

eCommerce UNLEASHED

Ipsos Introduction

June 30 2020

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Content

Capturing durable change
during the COVID-19
crisis and beyond



Questions & answers
for recovery
and growth



Country
and category
scope



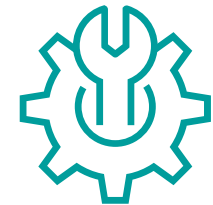
eCommerce
Unleashed pricing
and field plan



Strategy3
virtual activation
workshop



Ipsos
point of
difference



Launch
plan and
timeline



Questions & Answers for Future Recovery and Growth

2020 sales plans were set in a world when COVID-19 was unknown.

Now everything has changed!

Where did shoppers buy before COVID-19?

- ▶ *Understand how shopper's preferences and behaviors have changed.*

What are they doing through the crisis?

- ▶ *Adjust in the near-term to meet shopper needs in a chaotic environment*

Where do shoppers need help?

- ▶ *Be present for the triggers and remove the online category purchase barriers*

What behaviors will stick?

- ▶ *Understand durable changes to your sales and marketing to meet future shopper needs*

What is my best exit strategy from my old plan to a new plan?

- ▶ *Create an innovative transition plan to return to business growth*

When do shoppers think they've arrived at a post-pandemic, new normal?

- ▶ *Know where to reinsert yourselves into the life of your shoppers*

eCommerce Unleashed

Sentiment and Shopping Behavior Tracking

1 Shopper financial, health, recovery sentiment and new shopping behaviors

2 Compares and contrasts new and experienced eCommerce shopper behaviors

3 Megacategory selection, social media use, shopper migration and satisfaction

4 Category triggers, barriers, incidence; brand planning, trial and future purchase intent

5 Shoppers plans to continue new shopping behavior after the crisis





Robust Global Sample

Country	May 2020
Canada	✓
Colombia	✓
Mexico	✓
USA	✓
Spain	✓
Indonesia	✓
Malaysia	✓
Thailand	✓
Vietnam	✓
Other countries	*

Broad Category Perspective

Grocery <i>Past 14 Days</i>	Home Care <i>Past 14 Days</i>	Beauty Products <i>Past 14 Days</i>
Health Care Products <i>Past 14 Days</i>	Personal Care Products <i>Past 14 Days</i>	Electronic Devices <i>P3m</i>
Banking And Credit <i>P1M</i>	Alcohol <i>P1M (Where Relevant)</i>	Tobacco <i>P1M (Where Relevant)</i>

Deep Shopper Understanding

Ipsos Proprietary Shopper Migration Analytics:

Identifies "where to play"

Key Metrics:

- Category level: channel search, social media use, purchase location changes, summary retailer satisfaction and shopper future shopping intent
- Subcategory level: trigger, barrier, incidence, and brand planning/trial and future purchase intent

* Available with client investment : Brasil, Chile, Peru, Argentina, Australia, China, Japan, South Korea, Hong Kong, India, Belgium, France, Germany, Italy, Netherlands, Norway, Sweden, UK, Czech Republic, Hungary, Poland, Saudi Arabia, South Africa, Turkey

Strategy3 Virtual Activation Workshop

Ipsos Strategy3

IPSOS' MARKETING, BRAND, AND
INNOVATION STRATEGY CONSULTANCY

We approach every challenge through
three lenses



Ipsos Strategy3 brings Strategy and Tactics consulting skills to help you activate your shopper learning

- *Proven virtual format using video, exercises, and shared experiences to soften social distancing during COVID-19*
- *Tailored for single-day or multi-day sessions*
- *US\$11,000 per day (can adjust for workshop scope/length)*

1 Day Session

Format: Virtual workshop for a **short term pivot focus**.

Goals:

1. Review & align on the foundational learning
2. Determine potential implications for the business for the short term
3. Brainstorm & whiteboard near term responses for your business

3 Day Session

Format: Virtual workshop for **long term strategic planning**.

