

# IPSOS UPDATE

A selection of the latest  
research and thinking from  
Ipsos teams around the world

March 2020

Ipsos Knowledge Centre

GAME CHANGERS



# WELCOME

Welcome to the March edition of *Ipsos Update* – our round-up of the latest research and thinking from Ipsos teams around the world.

The underlying idea of *Ipsos Update* is simple: to present aspects of the “Best of Ipsos” in an easily digestible format. We have not tried to be comprehensive; the focus is on content which will be relevant to more than one market or specialist research area.

Links are provided to the various points of view and information sources, as well as the Ipsos colleagues responsible for each piece of work.

We hope you find this useful. Please email [\*\*IKC@ipsos.com\*\*](mailto:IKC@ipsos.com) with any comments or ideas, or if you would like to subscribe to future editions.

Thank you.

# IN THIS EDITION

## CORONAVIRUS

Widespread concern about the threat of the outbreak

A majority see the virus as a threat to the world and think it will take several months to contain. Ipsos is now tracking public opinion on this fast-changing issue in nine countries.

## THE POWER OF YOU

Enhance creativity through distinctive brand assets

With more content and the ever-present choice to look/scroll away, advertising must work harder to capture attention and encode positive memories. Visual and sensory cues are effective for maximising impact.

## GLOBAL TRENDS 2020

Understanding complexity

The third Ipsos *Global Trends* survey sees us connecting the global to the local, providing a way to understand how human interaction shapes – and is shaped by – our world.

## THE OPPORTUNITY FOR PODCASTS

Audio is not all about the music

The growing popularity of podcasts – where in the UK alone there are now nearly 10 million weekly listeners – shows the benefits of this format, which is building a new, albeit still relatively small, audience of loyal listeners.

## PERILS OF PERCEPTION

Causes of death around the world

The public think more people die from violent crimes or accidents than is actually the case, while underestimating the leading causes of death. Our *Perils of Perception* study exposes these misperceptions in 32 countries.

## SUPER BOWL 2020

Who won the advertising battle for attention?

At the yearly Super Bowl, brands pay big money to capture audiences' attention. Our new research looks at what it takes to develop a winning ad, presenting successful campaigns from this year's event.

## MYSTERY CALLING

The telephone experience still matters

Contact centres play an important role in customer experience, even in a world dominated by digital. To avoid leaving customers disillusioned by phone, companies should dial up their performance across all channels.

## CORPORATE REPUTATION

The key questions answered

Reputation relates to trust, credibility and responsibility. We discuss how to unlock the value of reputation with an example of how businesses can respond to real-world issues.



# CORONAVIRUS

People around the world see the virus as an ongoing threat that will take several months to contain.

The Coronavirus outbreak has been high profile worldwide: we find high levels of awareness (86%) across nine countries, with a majority also saying that it poses a high threat to the world.

An Ipsos survey is tracking the public view of the Coronavirus outbreak as the situation develops. It is being run in Australia, Canada, France, Germany, Italy, Japan, Russia, UK and US (excluding China at this stage, due to the sensitivity of the issue).

We find most widespread concern about the virus in Japan where two-thirds (66%) think it poses a high threat to the world. One in four Japanese respondents also consider it a threat to them personally.

Over half are also concerned in Italy (59%), Australia (57%), Germany (54%), France (54%) and the US (52%), with slightly lower levels in the UK (47%), Russia (46%) and Canada (42%).

In the public's view, one in ten think that the virus has been contained, while seven in ten believe it will take several months or longer to contain. Until then, there is strong support for actions to contain the virus – primarily travel bans and mandatory quarantines for those who might be infected.

All countries expect Coronavirus to have an impact on the global economy. [Our social media analysis](#) shows economic concern to be the second most widely discussed issue online.

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# CAUSES OF DEATH

Death might not be a topic many of us want to talk about, but our misperceptions have clear public health and policy implications.

Many overestimate the number of deaths caused by interpersonal violence, but cardiovascular disease and cancer kill more than people think. The latest in our Ipsos *Perils of Perception* series examines public opinion on the causes of death in 32 countries.

