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# PUBLIC AFFAIRS SG

INSIGHTS FROM GLOBAL SOCIAL RESEARCH EXPERTS, IPSOS



## What is the Singapore Identity?

OUR AGEING WORLD

THE ROLE OF CULTURE IN A GLOBAL CRISIS

MORE THAN A NUDGE. A BEHAVIOURAL SCIENCE  
FRAMEWORK TO ANTICIPATE AND SHAPE  
BEHAVIOUR

# FOREWORD



by Katharine Zhou  
Managing Director, Singapore  
Ipsos

Welcome to the 4th edition of Public Affairs SG.

When people ask me what it is that we do at Ipsos, I tell them that the essence of what we do is to help our clients listen to what their audiences are saying, understand what they are thinking and anticipate what they have in mind. The Public Affairs Specialist unit at Ipsos is a world leader in understanding the perceptions of citizens, public service users and other stakeholders, including members, constituents, employees, donors, health professionals, and voters. More than a business, Public Affairs sits squarely with our fundamental desire to provide total understanding of societies, markets and people. In fact, Ipsos first started in 1975 as a polling agency!

COVID-19 has brought about massive changes to our lives. We see that very clearly in all of society. Ipsos Public Affairs around the world has become a key partner for policy makers to keep tab on the fast-evolving society - their attitudes, their behaviours; what will revert and what is likely to be permanent. While many organisations in the private sector have paused on research activities during these uncertain times, Public Affairs has become busier than ever, in Singapore too! It is a service line that we have committed to (over)invest in in terms of talent, capabilities, thought leadership and solutions.

Singapore is a unique country, a city state, a geographical hub and a regional hub for many industries. While we have been significantly impacted by the pandemic, it has also brought loads of new opportunities. It is a great time for our clients to get fresh data, get new insights and we are here to help.

*Katharine*

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# PERSPECTIVES

## What is the Singapore Identity?





## WHAT IS THE SINGAPORE IDENTITY?

A maturing Singapore, rooted in cultural pluralism, local food and Singlish, wants a country that is socially and environmentally conscious, and technologically progressive.

On 9th August 2020, Singapore celebrated her 55th year of Independence. The latest Ipsos survey conducted over the period of 7th to 11th August 2020 looks at National Pride and what Singaporeans identify with as being Singaporean. This period was also just weeks after the 2020 Singaporean General Election, where the Workers Party won 10 out of 93 seats in parliament, the most ever held by an opposition party since the first general election in 1968. The data presented here is contrasted against data collected in a similar survey, 5 years ago, in December 2015.

The survey was conducted online, among a nationally representative sample of 1,000 Singaporeans and Permanent Residents, aged 18 years old and above.



### PROUD TO BE SINGAPOREAN

85% of respondents say they are proud to be a Singapore Citizen/PR, about half of these (38%) saying that they are very proud to be so. In addition, 65% of respondents say that they are proud of their fellow Singaporeans.

66% of Singaporeans agree that Singapore is a better country to live in than other countries and more than half (55%) believe that Singapore is a better country to work in than other countries.

Only 3 in 10 believe Singapore is a better country to retire in than other countries. Although another one third of Singaporeans are undecided, neither agreeing nor disagreeing that it is a better place for retirement.



**85%**  
PROUD TO BE  
SINGAPOREAN



# WHAT IS THE SINGAPORE IDENTITY?

## NATIONAL VALUES MOST IMPORTANT TO SINGAPOREANS

When asked to select their top values they believe are most important to Singapore as a country, respondents say that Singapore needs to have an honest and transparent government and be just and fair to all.

This opinion hasn't shifted in the past 5 years. But we are seeing significant movements on a few other attributes. Being socially and environmentally conscious moved up from 7th position replacing Have a sense of Unity in 5th place in 2015.

While having an honest and transparent government was in the top 5 values for most Singaporeans across age groups, this was felt more strongly among those 45 to 54 years of age (83%). Conversely, when it comes to being progressive, this was more strongly felt among the youth aged 18 to 24 years (45%) than those 45 to 54 years old (32%).

The effects of fighting a global health pandemic have brought to light what Singaporeans value. The outcome of the recent General Elections confirms that Singaporeans are looking for change. Five years ago, Singaporeans placed more importance on Singapore being prosperous over being socially and environmentally conscious, but now more emphasis is placed on being socially and environmentally conscious which is in line with the government's push for a sustainable environment. Furthermore, in part due to globalisation and exposure to more debate over social media, Singaporeans today are placing more importance on justice and having their voices heard.