Goals:

1. Review & align on the foundational learning
2. Brainstorm potential scenarios & implications for the short, medium and long term
3. Identify markers to monitor scenario developments
4. Whiteboard potential responses
5. Develop preliminary organizational plans

THE GLOBAL PANDEMIC HAS BEEN A SEISMIC SHOCK

People in lockdown

Most retailers closed

Whole sectors of the economy
shut down

***While we are beginning to return to a new normal,
things will be very different for a long while...***

COVID-19 IS AN ACCELERATOR

Accelerating the decline of already fragile retailers

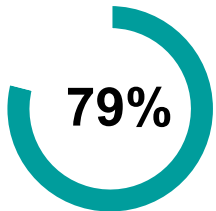
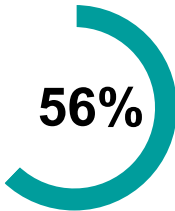
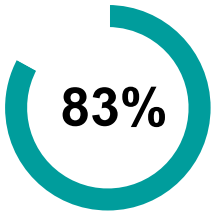
Forcing businesses across all sectors to change

Accelerating the rate of digital transformation and eCommerce

***But businesses are financially challenged
and a global recession looms...***

SHOPPING SHAPED BY PRAGMATISM, FRUGALITY & SAFETY

More mindful of how much I spend



More time researching products	45%	71%	47%	74%
Fewer store visits	69%	81%	73%	76%
Worried about safety of online deliveries	48%	66%	59%	45%

ONLINE OFFERS CONVENIENCE, SAFETY AND GOOD DEALS

Drivers of shopping online

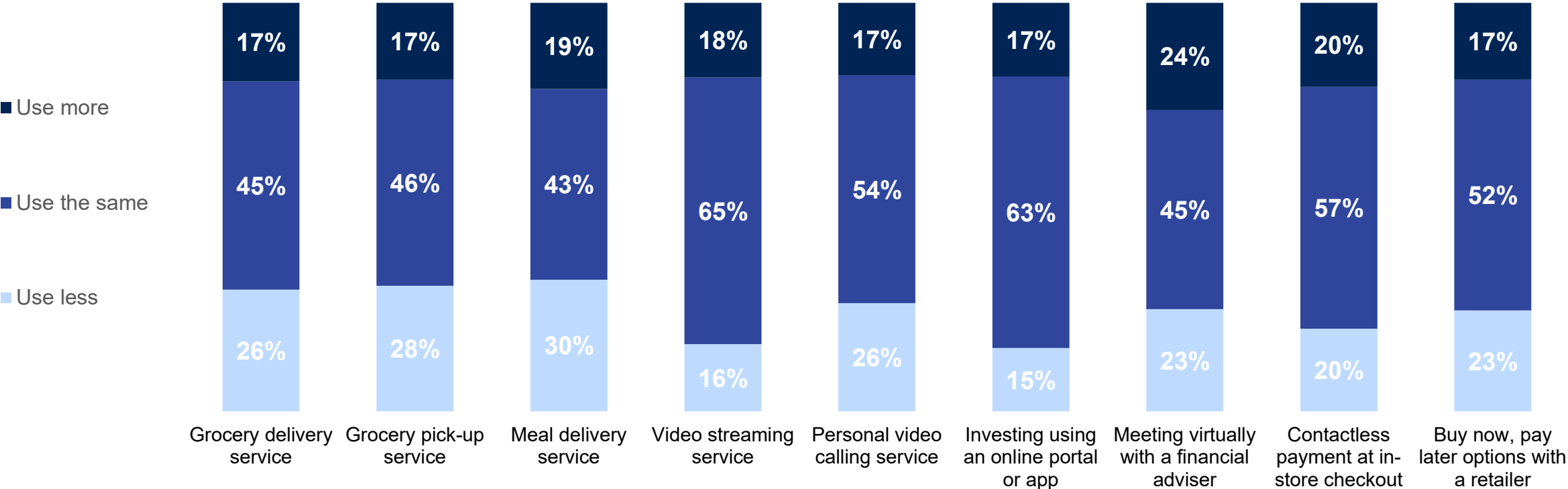


	USA	Mexico	Spain	Indonesia
Easier than going to the store	21%	22%	21%	30%
Didn't have to deal with people	19%	34%	14%	19%
Shipping free / low cost	21%	22%	22%	30%
Price promotion	23%	20%	15%	29%

