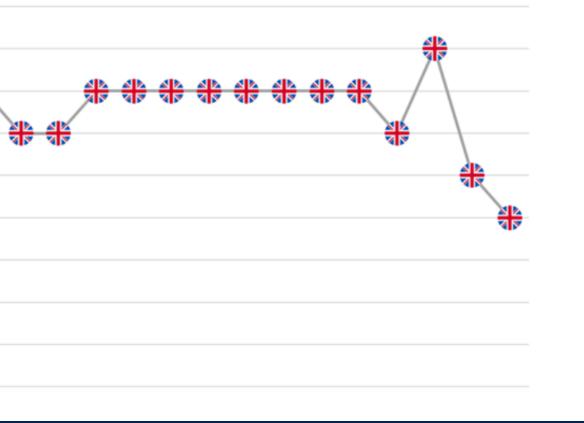




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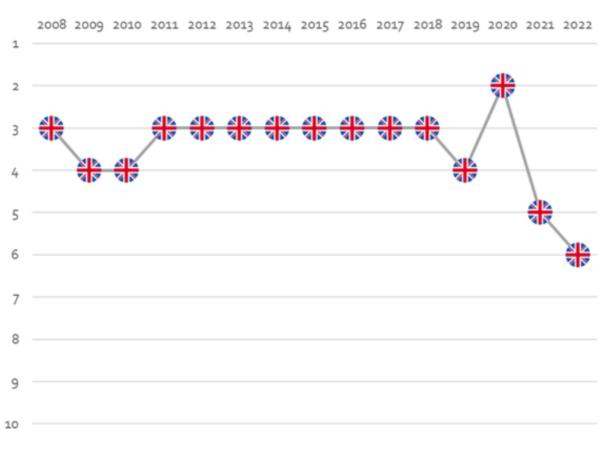


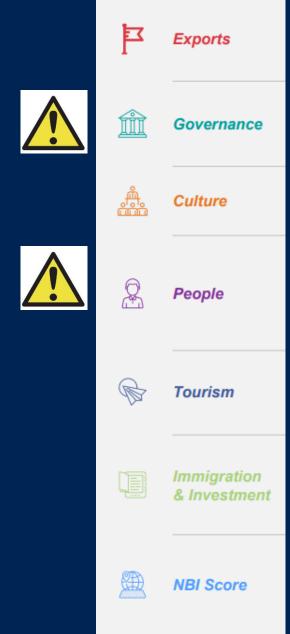




United Kingdom NBI Ranking (2008-2022)

DIVING DEEPER ON NATION BRANDS







RESOURCES TO EXPLORE



Watch again & Download the resources at our webinar home page



Beyond omnichannel to convergent commerce

Convergent commerce is the integration of online and instore experiences that allow shoppers to buy from anywhere, anytime, anyhow. The pandemic accelerated the digital transformation of shopping, ushering in a huge surge in expansion of multi-channel experiences for consumers, including mobile, social and livestreaming commerce, direct - to -consumer, buy-online-pickup-in-store (BOPIS), to name a few. As a result consumer journeys have changed, becoming more complex and less linear, based on their own commerce ecosystems of default go-to brands, retailers, channels and touchpoints.

nber 2022 Omnichannel / Consumers / Shapper / Retail / E-Commerc



Convergent Commerce web page



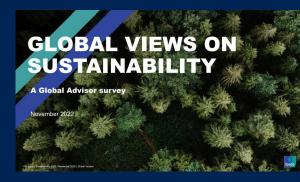
Trust in the Internet



PRESS RELEASE

November 2022: Global consumer confidence continues to show stability All three sub-indices are stable as sentiment remains muted among the world's most advanced economies

<u>What Worries the World</u> and <u>Global Consumer Confidence</u>



COP 27 Survey



November round-up



November round-up



Nations Brand Index





ACCESS the recording, presentations & resources from this episode



[[Webinar] KEYS - Convergent Commerce | Ipsos

JOIN US for our end-of-year KEYS webinar: Thursday, 15 December 11:00 & 17:00 CET





THE LATEST FROM CHINA

Patrick Xiang 18 November, 2022

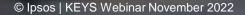
GAME CHANGERS

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THE QUIETEST DOUBLE 11

For the first time, Tmall and JD.com didn't release the GMV (sales) number.

