

# cue

QUARTERLY MAGAZINE

**WHICH WAY NOW?**  
The changing consumer journey



# 10

**THQ**  
PART OF CEUTA GROUP

**WE'RE MORE  
THAN JUST A  
BIT ON THE SIDE**

**HAVE A FLING** WITH FLAVOUR

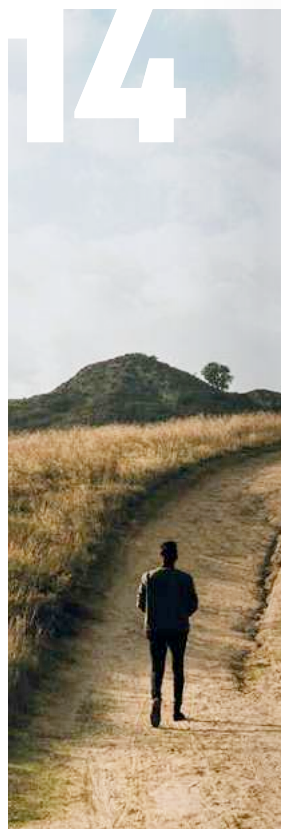


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# Contributors



**Guy Hepplewhite**

Head of Brand Communications  
1HQ UK

An award-winning, integrated communications planner with over 25 years' experience working across small, medium and large agencies including two that he either founded or co-founded. Guy's passion lies in showing how ideas, fuelled by genuine insight, should be allowed to flourish across a wide range of communications channels with absolute creative consistency, impact and relevance.



**Lawrence Janes**

Managing Director  
CollidaScope

Lawrence is a media and comms expert with substantial data science consultancy, media, shopper and consumer marketing experience. Before launching CollidaScope with 1HQ in 2016, Lawrence was Global Head of Media at Emnos, working with Carrefour, Walgreens and Lenta in Russia. Prior to this, Lawrence was Head of Media Solutions & Development at Dunnhumby and worked with Tesco across Europe and Asia; along with Kroger in the US. Lawrence has also devised solutions for Danone, Johnson & Johnson, Nestle, Pepsico and Unilever, to help maximise their marketing mix effectiveness.



**Laura Stiles**

Client Director  
1HQ UK

Laura has spent the majority of her career client side, in Shopper Marketing leadership roles for the likes of Mars Confectionery, GSK, Colgate-Palmolive and The Walt Disney Company, before joining 1HQ in March 2019. Laura brings the client-side perspective to her role at 1HQ that enables us to really challenge our thinking and ensure we are balancing the needs of the brand, the shopper and the consumer.



**Andrew Collins**

Chief Strategy Officer  
1HQ UK

After an early career as a client-side marketer, Andrew's agency experience has focussed on positioning, innovation and design for FMCG businesses and brands. Amongst the challenges faced have been the evolution and adaptation of heritage brands to changing markets and consumer tastes, as well as the demands on global brands to accommodate local nuances and needs.



**Andrew Collins**

Chief Strategy Officer - 1HQ UK

# Planners or Magpies?

The impact of 2020 in changing our collective shopper mind-set could hold the key to unlock a long-running debate about the role of packaging in the path to purchase. >>>





For years, getting research groups to talk about packaging could be an uphill battle. To cut a short story even shorter, most people gave it very little thought and when they did, their key motivation was to have to think about it for as little time as possible. The shopping experience was the key driver in this narrative: tiring, time-consuming and tedious, people reported that they wanted to get it over with as fast as they could – and the job of packaging was not to get in the way. The prevailing shopper mind-set demanded ease and speed: help me find what I want, grab it and go. The stats seemed to back this up – suggesting that around half the products appearing in people's baskets were the same on each and every shopping trip.

But there was a counter-narrative in which packaging was a brand's primary marketing tool particularly for those without the deep pockets needed to fund advertising support. This story had a different shopper at its heart – one who was less furious, more curious and prepared to have an open mind towards the things that caught their eye on-shelf. Evidence existed for this version of reality too. Setting aside the argument about the proportion of purchase decisions made in store, the success of emerging challenger brands that relied almost exclusively on design to make an impact, offered proof that packaging could persuade as well as locate. Of course, the degree to which shoppers were generally engaged with categories made a difference – but even supposedly low-interest categories, such as household cleaners, saw entrepreneurial brands using design to help gain a foothold in aisles traditionally dominated by multinationals.

And therein lies the heart of a debate about the role of packaging design that has rumbled on for years. One side of the argument is the belief that design cannot create attitudes towards brands, only symbolise them. In this scenario the primary role of pack is as a trigger of associations and, as such, design must be distinctive and memorable above all else. On the other is the idea that packs are, in essence, on-shelf advertising – not simply a tool to direct and unlock pre-existing desire but a means to stimulate it. According to this view, the entire shopper journey could be compressed into a moment where almost simultaneously, a shopper could move from not being in the market for a product, to making a purchase decision. The logic of these two positions drives very different perspectives on designing and re-designing packaging. One suggests cautious evolution over time – retaining and reinforcing visual equities and avoiding the risk of dislocation that might come with more radical change. The other isn't just more open to change, but actively demands it because if no one notices, how can anything positive be achieved?

While real-world decisions are rarely so binary, the disruption to CPG shopping behaviours seen in 2020 might yet tip the balance of the debate. Key to this outcome will be the shopper psyche that dominates in its aftermath: will we be confirmed as practical planners focussed on efficiency, or as maverick magpies with an eye for the shiny and new? >>>







Photo by Inside Weather on Unsplash

Common sense suggests that a time of rolling global pandemic and simultaneous recession is not one to be adventurous – and the emerging evidence supports this. The rising tide of smaller brands, against which the multi-national players have struggled for some years, has been stemmed – with shoppers returning to the comforting familiarity, and widespread availability of the Global A-Listers. With so much uncertainty, it appears that the contents of our shopping baskets can be a source of reassurance and stability. The task for these brands in the months ahead will be to secure and retain these gains – particularly against lower-priced competitors. It will be a brave big-brand, therefore, that rocks the boat – suggesting a focus on the reinforcement of core product lines, established equities and strong quality messaging.