TOO EARLY TO SAY IF DIGITAL BEHAVIOURS WILL STICK



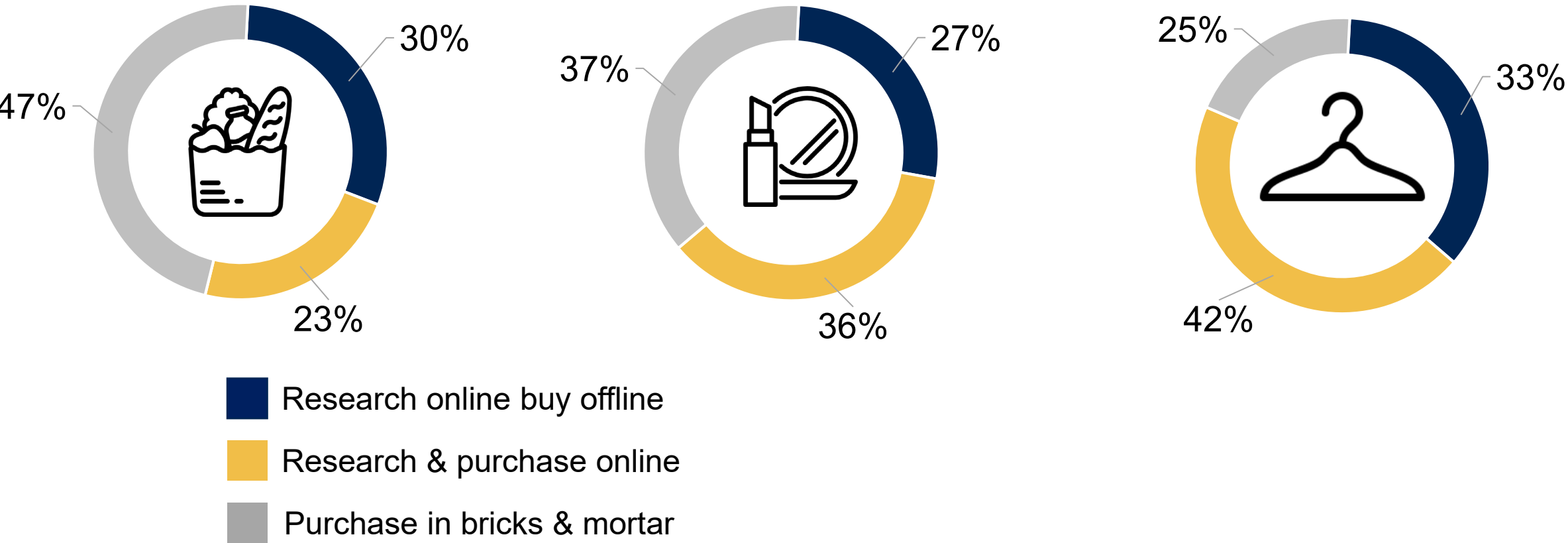
Projected change in behaviour regarding digital tools and payment methods



BUT OMNI-CHANNEL SHOPPING HERE TO STAY



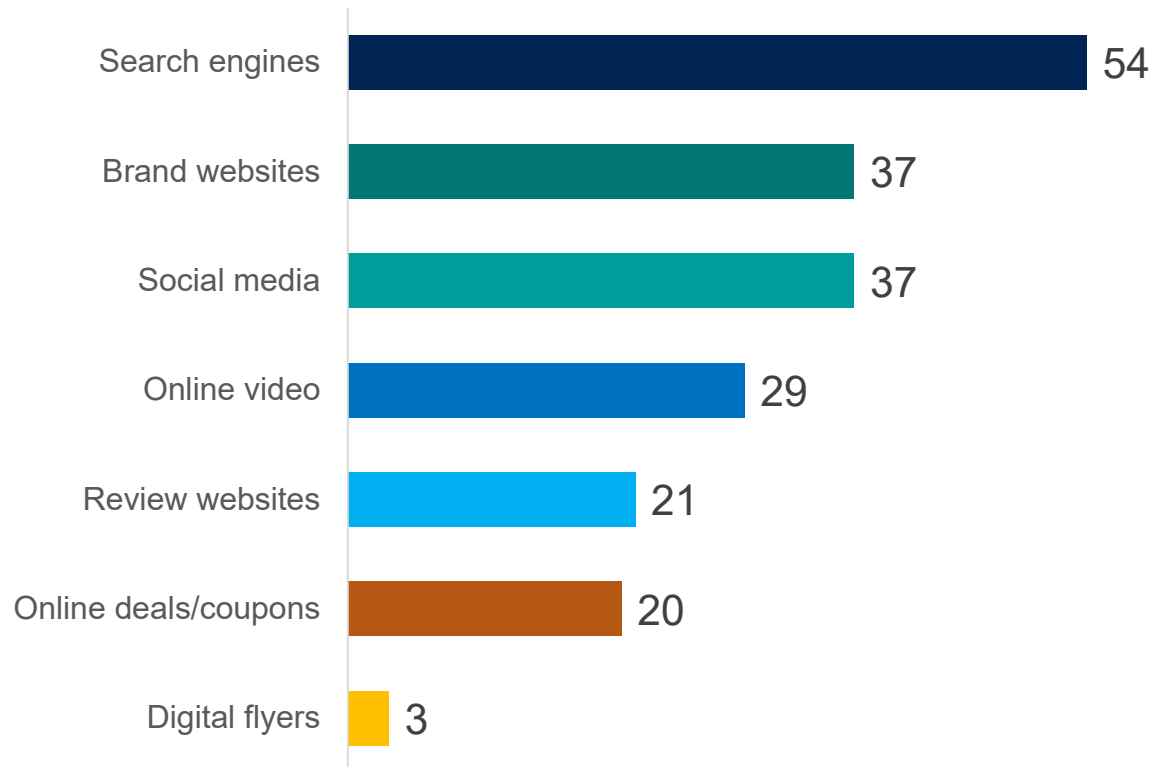
Projected channel usage by category:



