

GLOBAL PREDICTIONS FOR 2021

**Why they might be wrong
& other perils of perception**

Document produced by Ipsos for the
World Economic Forum Davos 21 virtual meeting

January 2021

GAME CHANGERS



What does the global public expect for 2021?



IMPACT OF COVID-19 CONTINUES

Hopes and Fears

61%

Likely that most people will wear a mask in public places a year from now

60%

Likely that a successful vaccine for COVID-19 will become widely available

52%

Unlikely that life will have got back to normal after the effects of the COVID-19 pandemic

59%

Unlikely that the world will change for the better because of the pandemic

Base: c. 15,700 online interviews across 31 markets, 23 October – 6 November 2020

UNITED GLOBAL CONCERN FOR THE ENVIRONMENT

Middling hopes for economic recovery, but not an equal one

75%

Likely that average global temperatures will increase

54%

Agree the global economy will be stronger in 2021 than in 2020

66%

Likely that income inequality will increase

51%

Unlikely that women will be paid the same as men for the same work

Base: c. 15,700 online interviews across 31 markets, 23 October – 6 November 2020.

WILL THE WAY WE LIVE OUR LIVES CHANGE?

Lifestyle changes

57%

Likely that people will spend more money buying things online than in stores

34%

Likely that the number of people living in big cities will shrink

36%

Likely that robots will look, think and speak like humans

31%

Likely that they will feel lonely most of the time

Base: c. 15,700 online interviews across 31 markets, 23 October – 6 November 2020

STILL, AFTER A TERRIBLE YEAR, THERE ARE HOPES...



... that
2021
will be
better

90%

Agree 2020 was a bad
year for their market



Up 25 points from
last year

77%

Optimistic that 2021 will
be better than 2020



But no better than
previous years

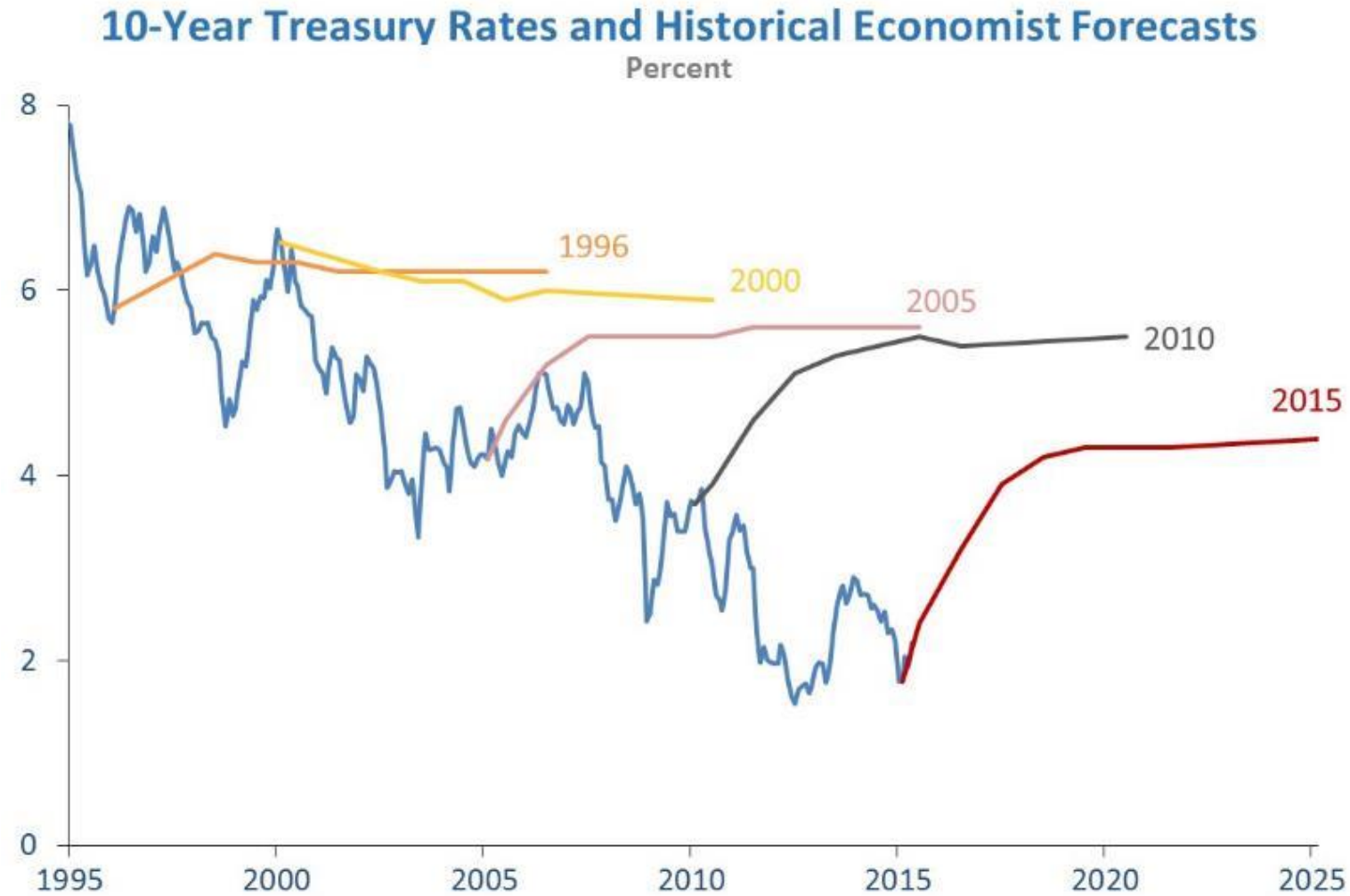
Base: c. 15,700 online interviews across 31 markets, 23 October – 6 November 2020

BUT CAN WE ALWAYS TRUST OUR OPINIONS?

We need to
understand the perils
of perception.

Why we are wrong
about nearly
everything.

EVEN MANY EXPERT PREDICTIONS ARE WRONG ...



Note: Forecasts are those reported by Blue Chip Economic Indicators released in March of the given calendar year, the median of over 50 private-sector economists. Source: Blue Chip Economic Indicators, Aspen Publishers.

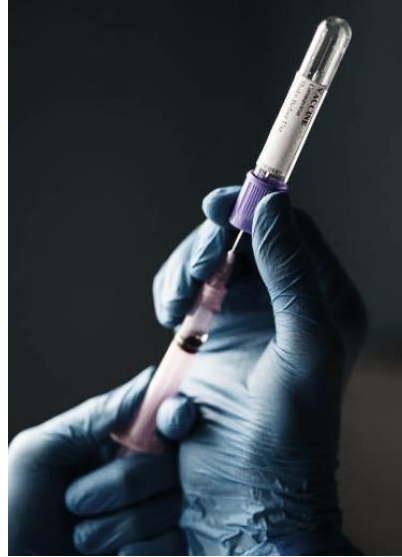
THE PERILS OF PERCEPTION STUDIES ...



Well over 100,000 interviews, in up to 40 countries ...

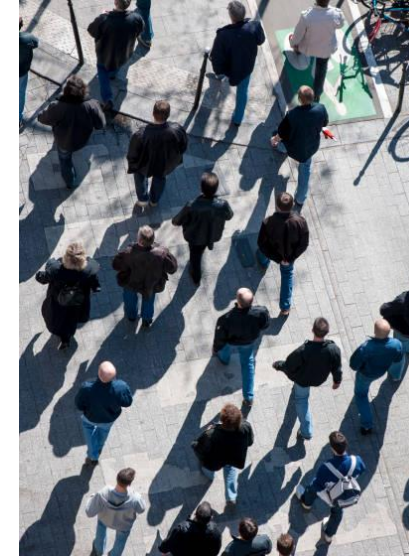


... guess the reality for their country and compare

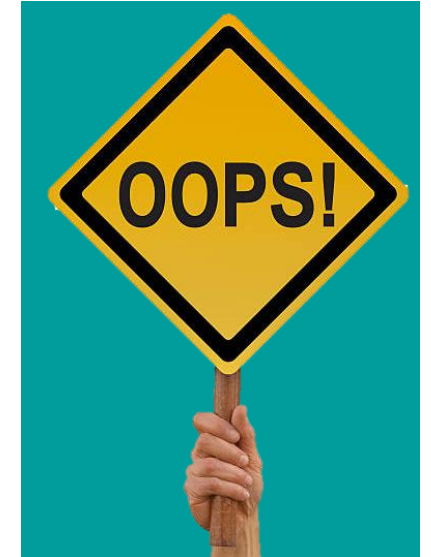


From immigration to vaccine safety, obesity levels to murder rates, happiness to sex

...



