

LIFE IN A CRISIS


– A DEEP DIVE

An Ipsos Webinar

31 August, 2020

GAME CHANGERS





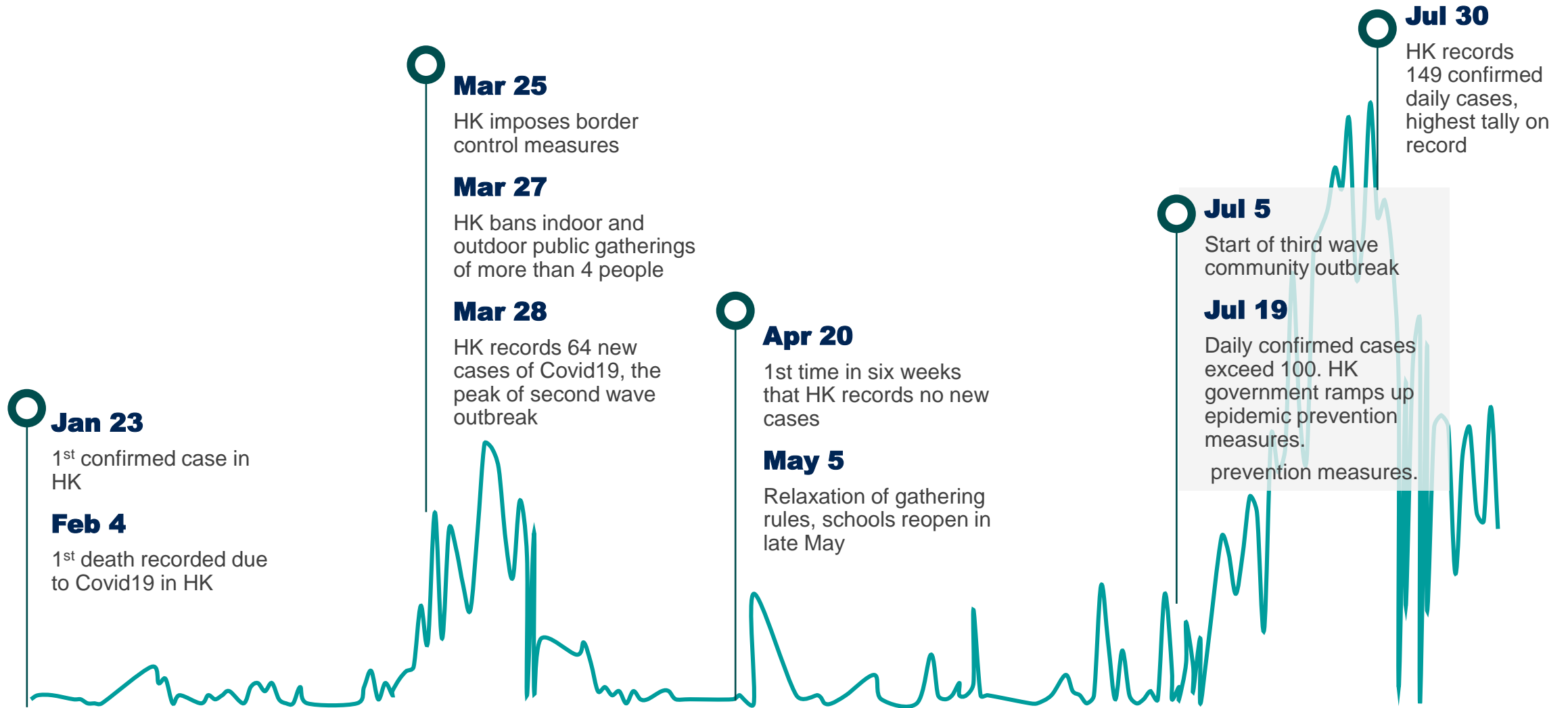
**1. HOW DO EMOTIONS
IMPACT BEHAVIOURS?**