Packages delivered from Nov 1st to 11th: -11% compared to 2021.





LIVESTREAMING: THE RETURN OF THE KING





\$1.29 billion on Nov 1st 2021



LIVESTREAMING: THE RETURN OF THE KING

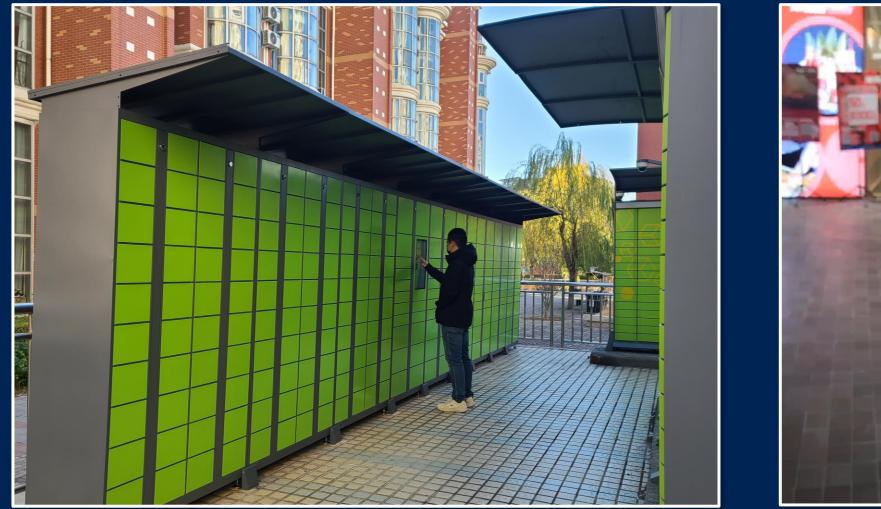
Yeta Ausan + 火注 新大注用戶(35元住区)・・ × Yeta Doorse aga + 火注 第5元住区)・・ × Yeta Doorse aga Arrest Doorse aga * * Yeta Doorse aga * * * * Yeta Doorse aga * * * * * Yeta Doorse aga * <th>\$2 billion sales value</th>	\$2 billion sales value
切換商品讲解 > 精灵宝宝mm: 优时颜洗面奶每年火爆, 不好抢	on Oct 24 th

In the Skincare sector,

68% of Tmall 1st day sales came from Austin Li.



NEW TECH ENABLES FLEXIBLE PICKUP





Delivery Robot



DIGITAL ORDERS OF STARBUCKS

Order online and pick up at the store

Order for delivery



- Customers are encouraged to order on the app or WeChat.
- Starbucks opened 'pickup only' locations with no seats and no cashier.

In 2022 Q2, Starbucks China's mobile orders accounted for

47% of total.

75% orders by loyalty members.



DIGITAL ORDERS OF MCDONALD'S



Customers either order on mobile or at the kiosk.



McDonald's digital orders in China accounted for **85%** of total



DIGITAL ORDERS OF AUDI

- SAIC-Audi pushed the DTC sales via the app.
- On the app you can:
 - Find promotions
 - Book a test drive
 - Choose all the specs and features
 - Pay the deposit
 - Sign the contract
 - Arrange the mortgage
 - Get the insurance
 - Buy all the accessories