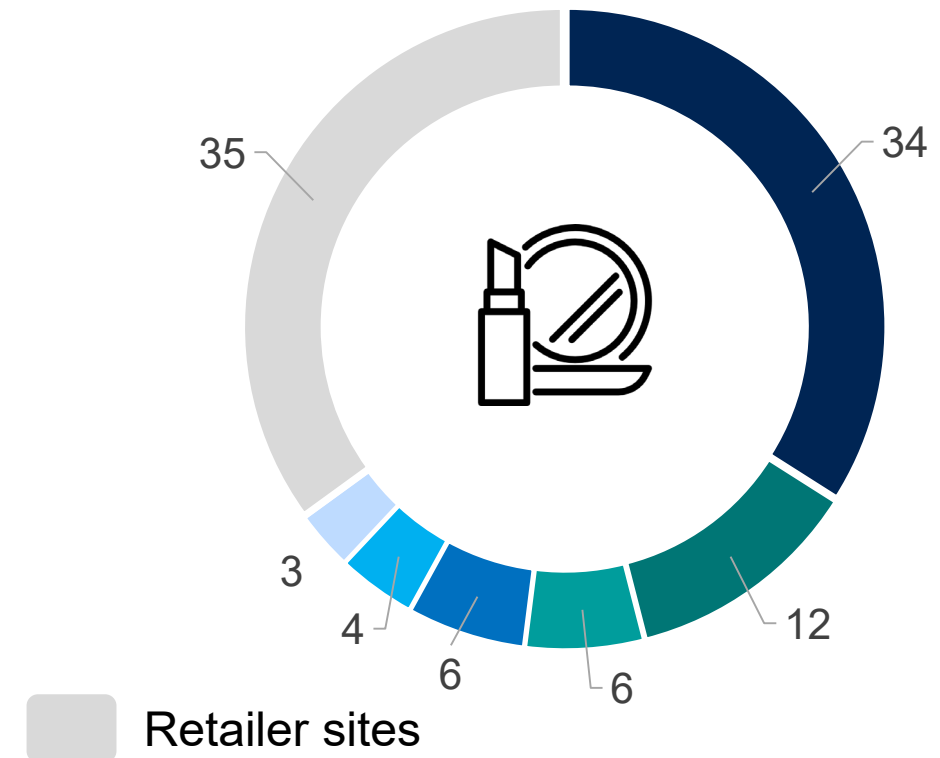


ONLINE SHOPPERS USE MULTIPLE TOUCHPOINTS

Digital touchpoints used to purchase category



Digital touchpoint used most often to initiate purchase



ECOMMERCE UNLEASHED GLOBAL PRICING

	Tier	Cost
Single country price	USA	US \$5,000
	Tier 1: Canada	US \$5,600
	Tier 2: Colombia, Mexico, Spain, Malaysia, Thailand	US \$4,500
	Tier 3: Indonesia, Vietnam	US \$3,400
Global and regional reports	Custom pricing on request	

