IPSOS UPDATE

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

February 2020

Ipsos Knowledge Centre

GAME CHANGERS

Ipsos

WELCOME

Welcome to the February 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** with any comments or ideas, or if you would like to subscribe to future editions.

Thank you.

IN THIS EDITION

PREDICTIONS FOR 2020
From global market crashes to alien landings

Three-quarters of people worldwide expect 2020 to be a better year for them personally than the last. We discover their top predictions on a range of topics in our 33-country survey.

GLOBAL ATTITUDES TOWARDS GENDER
Will the future be more or less “gendered”?

Our perceptions of personality traits, tasks and occupations are all affected by gender, but more so in some countries than others. Our 29-country survey explores attitudes in more detail.

CLIMATE CHANGE AND BEHAVIOUR CHANGE
Actions to save the planet start at home

7 in 10 people around the world say that they have changed their behaviour as a result of climate change concerns. These actions include using less water and energy and recycling/reusing products more.

THE EVOLUTION OF SHOPPER BEHAVIOUR
Digital continues to drive change in how we shop

Our updated paper takes a fresh look at the five main shopper trends today, with recent examples of how eCommerce models and omnichannel retailing are making purchases more intuitive and seamless.

ENTERTAINMENT IN INDIA
The disruption of online content consumption

The emergence of online streaming services in India – the world’s fastest-growing mobile market – is shifting conventions as viewers seek and access different types of content. We analyse social data to find out more.

SOCIAL MOBILITY
Will young people enjoy better lives their parents?

Opinion on future prosperity is divided across the 33 countries we surveyed for the World Economic Forum with emerging economies more confident in the financial wellbeing of young generations than developed nations.

GLOBAL EDUCATION BAROMETER
Is education preparing young people for the future?

We explore how satisfied young people in 20 countries are with the education they have received and ask them whether they feel prepared and confident in the future.

MILLENIALS ON WAR
The views of future leaders on war and conflict

Wars and armed conflict are among the main concerns of millennials today, both in conflict-affected countries and nations experiencing peacetime. Our report with the ICRC reveals this generation’s views and expectations.

2020 PREDICTIONS

Global predictions for the coming year are, in general, not too optimistic, but 75% worldwide are confident that 2020 will be better for them personally.

Our survey explores what people across 33 countries expect to happen in world affairs and society and culture in the coming year. The top predictions include:

- 77% of people around the world think average global temperatures will increase. The countries most certain of this include Turkey (89%), Singapore (86%) and Chile (85%).
- On average, 78% think that people around the world will spend more time online than watching TV.
- 56% worldwide think there will be large-scale public unrest in their country, and this figure rises to 82% in Columbia and Chile, 79% in France and 77% in South Africa.
- 52% believe the economy will get stronger while 36% think it is likely that major stock markets around the world will crash
- 15% of people around the world think it is likely that aliens will visit earth this year.

Two-thirds of people worldwide report that 2019 was a bad year for their country and half considered it a bad year for them personally. But looking ahead, people are optimistic: 75% worldwide say that 2020 will be better in a personal sense. We see sharp variations by country. For example, French respondents are split 50:50.

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GLOBAL ATTITUDES TOWARDS GENDER

How much do people associate characteristics, tasks and jobs with a particular gender?

In our 29-country survey, Peru, Spain and Brazil score as the least "gendered" countries in terms of the impact of gender on how people are perceived and how society works. The results also show Russia to be the most gendered, followed by Serbia and China.

On whether people associate character traits and tasks with a particular gender, we find 'strength' is the quality most attributed to men over women, with 35% globally - and 65% in Russia – sharing this view. 'Caring for others' is considered a more female trait by 23% globally, the highest score being 34% in Germany.

Worldwide, there is a clear gender divide when it comes to household tasks, with people more inclined to believe that cleaning, laundry and childcare are the domain of women but home maintenance and managing finances more likely performed by men.

People around the world think that doctors, scientists and politicians in their country tend to be men. Teaching is the only profession in the survey which is more associated with women.

How will gender look in the future? Perhaps this is a question that not many people have considered in detail yet. While 25% globally think that things will be *less* gendered in five years' time, 15% think it will be *more*, with 46% not expecting much to change.

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CLIMATE CHANGE AND BEHAVIOUR CHANGE

We ask people in 28 countries whether they are doing anything differently in their day-to-day lives as a result of concern about climate change.

Almost 7 in 10 (69%) consumers worldwide say they have changed their behaviour because of climate change concerns over the last few years. The countries leading this are India (88%), Mexico (86%), Chile (86%), China (85%), Malaysia (85%) and Peru (84%).