**2. LIFE IN A CRISIS: 4 KEY
CONSUMER GROUPS**

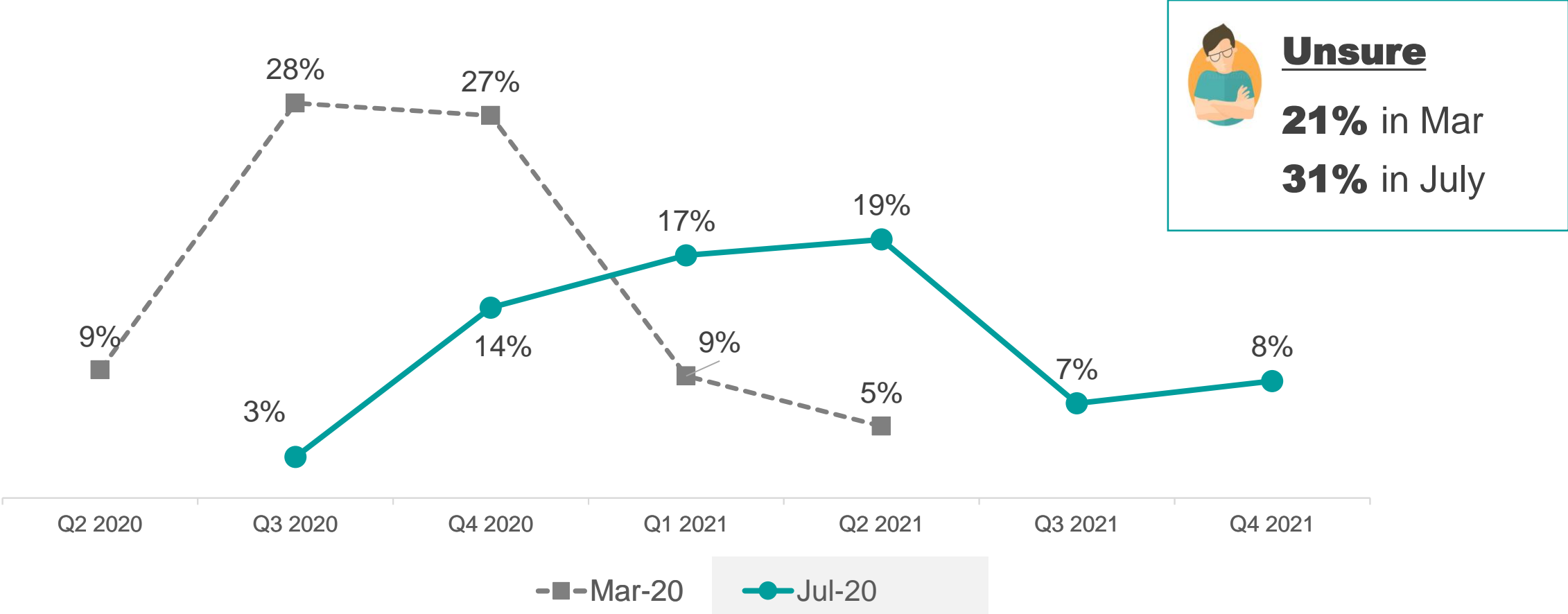
**3. IMPLICATIONS
FOR BRANDS**

HOW DO EMOTIONS IMPACT BEHAVIOURS?