Reflects Ipsos' real commitment to understanding society



The public are often incredibly wrong – raises questions: why, and what can we do about it?

WHY IS IT IMPORTANT TO HAVE A DEEPER UNDERSTANDING OF PERCEPTUAL BIASES?

Not measuring ignorance – measuring what people believe to be true...

...which can provide clues to what people are worried/not worried about

Our perceptions also highlight what we think of certain behaviours/how we view other people and what we think are social norms

Can help uncover why people believe what they do and which biases are having the biggest influence on them

And how/if we can make people better informed

MISPERCEPTIONS EXIST ACROSS ALL WALKS OF LIFE – MANY MORE THAN THE EXAMPLES BELOW

On average, across the world ...

Immigration is
over-estimated

People think immigrants make up **28%** of their population – the true figure was **12%**

Climate change is
under-estimated

People guess **9** of the last 18 years were the hottest on record – the true figure was **17**

Sexual harassment is
under-estimated

Across Europe and the US, people guess **39%** of women have experienced sexual harassment – the true figure is **60%**

Hardly anyone realises the murder rate is falling

Only **16%** of people correctly state that the murder rate has fallen in their country since 2000

Source: Ipsos Perils of Perception 2018 (28,115 online interviews Sept–Oct 2018 in 37 countries)

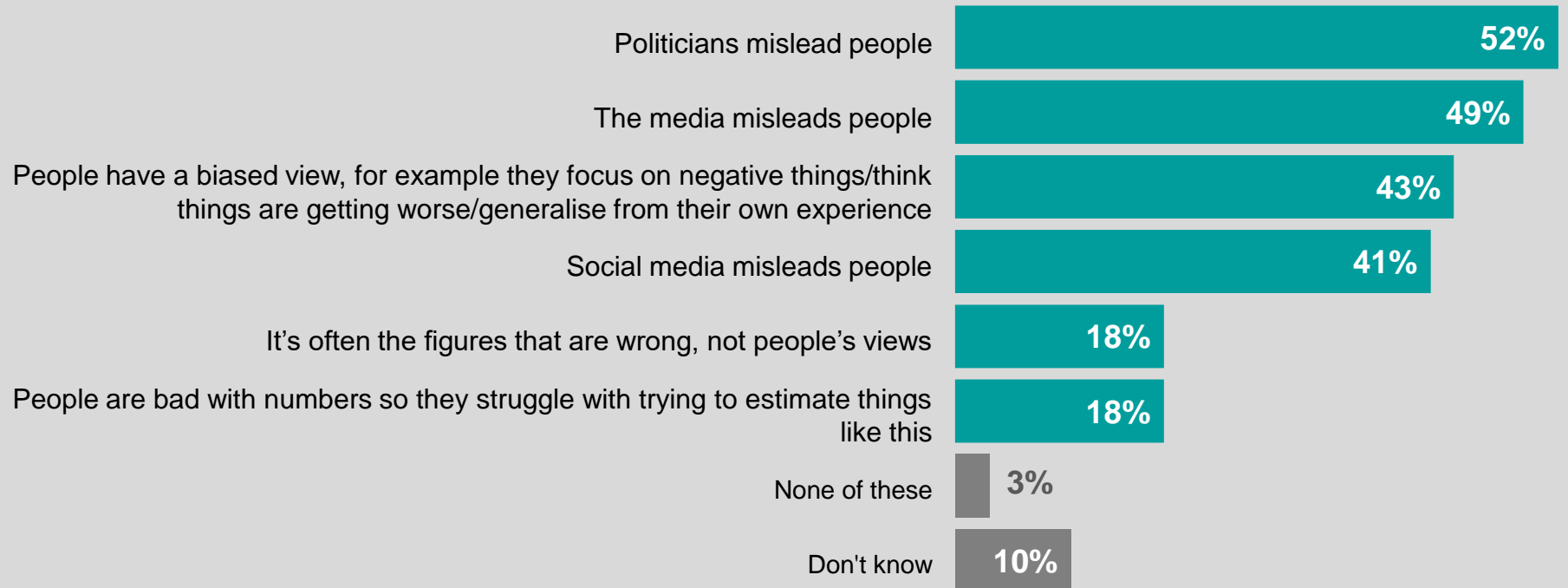
Source: Ipsos Perils of Perception 2017 (29,113 online interviews Sept–Oct 2017 in 38 countries)

WHEN WE ASK THEM, PEOPLE TEND TO BLAME OTHERS

(A few even blame the facts themselves)

... but
should
we look
in the
mirror?

People often get lots of things wrong about their countries and how they're changing, for example, what proportion of the population are immigrants, or whether the crime rate is going up or down. Which of these, if any, do you think are the biggest reasons for this?



Base: 19,243 online adults under 65 in 27 countries, June - July 2018 | Source: Ipsos Global Advisor

WHY DO THESE EXIST? A WIDE RANGE OF CAUSES...

How we think

Maths and
statistical
skills and
critical
literacy

Biases and
Heuristics,
including
psycho-
physics

Rational
ignorance

What we're told

Media

Social
media/
tech

Politics

Our own
experience

Cognitive
capabilities

External
context

THE ROLE OF NUMERACY

**Numerical
(especially
statistical)
skills neither
widespread nor
valued**

Just **26%** of Brits correctly know that the probability of getting two heads if **you spin a coin twice** is 1 in 4

Only **13%** of Brits would be most proud of their children if they were **good at numbers** – 55% would be more proud of excellence in literacy

Base: c. 15,700 online interviews across 31 markets, 23 October – 6 November 2020

But there is much more to our errors than numerical limitations
– one of the key concepts:
‘Emotional Innumeracy’...

HUGE OVERESTIMATES OF TEENAGE BIRTHS...



What percentage of women and girls aged 15 to 19 in [Country] do you think give birth each year?

	% point difference	too high	Guess	Actual
Total	<div></div>	+21	23	2
Argentina	<div></div>	+31	37	6
USA	<div></div>	+22	24	2
Britain	<div></div>	+18	19	1.4

Please see <http://perils.ipsos.com/> for full details of all sources.

Guarantee
you will
never see a
headline like
this ...



EMOTIONAL INNUMERACY...



We overestimate what we worry about as much as we worry about what we overestimate

Makes misperceptions useful indicators of what we're really worried about

Cause and effect run in both directions

Vital implications:

- can't just use facts, misdiagnoses cause – partly emotional
- 'myth-busting' seldom gives the full answer...

OUR BIASES HELP EXPLAIN FOCUS ON NEGATIVE

... including the way our brains have evolved to handle information

We are poor at spotting gradual, positive improvements (such as birth rates among teenagers)