Official sources tell us that cardiovascular diseases and cancer account for around half of all deaths across the 32 countries surveyed. The public correctly identifies these as the leading causes of death, but underestimate to what extent this is the case.

For cardiovascular diseases, the actual number of deaths is almost three times higher than the average guess across all countries (30% vs. 11%). This is most extreme in Romania, where this causes 56% of all deaths compared to the public estimate of 12%.

Most countries also underestimate how many people die as a result of cancer. People think it causes 15% of deaths when the actual figure is 24%. In France, twice as many deaths recorded are due to cancer than people think (32% vs. 16%).

On the other hand, people tend to overestimate how many die from transport injuries (10% vs. 2%). The findings also show that terrorism, interpersonal violence and substance use disorders also cause fewer deaths than the public would expect.

[Read more on public attitudes to death in “The Departure Lounge”.](#)

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# THE POWER OF YOU

How to develop the brand assets and sensory cues that will give your creative advertising most impact.

Today's media landscape is constantly evolving. But the role of great creative has largely stayed the same. That is, to capture attention to encode memories that can later influence brand choice.

Great creative moves people to trigger new behaviours (or reinforces existing ones) that are beneficial to the brand by leaving consumers with positive memories that can easily come to mind at the right moment. These can relate to product benefits, though more often than not it's also a positive feeling associated with the brand.

Brand assets are the cues and signals of a brand, such as colours, logos, characters, celebrities, audio devices or music, as well as scents/tastes. As a marketing and brand-building tool, brand assets are more effective than showing or talking about the brand directly. They must have strong brand linkage, uniqueness, and conjure the brand in a subtle way, a good example being KFC's "The Colonel".

Video creative can engage consumers in a multi-sensory way towards these goals. Our analysis shows us that:

- Visual assets are effective but audio is often a missed opportunity.
- Celebrities are an effective marketing tool, but characters are even better.
- Consistent creative styles work better than styles and fonts.

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# SUPER BOWL 2020

Humour, emotion, celebrity and music characterised the most emotionally engaging Super Bowl ads.

Doritos, Michelob Ultra and Google all produced winning ads in this year's Super Bowl, according to our study. We used biometric sensors to measure the passive emotional responses of an audience as they watched each commercial at a controlled and realistic screening event, alongside friends and family.

An engaging and successful ad must achieve the following:

- The ability to hook viewers emotionally in the first five seconds.
- Generating excitement about the brand reveal in the last five seconds.
- Maintaining high average emotional arousal over the course of the ad.
- The high emotional “peak” of an ad scene.

These three ads inspired very different patterns of engagement, with some capturing attention straight away and others building slowly. Online conversations following the Super Bowl suggest that Google left the longest lasting impression of the three ads. This is consistent with Ipsos learnings that ending on an emotional high leads to strong recall of an ad.

In another report focusing on [automotive advertising](#), we found car manufacturers spent \$77 million on ads during this year's Super Bowl to introduce and highlight new vehicles and technology.

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# GLOBAL TRENDS 2020

Ipsos launches a new resource based on 200 questions asked of people across 33 markets.

The third *Ipsos Global Trends* survey sees us connecting the global to the local, providing a way to understand how human interaction shapes – and is shaped by – our world.

Using advanced analytics and expert analysis on this huge dataset, our team has identified 12 trends and 36 values that will dominate the world in the 2020s. It builds on previous waves in our series from 2013 and 2016.

At first sight, we find a world challenged by power conflicts, populist risings, climate emergency and frightening technology. Yet we also found satisfaction with living standards, which are rising globally, as well as a gentle rise in self-fulfilment.

In what is sometimes dubbed as a “populist age”, we find rising support for globalisation and improvements in ratings of local public services around the world. We find more people worried that technology is destroying our lives, but simultaneously more people saying we need technology to solve our challenges. For this reason, we have called this edition *Understanding Complexity*.

In the report you will find short reflection essays from Ipsos teams in France, Canada, the US, Brazil, the Netherlands, Australia and the UK. This is the start of the journey and our team is looking forward to working through the trends across the 33 countries as they affect you.