COVID-19 IN HK: A RETROSPECTIVE



MORE HONG KONG PEOPLE ARE UNSURE ABOUT WHEN THE PANDEMIC WILL END



Source: Hong Kong Consumer and COVID-19 Tracker



COVID-19 IMPACTS A WIDE RANGE OF BEHAVIOURS



Thriving in a Bubble

- Focus on well being
- Learning new things
- Cooking at home
- Home cleaning



Playtime in Fortress Home

- Entertainment hubs
- Increased screen time



New Home Workplace

- Collaboration tools
- Home schooling
- Blurred living



Revolution of Choice

- Supply restrictions leading to increase in trial opportunities



Personal Health

- Immunity enhancement
- Contactless retail and payments

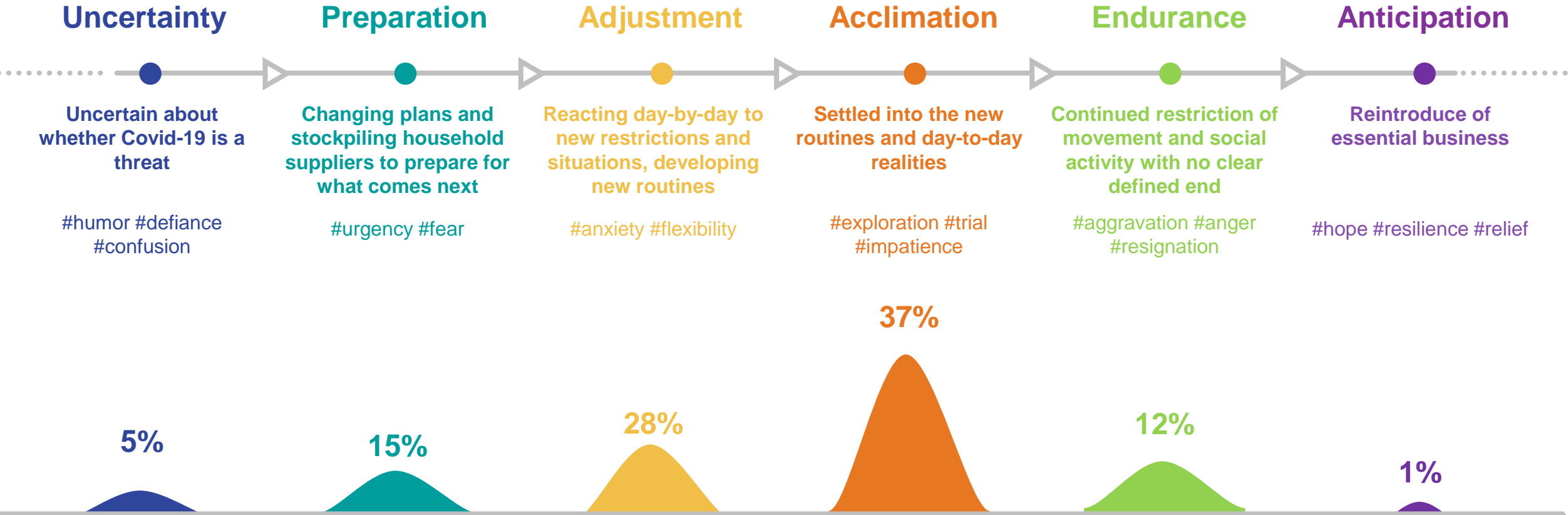


New Value Equation

- Controlled spending

Source: Hong Kong Consumer and COVID-19 Tracker

CONSUMERS FOLLOW A JOURNEY TO ADAPT AS THE PANDEMIC UNFOLDS



Source: Hong Kong Consumer and COVID-19 Tracker



HOW TO MAINTAIN AN IN-DEPTH CONNECTION WITH CONSUMERS



Ipsos SpeakEasy

歡迎你加入SpeakEasy香港。這是由環球頂尖市場研究公司 Ipsos 建立的網上社群，旨在提供一個平台讓你每日使用的產品與服務發表意見。你可於這裡就環球品牌到娛樂等一切範疇，通過與主持人或其他會員進行討論、上傳照片 / 圖片 / 影片等方式，向我們發表想法。我們通常會透過電子郵件邀請你參與平台上新的活動（當中包括每月主題研究、網上論壇、網上聚焦小組、等），你可以隨時隨地登入這個平台分享意見。你付出了時間，當然值得回報！我們除了會定期在這個平台與你分享有趣的研究資訊外，你亦有機會於參與個別調查活動後賺取現金禮券作為謝禮。希望大家享受在這裡互相交流意見。

活動欄

歡迎您加入SpeakEasy 香港!!

投票

你嘅過去一個禮拜，有幾多日出過街？

- 冇出過街
- 1日
- 2日
- 3日
- 4日
- 5日
- 6日
- 日日都有出

投票

你最近嘅消費模式

新型冠狀病毒引發嘅肺炎疫情改變咗我哋嘅生活同消費模式 - 需要買乜嘢? 去邊度買? 點樣俾錢? 等等 我哋想了解一下你同埋呢個網上社群...

Olive Moderator Bio

新加入? 從這裡開始吧



SpeakEasy香港

歡迎你加入SpeakEasy香港。這是由環球頂尖市場研究公司 Ipsos 建立的網上社群，旨在提供一個平台讓你對每日使用的產品與服務發表意見。你可於這裡就環球品牌到城巖等一切範疇，透過與主持人或其他會員進行討論、上傳照片 / 圖片 / 影片等方式，向我們發表想法。我們通常會透過電子郵件邀請你參與平台上新活動（當中包括每月主題研究、網上論壇、網上聚焦小組，等），你可以隨時隨地登入這個平台分享意見。你付出了時間，當然值得回報！我們除了會定期在這個平台與你分享有趣的研究資訊外，你亦有機會於參與個別調查活動後賺取現金禮券作為謝禮。希望大家享受在這裡互相交流意見。

活動欄



歡迎您加入SpeakEasy 香港!!



你最近嘅消費模式

最近你嘅消費模式有冇變化? 你最近嘅消費模式有冇變化? 你最近嘅消費模式有冇變化? 你最近嘅消費模式有冇變化?



「行」動起來!

你最近嘅消費模式有冇變化? 你最近嘅消費模式有冇變化? 你最近嘅消費模式有冇變化? 你最近嘅消費模式有冇變化?

投票

你覺得以下這一個描述最能描述你當前狀態?

- 新冠病毒爆發後對我的地區，所以沒有任何限制。
- 我們可能出現限制措施好準備，開始儲存日常用品。
- 我每日都嚴格執行生活上所有限制，並建立緊密聯繫。
- 我已知道如何限制限制。
- 雖然我所住地方好快就會解除所有限制。
- 我開始進入第一級限制限制我的舉動。
- 我已開始大部分限制從發生之前會非常準備。
- 我覺得情況已經過去，正考慮如何生活。



Chris
@chris

THE IMMERSION

LET'S TAKE A LOOK AT THE RESEARCH

Screenshots:

投票

你覺得以下邊一項最適合用嚟描述你當前嘅狀態?