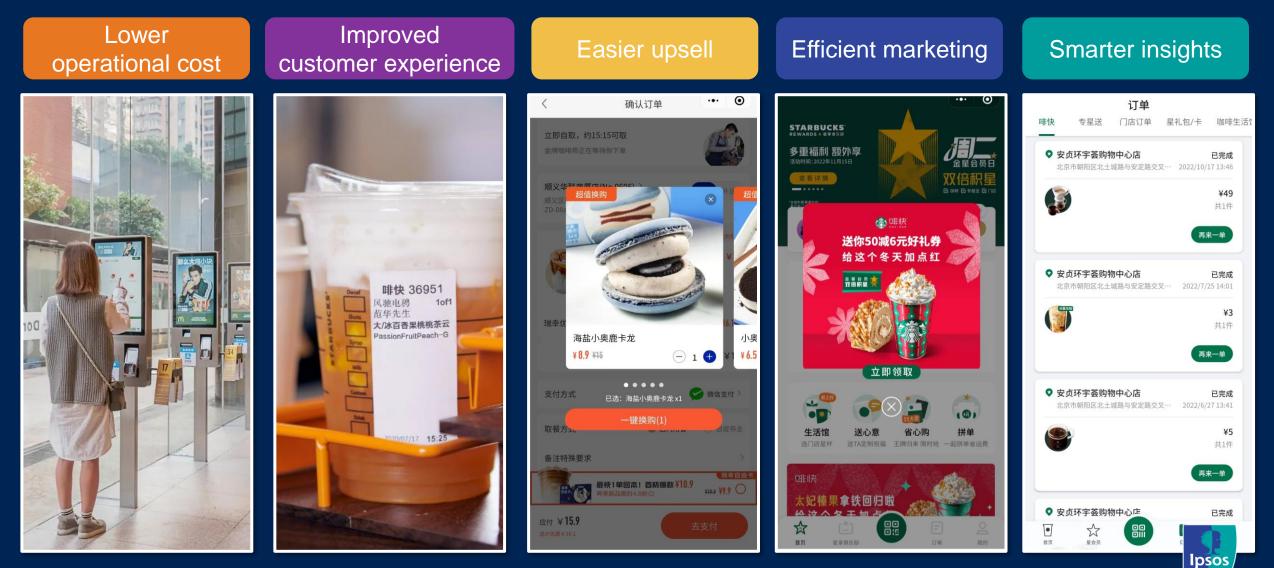
Q5 e-tron

爱车





THE INTEGRATION EMPOWERS BRANDS



SOME NOTES ABOUT CHINA TODAY

The dynamic zero-Covid policy has a strong impact. on economy and consumer confidence.

But things are changing...



EMBRACING CONVERGENT COMMERCE

Alison Chaltas November 17th, 2022



UNDERSTATEMENT: COMMERCE IS EVOLVING RAPIDLY

MULTICHANNEL

- Binary silos: online vs. offline
- Transaction oriented communication

OMNICHANNEL

- Seamless handoffs from one channel and touchpoint to another
- Functional, 'frictionless' experiences

CONVERGENT COMMERCE

- Channel explosion driven by technology
- Converging physical and digital environments and touchpoints



EMERGING AND SCALING COMMERCE CHANNELS MOVING TO MAINSTREAM

Use of digital commerce channels, Past 6 months



© Ipsos | KEYS Webinar November 2022

Source: Ipsos Essentials Wave 64, September 2022, Base 10,017 across 15 countries.



MEANWHILE, THE PHYSICAL STORE'S ROLES ARE EXPANDING

Increasing roles = increasing traffic





© Ipsos | KEYS Webinar November 2022

Source: Ipsos Essentials Wave 64, September 2022, Base 10,017 across 15 countries.

NO LONGER JUST ABOUT SALES PER SQUARE METRE

Instore metrics should be updated to reflect new reality



- Fulfillment multiple ways
- Post sales & servicing
- Manufacture & cocreation



- Discovery & entertainment
- Tangibility & sensory
- Convenience



- F2F staff connection
- Community hub
- Leisure & social together time



Pudo pickup lockers, 7Eleven Japan



L'Oreal flagship China



Nordstrom, USA



But, consumers don't think in channels

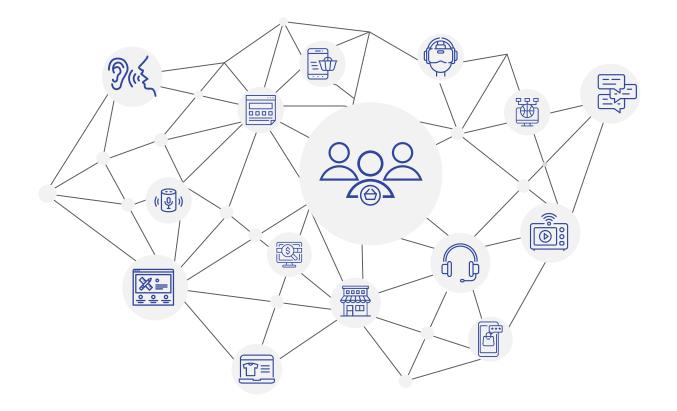


CONSUMERS NOW IN CONTROL OF THEIR OWN COMMERCE ECOSYSTEMS

Be wherever the consumer is, 24/7, for whenever they need you

Integrate into the consumer's ecosystem – become their default go-to

Ensure their human experience is optimal



Shopping is no longer a place, but a fluid set of activities across channels and touchpoints