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# MYSTERY CALLING

In a digital world, the telephone experience can still be a make-or-break moment for many customers.

Despite the growing use of new digital technologies, the telephone experience is still key. Three in ten consumers who are left dissatisfied with how a call centre addressed their issues report the intention to stop using the company, or use it less.

Contact centres are handling enquiries that customers are either unable to undertake face-to-face, or are unwilling to conduct digitally; enquiries which are often complex in nature and can, therefore, have a significant impact on the brand if handled poorly.

For the majority of large, multi-channel organisations, contact centres ensure that callers receive a great telephone experience as consistently and efficiently as possible. And there is always room for improvement.

The most effective way to optimise a contact centre's performance is through a strategic programme of mystery calling. This is one of many possible ways to measure performance – all of which have their strengths and weaknesses. But mystery calling provides unique benefits including an end-to-end view of the customer journey, detailed, objective feedback and a competitor benchmark.

A mystery calling programme is only as good as its design in an omnichannel world. Our new white paper gives expert guidance.

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# THE OPPORTUNITY FOR PODCASTS

New audio offers on-the-go listeners varied content choices. Our UK team reports on the story so far.

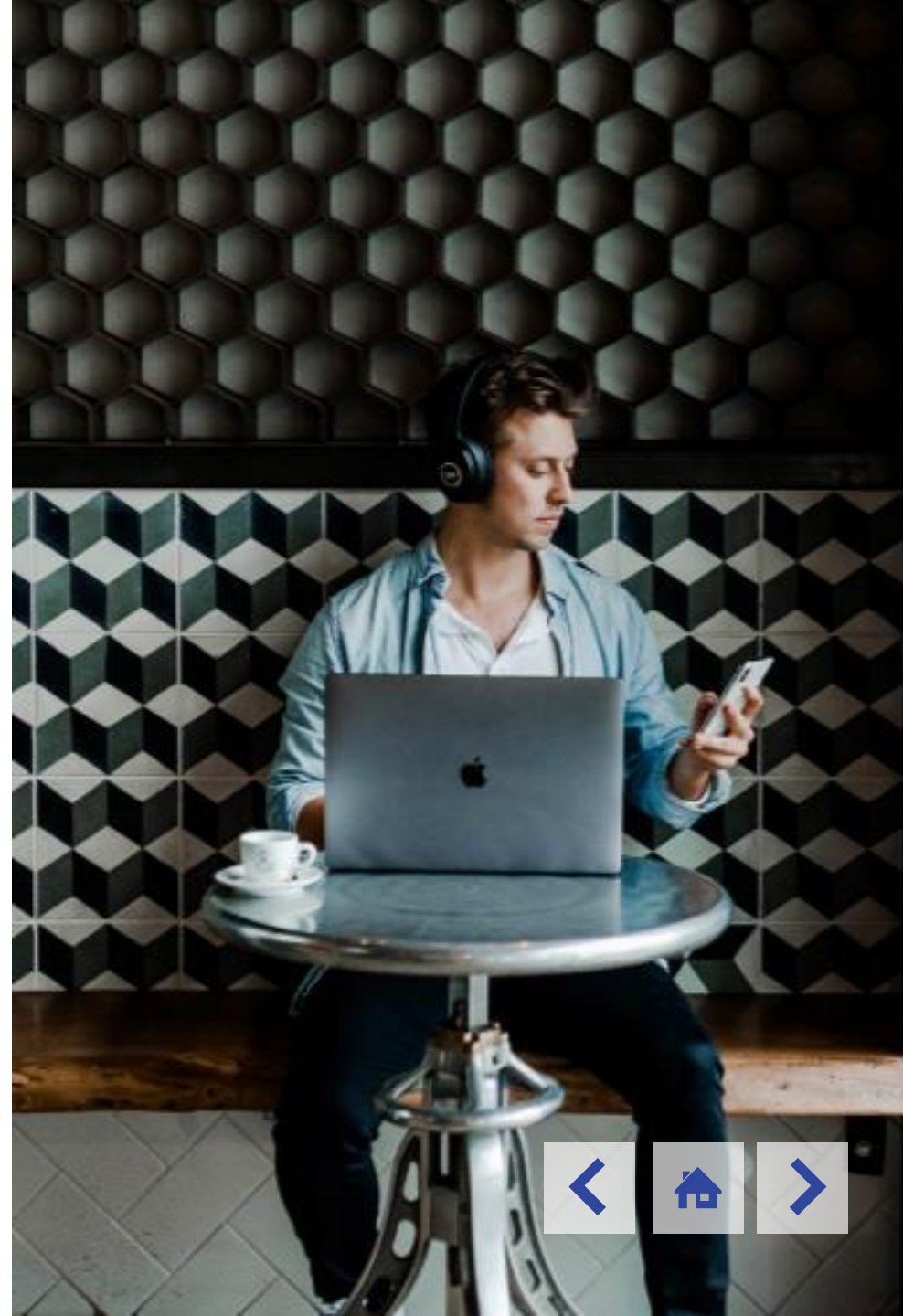
The popularity of podcasts is growing: 9.4 million people in Britain now listen to podcasts every week, an increase of 45% in a year. The convenient format feeds listeners information while they are on-the-go. Over 70% of podcast listening happens on a smartphone and peaks at certain times of day, such as when commuting.