# WHAT IS THE SINGAPORE IDENTITY?

## safety

83%

## infrastructure

80%

## cleanliness

75%

## education

72%

## healthcare

71%

### MOST NOTABLE CHARACTERISTICS OF SINGAPORE

When asked to rate Singapore's performance on 17 aspects, the 5 most notable characteristics were Safety (83%), Infrastructure (80%), Cleanliness Standard (75%), Standard of Education (72%) and Standard of Healthcare (71%).

Although being safe seems to have come down the importance list, Singapore's performance on safety was rated very highly by the people. This could indicate that being safe is not any less important, but that safety is now a given and synonymous with Singapore.

Compared to the scorecard in 2015, significant up-shifts are seen on Infrastructure, Cleanliness and Public Transport. On the other hand, much fewer Singaporeans feel we are doing as well on Caring for the Environment and Transparency of Government. Significantly fewer believe that Singapore is performing well in the areas of Employment Opportunities (34%), and Cost of Living (15%), the majority agreeing that there is much room for improvement in these areas.



[SEE DETAILED CHART HERE](#)





# WHAT IS THE SINGAPORE IDENTITY?

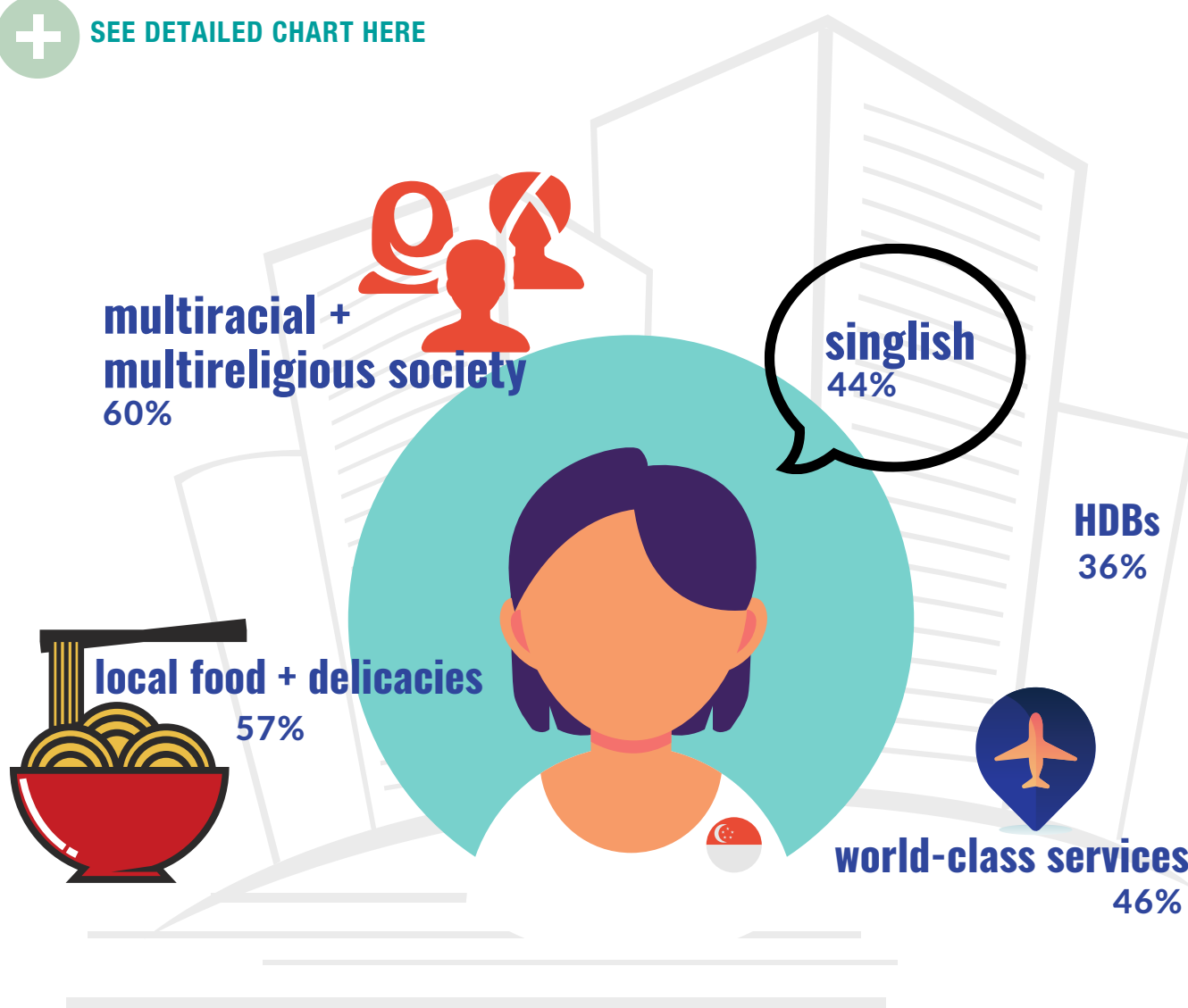
## CULTURAL PLURALISM, LOCAL FOOD AND SINGLISH

