

eCOMMERCE UNLEASHED

Prepping for the New Normal of the New Retail

eCommerce Unleashed: Capturing changes in retail behaviour during the COVID-19 crisis and beyond

COVID-19 is unleashing eCommerce shopping globally and will drive permanent long-term shopping behaviour changes. People are trying new channels, new services, and new products—and forcing shopper marketers to re-think how they will meet their rapidly expanding needs.

Ipsos' **eCommerce Unleashed** is launched as a syndicated study that provides global and local insights through a shopper-centric, cost-effective design. **eCommerce Unleashed** is an ideal solution for understanding the impact of **the COVID-19 crisis on shopping today and the implications for what a "new normal" will look like tomorrow**.

eCommerce Unleashed addresses the immediate need for information as companies adapt their retail offerings

- Understand shoppers' outlook, financial health, and recovery sentiment
- Capture new online category behaviour
- Understand purchase metrics (mission, device usage, retailer selection, transaction channel, payment method, and more) across a number of categories
- Uncover triggers and barriers for shopping online
- Understand the impact of online sources on in-store sales (i.e. omni-channel behaviour) for different categories
- Help predict what COVID-19-related behaviours will persist as we enter a "new normal" for retail in Canada

Retail Categories

Categories and Subcategories* of Investigation

Food and Beverage

- Fresh or frozen beef, pork, poultry, eggs, and fish
- Fresh or frozen vegetables, salads, and fruits
- Milk/cream/milk drinks
- Cheese/cream cheese/yogurt
- Butter/margarine/ghee
- Breads and breakfast
- Savory snacks
- Jerked meat/dried fish
- Nuts/seeds
- Candy/sweets/mints/gum
- Chocolate
- Sweet biscuits/cookies
- Frozen full meal/pizza/dough
- Frozen snacks/ice cream/dessert
- Infant milk/formula
- Baby food
- Pet food and treats
- Carbonated/fizzy drinks
- Non-carbonated drinks
- Water
- Sport/Energy/Isotonic drinks
- Milk modifiers
- Coffee or tea
- Soup
- Jam, jelly or spreads
- Cooking ingredients/seasoning

Home Care

- Cleaning products for kitchen, bathroom, toilet, windows, carpet
- Cleaning products for dishes, dishwasher
- Cleaning materials
- Laundry detergent/pre-wash
- Fabric softeners
- Paper products

Beauty Care

- Eye cosmetics
- Face cosmetics
- Face
- Nail polish or removers
- Lip stick or gloss
- Perfume or cologne

Health Care

- Pain/analgesics medication
- Cough and cold/flu/sore throat medication
- Allergy/anti-histamine medication
- Digestive health/gastro-intestinal/laxatives/constipation relief
- Nutritionals/supplements/vitamins/probiotics
- Sleep aids/tranquilizers
- Homeopathic/alternative medicine
- Prescription drugs

Personal Care

- Soap, shower and bath
- Oral care products
- Deodorant/anti-perspirant
- Skincare products
- Sunscreen products
- Treatment for skin conditions
- Razors and blades, shaving gel/foam/grooming
- Shampoo/conditioner/styling
- Hair colour
- Feminine care
- Adult incontinence
- Baby diapers and wipes

Electronic Devices

- Smart home
- TV and audio
- Computers
- Computer accessories
- Gaming console
- Cell phone/Smartphone

Alcoholic beverages

- Beer
- Wine
- Spirits
- Traditional or other alcohol

Tobacco

- Cigarettes/Roll your own
- Vaping device, vaping cartridges
- E-Cigarettes/vaporizer
- Tobacco heating device

*Subcategory reporting based on sample and shopping incidence within the country



Category Reporting and Methodology

Categories Reporting

- Incidence (online and in-store)
- Retailer incidence and satisfaction
- Retailer migration (past shopping location, future shopping location)
- Share of online vs. offline (most recent purchase)
- New online shopping behaviours
- Device and sources used
- Trip mission
- Use of shopping app

Subcategories Reporting*

- Subcategory incidence
- Subcategory planning (finder/decider)
- Online/offline percentage
- Shopping mission
- Transaction channel
- Payment method
- Purchase drivers
- Purchase barriers
- New brand engagement

Financial Measures

Financial security and change in payment methods and channels will impact all categories. With eCommerce Unleashed, we will be investigating the following:

- **Impact of COVID-19 on personal financial situation**, including loss of job or working fewer hours, being mindful of spending, delaying or cancelled big purchases, borrowing money, using savings or credit cards to pay bills, delaying retirement, and cashing in life insurance.
- **Method of payment at POS**, including use of mobile wallet apps, online payment solutions, and contactless pay.
- **Use of virtual banking**, including doing banking online instead of at a bank branch, using a financial institution's mobile app, and meeting virtually with an advisor.

Methodology and Sample

- 1,500 shoppers per country
- Females and Males 18+
- 15-minute online survey
- Past 2-week shoppers (past 4-week for Consumer Electronics and Home Care)

Sample Deliverables

Drivers of eCommerce

We will uncover key drivers and barriers of shopping online by category.



Shopper Behaviour

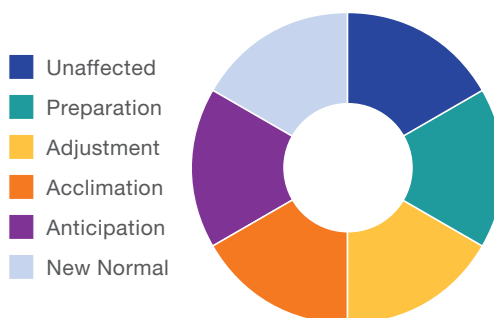
We will look at multiple views of shopper behaviour, including:

- Shopping in a time of social distancing
- Changes related to shifts in personal financial situations
- Attitudes towards retailers



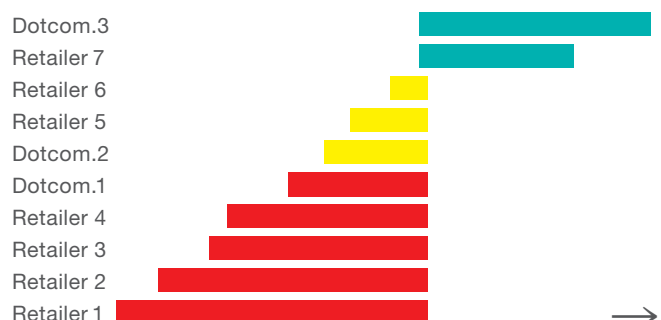
Shopper Sentiment

As we move towards a "new normal," shoppers will go through multiple stages that will impact their shopping.



Retailer Migration

We can understand how COVID-19 is driving shoppers away from some retailers and towards others and predict which types of retailers will ultimately come out on top.



Deliverables designed for your needs

Country Report and Portal Delivery

Deep dive into country-specific dynamics reflecting local market retail implications. Delivered as a PowerPoint file with summary or data access and plotting via Ipsos portal.

\$7,500 CAD

Global and Regional Reports

Insights into shopper sentiment, behaviours and channel migration in the countries most important to your business.

Price upon request

Custom Ad-hoc Investigations

Go beyond country and category deep dives to have Ipsos analysts answer your questions and test your specific hypotheses.

\$4,000 CAD per 20 hours

Contact:

Naumi Haque

Senior Vice President

Market Strategy & Understanding

naumi.haque@ipsos.com

About Ipsos

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

Our passionately curious research professionals, analysts and scientists have built unique multi-specialist capabilities that provide true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. We serve more than 5,000 clients across the world with 75 business solutions.

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

www.ipsos.com