Podcasts are available on a diversity of topics, the main genres being real-life stories, comedies, hobbies, facts, history and movies. The growing popularity of podcasts mirrors the growth of on-demand video which is driven by its popularity with younger age cohorts, but appealing to anyone looking for diverse content accessed at a time that suits them.

Listening to podcasts is, 90% of the time, a solo activity and its immersive nature means that listeners are engaged and loyal: 60% listen to the entire episode they stream or download.

In Britain, 16% of 16-34 year olds listen to podcasts at least once a week for an average of 38 minutes per day, compared to 6% of those aged over 35, whose listening time drops to 19 minutes. Londoners show the highest usage, with 23% listening every week.

Despite relatively small audiences (so far), podcasts allow advertisers to reach dedicated listeners with specific interests.

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# CORPORATE REPUTATION

There is more value stored in reputation than you may think, and unlocking it takes strategic planning.

If you are building trust, you are building reputation. Trust is intuitively the ideal for which companies aim and is the foundation of the Ipsos approach to reputation.

Good reputation can save you money: if a company has a good reputation, their baseline of credibility that means they have to spend less money on advertising and marketing.

While reputation studies tend to measure corporate attributes and some core product attributes (as these are vital to perceptions of any business), we also bring in perceptions around how companies are managed and how they act in society.

Building reputation is not all about putting out the right messages. Greater alignment must be achieved between internal communications and behaviour and their external counterparts, all in the context of issues facing the industry.

Concern around plastic and packaging is one example of an issue that companies may need to respond to. [An article by our UK team](#) discusses how plastic reduction is a new battleground in this sense, and 'first mover advantage' can help to build reputation.

[Read more about the relationship between trust and reputation.](#)

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# SHORTCUTS

## ACCENT ANXIETY

From a purely linguistic perspective, accents are the use of specific sounds in specific contexts. Attitudes to accents, including prejudices and preferences, come into play when we think about the sociolinguistic dimension.

Ipsos conducted a study in eight countries for Babel to find out about attitudes to accents. It found that over one-third (38%) globally state that they have felt anxious about their accent when speaking a foreign language.

Americans are the most worried of all nations about their accents, with 54% reporting feeling anxious when speaking a foreign language. On the other hand, Germans (23%) and French (24%) are the least anxious about this.

Foreign accents carry certain associations. Here are some of the most common ones we found:

**Most friendly** = Spanish (39%)

**Most harsh** = German and Russian (38%)

**Most passionate** = Italian (42%)

**Most sexy** = French (37%)

**Most intelligent** = Swedish (24%)

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## SPOTLIGHT ON AUSTRALIA

In January the environment topped the Ipsos Australia Issues Index for the first time since it began a decade ago, coming at a time when the country was seeing widespread devastation from bushfires.

This continued into February as the environment remained Australia's number one concern.

To understand more about how life in Australia is changing, we spoke to Daniel Evans, deputy managing director, Ipsos Public Affairs in Australia.