MULTIPLE MODELS FOR MESHING YOUR COMMERCE ECOSYSTEM WITH A CONSUMER'S



SECTOR EXPANSION



Loblaws

Walmart ><

OPEN PLATFORMS







KEEP HUMANS AT THE CENTRE OF THE ECOSYSTEM



Build your commerce ecosystem around the human, with tech as the enabler



Co-create with consumers for optimal brand experiences and channel activations



Humanize commerce experiences. Be tangible, sensorial, immersive, and personal



SHOPPERS REACTING WITHIN CONTEXT OF TODAY'S TURBULENT TIMES

Current Context

Global Consumers' Key Concerns



Inflation



Wars and political unrest



COVID hangovers



Resulting Consumer Behaviour

Seek lowest price products and channels. Starting earlier for pre-holiday sales.



75% cutting back on holidays. More planning, more touchpoints, less impulse.



Abandoned & postponed purchases.



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••• SO WHAT?



- Think convergence first in all categories be where the consumer is at all times
- Define the role of each physical and digital channel and touchpoint in the consumer's ecosystem, and how they can support each other

Keep it human.

Stay tuned for our upcoming Customer Perspective podcast on commerce ecosystems



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www.ipsos.com/en/omnichannel

THE RETAIL CONVERSATION: LOOKING TO THE HOLIDAYS

New insights from Ipsos.Digital + Synthesio

Allen Bonde Chief Marketing Officer SIA + Synthesio





USING SURVEY + SOCIAL TO GET THE COMPLETE PICTURE

A sneak peak at our 2022 Holiday Shopping research with insights from FastFacts survey of 12 markets, plus English and French language social data from Synthesio in 4 countries

- **1. Will inflation's impact creates new traditions?**
- 2. Are we seeing a rush (back) to the store?
- 3. Top gifts...and looking into the future



INFLATION'S IMPACT: 87% SAY RISING COSTS WILL IMPACT THEIR HOLIDAY SHOPPING

IS SAVING MONEY THE NEW HOLIDAY TRADITION?

Ipsos Global Inflation Monitor saw the trend in June, when 37% said they would spend less on holidays

Our 2022 Holiday Shopping survey shows how this is already impacting shopping behavior and even traditions...





Will look for the best prices, deals, and coupons



34%

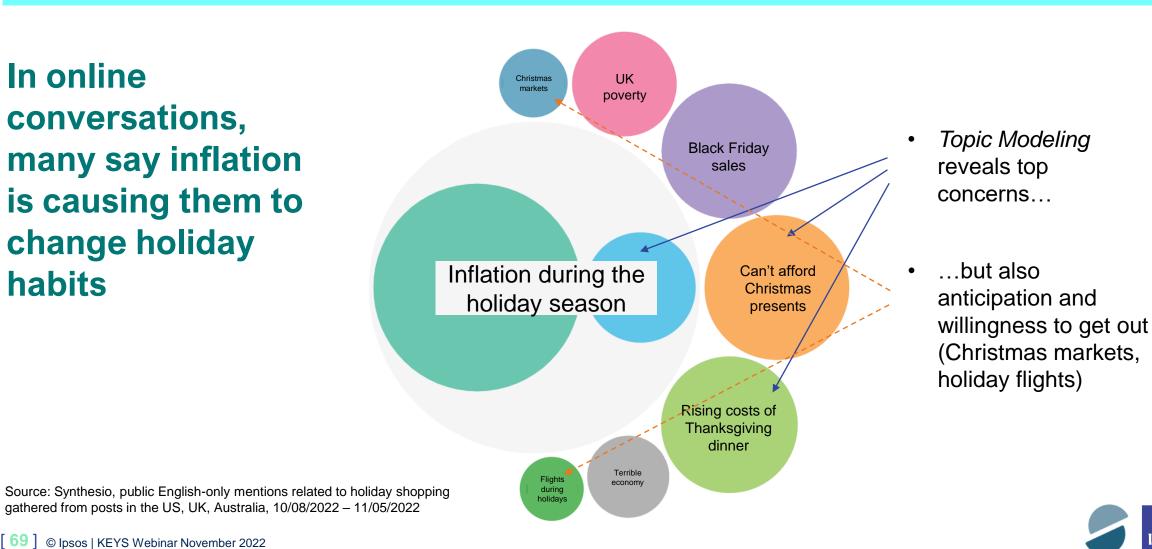
Will spend less money on holiday decorations