74% of Singaporeans agree that Being a Singaporean is an important part of their identity, and 58% consider themselves as patriotic residents of Singapore.

When asked what they consider to be important to the Singaporean Identity, 3 in 5 Singaporeans said a Multiracial and multireligious society. This was closely followed by Local food and delicacies (57%), World-class services (46%) such as Singapore Airlines and Changi Airport, and Singlish (44%).

The opinions as to what is most important to the Singaporean identity differ by age. World-class services and our Government are more important for the older Singaporeans, while those aged 18 – 24 years old were significantly more inclined to associate Singlish and Mother tongues with being Singaporean, perhaps reflective of a proud and confident younger generation.

 [SEE DETAILED CHART HERE](#)





# INSIGHTS

LATEST SELF-FUNDED  
RESEARCH FROM IPSOS

**Our ageing world**

**The role of culture  
in a global crisis**



# OUR AGEING WORLD

The growing number of older people around the world is now well documented. Among the many alarming statistics is the projection that by 2050, one in five of us will be over 60.

But what is not always evident is a clear understanding of what our changing, ageing world means – to us as individuals, for the societies we live in, and for businesses and other organisations – and how we can best respond to these changes.

For all the hype about Millennials as the society-shifting generation, we need to consider how older generations may well prove even more disruptive.

To address this possible blind spot in our thinking, we should ask: How can we better understand older people? What are the trends that will help us to better plan for the future?

To help us navigate this big topic, this briefing document brings together existing data and perspectives, highlighting key research findings from across the Ipsos world. We end with some points to stimulate forward-thinking discussion on the challenges and opportunities of older generations, and ageing more broadly.



**READ THE IPSOS BRIEFING HERE**



## INCLUSIVITY IN OUR BACKYARD

Commentary by Hui-Ching Tan

Singapore is a rapidly ageing population. According to Singapore Statistics, 7% of Singaporeans in 2000 are aged 65 years and above and this number is predicted to reach 25% by 2030. This means that 1 in 4 persons in the country will be a senior citizen in just 10 years. This is largely due to Singapore's continuously declining birth rate and improving life expectancy. Birth rate has declined by 76% since 1965, and at 1.1 children per female, it is currently the fourth lowest in the world. Meanwhile, Singaporeans are also expected to live the longest with an average life span of 84 to 85 years old. (Source: [www.singstat.gov.sg](http://www.singstat.gov.sg))

This demographic shift has raised the need for the government to initiate programmes and policies that circumvent any negative impact to the nation's workforce and economy while enabling a positive ageing experience for its elderly citizens. It is not just about looking after the needs of elderly citizens, but also about balancing the spectrum of issues, including raising birth rates.

The COVID-19 outbreak has quickened the pace of technology pick-up - from text messaging to video calls to buying groceries online. When Singapore went into Phase 2, scanning a QR code or your identity card at every mall or outlet may seem like a simple task for most, but it is a new and perhaps, alien concept for the elderly. Stepping out of the known into the unknown takes courage for anyone, more so for the silvers who struggle with technology and who have become accustomed to a certain way of living.

As much as the government is doing to help our silvers be as independent as possible, the ability of our elders to embrace change will need the support of the community. If it takes a village to raise a child, it should also take a village to care for the old among us. If each of us can keep an eye out for those who need help among us, together we can easily create a more inclusive and understanding society.