The actions taken by individuals to minimise their climate impact tend to centre around the home, for example:

- Using less water (cited by 60% of those who have made changes, or 41% of all adults)
- Recycling more, and more often (57%/39%)
- Using less energy at home (55%/38%)

Behaviour varies across countries. Recycling and reusing products is common in Australia, Canada, Great Britain and New Zealand. Meanwhile, South Africans tend to watch their water use, and those in Germany are more likely to consider the environmental impact of the food they purchase.

On the other hand, nearly half of Japanese respondents (47%) say they have made no such changes. This is also true for over one-third in the US (36%), the Netherlands and Russia (both 35%).

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THE EVOLUTION OF SHOPPER BEHAVIOUR

In our changing world, retailers must respond to the latest trends to remain relevant and competitive.

Updated for 2020, this paper presents five main trends underpinning how shopper behaviour is changing.

Increasing complexity of choice encourages consumers to make decision-making shortcuts. Shopping is often about “de-selection” so retailers need to make sales intuitive, both in store and online.

As the digital environment can reinforce or disrupt purchase choice, brands need to connect with consumers in the moments that matter, making use of different channels. Social commerce is growing with retailers using messaging apps and posting shoppable content on Instagram to generate impulse purchases digitally.

eCommerce now accounts for 14% of global sales and is expected to grow. New models are constantly springing up, and sometimes in unexpected categories – such as mattresses.

Fluidity is the new currency, so retailers need to offer seamless solutions and ultimate convenience through omnichannel retailing – where the physical and digital worlds merge. The role of the physical store may adapt to provide more of an experience.

Voice activation and AI-powered digital assistants are new tools too that consumers will increasingly use in their shopping experiences.

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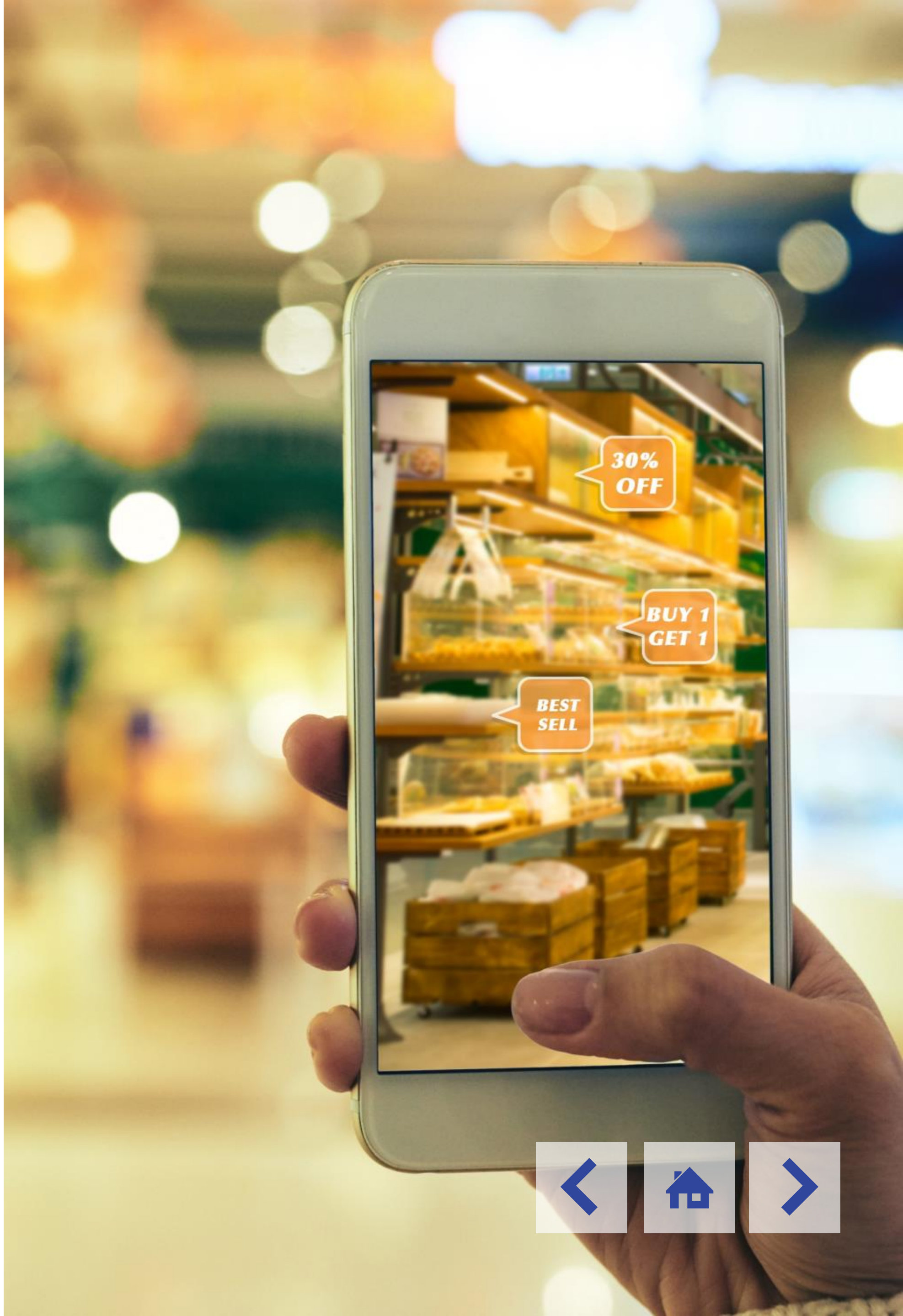