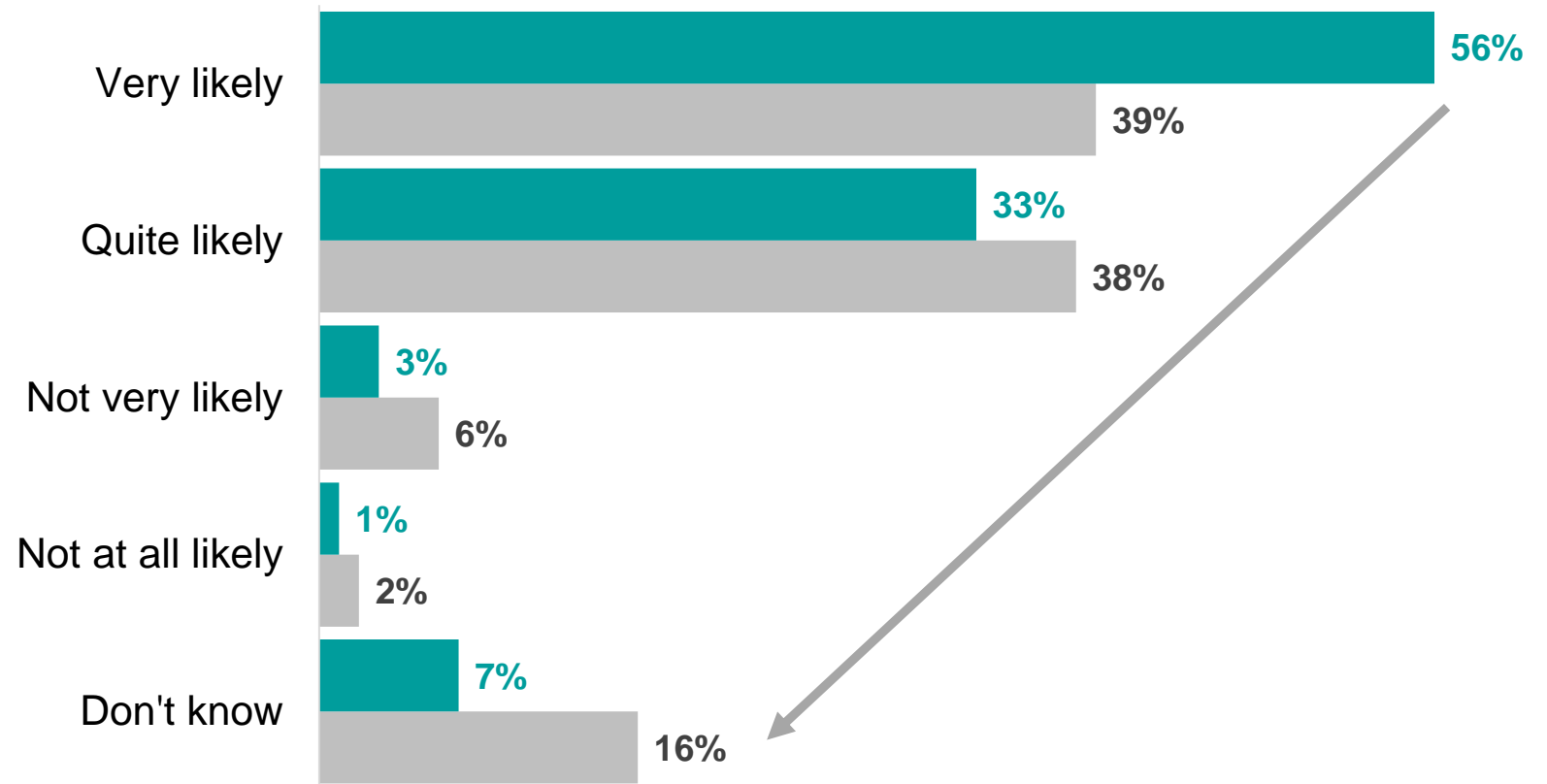
We tend to focus on negative information due to evolutionary reasons, but means our brains tend to respond to negative information differently

‘Rosy retrospection’ – tendency to believe things were better in the past/are getting worse (we can edit out the bad bits from our memories)

AND THE FOCUS ON NEGATIVE INFO HAS IMPORTANT SIDE-EFFECTS...

Imagine you have a life-threatening illness and your doctor has told you that you need an operation to treat it. How likely, if at all, are you to have this operation if your doctor tells you that....

- 90% of people who have the operation are alive for at least 5 years following the operation
- 10% of people who have the operation die within 5 years of having the operation



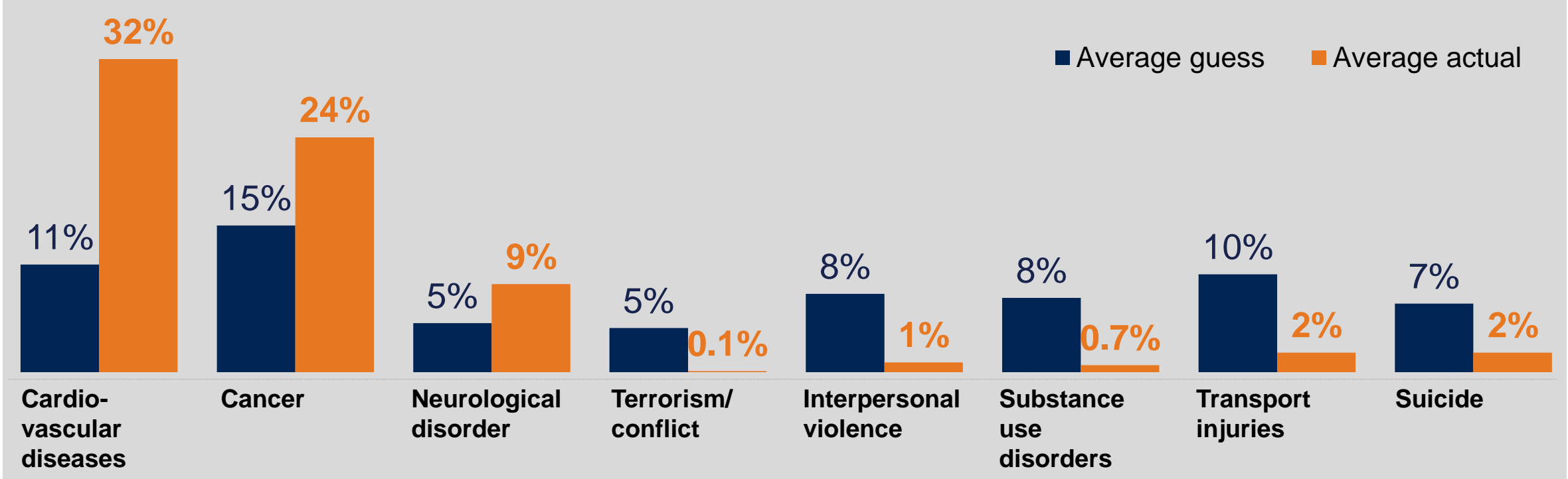
Base: c500 online British adults aged 16-74, April 2013. Source: Ipsos MORI/RSS

Take death as an example



GLOBALLY, WE UNDERESTIMATE CANCER AND HEART DISEASE AS CAUSES OF DEATH, AND OVERESTIMATE MORE VIOLENT CAUSES

Q. Out of every 100 deaths in [Country] – about how many are a result of the following...



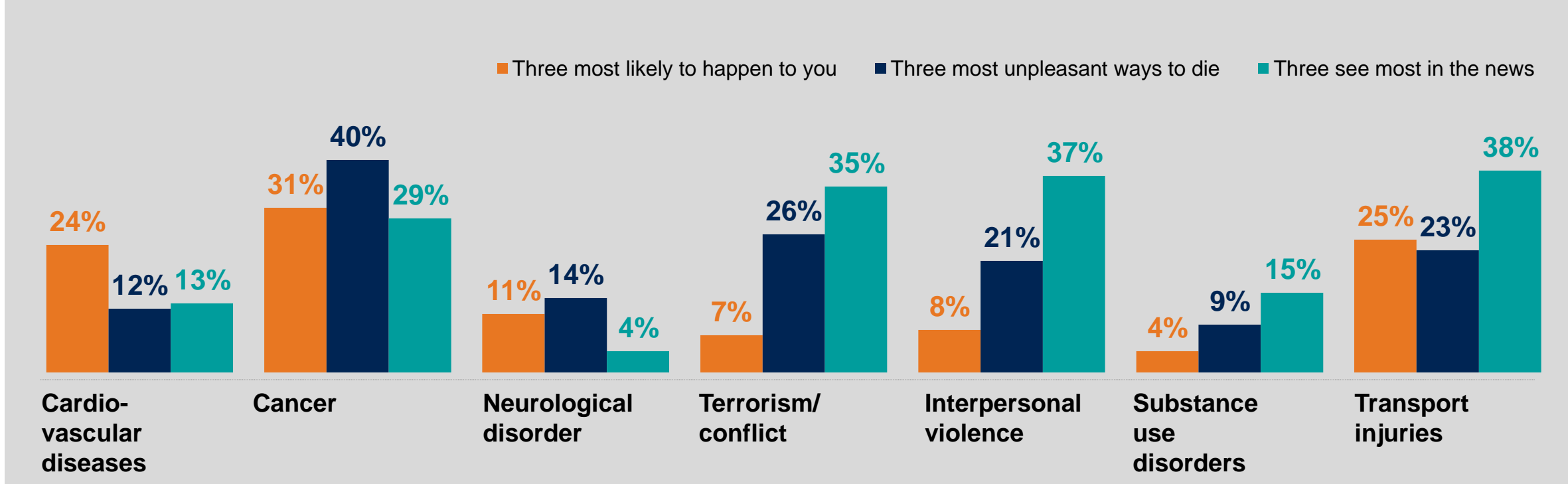
Base: 16,000 online interviews with adults aged 16-64 in 32 countries around the world, November- December 2019
 Source for actual health data: IHME GBD (2017). Please see <http://perils.ipsos.com/> for more information.