Source: Ipsos.Digital FastFacts quantitative survey launched on Nov 10th with national representative samples of ~10,000 respondents across 12 markets



IS SAVING MONEY THE NEW HOLIDAY TRADITION?

In online conversations, many say inflation is causing them to change holiday habits



ARE SHOPPERS STARTING EARLY THIS YEAR?

In our new survey, on average 18% are already finished or almost done with their holiday shopping (but don't worry 56% haven't started yet)



Aubrey 4 @aubrey_reisch

Feeling accomplished because I just did Christmas shopping (I know it's early, but I can't wait for inflation to get worse) for my family of 10 and spent a total of \$110. Not bad.

1:24 AM · Nov 6, 2022 · Twitter for Android





Temi 🖶 🗱 (🔍, 🧡) 🗰 👘 @millkk_shake

I can't believe I have to start doing my Christmas gift shopping now. Coz price of things have started looking ridiculous.

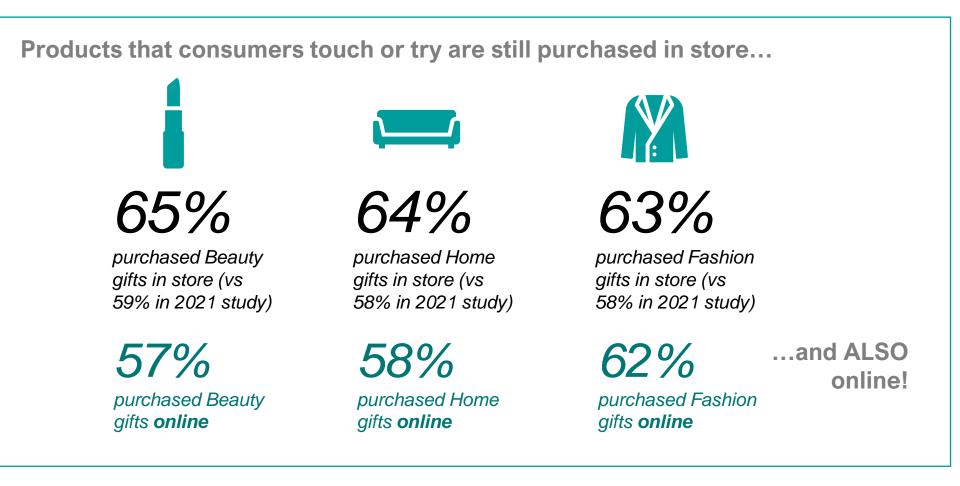
Ngl I hate it here 😃

10:34 AM · Nov 2, 2022 · Twitter for iPhone

BACK TO THE STORE: 23% OF CONSUMERS ARE PLANNING TO INCREASE THEIR IN STORE SHOPPING



IS IN-STORE SHOPPING THE NEW (OLD) THING?