While the jury is out on whether the rediscovery of old favourites will stick, commentators seem agreed that 2020 is the year that online grocery shopping came into its own and the acceleration in uptake will be sustained. This would seem to be a decisive shift in favour of pack design for a planned purchase mindset, since on-line shopping is planned by its very nature. Much like classified advertising, it works when you know what you are looking for but don't expect much in terms of inspiration. But still, logic dictates that the sheer ease and convenience of doing your shopping in the comfort of your own sofa, and having delivered pre-bagged to your doorstep means those who have experienced it for the first time will never go back. And

if browsing the shelves becomes a thing of the past, why would anyone design a pack with that behaviour in mind?

So, will 2020 be the year when the Magpie shopper becomes an endangered species and pack design moves decisively towards a focus on the consummation of the journey rather than an attempt to play the role of self-sufficient salesman? Perhaps – and some would argue amen to that. But the counter-narrative is not quite dead yet.

First the argument underestimates quite how onerous some people find forward planning. Take those trying on-line grocery shopping for the first time. For every one of them converted to its ease and convenience, there will likely be someone else whose mind went blank when it came to plotting a week's worth of menus. Or who panicked at the thought of managing a fridge full of sell-by dates without waste. Or who missed the gondola end that reminded them that they needed more bleach. These are people for whom shopping is a more organic process – a browse-y drift towards an open end rather than a foregone conclusion. And second it misses the point that even the most natural planners amongst us will, from time to time, want to go 'off-liste' in search of something fresh and new.

It's this desire for freedom and spontaneity – not just a preparedness to have our eye caught by something different but a pleasure taken in it – that will keep the Magpie spirit alive. And while that remains the case, there will continue to be a strand in packaging design that seeks to play to it. **Q**



# Road to nowhere

Social media's role in the shoppers' path to purchase.



**Lawrence Janes**

Managing Director - CollidaScope

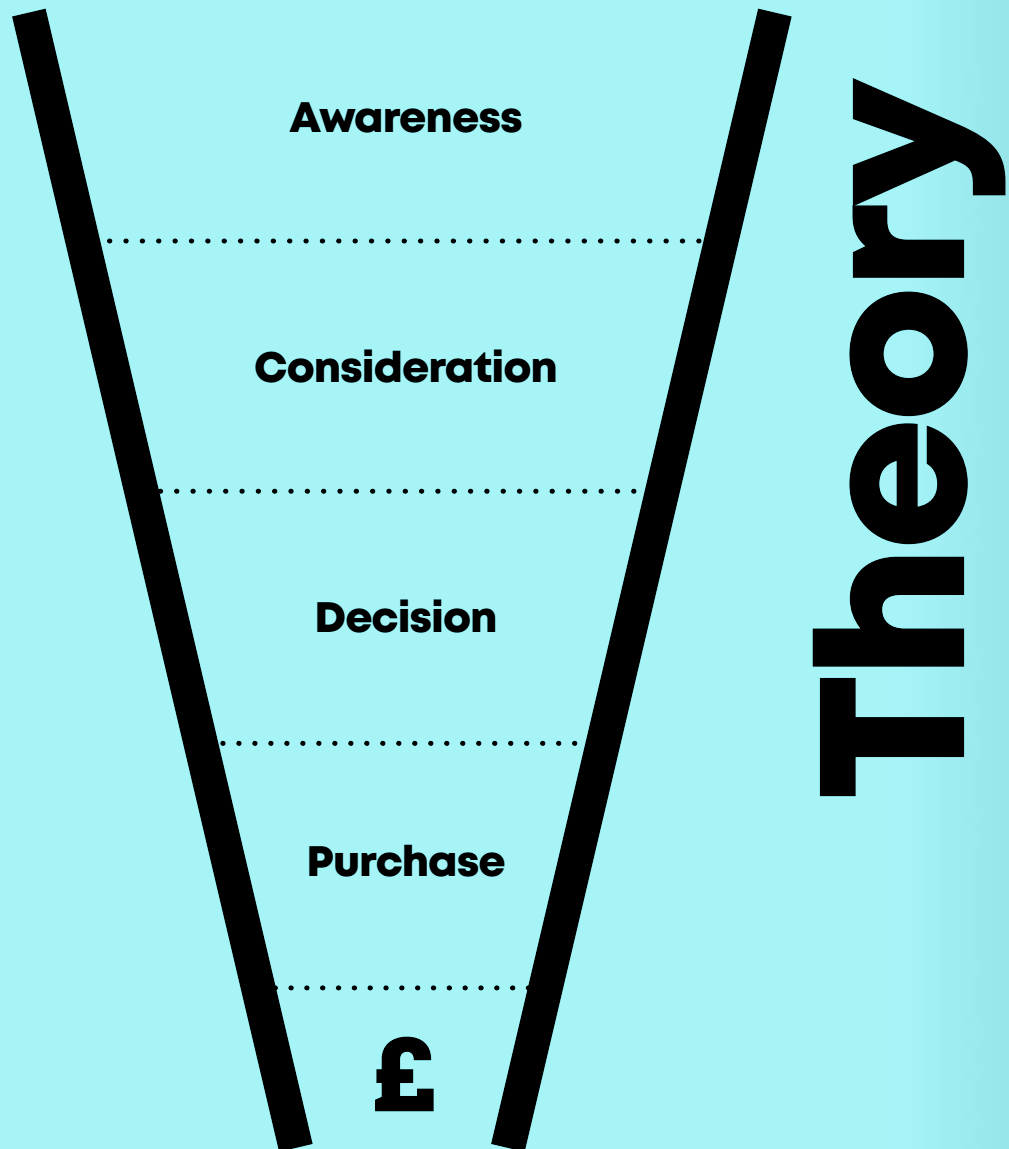
I'm old enough to remember a brilliant 1980s band, Talking Heads' great single 'Road to nowhere', with the opening lines reminding me so much of our current state of affairs when it comes to the path to purchase, even if the penultimate line about the future being certain is somewhat up for grabs at the moment! >>>