Study Deliverables



Reporting

Your choice of PPT
OR
portal access



Research Presentation

Ipsos local experts
review PPT findings
and implications

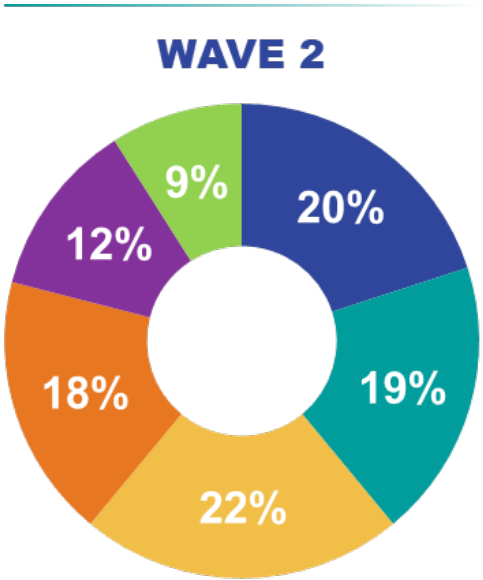
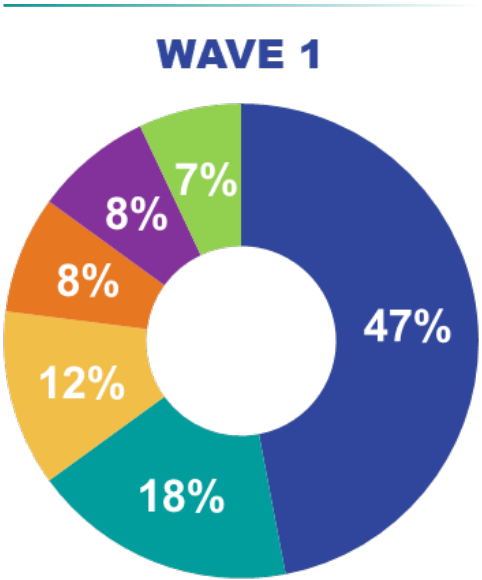


Optional Virtual Workshop

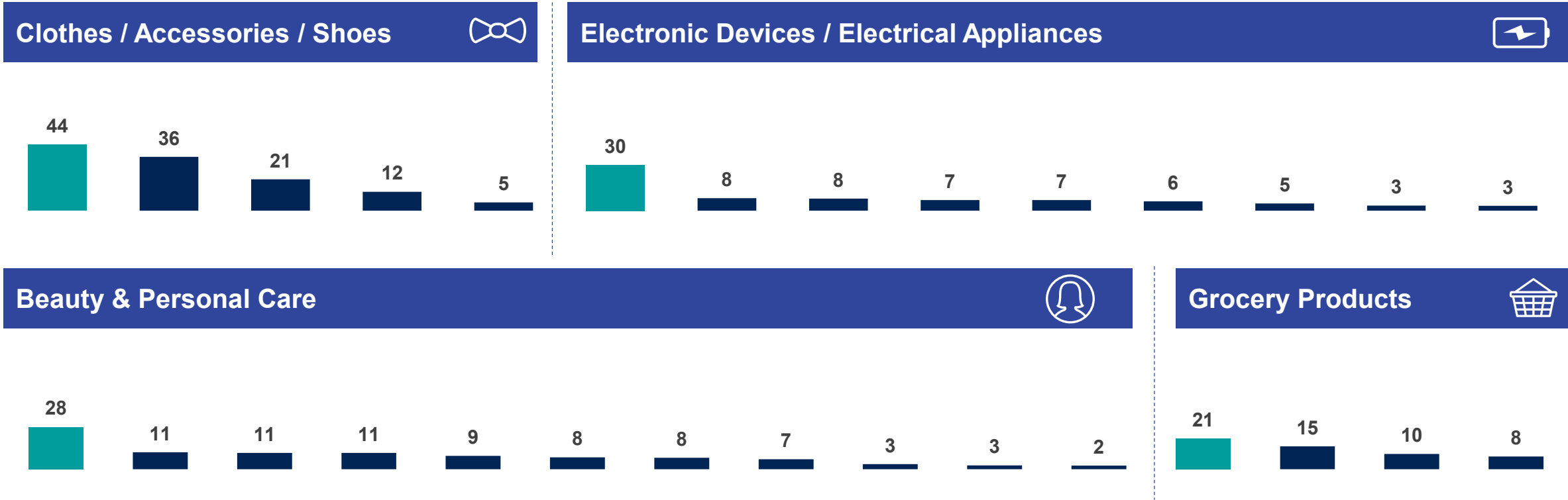
Strategy3 proven format
for short term gain
and long term strategy

Ipsos Globally Aligned Shopper Sentiment Tracking

eCommerce
Unleashed uses
Ipsos newly
designed shopper
sentiment tracker
to simplify country
comparisons and
comparisons
across Ipsos
tracking studies



Category Online Shopping Incidence



Base: Shopper level (n=1005)
Question: Q13. Which of the following categories have you purchased online at least once in the past 12 months?

Category Drivers & Barriers

Online Shopping Drivers



Base: Category Level (=n=2016)

Question: Q2a. Thinking about this specific purchase occasion, did you buy in-store or online?

Q3a. Why did you purchase from an online store rather than visiting a physical store location?