- 新型冠狀病毒仲未傳到我嘅地區，所以未有任何限制。
- 我為可能出現嘅新限制做好準備，開始儲存日常用品。
- 我每日都要應付生活上嘅同時限制，並建立緊新嘅習慣。
- 我已經適應咗呢啲限制。
- 睇嚟我所住嘅地方好快就會解除所有限制。
- 我開始投入做一啲曾經被限制嘅事情。
- 我已經做緊大部分嘅疫情發生之前會做嘅事情。

疫情已經過去，正常生活。

投票

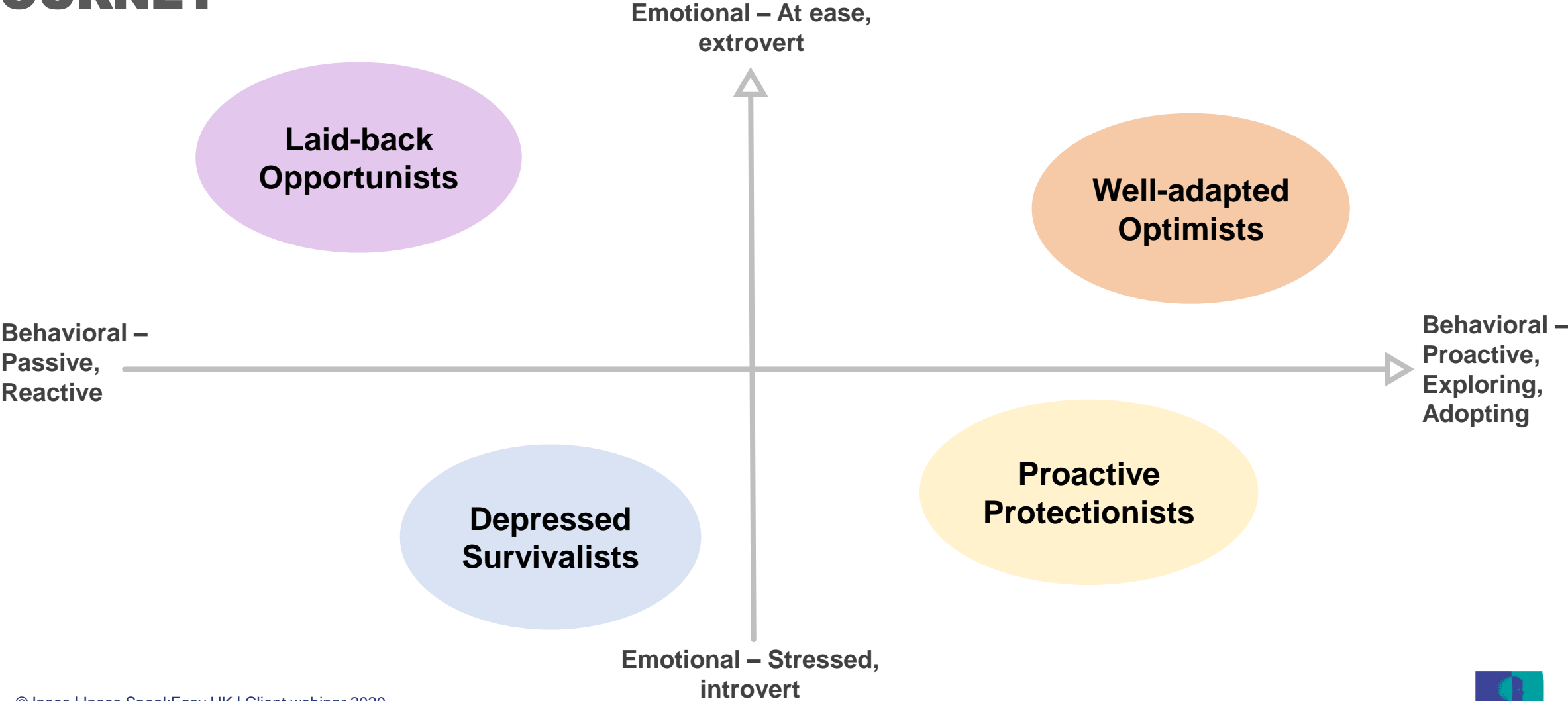


重建聯繫

[聯絡我們](#) | [條款及細則](#) | [私隱政策](#) | [Cookie Datasheet](#)