“ Well we know where we're going  
But we don't know where we've been  
And we know what we're knowing  
But we can't say what we've seen  
And we're not little children  
And we know what we want  
And the future is certain  
Give us time to work it out ”

— Talking Heads



It makes me think of my favourite path to purchase graphics, which just about sums up our predicament. I can remember the days when we used to think brands' path to purchase was a nice, neat and logical process that looks something like this:



...and now life is not so simple, and we have a path to purchase (I'm not even sure that's really the best name for it anymore) that resembles something rather messier:

**Reality**



It really does look like we're on a road to nowhere when trying to establish shoppers' path to purchase. It's further complicated when marketers are trying to find the right communication touchpoints on this winding journey to try and convince a shopper or consumer their brand is the one for them. >>>



We've all been taught about the need for precision targeting, being relevant, having the right ad at the right time in the right place... and it's all supposed to be so easy in our hyper-connected and digitalised world. We can build, segment and cluster so-called custom audiences, reach them programmatically by what they've searched for, where they are, by what they're doing, and pretty much anything else that comes to mind. Click your mouse, press a button, and all will be solved. Yet, especially when it comes to arguably the most dominant communication vehicles of our time, social media platforms, we get ourselves into the most enormous tangle in an already complex situation.

Faced with a myriad of KPIs and unfathomable jargon, we run the risk of getting our TikTok hashtag strategy tangled around our influencer strategy which could have a celeb or nano execution depending on which audience cluster engages with our brand ambassadors' dance routines. This in turn might change our retweet optimisation approach depending on Instagram or YouTube VTR (Video-Through Rates) in addition to the CTRs (Click-Through Rates) achieved on Facebook divided by the total impressions and uniques achieved. This is before we consider the impact on our sentiment KPIs via our NPS (Net Promotor Scores), review ratings, pins on Pinterest and Snapchat completed views.

It's no wonder by the end of all this we end up counting the number of responses from prospective employers our new job search gets on our subsequently favourite social media platform, LinkedIn! Not only does it look like we're on a road to nowhere, it feels like it too!

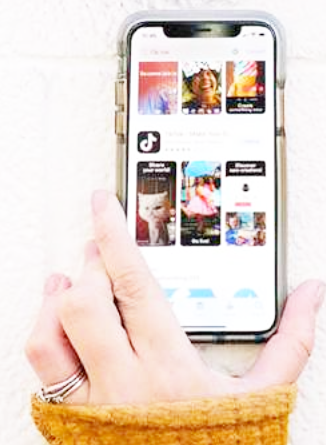
The route out of this quagmire is not to be distracted by this unending jargon, but to focus on what's practical and valuable for your business. It's unlikely to be any KPI a social media platform offers, but more like something that has an actual commercial impact on the sales of your brand, if not in the short term, at least in the measurable longer term. It is possible to link social media activity to both on-line and bricks and mortar sales, measure the residual sales effects to work out what you said, where you said it and when you said it to establish the role and value of this kind of marketing communication activity on shoppers' path to purchase.

In fact, we know at **CollidaScope**, through our clever analytical techniques, that social media, when used in this manner, is commercially a pretty strong tactic for brands to win short and longer term sales, despite what seems the best endeavours of the platform owners themselves to put you off.

You can find the sweet spot where audience numbers and their reactions to your commercial messages maximise incremental sales; see the effect of different forms of content; and rather than optimise your social media mix against a bunch of not so key performance indicators, do it against the commercial KPIs that really count.

For example, for one client, using our statistical analyses to measure short and medium term sales impact of their social media campaigns, we recommended switching spend from Facebook and Instagram into YouTube, capping the number of impressions bought to avoid diminishing returns, removing product-based end tags from their videos, and focussing on building their brand message.

“ You can find the sweet spot where audience numbers and their reactions to your commercial messages maximise incremental sales ”



The result has been an ROI of 5x spend (an improvement of 200%), and an increase in incremental sales in both on-line and brick and mortar stores of 29%. This is taking into account effects on shopping behaviours from Covid19 lockdown (yes, we can work that out), seasonality and any other factor the marketing world can throw at us.

If Talking Heads had written the song about this, I'm sure it would've been called 'Road to somewhere'... now there's a thought. **Q**



# What's going on?

Stay inspired and up to date

LONDON  
NEW YORK  
AMSTERDAM  
SINGAPORE

Photo by Devon Divine on Unsplash

## LONDON

### 01 Dishoom

Across London

For those not quite ready to face the outside world on a Sunday morning, or for those more comfortable at home, Dishoom are introducing their first-ever 'at home' cookery kit, complete with all the ingredients to create Bacon Naan Rolls in your own kitchen. The kit contains the freshest ingredients, dishoomed straight from your local café kitchen to your door, including the magic ingredients for their Masala Chai. For every Bacon Naan made at home, they will donate a meal to Magic Breakfast - a brilliant charity who provide nourishing free meals to schools.