Online Shopping Barriers

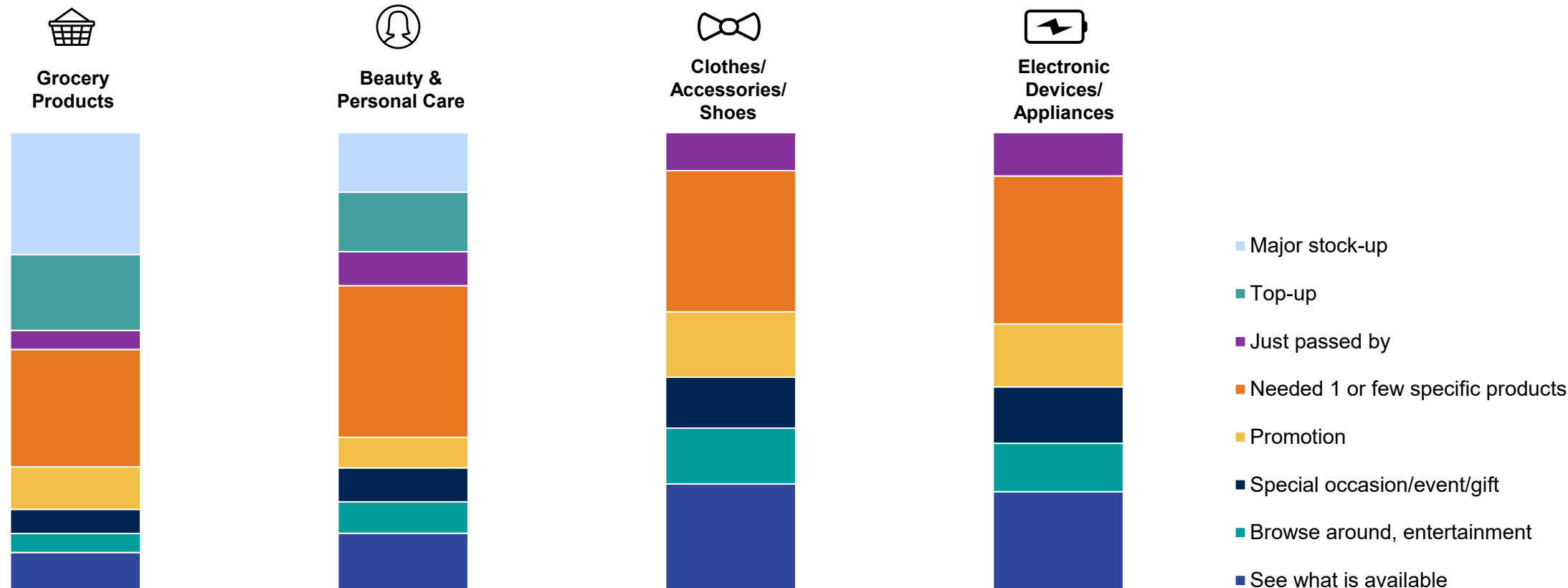


Base: Category Level (=n=2016)

Question: Q2a. Thinking about this specific purchase occasion, did you buy in-store or online?

Q3a. Why did you not purchase online?