THAT'S DESPITE PEOPLE KNOWING HEART DISEASE & CANCER ARE MORE LIKELY TO HAPPEN TO THEM PERSONALLY

But other factors are seen as more unpleasant or more frequently in the news

- Q. Which three, if any, of the following things do you think are most likely to happen to you?
Q. Which three, if any, of the following things would be the most unpleasant thing to die from?
Q. Which three, if any, of the following things do you see covered most frequently in the news



Base: 16,000 online interviews with adults aged 16-64 in 32 countries around the world, November- December 2019
Source for actual health data: IHME GBD (2017). Please see <http://perils.ipsos.com/> for more information.

Which brings us to 'Fake News'



People think it's widespread

Fake News!

60%

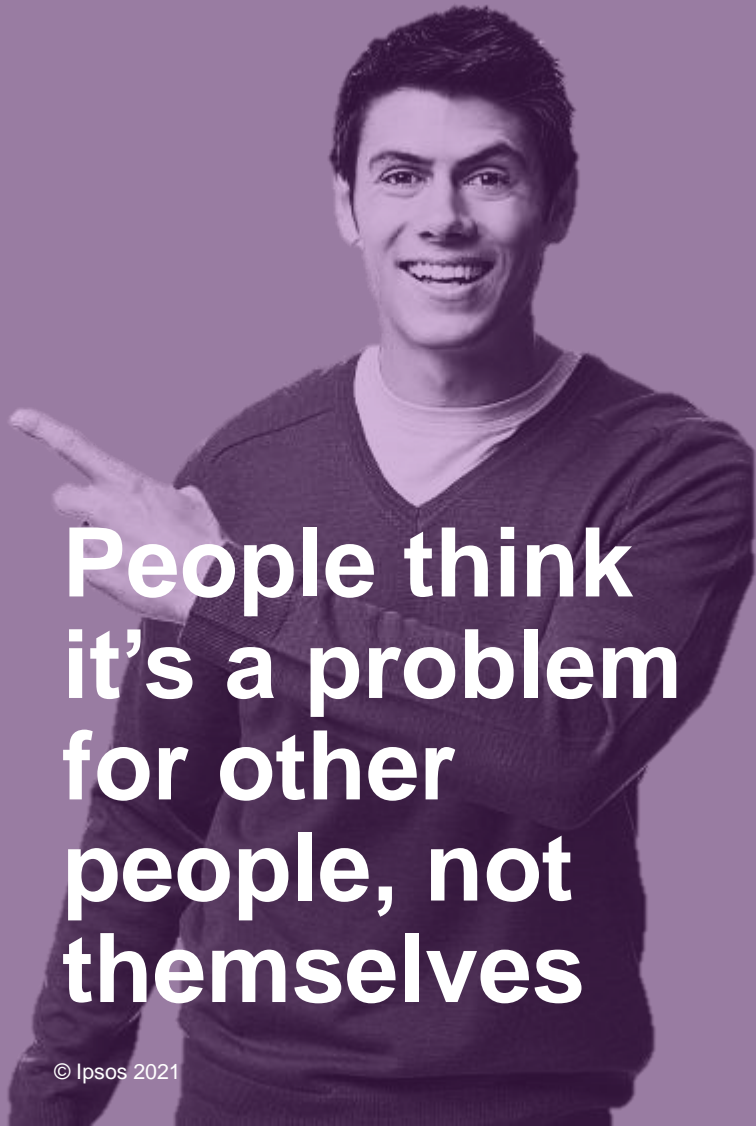
Say they very or fairly often see news stories that are deliberately untrue

48%

Say they've falsely believed a story that they found out was fake

*Base: 19,243 online adults under 65 in 27 countries, June-July 2018
Source: Ipsos Global Advisor*

But there is complacency



People think it's a problem for other people, not themselves

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You

34%

Agree "I live in a bubble on the internet, mostly connecting with people like myself and looking for opinions I already agree with"

63%

Agree "I am confident that I can tell real news from fake news (entirely made-up stories or facts)"

Other people

65%

Agree "The average person in my country lives in their own bubble on the internet, mostly connecting with people like themselves and looking for opinions they already agree with"

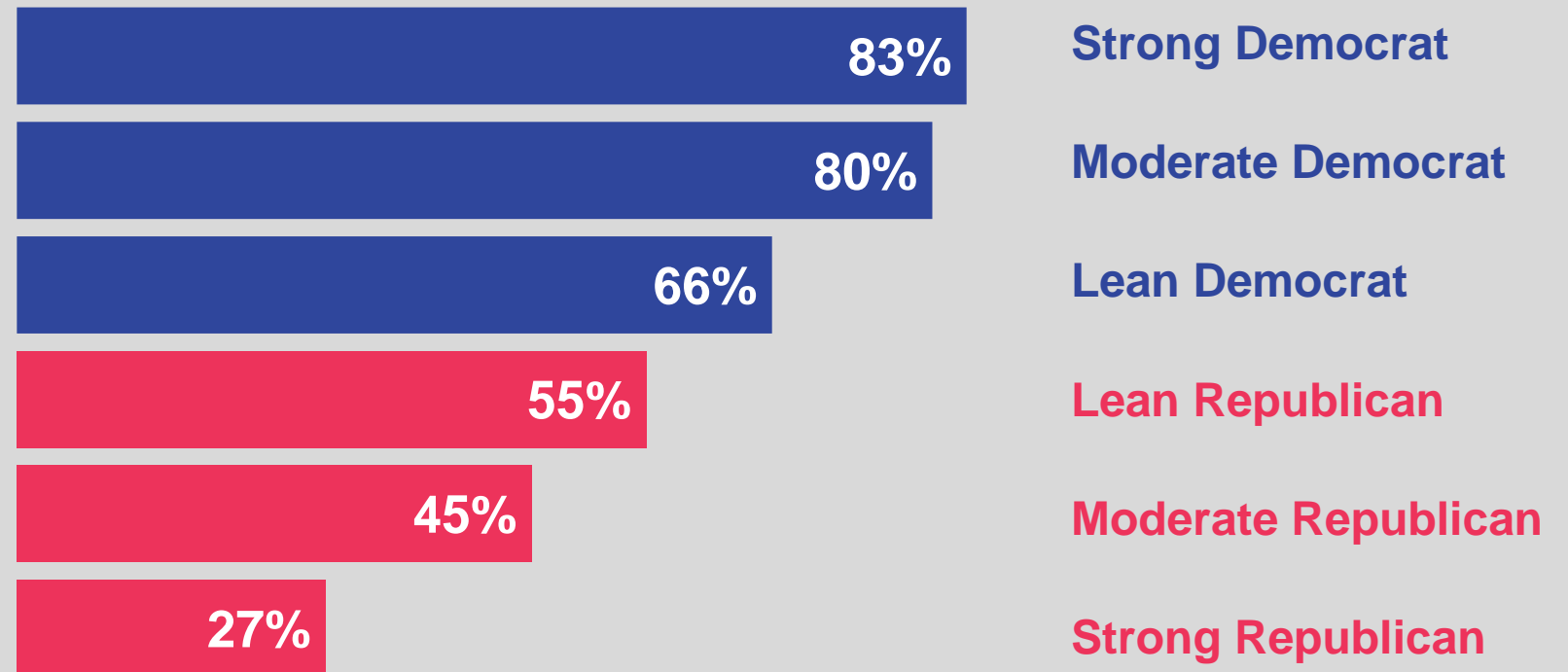
41%

Agree "I am confident that the average person in my country can tell real news from fake news"

MOTIVATED REASONING IS AN ISSUE IN POLARISED TIMES

In the USA, do you think more people are killed by guns, knives or other violence?