# THE ROLE OF CULTURE IN A GLOBAL CRISIS

"... behavioural changes adopted tend to happen within the realms of already available options rather than completely new and unfamiliar options. Familiarity is the balm that eases some of the anxiety around uncertainty, and culture is one of the strongest markers of familiarity."



**READ THE IPSOS PAPER HERE**



Shared values shape individual behaviour, and this is even more evident during the coronavirus pandemic.

While it remains to be seen how much and how deeply the world will change following the pandemic, there is no doubt that it has disrupted life, livelihoods and health across countries and cultures. Consumption cycles have not stopped, but various aspects are reshaped through different contexts and needs.

**Culture kicks in stronger in times of crisis.** In times of uncertainty, culture anchors people to the familiar, providing meaning and helping them to cope with any anxiety that arises. This paper shows that government messaging and personal responses to the crisis have been shaped by culturally relative concepts, highlighting the importance of understanding cultural drivers and nuances.



**LISTEN TO THE IPSOS PODCAST HERE**



**Fast and Slow Culture with Oliver Sweet**

April and Oli discuss how cultural differences influence our response to Covid 19 and the need to pay attention to the shifts that are happening around us.



The Singapore Sling



## WHAT WE CAN TELL ABOUT THE SINGAPORE CULTURE THROUGH SINGLISH

Commentary by Tammy Ho

Defining the Singaporean identity can be a little challenging. For a relatively young country and one that is growing so quickly, we struggle with what can be described as truly Singaporean versus what we have adopted from the cultures of our first generation of immigrants.

In a recent Ipsos survey, 44% of Singaporeans identify Singlish as one of the most important parts of their Singapore identity. To the unacquainted, Singlish is an informal variant of the English language, that combines rough translations and elements of other languages such as Mandarin, Malay, Tamil, and their dialects. I imagine it stems from 'kampong days' where early immigrants from various parts of Asia had to find new ways to communicate with each other in this new land. Over generations, this has evolved to a unique blend of words and expressions that succinctly captures the cultural pluralism that is characteristic of Singapore.

A little less discussed quality of Singlish is its efficiency. The language can be rather complex to master unless you've grown up in the country. But at its basic level, changing a single word, or perhaps what is better described as a sound, at the end of a sentence can accurately communicate a completely different sentiment.

It is a language that has no rules other than to get the point across and all of the associated emotions in the fastest way. You could say that this is also reflective of the Singaporean ethos - efficient, proficient, progressive and pragmatic.

Just like the resilience we have observed about Singaporeans through this pandemic, Singlish has stood the test of time. With the younger generation more inclined to agree that the language is a part of their national identity, I believe Singlish will not only stay but also be a celebrated "local produce".

'Mai siao siao! Sure can one.'



# ACCESS TO IPSOS

THOUGHT LEADERSHIP, MARKET RESEARCH  
TOOLS AND BEST PRACTICES

## More than a nudge

A Behavioral  
Science framework  
to anticipate and  
shape behaviour



# MORE THAN A NUDGE

A behavioural science framework to anticipate and shape behaviour



Behavioural Science is now well established as a way of examining policy challenges. There is often recognition that it can offer a fresh lens to long-standing issues offering new insights and solutions. However, there is often confusion about the discipline. It can seem interesting but hard to master. And the application of it seems complex, without a clear set of practices.

Ipsos has a dedicated focus in this area of science and as part of this is taking a leading role in giving greater clarity about the discipline of behavioral science as well as how to successfully apply it.

## UNDERSTANDING HUMAN BEHAVIOUR IS KEY TO CHANGE

Given the shifting business and policy environment, a major focus for behavioural science at Ipsos is behaviour change. But change is hard as people may not feel motivated or feel that they are capable of change. Behavioural science is therefore at the heart of behaviour change strategy and policy.



# MORE THAN A NUDGE

## A behavioural science framework to anticipate and shape behaviour

### KEY PILLARS THAT GUIDE IPSOS' BEHAVIOUR CHANGE MODEL

#### TACIT KNOWLEDGE - TACIT TIMES

When we do familiar activities such as a regular shop in familiar categories then we inhabit a world with certainties. We have such established traditions and routines that allow us not to have to undertake all decision making that we once did.