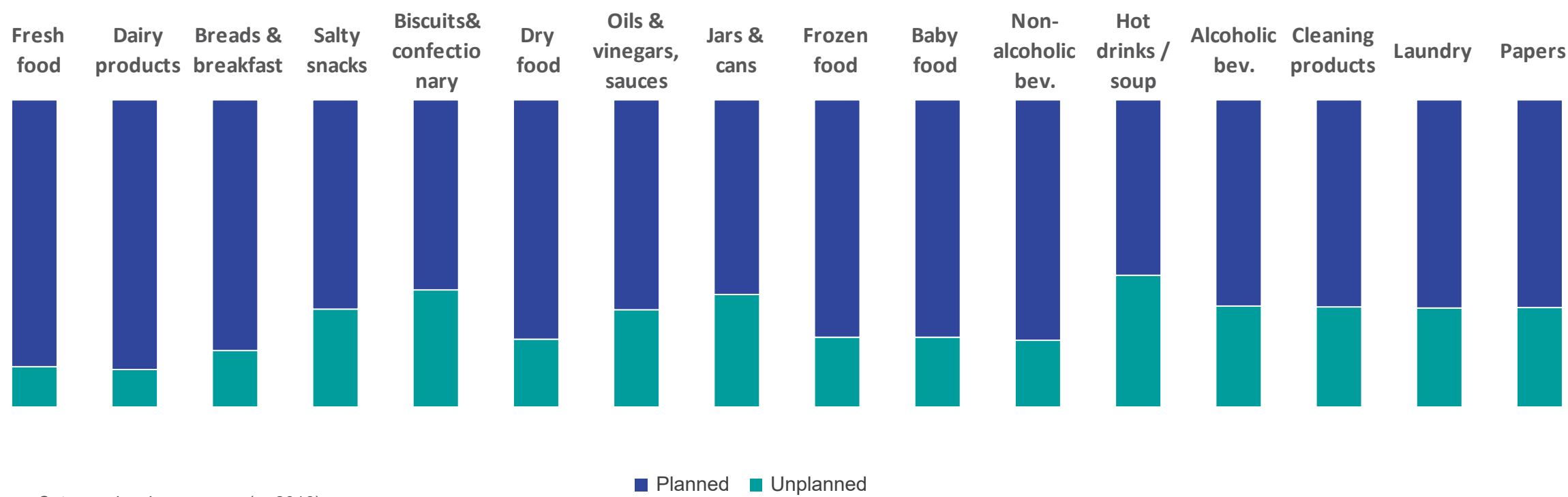
Key Shopping Missions Per Category



Base: Shopping occasions
Question: Q4. How would you describe the purpose of your visit?

Online vs. Offline Buying Per Shopping Mission

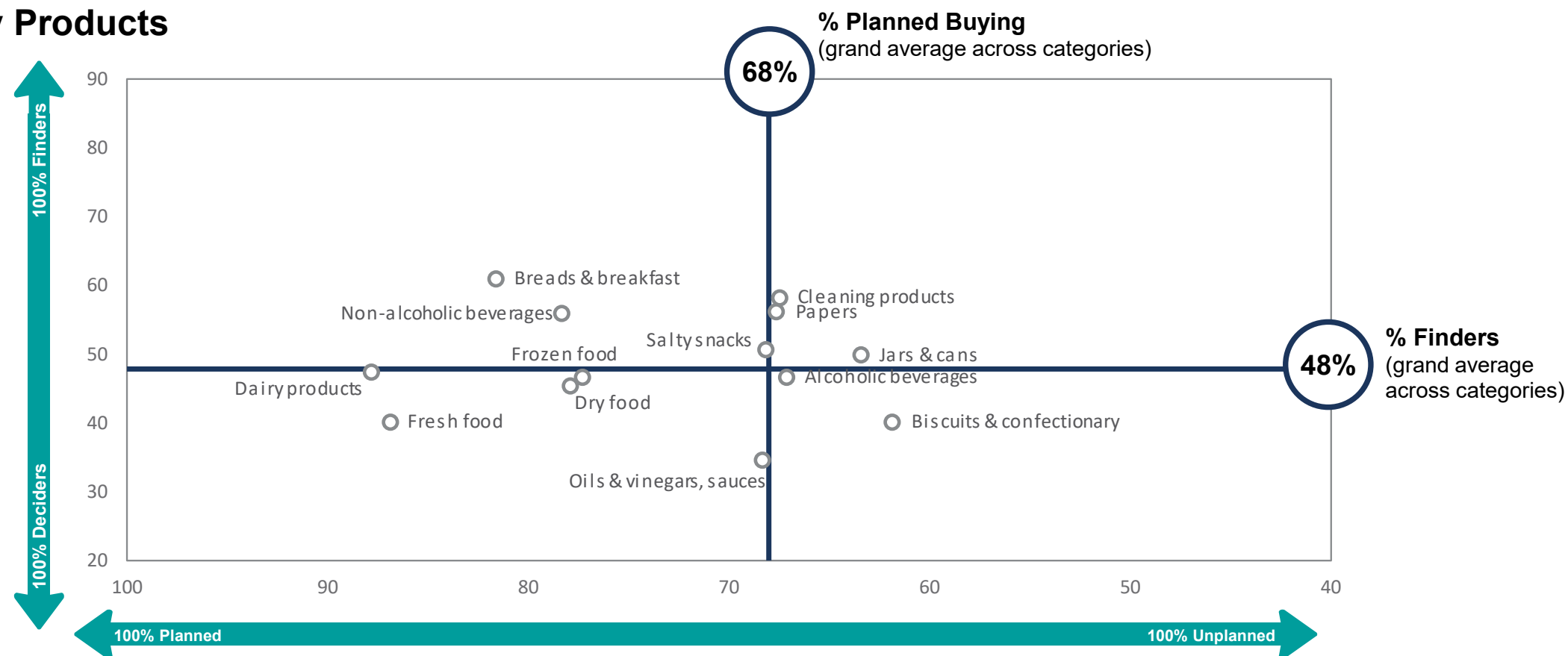
Planned vs Unplanned



Base: Category level (n=2016)
Question: Q6. Which of these categories were planned?
Note: Products with too low base sizes are not reported (n<40)