% correctly saying **firearms**

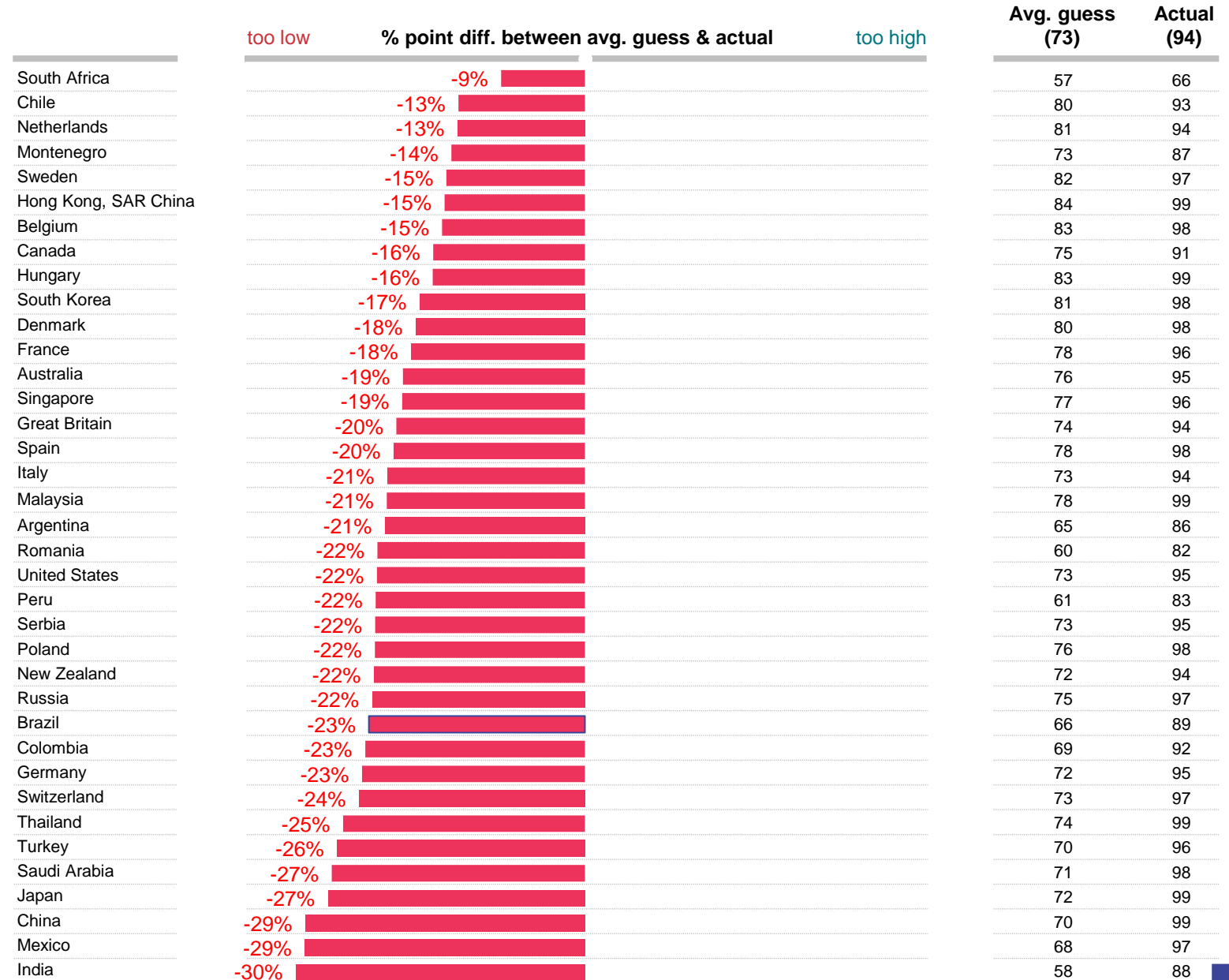


Perils of Perception 2018

**And many of these
issues are vital for
understanding public
opinion on COVID-19**

Misperceptions already exist on vaccines – e.g. underestimating the coverage of vaccinations of infants in their market

Q. Out of every 100 infants aged under 12 months in [MARKET], about how many do you think have had all the World Health Organisation recommended vaccinations for Diphtheria, Tetanus, Whooping Cough, Polio and Measles?

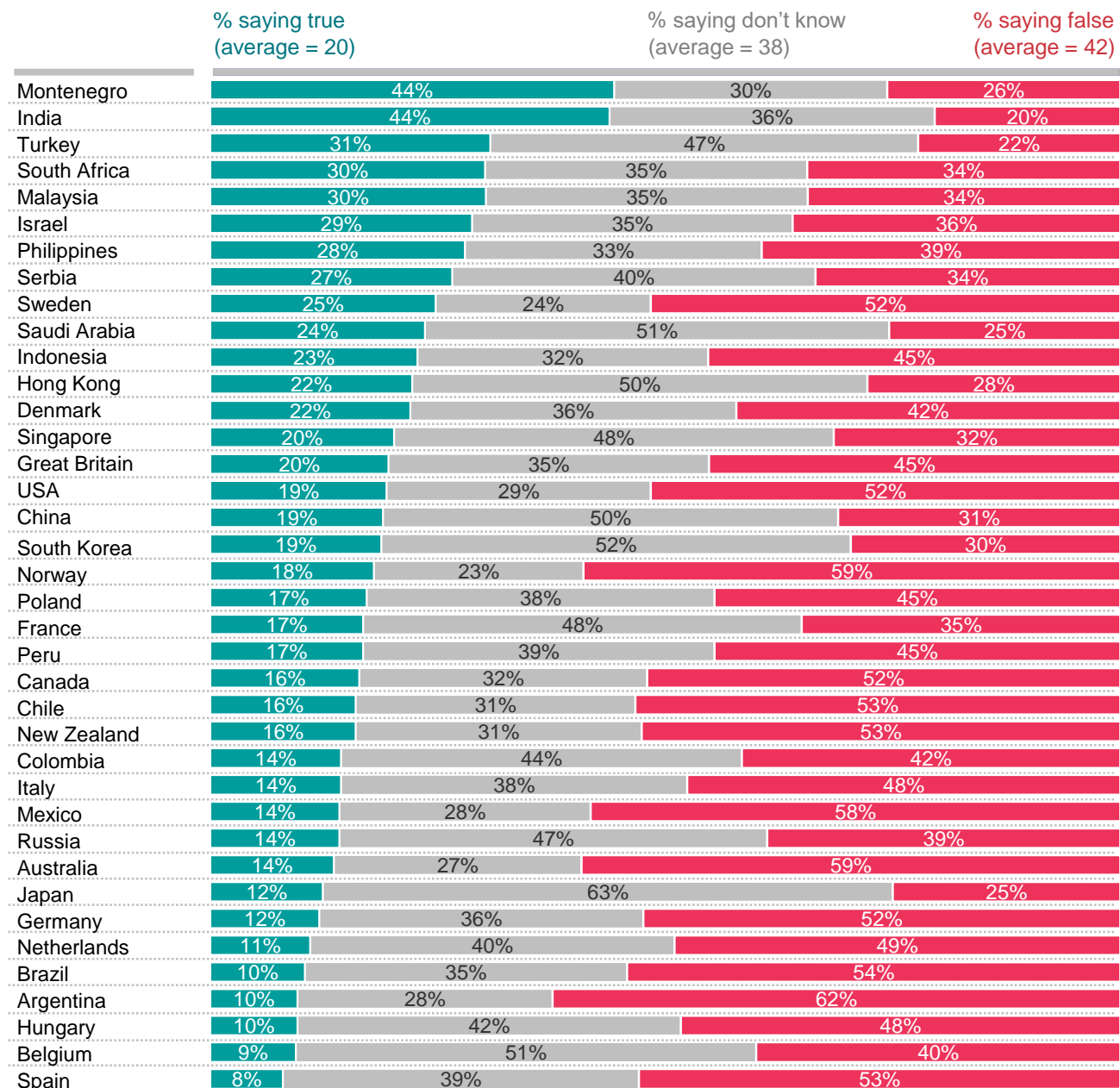


Source: Ipsos Perils of Perception 2018 (28,115 online interviews Sept –Oct 2018 in 37 countries)
Please see <http://perils.ipsos.com/> for full details of all sources.

Meanwhile, the claim there is a link between vaccines and autism in healthy children persists – or at least is subject to uncertainty

Do you think the following statement is true or false?