### 02 The Bridge Theatre

3 Potters Fields Park, London, SE1 2SG  
Until 31 October

Whilst their venue was closed, the Bridge Theatre worked with the BBC to produce Alan Bennett's landmark Talking Heads monologues which proved to be one of the TV highlights of lockdown. Now, eight of them come to the stage in a series of unique double bills, keeping the cast and directors from the TV series. The socially distanced short performances that make up Talking Heads are perfectly distilled masterpieces, sometimes disturbing, often hilarious and always profoundly humane.

## NEW YORK

### 03 The Carreau Club

Courtyard 5/6 of Industry City, Sunset Park, Brooklyn

Whilst their plans to open a sprawling bar within Industry City are on hold, The Carreau Club's co-owners Dana Bunker and Aaron Weeks are using their outdoor space to open the city's first pétanque bar. The aim of the game is to toss the steel balls, as close as possible to a smaller ball, known as the cochonnet, which translates to piglet. The team that finishes closest to the cochonnet wins. Learn to play in minutes, even with a beverage in hand, with four courts available, the club is open to bookings during the week from 3-9pm and weekends noon-10pm.

### 04 Go Love NY

goloveny.com

Everyone loves New York. But everyone also wants to get out of the city every so often, right? Go Love NY is the result of a desire to share the beauty of the Rivertowns and Hudson Valley and offers crafted experiences to combine architecture, design and culture, with breweries, food artisans and local small businesses. Join a nature walk and iPhone photo class or jump in a Kayak and explore Bannerman Castle, there really is something for everyone. You can even build your own experience following COVID-19 health and safety guidelines, including cheese tasting, flower workshops and yoga lessons. Why not try something new!



# AMSTERDAM

## 05 From Thonet to Dutch Design

05 Stedelijk, Museumplein 10, 1071 DJ Amsterdam, Netherlands  
Until March 2021

The Stedelijk presents an extensive 300 objects that have been considered landmarks of design innovation and excellence over the last 125 years. Explore design history, starting with a Thonet bench, one of the oldest pieces in the collection, through to how sustainability and the impact of Coronavirus is likely to put its stamp on the Dutch design world. Also included are acclaimed designs by the Wiener Werkstätte and a showcase of the advent of plastics in the '60s and the colourful Italian Memphis designs of the '80s.

## 06 World Press Photo 2020

06 De Nieuwe Kerk, Dam Square, Amsterdam  
Until 29 November

On 3 December 1955, the first annual exhibition 'World Press Photo 55' opened its doors, with a belief in the importance of showing high-quality visual stories. This year, the major annual international press photo competition showcasing over 150 award-winning images and videos will premiere in De Nieuwe Kerk, Amsterdam. Categories including News, Portraits, Sports, Nature and Environment will shock, inspire and educate, with visitors able to view the World Press Photo of the Year and the World Press Photo Story of the Year.

# SINGAPORE

## 07 The Projector

07 6001 Beach Road, #05-00, Golden Mile Tower

We've featured this beloved independent cinema before, but this time its fate lies in the hands of the same community of film buffs that crowdfunded its existence. With uncertain economic times threatening to extinguish its light forever, The Projector has found alternative ways to find it's much-needed revenue, including a scheme to encourage patrons to 'Adopt-a-Seat' and have their message affixed to the chair. The cinema is also offering a collection of movies to download from their on-demand platform, including Singapore-made documentaries - and will even deliver popcorn, chilli dogs and craft beers for your home movie set up.

## 08 Planet or Plastic?

08 ArtScience Museum, 10 Bayfront Avenue, Singapore 018956  
Until 28 March 2021

ArtScience Museum's first exhibition to launch since re-opening after Singapore's circuit-breaker, shines a spotlight on the fragility of the natural environment as a result of the global plastic waste crisis. This exhibition provides practical steps we can take to responsibly reduce, reuse, recycle, and refuse single-use plastic products. Featuring the work of researchers, scientists and artists, the exhibition traces the history of plastic and explores the devastating plastic pollution of our oceans. National Geographic hope that their 70 powerful photographs and videos will raise awareness of this growing crisis, and showcase that change is possible, highlighting the innovative individuals and communities who are working on solutions to the urgent problem.





# A changing shopper journey

We sat down with CollidaScope Managing Director, Lawrence Janes, and 1HQ Head of Brand Communications, Guy Hepplewhite, to discuss how the right data can drive effective communications. >>>





**How do you believe that shopping behaviour has been impacted by a world in transition?**

**LJ:** There's been so much written about this – whether we're heading for a new retail world, accelerating what's already been happening over recent history, or whether it's just a temporary blip and the 'new normal' will end up the same as the 'old normal'.

**GH:** A lot of commentators are telling us that shopping behaviours have changed – fewer visits, bigger shops, the increase in online shopping, people sticking to what they know and trust. Analysis of some of our clients' shoppers' behaviours has shown this to be the case... but only for the first 4-5 weeks of lockdown.

For example, one of our clients saw rapid sales increases of 25% for their 'core' products during March and April, accompanied by a decline in sales of their NPD. However, since then, behaviours have returned pretty much to normal, and they've just successfully launched some more NPD, using pretty traditional methods to do it - in-store PoS, a price promo and some on and off-line ad support.

**LJ:** Speaking as an analyst, the important information lies in what the data tells us about shopping behaviours. In the most fundamental of shopping behaviours – how we spend our money, there were already pretty rapid changes happening that the current circumstances have accelerated. Talking about the increase in online shopping, the speed of change is really dependent on the countries and sectors you're looking at. Markets where digital infrastructure and supporting delivery services are mature and optimised. In the UK, South Korea and China, household, fashion, travel, financial sectors e-commerce has long seen

significant movements from brick and mortar sales to on-line taking up the majority of trade, representing over 34% of sales. Whereas, in place, such as Germany and the US, e-commerce currently only accounts for 8% and 10% of sales respectively.