WE HAVE IDENTIFIED 4 CONSUMERS SEGMENTS, EACH AT A DIFFERENT STAGE ON THE PANDEMIC ADAPTABILITY JOURNEY



WELL-ADAPTED OPTIMISTS

WHO: More male; Single/ Married without children, with mid-high income

HOW THEY FEEL: Explorative, open-minded



BEHAVIOUR & CONSUMPTION PATTERN:

- Familiar with online shopping – developed this habit before COVID;
- Staying at home while proactively interacting with the outside world via digital media;
- Invested/ plan to invest in stock market during the slump for potential gains later on

“

Working from home, didn't go out much. Just order take away and shop online

Click Click Click - The only way of shopping during Covid-19. This is my latest delivery. I am trying a new providers.



ADAPTABILITY TO NEW NORMAL: High

Has already been living in the stay-home economy



EXPECTATION FROM BRANDS:

#local #creative #nonconventional

“

I paid more attention to local small brands, such as AboutThai.

There are entertainment platforms (for example: Now E), orchestra, singers organized online fundraising shows. Allowing bored people to enjoy entertainment at home.

PROACTIVE PROTECTIONISTS

WHO: More female; Single/ Married with children, skewed towards higher income

HOW THEY FEEL: Unsecured, anxious



BEHAVIOUR & CONSUMPTION PATTERN:

- Stock up and shop more (mainly online);
- Beside groceries, shopping for a variety of items (from apparels to household goods);
- Conservative in terms of investment – hold cash/ invest on gold

“

I monitor the retailers constantly on what they put on shelves; I feel so tired and nervous recently.

I didn't consume much frozen meat before the pandemic, but my lifestyle changed and it's filled up my fridge now.

I have developed a new shopping pattern in this period.

ADAPTABILITY TO NEW NORMAL: High

Ready to continue under the stay-at-home economy



EXPECTATION FROM BRANDS:

#guideme #caring #partofthecommunity



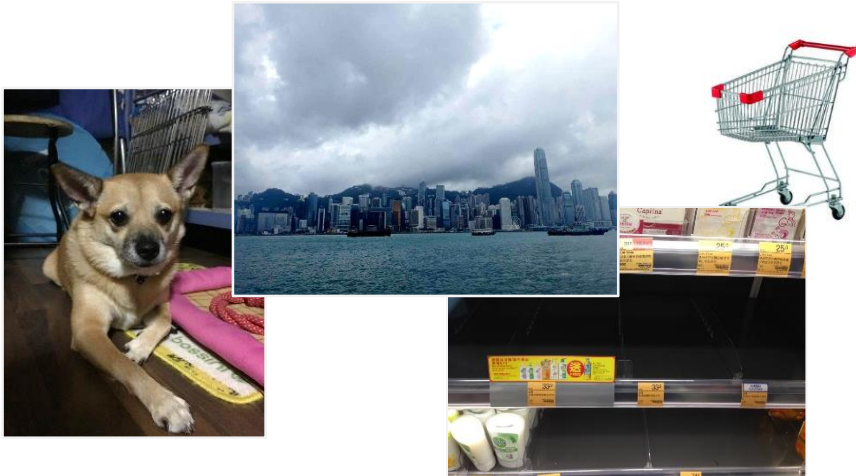
A PROACTIVE PROTECTIONIST SHARED HER DAILY 'HYGIENIC' ROUTINE



DEPRESSED SURVIVALISTS

WHO: More female, with mid-range income

HOW THEY FEEL: Pessimistic, constrained



BEHAVIOUR & CONSUMPTION PATTERN:

- Safety first – staying at home;
- Minimal consumption made – only bare necessities;
- Reduced Investments: sold stocks to minimize loss

“

I am in a bad mood. It's chaotic that we need to fight for daily products again.

I am no longer interested to go shopping, it's not safe to stay on the street for too long.

I liked shopping in physical stores, so I can touch and try. There is no sense of security and authenticity to shop online.

ADAPTABILITY TO NEW NORMAL: **Low**

They tend to stick to in-store shopping and less likely to fully embrace the “new normal”.



EXPECTATION FROM BRANDS:

#safe #secure #clean #control

“

They do regular cleaning and disinfection.

Handle the packing with extra care, all products will be cleaned throughout as I have fear of getting infected.

LAIID-BACK OPPORTUNISTS

WHO: More male, low-mid income

HOW THEY FEEL: Relaxed, live life as usual



BEHAVIOUR & CONSUMPTION PATTERN:

- COVID has had minimal impact on them – not much worry about going out or getting in contact with other people;
- Prioritize their own convenience/ freedom;
- Maintaining a “normal” life

“

People are afraid going out, leading to a decline in the business. Many shops strive to survive through price reduction. Some are really good deal! I am also happy to spend more and support them.