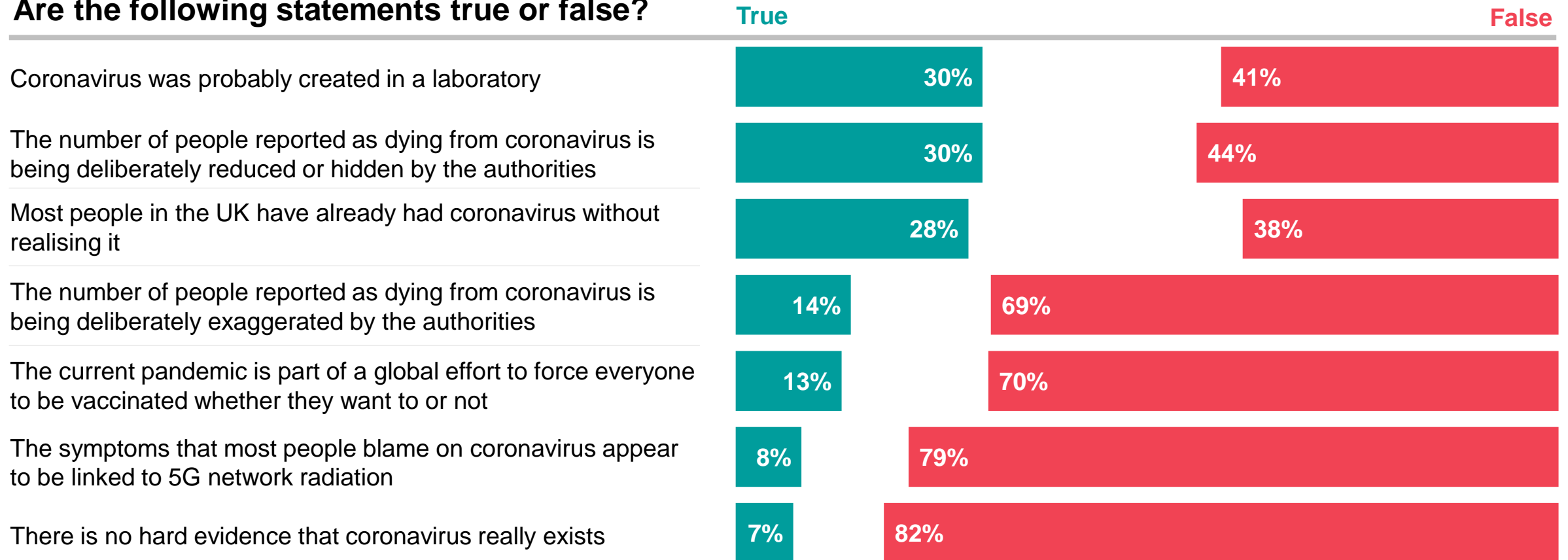
Some vaccines cause autism in healthy children



Source: Ipsos Perils of Perception 2017 (29,113 online interviews Sept –Oct 2017 in 38 countries)
Please see <http://perils.ipsos.com/> for full details of all sources.

THERE'S COVID-19 CONFUSION – THREE IN TEN IN THE UK THINK IT WAS CREATED IN A LAB

Are the following statements true or false?



Base: 2,254 UK residents aged 16-75, interviewed 20-22 May 2020

Source: King's College London/Ipsos MORI

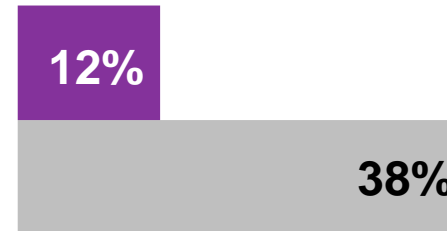
AND THESE BELIEFS ARE LINKED TO BEHAVIOURS

% engaging in behaviours among those who do/don't believe there is no hard evidence that coronavirus really exists

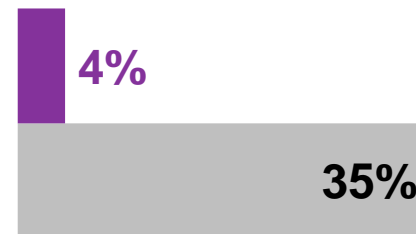
Staying 2 metres away from other people when outside your home



Had friends or family visit you at home



Gone to work or outside despite having symptoms that could be coronavirus

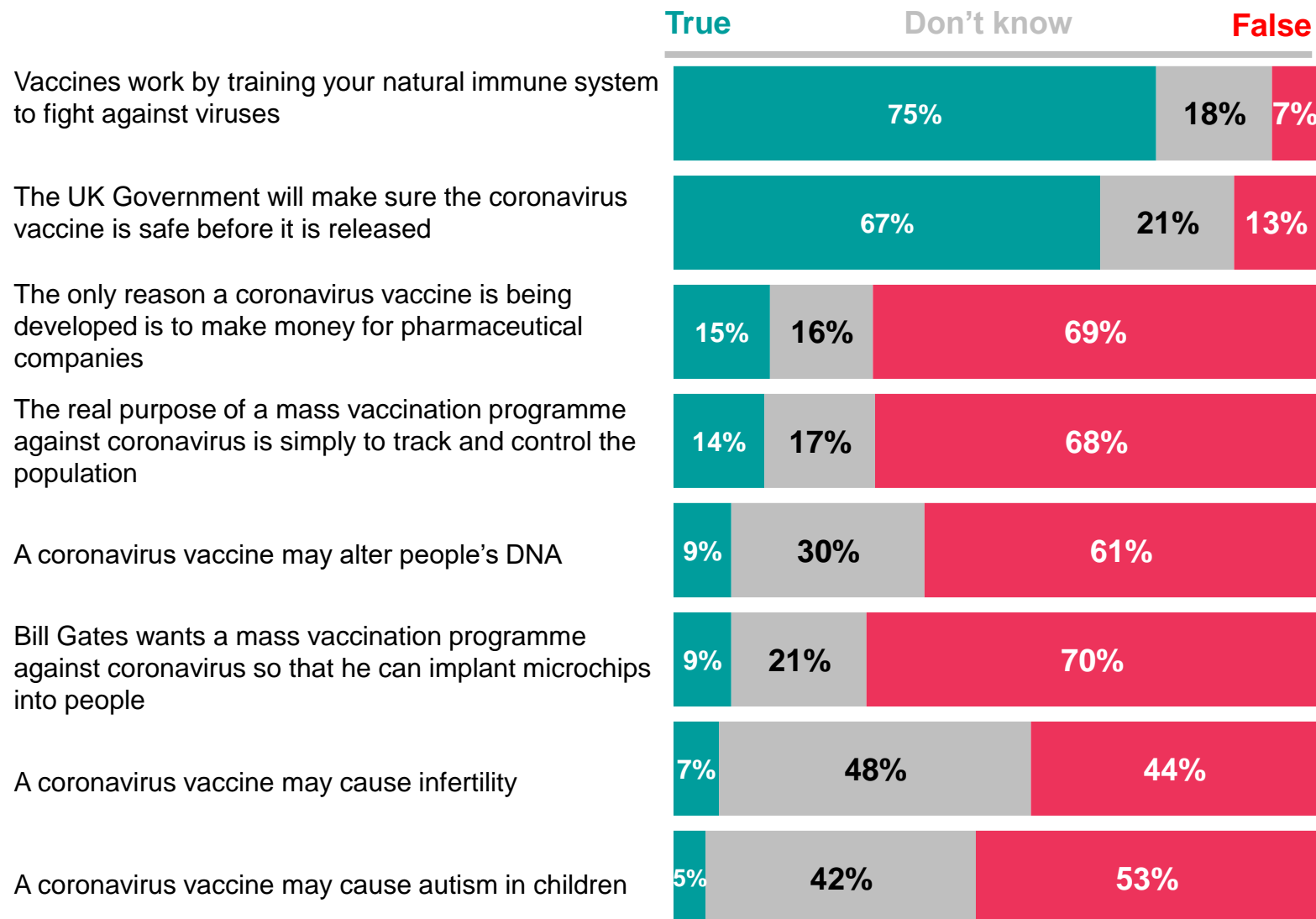


True False

Base: 2,254 UK residents aged 16-75, interviewed 20-22 May 2020
Source: King's College London/Ipsos MORI

BELIEF IN VACCINE CONSPIRACY THEORIES IS ONLY AMONG A MINORITY IN THE UK – BUT CONFUSION REMAINS

Are the following statements true or false?