RETURNING TO STORES: the social view

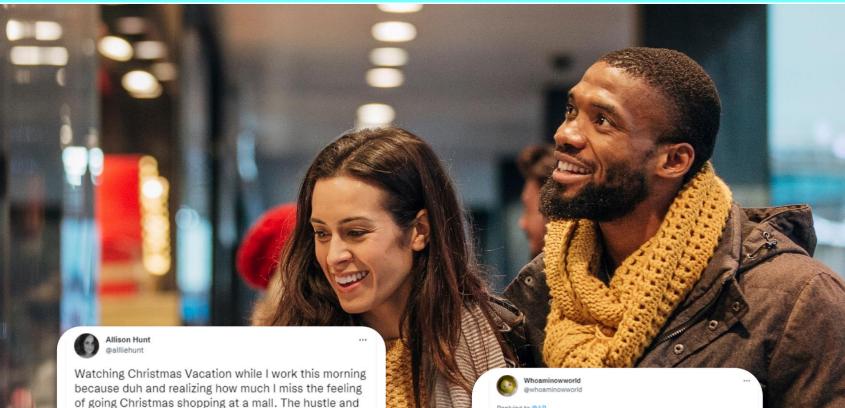
IS IN-STORE SHOPPING THE NEW (OLD) THING?

bustle they write about in songs. Stumbling upon the

perfect gift. Not having to scour the internet.

10:21 AM · Nov 2, 2022 · Twitter for iPhone

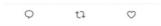
In online conversations, many say they are looking forward to returning to in-store shopping experiences, yet sentiment is mixed (dreading crowds vs seeing decorations and music)



Replying to OAP

Look ... I HATE holiday shopping ... however, last few days I've found myself ooohing & ahhhing at Holiday decorations & sales. There is something different this year, I'm actually smiling & enjoying the Holidays decorations & sales & I'm definitely gonna go shopping this year 🙂

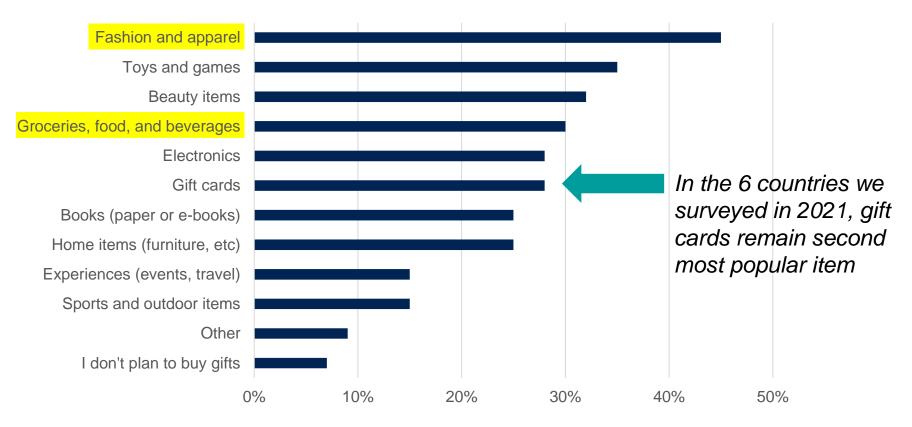
12-37 PM - Oct 16, 2022 - Twitter Web App



WHAT'S TRENDING: FASHION, FOOD...AND GIFT CARDS (AGAIN)

WHAT'S TRENDING?

Gifts you have purchased or plan to purchase



Source: Ipsos.Digital FastFacts quantitative survey launched on Nov 10th with national representative samples of ~10,000 respondents across 12 markets



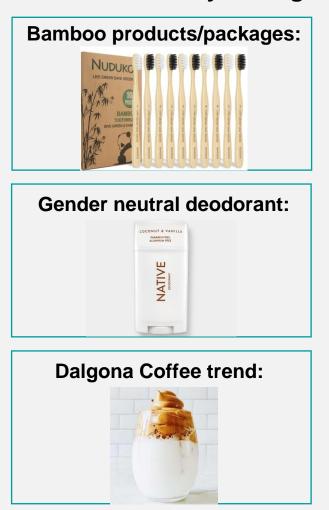
LOOKING INTO THE FUTURE

SEEING EMERGING TRENDS USING SOCIAL DATA

Spotting early signals with Topic Modeling lets us see what may be in the store in the next 1-3 years.



What did we see 2 years ago?



WHAT WILL BE THE HOT PRODUCT IN 2024?

LET'S TALK:

Allen Bonde Allen.Bonde@ipsos.com

GET OUR FULL HOLIDAY SHOPPING REPORT ON DEC 1ST AT **WWW.SYNTHESIO.COM**



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