Shoppers reduced, malls and shops are not as crowded as they used to be. It offer a better shopping experience to me.

ADAPTABILITY TO NEW NORMAL: **Low**

They have never changed!



EXPECTATION FROM BRANDS:

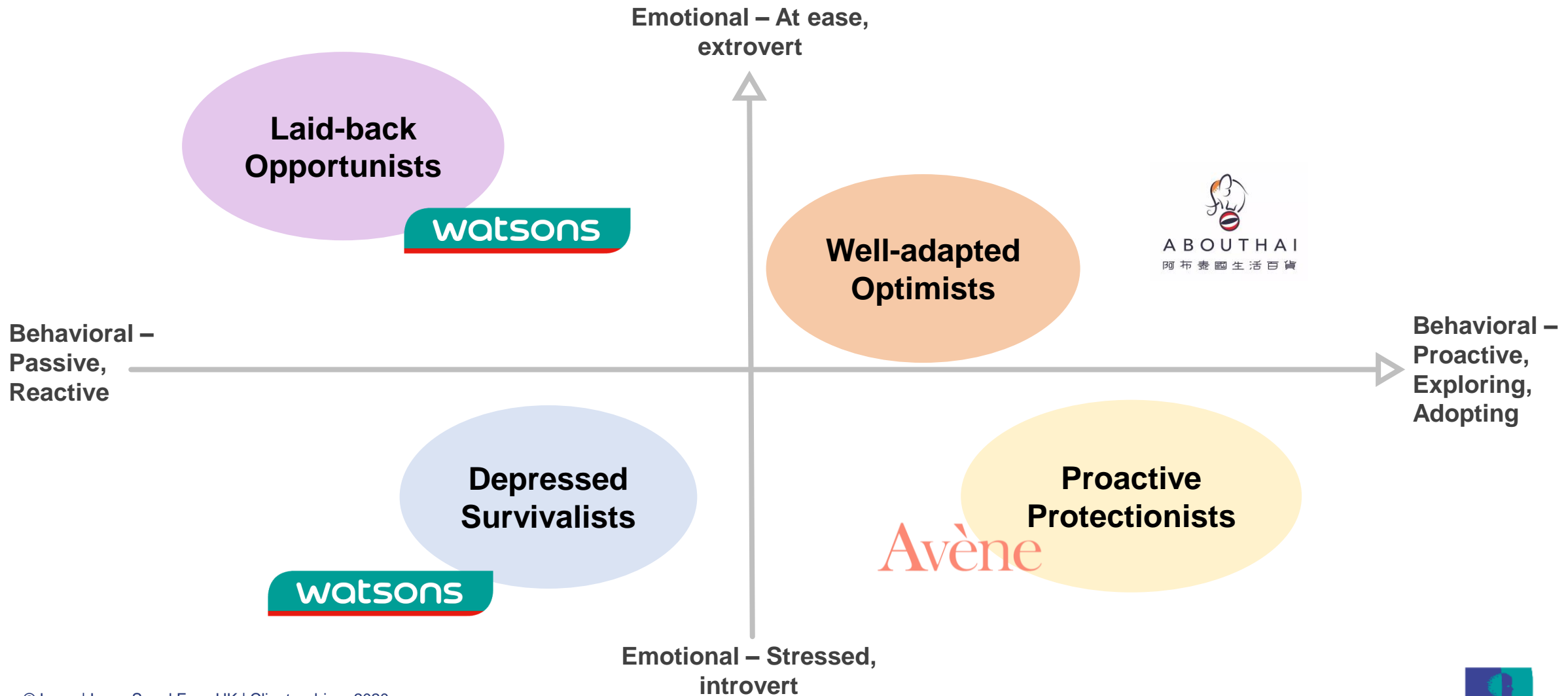
#discount #nomarkup #freeupgrades

“

They are not marking up the price when sell masks.

The first consideration is how much discount I can get while using the payment method