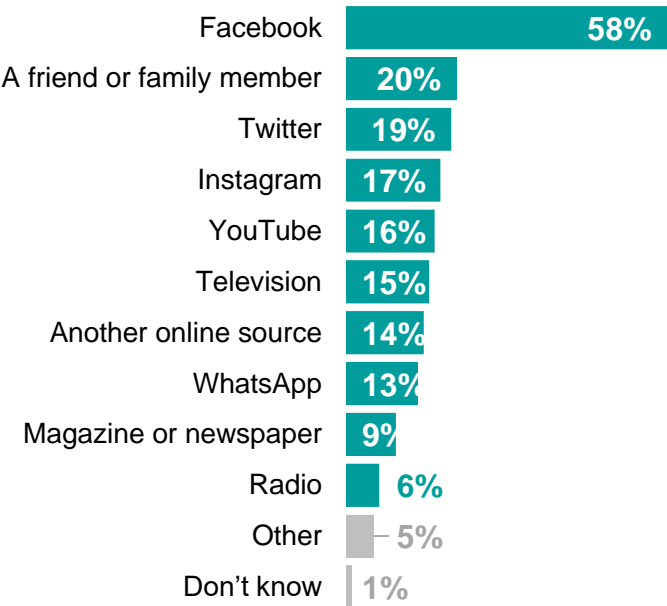


Base: 1,122 UK residents aged 16-75, interviewed 20-24 November 2020

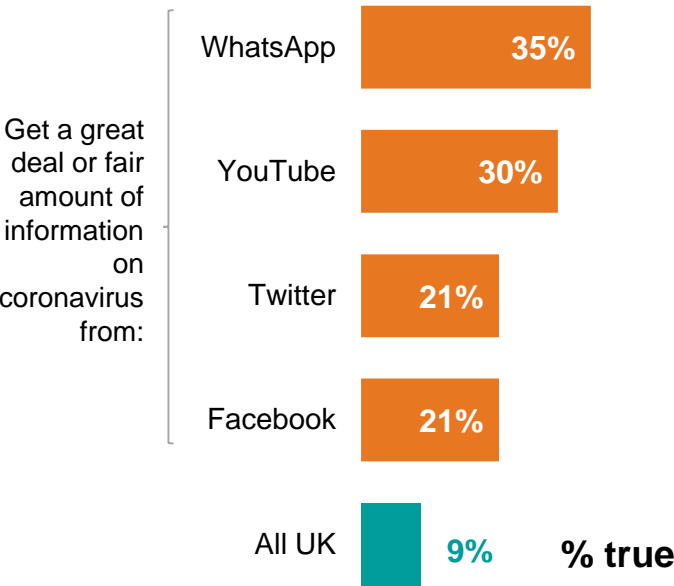
BUT LINKS WITH SOCIAL MEDIA USE

More likely to be a source of anti-vax messages, and belief in them is higher among those who get their information from social media

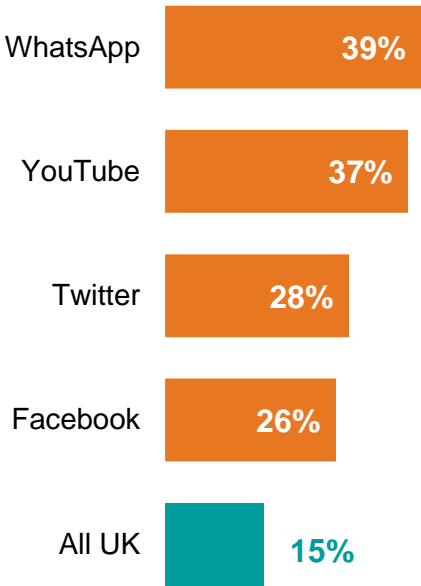
Where **34%** of Britons say they have seen or heard messages encouraging the public **not** to get a coronavirus vaccine



Are the following statements true or false?
Bill Gates wants a mass vaccination programme against coronavirus so that he can implant microchips into people



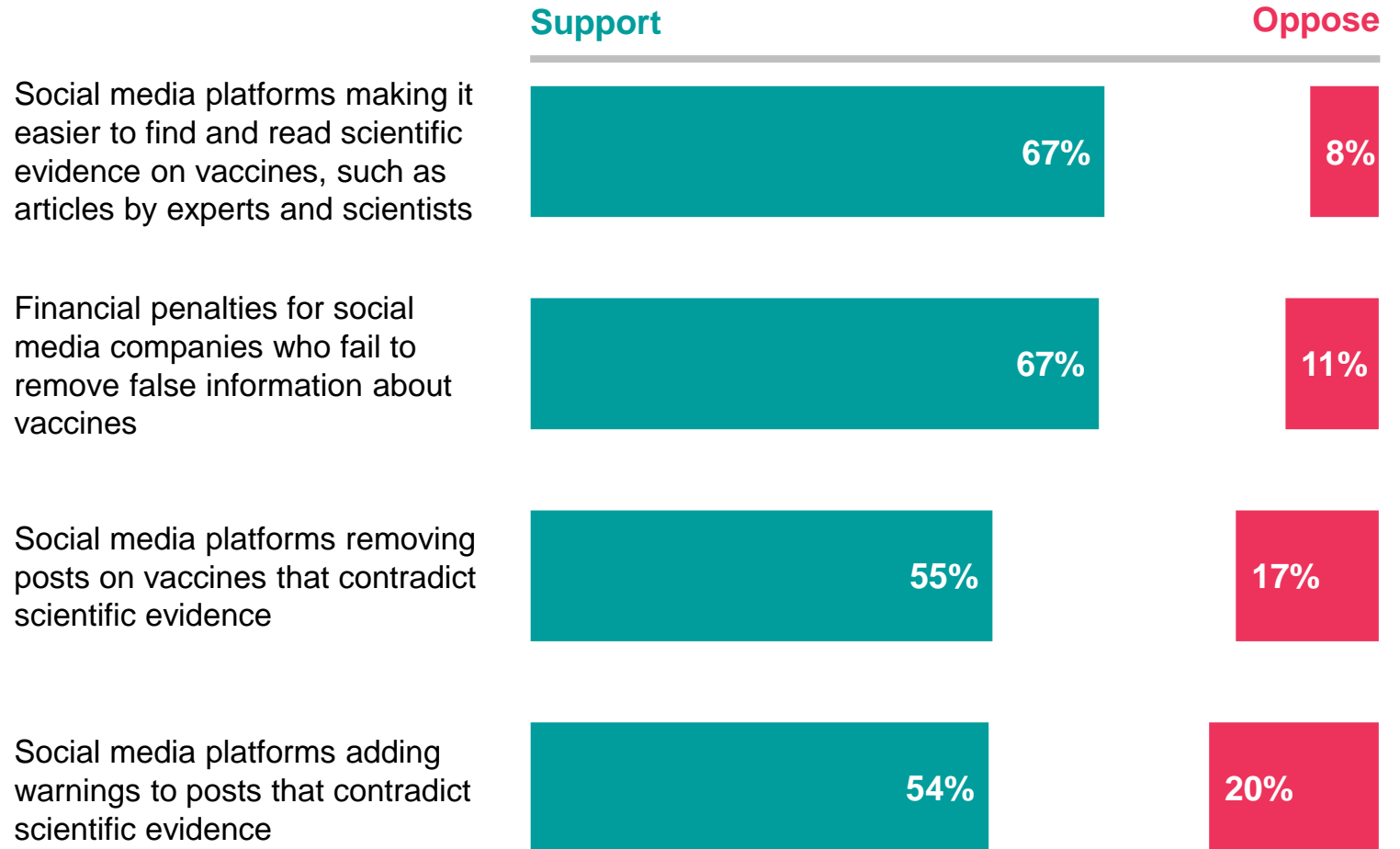
Are the following statements true or false?
The only reason a coronavirus vaccine is being developed is to make money for pharmaceutical companies



Base: 1,122 UK residents aged 16-75, interviewed 20-24 November 2020

THERE IS SUPPORT, THOUGH, FOR SOCIAL MEDIA PLATFORMS TO ACT AGAINST MISINFORMATION

To what extent, if at all, do you support or oppose each of the following?