Finder vs Decider - Planned vs. Unplanned

Grocery Products

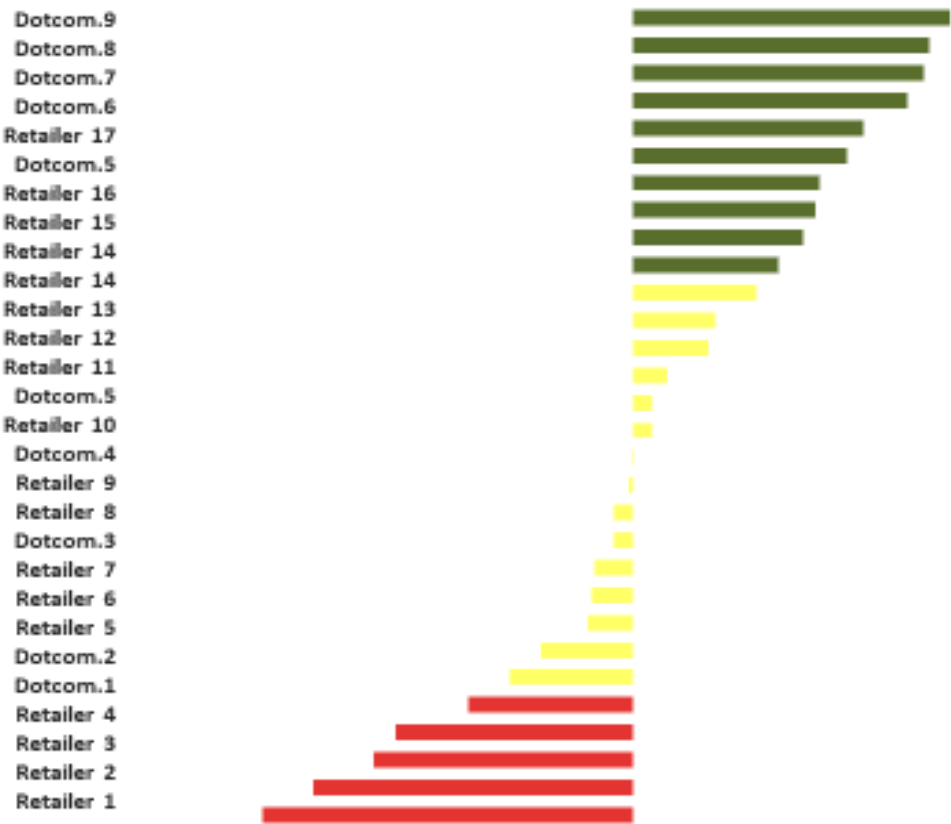


Question: Q10a. Which of the following statements best describes why you ended up buying this brand and not another brand? & Q6. Which of these categories were planned?
Note: Products with too low base sizes are not reported (n<40)

Category Shopper Migration

Migration Patterns – by Store

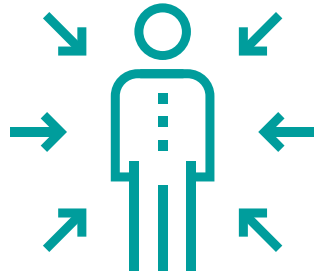
Where do shoppers say they will shop in the year ahead as we settle into the new normal?



Online Movement is Increasing along with Specialty

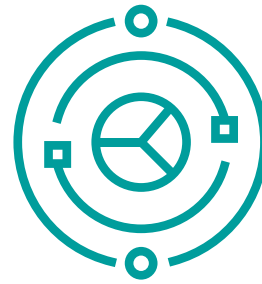
Retailer 1 and Retailer 2 are Notable Negative Migrators

The Ipsos Difference



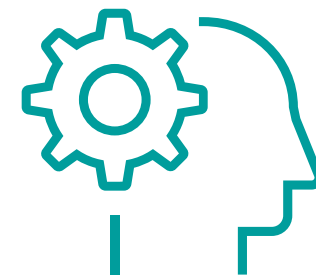
Human Context

Captures shopper emotions and behaviors as they emerge from social distancing and settle into the new normal



Behavioral Migration

Pinpoints triggers, patterns and purchases of the new normal shopping trip and how you can be there for your customers



Clear Guidance

Illuminates emerging shopping patterns and durable changes to help you futureproof your shopper strategies

**THANK
YOU.**