Once we did the work to establish the best options, then the knowledge, motivations, attitudes and goals become tacit.

Behaviour influence is typically is often about making subtle changes in our environment to reinforce and incrementally shape citizens' behaviour to a desirable outcome. **This works well as long as the overall structure and logic of the options available to us are fundamentally unchanged.**

Once behaviors have become tacit, they are more automatic in nature. These more automatic behaviors allow us to master our environment in a way that is highly efficient, as we don't have to deliberate each time.

The exploration of these more tacit behaviors has been the subject of much work by people such as Daniel Kahneman. While he suggested we have two systems, one more automatic, another more reflective, the focus on our more automatic System 1 learned behaviors. The science underpinning more automatic behaviors such as heuristics and biases, nudge, rituals, habits are very helpful to understand these behaviors.

#### LIQUID KNOWLEDGE - LIQUID TIMES

Sociologist Zygmunt Bauman suggests our environment is increasingly 'liquid', subject to permanent change and operating without fixed, solid patterns. This means that our thinking and planning about how to navigate the world cannot be allowed to become more tacit. We cannot depend on these automatic behaviors as they reflect a mastery of a past that no longer exists. Instead, he argues, we must learn to 'walk on quicksand'. People need to be flexible and adapt constantly to rapid change.

# MORE THAN A NUDGE

## A behavioural science framework to anticipate and shape behaviour

Tacit knowledge works when the environment is well understood and stable as we can use past learning to navigate the present. But to navigate changing conditions, we need to re-learn how to operate. This requires us to consider what we want, what kind of a person we are, whether we think we are capable, what kind of social norms we want to reflect. In other words, **to understand our behavior in these contexts, we need to look at people in much broader psychological dimensions such as motivations, goals, values, emotions, knowledge, identity and so on.**

Our approach is based on research by Professor Susan Michie UCL who developed 'The Behavior Change Wheel' (BCW). Alongside this we have undertaken an extensive review of the academic and practitioner literature relating to behavior change systems. Our years of practitioner work has also informed 'what works'.

From this we developed a new system based on BCW, our experience alongside more recent developments from within the Ipsos Global Science Organisation.



### KEY FEATURES OF OUR SYSTEM

COHERENT SYSTEM THAT OFFERS A PROPERLY INTEGRATED APPROACH TO BEHAVIOR CHANGE

THEORY BASED - ALLOWING MUCH MORE EFFECTIVE INTERVENTION DEVELOPMENT

CLEAR LINK FROM PROBLEM TO INTERVENTION DESIGN - TACKLES THE TRADITIONAL CHASM BETWEEN UNDERSTANDING AND SOLUTIONS

UNDERSTANDABLE - BOTH INTERNALLY AND EXTERNALLY



# MORE THAN A NUDGE

## A behavioural science framework to anticipate and shape behaviour

### THE IPSOS MAPPS BEHAVIOURAL CHANGE FRAMEWORK

At the heart of the Ipsos behavioural change understanding is the MAPPS Framework. Sitting under each of the dimensions are further ways to diagnose behavior – each of which has guidance about how to design interventions. The point of this framework is to offer a holistic diagnosis of behavior and then how to change behaviour. While this is based on BCW, we have adapted it based on our applied experience across a range of topics in both the public and private sectors.

## MOTIVATION

Internalisation "I don't want to do it"  
Self-efficacy "I don't feel able to do it"  
Identity "I'm not that kind of person"  
Emotion "I don't feel like doing it"

## ABILITY

Capability "I am not able to do it"  
Routines "It's not part of what i usually do"  
Outcome expectations "I don't think it will work"

## PROCESSING

Decision forces - How we process information

## PHYSICAL

Structural factors - How things are set up

## SOCIAL

Cultural norms - The way we live  
Social norms - What is expected of us

# MORE THAN A NUDGE

## A behavioural science framework to anticipate and shape behaviour

### NOW... BRINGING YOU FROM UNDERSTANDING TO INTERVENTIONS

The MAPPS framework is part of a holistic system that goes from the behavior change challenge through to the design and testing of effective interventions. The heart of our behavior change toolkit is the ability to bring through understanding behavioural change to creating intervention design briefs.

MAPPS has been successfully applied on a range of programs across the public sector such as adoption of security measures, healthcare self-management, use of public transport, and encouraging greater engagement in financial well-being.