**GH:** The first edition of the EY Future Consumer Index suggests that 4 in every 10 UK shoppers will fundamentally change the way they shop as a direct result of C-19.

**LJ:** Which could include the sharp increase in online shopping. In the UK, it nearly doubled in volume to c.14% of all transactions in July, from 7% just before lockdown in March.

**GH:** And in the UK, behaviours have shifted again, with almost 3/4 of all shoppers buying only essential items. I expect that many will keep things tight as they continue to believe in the importance of price and believing that luxury is less important now than it was before the pandemic struck.

**What's the subsequent impact been on the shopper journey?**

**GH:** Ask yourself this - when you last went shopping during the pandemic, did you find yourself taking part in a genuinely enjoyable retail experience?

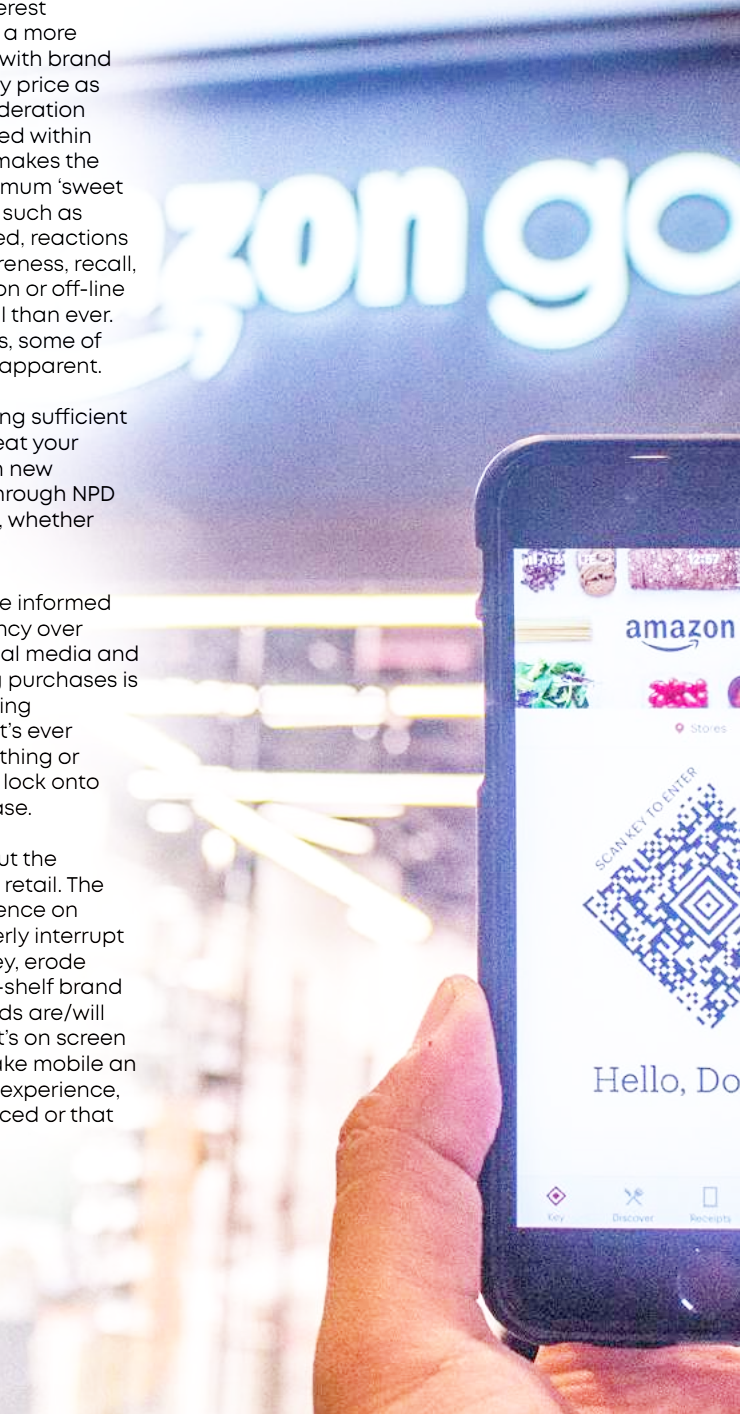
No? Exactly. The pandemic's ripped the heart out of the shopping experience and turned it into either (a) something that arrives in a brown box with six letters and a ubiquitous smile on it or (b) a physical and time-consuming exercise that's endured rather than enjoyed. The physical shopping experience features little, if any, form of social interaction, a pre-determined walk plan (with arrows on the floor just in case you were in any doubt of which way to travel) peppered with hand sanitiser and touch-only transactions.

**LJ:** I agree, but moving away from the supermarket, higher interest categories still are showing a more complex shopping journey, with brand choice heavily influenced by price as awareness, research, consideration and purchase are intertwined within on-line marketplaces. This makes the requirement to find the optimum 'sweet spot' in your marketing KPIs such as impressions or TVRs achieved, reactions generated (sentiment, awareness, recall, likes, shares, reviews etc) & on or off-line sales achieved more crucial than ever. For lower interest categories, some of these complexities are less apparent.

The challenge is about raising sufficient interest in your brands to beat your competition and bringing in new shoppers and consumers through NPD as well as price promotions, whether on or off-line.

**GH:** Shoppers are also more informed than ever and crave efficiency over discovery. The role that social media and influencers have on guiding purchases is huge and, with the purchasing journey being shorter than it's ever been, consumers value anything or anyone that can help them lock onto the quickest path to purchase.

Mobile is their Godsend – but the thorn in the side of physical retail. The shopper's growing dependence on mobile has started to properly interrupt the physical shopper journey, erode in-store experience and on-shelf brand impact. So, successful brands are/will be those that connect what's on screen with what's in-store and make mobile an integral part of the in-store experience, not something that's distanced or that detracts from it. >>>





**What does that mean for brands wishing to connect with shoppers in the most meaningful way right now?**

**GH:** I don't think there's much doubt that shoppers are unlikely to change back to pre-crisis behaviours any time soon.