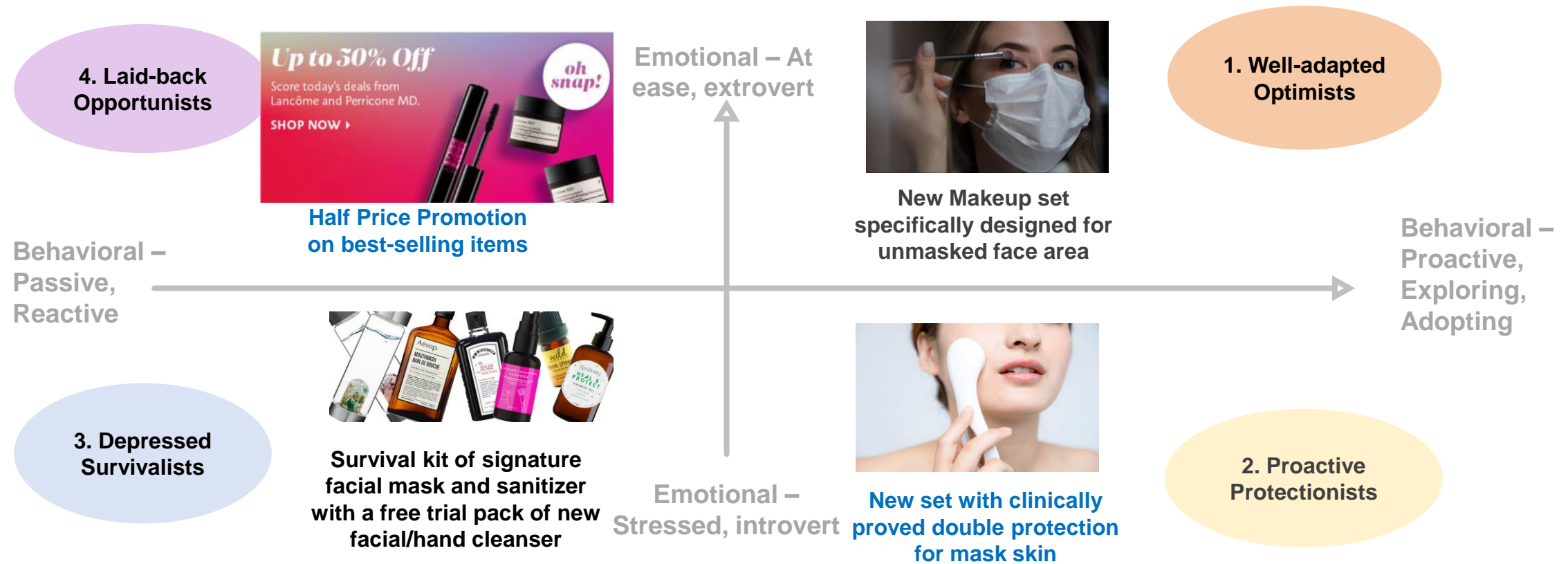
BRANDS IN HK THAT HAVE SUCCESSFULLY BUILT A CONNECTION WITH CONSUMERS



A neon sign on a dark brick wall. The sign features the words "QUIZ" and "TIME" in a stylized, bubbly font. "QUIZ" is rendered in pink neon, and "TIME" is rendered in cyan neon. The text is enclosed within a double-line border that is also color-coded: the top and bottom lines are pink, while the left and right lines are cyan. The sign has a glowing effect against the dark background.

QUIZ
TIME

GUESS WHO MIGHT BE THE RIGHT TARGET FOR THIS OFFER?



IMPLICATIONS FOR BRANDS

THINGS TO KNOW

1. Customers prioritize trusted relationships
2. Crises can also be an opportunity for customer acquisition (brand switch)
3. Data points are only part of the story, understanding the context and emotions provides more depth
4. Key to success in a crisis is to stay relevant to your customers



USING A COMMUNITY BRINGS YOU...

1 STAY CONNECTED

Understand in **real-time** with rich **multi-media contents** on how consumers are feeling and what they would like to share

2 AGILE

Enables quick research with depth

3 BUDGETED

Save an average of **20%** comparing to conventional research method.



OUR SOLUTION

THE FREQUENTLY USED TOOLS

We offer a variety of activities that make the online community compelling. The community features a robust suite of qualitative and quantitative research tools for truly integrated learning.

SC/ MC questions/ grids/ ranking/ card-sorting
 Image response
 Video response response
 Marker/ hotspot
 Multimedia Stimulus exposure



Research Tools

ACTIVITIES MENU

Quantitative Activity

Qualitative Activity



Polling



1-2 polling questions



Quick Survey



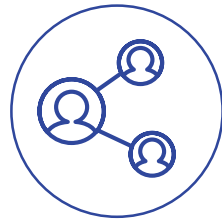
5-10 mins survey to either get a quick quantitative read, or collect feedback to open-ended questions



Contest



A tool with voting function. Useful for directional vetting of ideas, concepts, copy, claims



Discussion Board



A series of moderator-generated questions to spark conversation around a general or specific learning need



Blog/ Diary



Optimized for longer individual replies. It can be used in various type of research – such as product trial, understanding living style, etc.