What IPSOS brings is an end-to-end solution **from Understanding to Interventions**:

#### 1 DEFINE PROBLEM & UNDERSTAND ISSUES

##### DEFINE → LEARN

the behavioral outcome being sought → what we know from research / internally

#### 2 PIVOT FROM UNDERSTANDING TO CHANGING

##### DIAGNOSE → CHANGE

the dimension that are barriers to change → link to intervention guidance and development of design briefs

#### 3 DESIGN & TEST INTERVENTIONS

##### REFINE → TEST

move from designing briefs to development of prototypes → evaluate impact of interventions

### SEE IPSOS MAPPS IN ACTION



In this report, Ipsos' Behavioural Science experts, Colin Strong and Tamara Ansons give a breakdown on strategies to facilitate the behaviour change needed for re-engagement amid COVID-19.



**READ THE IPSOS REPORT HERE**



# MORE THAN A NUDGE

## A behavioural science framework to anticipate and shape behaviour

### INTERVENTIONS THROUGH A BEHAVIORAL CHANGE WORKSHOP

A Behavioral change workshop is a key part of our system that starts with defining the behavior change problem and curating our understanding of the issues. The workshop means we can pivot from understanding to changing behavior through the development of design briefs. Our design briefs mean that there is no longer the chasm from understanding to design – clear guidance is given in terms of next steps.