**LJ:** And we know that the days of taking biannual, annual planning and evaluation of campaigns is coming to an end. You'll now need to continuously track your marketing and sales KPIs so you can course-correct your activities to meet changing circumstances and commercial objectives. At the same time, you'll need to keep an eye on longer term brand equity.

**GH:** Absolutely. Brands will need to take greater responsibility than ever before as the scale and pace of changing circumstances ramps up. Changes that would likely have taken years are happening in a matter of weeks, highlighting the importance of the need for continuous tracking if brands are to forge relevant connections.

**LJ:** It's not easy, but having a system to forecast the impact of different planning scenarios in different circumstances really helps. We work with a number clients in both grocery and healthcare who have seen considerable sales growth recently through predicting and optimising their marketing mix vs. the sales and changes to shopping behaviours they drive in both on and off-line retail channels.

**GH:** As you say, data is one of, if not the most important tool for brands wishing to understand changing shopper behaviours and to respond in the most meaningful and relevant way.



Yoga classes in store at lululemon  
Photo courtesy of lululemon.co.uk



Ikea planning studios  
Photo courtesy of ikea.com

**And what does it mean for retailers – especially when it comes to the bricks and mortar stores given how it's suffered as a direct result of the growth in online shopping?**

**LJ:** People are more averse than ever to touching technology and it seems clear that this isn't simply some over-blow, short-term fad. We'll see a rise in the use of styluses, improved mobile payments and, yes, the much maligned QR codes as a way to pay, whilst having a longer-term strategy for the trajectory towards being completely touchless. That'll take us on a journey through haptics, voice and gesture as well as mobile devices facilitating a much broader set of interactions beyond payments alone.

**GH:** To survive, retailers will have to play their part in transforming the High Street into a place that people want to return to, shop and, above all, enjoy. That means becoming an occasion that delivers more than just the opportunity to buy a product. More than ever, brands need to define what they stand for and then bring that to life with imagination and via experience. More moments of delight – simply addressing consumers by their name, offering a free beverage for high-value shoppers, the delivery of more efficient and impressive collection services. Or elevate the experience by making your retail space work harder for you and provide shoppers with even more reasons to visit. Look at the yoga classes run by lululemon and Patagonia before their stores open or Apple's experiments with turning over some of their stores into open classrooms so people have the opportunity to explore the full power of their devices. >>>



## What do you think the future is for the great British High Street?

**LJ:** Over the next 2-3 years we will unfortunately see a steady decline in the fortunes of our High Streets. Footfall data shows what was a steady decline of 10% over the last 7 years in both traditional High Streets and shopping malls has accelerated over recent months, even taking into account some short term increases as lockdown eased.

Retailers with either ill-defined propositions, poorly integrated online capabilities or both will really suffer. These already include some household names who, regardless of the brand equity they've built over a long time, have failed to track successfully the changes in shopping behaviours and to optimise their propositions accordingly.

**GH:** I agree in part with what Lawrence says. But I also think this could be the greatest opportunity for our High Streets. It could be transformative. As Michelle Norris says, *'The great pause needs to be the greatest recalibration.'* But that will only be possible if landlords and retailers reset their thinking and find ways to work together in a more progressive, imaginative and above all, a mutually beneficial way.

**LJ:** You know, we talk about walled gardens for e-commerce. But the same applies to the High Street. It needs to become a walled garden of its own that draws shoppers in and provides them with what's needed to engage and connect with them when there.

**GH:** Big out-of-town operators such as Ikea need to continue innovating with small format spaces. Shop space needs to be turned over to dynamic soft play areas for kids, creative galleries

for adults, retail experiences where products are there to be enjoyed, not retailed. The High Street doesn't need to revert to what it was – because what it had become was homogenised, bland and uninspiring. I also think we need to draw the independents, the craftsmen and women, the artisans back to the High Streets. More greengrocers, florists, patisseries, butchers, bakers and, if need be, candlestick makers. Because these are the operators that will get the High Street's heart beating.

As with everything else, technology has a vital role to play. If it can draw these independents together in a way that gives them the type of collective influence they've rarely, if ever, enjoyed to date, more power to it and them. Apps like **bubltown** need to be applauded and, ideally, really encouraged by local authorities and national government alike. Because they provide us with wonderful, yet crucial, opportunity to help re-shape the High Street of tomorrow. >>>



**Finally, if you could suggest three top tips for brands to heed over the coming months, what would they be?**



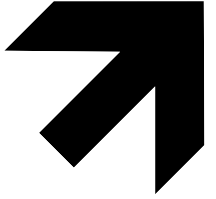
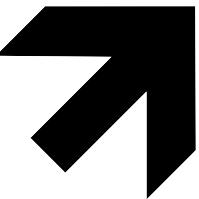
**Lawrence Janes**

Managing Director - CollidaScope



**Guy Hepplewhite**

Head of Brand Communications - 1HQ UK



**Top 3 tips**

01

Don't believe all you read (except this article!)

02

Be granular in your approach – different markets, sectors and categories, always change, especially at the moment, but they change in different and sometimes unexpected ways, and certainly at different speeds. A one size fits all approach will not work.

03

Use a wide variety of data-sources and empirical evidence to make your commercial and marketing investment decisions. In such a transitional world, no one is going to get it totally right. So, frequent monitoring of shopping behaviours, consumer reactions, environmental considerations such as government announcements, C-19 cures, good and bad economic news and the like will help inform what you need to do, especially if you have the capability to forecast the impact on sales of all these factors in conjunction with your marketing mix.