Live Chat



A scheduled sessions allowing a small, select group of respondents to chat (i.e. text based) in real-time




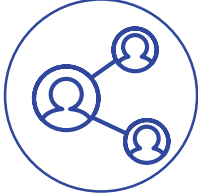





Video Discussion



Bring customers' experience to live through live, remote video streams. It can be in-depth interviews or focus group discussion

BASIC SPECIFICATIONS

Quantitative Activity			Qualitative Activity			
						
Polling	Quick Survey	Contest	Discussion Board	Blog/ Diary	Live Chat	Video Discussion
Sample Size & Interview Length						
1-2 polling questions, targeting n=80-100 response	Conduct 5-10mins quantitative survey with n=100 members**	Conduct directional vetting of ideas, concepts, copy, claims with n=100 members**	Engaging up to 20 members for 5-14 days discussion board	4 days text + image based diary exercise with n=10 members	2 live chats with 7-10 members per chat; 45-60 mins per chat	(1) N=4 One-on-one web in-depth interviews, 60 minutes (2) 2 web focus groups with ;4-5 members per group; up to 120 mins
Deliverables						
Tabulation	Tabulation	Tabulation	8-10 slides PPT report	8-10 slides PPT report	8-10 slides PPT report	8-10 slides PPT report
Credits^ (Add 1 credit to upgrade a tabulation to PPT report)						
1 credits	5 credits	6 credits	8-12 credits (Depend on the duration of the board)	8 credits	8 credits	Web IDI: 7 credits Web FGD: 10 credits

* Specification for the activities can be customize according to client needs, pricing may vary depending on the design (e.g. increase of sample size, additional concepts, etc.)

** Assuming the target audience is around 70% amongst the population

^ Credits listed assume respondents can be found

BUY YOUR CREDITS, USE YOUR CREDITS

Project investment is calculated with using a credit system...

1 credit = HK\$5,000

The most cost-efficient approach is buying a bag of credits and use it when you want.

But for sure, you can buy only the number of credits needed for a single project.

Early bird offer:

Special -30% discount of on all available tools listed in the 2020 rate card will be provided for those who book any study by end September. Capacity will be reserved for first comers.



COMBINING THE ACTIVITIES TO ACHIEVE A DESIRE OUTCOME

You can combine up to two of the seven menus.

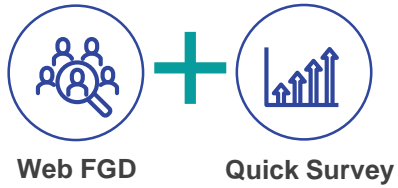
Example of Combinations

After the 5-days Discussion Forum with 20s, we'd like to conduct N=4 Web IDI to deep dive the consumers who posted very interesting things!



15 credits
 Standard rate: HK\$ 75,000
 After Early-bird offer:
 HK\$ 52,500

After conducting N=2 Web focus group discussions, we'd like to do a quick survey to quantify some of the findings



15 credits
 Standard rate: HK\$ 75,000
 After Early-bird offer:
 HK\$ 52,500

After the contest with 100s, we'd like to brush up and improve the winning idea through N=2 Web focus group discussions with those who voted the idea!



16 credits
 Standard rate: HK\$ 80,000
 After Early-bird offer:
 HK\$ 56,000

Feel free to contact us separately if you would like to explore other combinations.



ABOUT IPSOS

Ipsos is the third largest market research company in the world, present in 90 markets and employing more than 18,000 people.

Our research professionals, analysts and scientists have built unique multi-specialist capabilities that provide powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 business solutions are based on primary data coming from our surveys, social media monitoring, and qualitative or observational techniques.

“Game Changers” – our tagline – summarises our ambition to help our 5,000 clients to navigate more easily our deeply changing world.

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg
IPS:FP
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GAME CHANGERS

In our world of rapid change, the need for reliable information to make confident decisions has never been greater.

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder. Ultimately, success comes down to a simple truth:
You act better when you are sure.

YOUR DEDICATED COMMUNITY EXPERTS



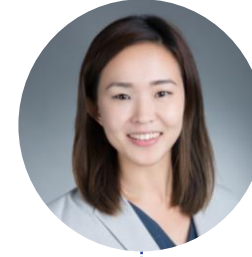
Stephen HUANG

Executive Director, Ipsos UU

With 20 years experience in research, Stephen brings in his ample experience on brand positioning and segmentation research for this project. He focused on qualitative & segmentation research at Ipsos.

Email: Stephen.huang@ipsos.com

Tel: +852 2837 8263



Olive WONG

Project Director, Community

Olive has 10 years of experience in market research. She had hands on experience in handling local and regional projects across various industries – from consumer goods to beauty products to healthcare products. Olive manages the syndicated community.

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Tel: +852 2839 0639

**BE
SURE.
MOVE
FASTER.**

GAME CHANGERS