He said: "The environment is now clearly the top issue facing the nation. There's a clear gap now between the environment as our number one concern and everything else."

Attitudes to the environment isn't the only thing that's changing in the country, as great demographic shifts are leading to rapid population growth in its two biggest cities: Sydney and Melbourne.

The podcast also looks at liveability in the country and the differences between metropolitan areas and the regions.

[READ MORE](#)

## GENDER REPRESENTATION

Gender is an increasingly complicated topic. Some brands tiptoe around the discussions and others dive right in – with mixed results.

In a recent webinar, the authors of our recent *What the Future* publication on gender present some advertising "dos and don'ts" to avoid gender missteps in a time of shifting norms.

The dilemma today is that media and advertising tends to box people in their gender roles, but they can also play a role in changing them.

Over half (51%) of US respondents think that advertisements keep men and women in traditional gender roles. At the same time, an even greater proportion (58%) agree that these same adverts can change perceptions.

[Another recent survey](#) found that only 20% look for personal care products marketed specifically to men or women with three-quarters of younger adults interested in unisex products.

In *What the Future: Gender*, you can explore multiple articles on the shifting gender landscape in terms of public opinion, societal impact and the business lenses of media, retail, marketing and healthcare.

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## CORONAVIRUS

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<https://www.ipsos.com/sites/default/files/ct/news/documents/2020-02/coronavirus-topline-results-ipsos.pdf>

**Contact:** [Darrell.Bricker@Ipsos.com](mailto:Darrell.Bricker@Ipsos.com)

## PERILS OF PERCEPTION: CAUSES OF DEATH

**Read more:** <https://www.ipsos.com/en/why-do-you-think-fewer-people-die-disease-more-die-other-causes>

**Download:**  
<https://www.ipsos.com/sites/default/files/ct/publication/documents/2020-02/perils-of-perception-2020.pdf>

**Contact:** [Gideon.Skinner@Ipsos.com](mailto:Gideon.Skinner@Ipsos.com)

## THE POWER OF YOU

**Read more:** <https://www.ipsos.com/de-ch/power-you-why-distinctive-brand-assets-are-driving-force-creative-effectiveness>

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**Contact:** [Adam.Sheridan@Ipsos.com](mailto:Adam.Sheridan@Ipsos.com)

## SUPERBOWL 2020

**Read more:** <https://www.ipsos.com/en-us/knowledge/media-brand-communication/Most-Engaging-Ads-of-Super-Bowl-LIV>

**Download:** [https://www.ipsos.com/sites/default/files/20-02-52\\_mostengads\\_v2.pdf](https://www.ipsos.com/sites/default/files/20-02-52_mostengads_v2.pdf)

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## GLOBAL TRENDS 2020

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**Contact:** [Billie.Ing@Ipsos.com](mailto:Billie.Ing@Ipsos.com)

## MYSTERY CALLING

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**Contact:** [Andrew.Firth@Ipsos.com](mailto:Andrew.Firth@Ipsos.com)

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## CORPORATE REPUTATION

**Read more:** <https://www.ipsos.com/en/corporate-reputation-key-questions-answered>

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**In Spanish:**

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# SHORTCUTS SUMMARY

## ACCENT ANXIETY

Read more:

[https://www.languagemagazine.com/2020/01/24/americans-worry-most-about-their-accents/?fbclid=IwAR2LFdZrNXdgHqRNN4xQqOzIEeqAcv8RNIqJLnNetWqj\\_xXsf9\\_4U8smeGE](https://www.languagemagazine.com/2020/01/24/americans-worry-most-about-their-accents/?fbclid=IwAR2LFdZrNXdgHqRNN4xQqOzIEeqAcv8RNIqJLnNetWqj_xXsf9_4U8smeGE)

## SPOTLIGHT ON AUSTRALIA

Read more: <https://www.ipsos.com/en/spotlight-australia>

## GENDER REPRESENTATION

Read more:

<https://www.ipsos.com/en-us/knowledge/media-brand-communication/what-the-future-gender-webinar>

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Content is also regularly updated on our website and social media outlets.

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