01

Following on from what Lawrence says, do whatever it takes to become more agile and responsive to change. The world feels like a big place. But, if COVID's taught us anything, it's how the macro, not just the micro, can pivot in the blink of an eye. Brands (and their agencies) must anticipate changing times and find ways to scenario plan different creative and media options by their predicted impact on sales and behaviours.

02

Brands need to engage shoppers through experience. For retailed brands, that experience starts with your ingredients and how you present yourself on shelf to how you contribute to the wellbeing of people and planet. For retailers, it's about the digital and physical shopping experiences you deliver. Work with, not against, the brands you retail to deliver a shopping experience that makes your shoppers glad they've journeyed to you, not a sterile destination that's homogenised, bland and meaningless.

03

Entertaining customers and giving people a reason to return isn't about cheap thrills; it needs to address an unmet need or mission for shoppers whilst perfectly capturing what the brand stands for. **Q**



# 107 YEARS IN THE MAKING

Sorry it took  
so long.





# Right place, right time



**Laura Stiles**

Client Director - IHQ UK

Hands up if you have been dashing through your local supermarket or convenience store, picking up the items on your shopping list as quickly as possible, or have started ordering online groceries for the first time due to the lockdown earlier this year?

Whilst we all dream of a return to some form of normality, there will inevitably be changes in shopper behaviour that stick in a post-covid world. Gone are the days of leisurely browsing, impulsively buying things you weren't planning to, and quite frankly, didn't need. We are now all hyper-aware of our time, our safety, and the difference between the essential and the nice-to-have.

Pre-covid, we were familiar with the savvy, promiscuous shopper, who visited many stores, with a smaller basket spend and increased number of trips, to seek out the best value. Convenience and Discounter shopping was on the rise and the death of the "weekly big-shop" was often referenced.

Covid-19 has undoubtedly changed our behaviour as consumers, and some of that behavioural change is here to stay. >>>

## The growth of online

Whether it's restricted numbers instore, the need to maintain a social distance, the mandatory wearing of a face covering or being categorised as 'at risk' and needing to shield, the surge in online shopping has led to a shift away from traditional bricks and mortar stores. It took seven years for online shopping to get from 9% to 19% of retail sales, but only four months to get from 19% to 33% - in May 2020, according to the ONS.<sup>1</sup>

Undoubtedly, these gains won't be sustained long-term, but it is likely that the pandemic will have accelerated a move to online retail, particularly amongst shoppers who may not have used this channel previously, and are now used to enjoying the added convenience and safety. The impact of the growth in online shopping for impulse-led brands and categories is a real challenge as shoppers tend to revert to list-based shopping online, avoiding products and categories they might have previously picked up on impulse during a physical shopping trip. Brands will have to re-consider their digital path to purchase and ways in which to disrupt and engage shoppers online, in order to find themselves in more baskets and avoid being left on the digital shelf.

Grocery retail shopping aside, the opportunity for D2C brands to connect with consumers and shoppers in a relevant and meaningful way has never been greater. Who knew that letterbox wine, subscription coffee pods and deodorant refills could become the norm?

## Brand switching

Can't find your usual favourite brand of butter or toilet roll? No problem. For the first time in a generation, we have had to adapt to reduced choice due to limited availability. Whilst the increase in list-based shopping has been marked, there has also been a shift away from the usual preferred brand of choice towards 'whatever is available'. Shoppers are trying out retailers and brands for the first time, and more than a quarter claim to make some of these switches permanent. The words of Byron Sharp<sup>2</sup> are more relevant than ever; in order to grow, brands should focus on attracting as many consumers as possible, rather than encouraging existing to buy more. In order to stay relevant, they must focus on building distinctive and memorable brands, as brands are substitutable, and memories are fragile, more so now than ever.

## Cue the demise of impulse-led behaviour

Whether instore or online, there is an increased need to get the shopping done as quickly and efficiently as possible. Shopping has undoubtedly become more functional, and dwell time has reduced. As redundancies inevitably climb following the ending of the furlough scheme this month, shoppers will be watching their wallets more carefully than ever and going back to basics. The battle to gain the share of wallet is on. Brands must ensure they are front of mind at home, when lists are being written, online, when consumers and shoppers are browsing, or scrolling through social media channels, and instore when they're rushing up and down the aisles. Getting the right message, in the right place, at the right time has never been more important to brands than it is right now. **a**



\*\*\* Natural deodorant refills from Wild  
Photo courtesy of wearwild.com

**“ It took seven years for online shopping to get from 9% to 19% of retail sales, but only four months to get from 19% to 33% ”**



\*\*\* Coffee bean refills from Grind  
Photo courtesy of grind.co.uk

<sup>1</sup> ONS – online sales as a percentage of retail sales. [bbc.co.uk/news/uk-54201617](https://www.bbc.com/news/uk-54201617)

<sup>2</sup> How Brands Grow, Byron Sharp.



# Top 5



*good*

*"it's*

Photo courtesy of kfc.co.uk

## Campaign twists

01

### Finger Lickin' Good

Rubbing salt into the wounds, the pandemic hit just as KFC was running a major new ad campaign, depicting diners licking their fingers. KFC had to can months of work, dropping the TV ad and billboards but not before complaints were lodged. Five months later and it is back, sort of. 'It's Finger Lickin' Good\*' spanned TVC, print, OOH and social with a bigger than usual first-week blast across multiple screens and locations. Their digital ad now shows the slogan, but blurred, and ends with the message 'That thing we always say? Ignore it. For now.'