#### HOW THE WORKSHOP WORKS

##### WHAT IS THE ISSUE?

Agree a clear articulation of the behavior we are trying to change

##### WHAT DO WE KNOW?

Presentation of research with a MAPPS lens and curation of materials

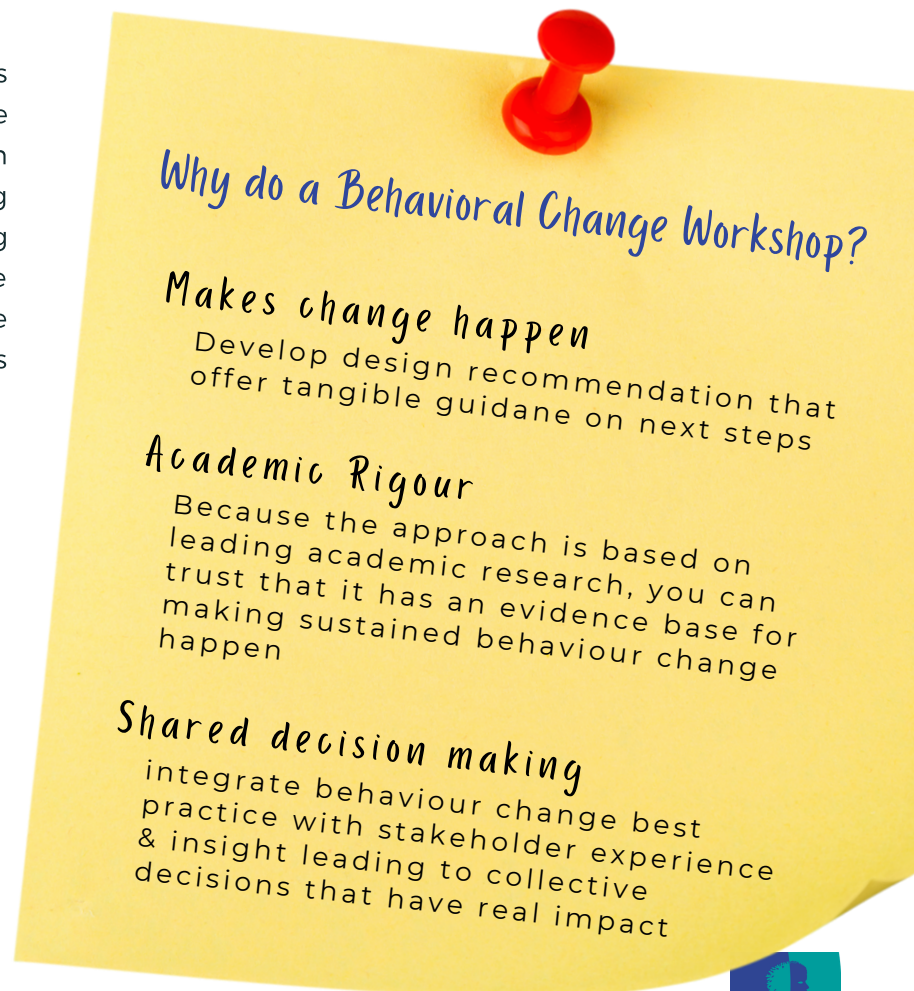
##### BEHAVIORAL DIAGNOSIS

Using MAPPS to identify underlying mechanisms / barriers

##### INTERVENTION DESIGN BRIEF

Using MAPPS intervention guidance to create design brief

The behavior change workshop takes place over 1 - 2 days depending on the complexity of the challenge. It can also be used as a means of designing a wider research project - by providing a framework to better understand the issues and a set of metrics to evaluate the impact of the interventions developed.



# WE MANAGE THE 'HOW' SO YOU CAN FOCUS ON 'WHAT'S NEXT'

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.

Working with Ipsos means accessing the best that Market Research has to offer. Since 11 June 2020, Ipsos is an approved vendor in **Categories A1, A3, B1, C1, D1 and E of the Whole of Government Research Framework.**



## IPSOS QUALIFIED WOG CATEGORIES

CAT A1 TELEPHONE SURVEYS

CAT A3 TELEPHONE SURVEYS  
(ENTERPRISE SAMPLE)

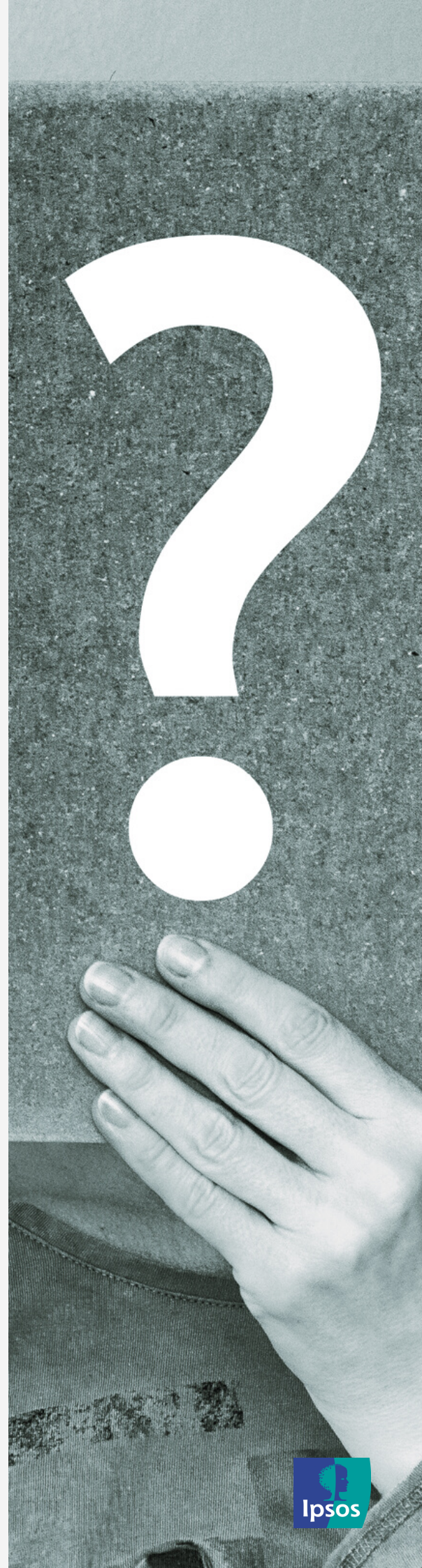
CAT B1 FOCUS GROUP DISCUSSIONS

CAT C1 FIELD SURVEYS

CAT D1 INTERNET SURVEYS

CAT E CUSTOM RESEARCH

**TO REQUEST A QUOTE, CONTACT  
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# Bound by the industry's most stringent quality standards

Ipsos was the first company in the world to gain ISO 20252 accreditation. ISO20252:2019 sets out requirements for a quality management system and covers the management and delivery of research from executable elements such as research proposals, designing questionnaires and discussion guides, sampling and data processing, and archiving documents. Of particular importance is the incorporation of IQCS (Interviewer Quality Control Scheme) in this standard.







Scenes of Singapore. Location: Library@Orchard

## 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).

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