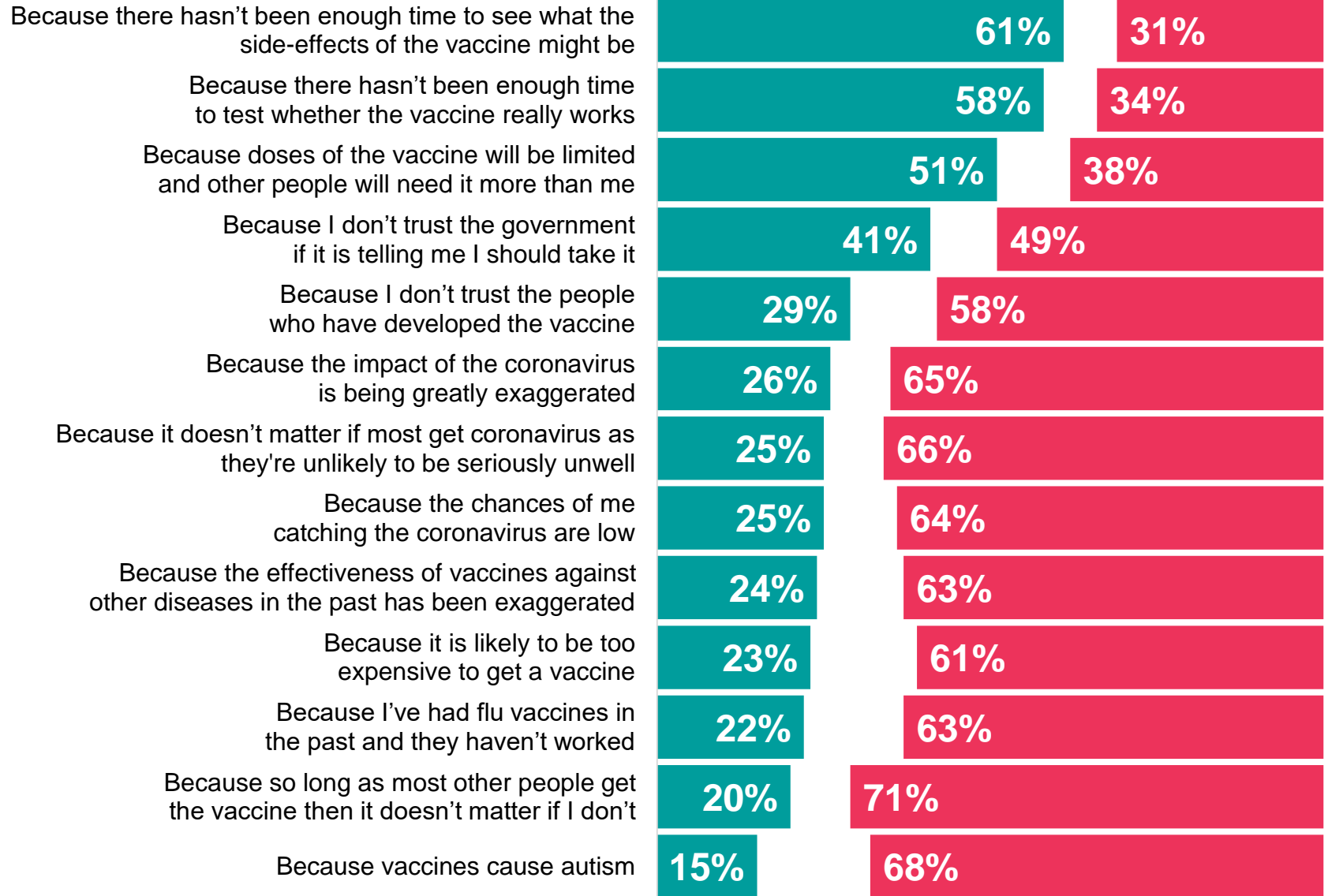
Base: 2,244 UK residents aged 16-75, interviewed 20-24 November 2020

Though worth remembering that vaccine hesitancy likely to be a bigger issue than conspiracy theories...

How convincing, or otherwise, do you find each of the following reasons why you should take a vaccine against coronavirus (when one becomes available)?

Convincing

Not convincing



Base: 1,049 Online British adults 18-75, 13-16 November 2020

ARE THERE ANY SOLUTIONS?

IT WON'T BE EASY...



**I've been studying
this stuff for about
45 years and I
really haven't
improved one bit**

...

Daniel Kahneman

Some individual-level approaches:

- start with assumption things are getting better
- avoid assuming you're utterly normal...
- ... or focusing on the extreme
- actively unfilter your world

WE CAN SUPPORT A REALITY-BASED VIEW OF THE WORLD...

Critical, statistical and news literacy from schools onwards

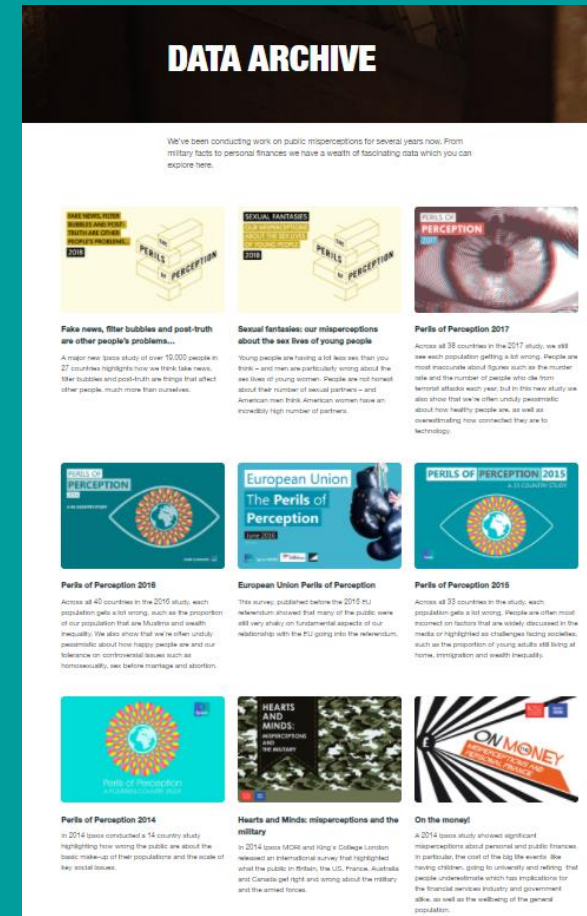
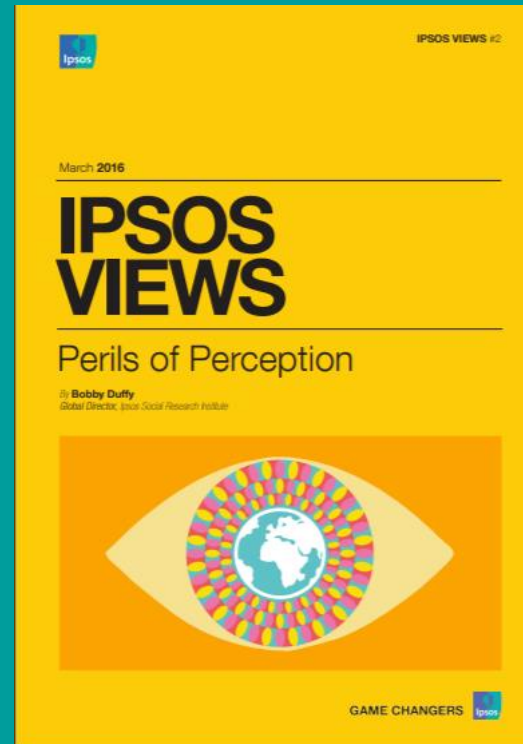
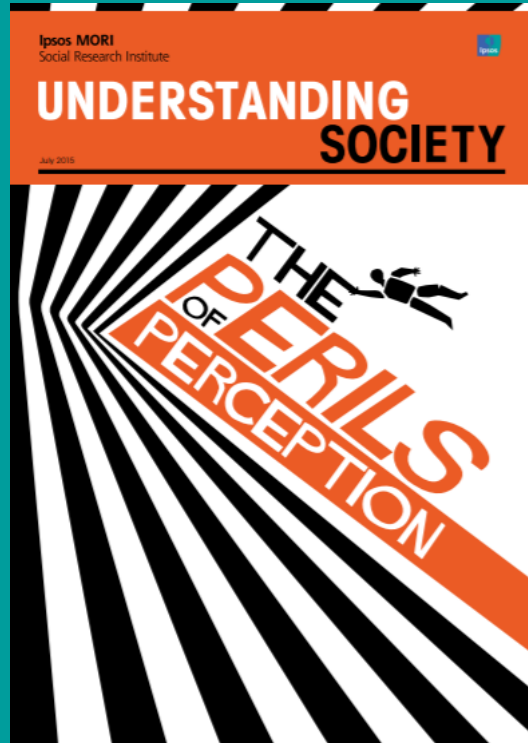
Support fact-checking, systemically, pre-emptively

Facts and stories not opposites: use both to explain

Great untapped potential in more meaningful deliberation, using technology and traditional approaches

People are NOT automatons, entirely driven by biases and tribal identities, and unwilling to change...

FOR MORE INFORMATION:



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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.**

Essentials

Data from the report is drawn from Essentials which tracks the public’s latest attitudes, behaviours and future intentions as the world emerges from this crisis.

The study has been designed to help businesses adapt, plan and execute in these turbulent times. It offers fast, cost-effective answers to help you navigate as consumer attitudes and behaviours continue to evolve.

Contact:

Natalie Lacey

Natalie.Lacey@ipsos.com