02

### Emily Crisps

As luck would have it, Emily Crisps launched their first outdoor campaign at a time when no-one was around to see it. Before lockdown, the brand bought outdoor media space ready for an April campaign, whilst many brands may have pulled out given the current state of affairs, Adam Draper, MD, told his team to embrace the moment as a unique opportunity. They adjustive the creative to draw humour from the position, stating on one of their six-sheets 'Our first ever poster, seen by a runner and one pigeon - Typical'. Injecting a much-needed light-heartedness created a level of interested and awareness that may not have otherwise been possible, showing a little levity can go a long way.

03

### Notflix

This fake campaign was the brain-child of Seine Kongruangkit and Matithorn Prachuabmoh Chaimoungkalo, known as Brave, of the Miami Ad School, Europe in Hamburg, Germany. Featuring spoilers for Netflix original shows including Money Heist, Narcos, Love is Blind and Stranger Things, these clever ads went viral in the early stages of lockdown. Whilst the ads weren't real, the digital OOH billboards sought to curb the spread of Covid-19, by using the threat of spoilers to stop people being tempted to socialise, leave the house and potentially run into a nasty reveal.

04

### Whassup?

Budweiser brought back its iconic 'Whassup' ad to encourage people to check in on their friends during the coronavirus lockdown. It used an updated voiceover in which the characters were "in quarantine, having a Bud", rather than "watching the game" and enjoying the same beverage to get its "Buds support buds" message across. From there, the brand has taken the message to social media, using the hashtag #TogetherAtADistance to stimulate a conversation. This piece of recycling to get an important message across was elegantly timed and delivered - the beer brand also released a special 'Checking in' version.

05

### Grateful Britain

"Thank you to our stethoscope slingin' letter postin' lorry drivin' loo roll deliverin' heroes," - this DOOH effort ran across roadside and retail locations using clever language and light humor to emphasise the importance of message over the finer bells and whistles of branding and animation. The 'Grateful Britain' campaign tastefully minimised style by opting for a text-heavy display of black copy on a white background, helping to honor healthcare workers, caregivers, food service workers, delivery drivers and those who continued working during the crisis.



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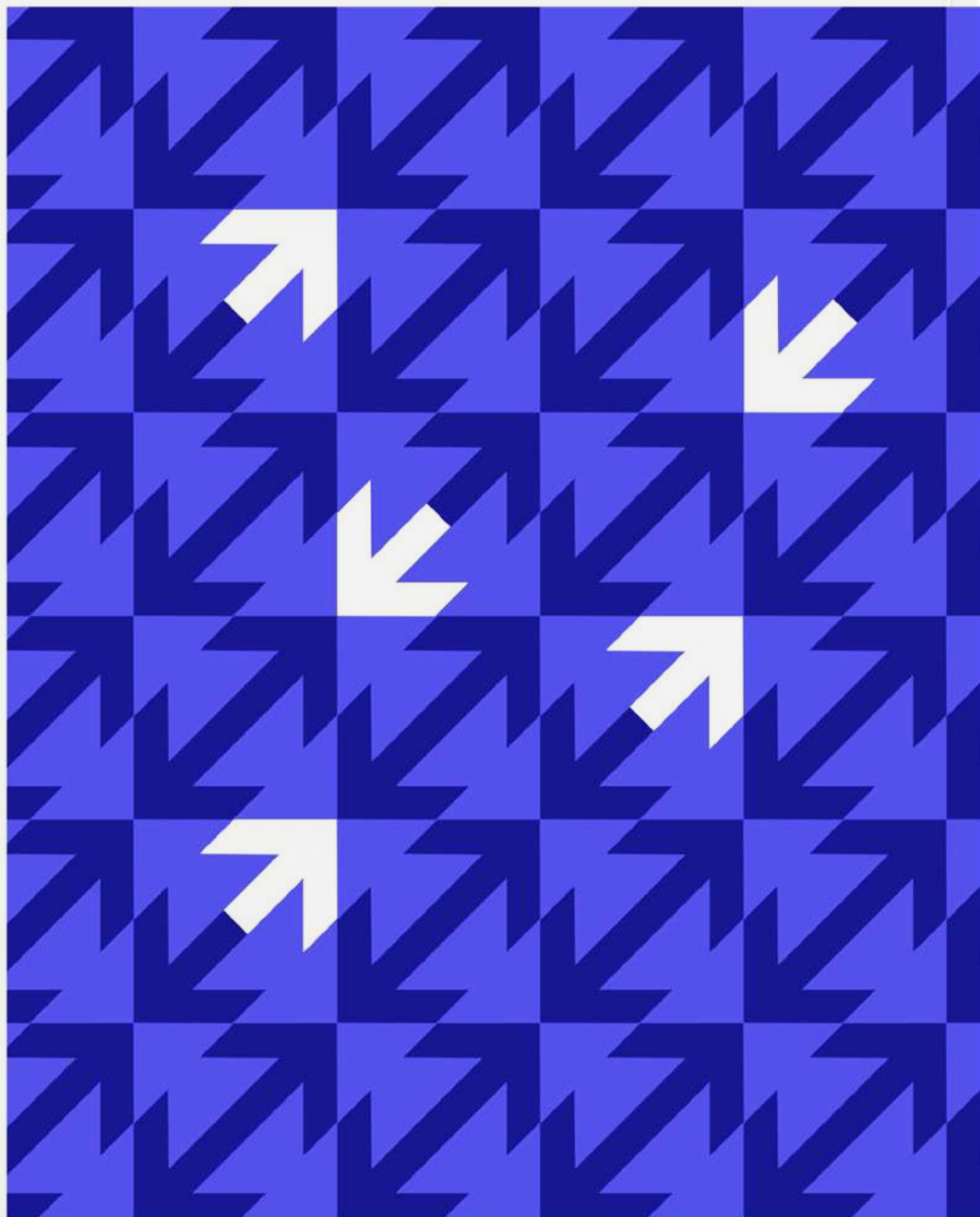
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