ENTERTAINMENT IN INDIA

Using social intelligence data, our paper explores how online streaming services are changing entertainment consumption habits in India.

The traditional “tune-in” and “consume-what-you-are-fed” model of television is shifting towards a new on-demand era of choice. OTT (over-the-top) content consumption is now a mass offering enabled by digital infrastructure – India is the fastest growing mobile market in the world with half of its 500 million internet users solely mobile.

To understand more about what drives popularity of online content in India, our social media monitoring reveals three key themes:

1. **Realism:** Viewers no longer seek to ‘escape’ through fantasy or idealism and are open to a less-than-perfect reality. This allows for new takes on existing ideas and for stereotypes to be broken.
2. **Social currency:** Interacting with and sharing views on online content is a way for people to be part of the conversation.
3. **Individualism:** With the variety of genres available and the decline of collective consumption, viewers can make decisions on what they view based on their own preferences.

We find that online content differs to traditional offline content, but there is space for both in the future of entertainment.

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SOCIAL MOBILITY

Globally, we find a stark divide in expectations for improved quality of life and opportunities in the future.

Our survey with the World Economic Forum in 33 countries explores expectations on whether young people will fare better or worse than their parents when it comes to financial wellbeing and job security.

Key findings from our survey include:

- Four in five globally say today's youth will be better off than their parents when it comes to having access to information (82%) and entertainment (80%).
- More than three in five feel the same about young people's ability to travel abroad (67%), have a good education (64%), and freedom to be true to themselves (61%).
- Just half (52%) say that today's youth have better prospects for a successful career than their parents.
- Only four in ten say young people will be better off than their parents in terms of having enough money to live well (42%).

Looking at results across countries, we can see a strong contrast between emerging countries and mature markets. Across most emerging countries optimism reigns – but the opposite is true in many advanced economies. Pessimism about young people's financial wellbeing and job security is the norm in Western Europe, North America, Australia, Japan, South Korea and Israel.

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GLOBAL EDUCATION BAROMETER

In our 20-country survey, young people evaluate how well education prepares them for the future.

Our survey finds that young people value schooling and express overall satisfaction with the education they have received. Ratings are particularly high in Finland, where 44% say they are 'fully satisfied' with their education.

Young people expect school to prepare them for the future on a personal level, such as providing them with useful skills knowledge for a career. But 90% also agree that it goes beyond this and that education is valuable in itself.

However, we find young people feel less prepared to participate positively in the world around them. While 87% of young people believe their generation has a responsibility to change the world for the better, only half of them feel equipped to do this. In this way, there is a mismatch between priorities and concerns: while 'access to employment' is the third biggest concern for young people, this comes behind worries about 'poverty and social inequality' and 'climate change and the environment'.

Looking at how education can be improved, young people think learning experiences should be more diverse, focusing more on new technologies and skills such as creativity and collaboration. Additionally, half of respondents do not believe their country's education system provides everyone with equal opportunities.

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MILLENNIALS ON WAR

We explore the opinions of a generation that represent the future leaders and policy-makers.

Our survey for the International Committee of the Red Cross (ICRC) asks millennials in 16 countries for their views on issues relating to war and conflict. The survey covers both conflict-affected countries (Afghanistan, Colombia, Israel, Palestine, Nigeria, Syria and Ukraine), and those in “peacetime” (France, Indonesia, Malaysia, Mexico, Russia, Switzerland, UK, US and South Africa).

Key points include:

- 45% of millennials see ‘wars and armed conflicts’ as one of the most important issues affecting people around the world today.
- Three-quarters think that most wars and armed conflicts can be prevented. Those in Syria and Palestine are most likely to think war is unavoidable.
- On average, two in five think there will be fewer wars and conflicts in the future. Those from war-affected countries are more optimistic about this (46% vs. 30%).
- More than 8 in 10 see nuclear weapons as a threat to humanity and over half think it is more likely than not that a nuclear attack will occur in the next decade.
- Opinions are almost evenly split on the prospect of a Third World War happening in millennials’ lifetime (47% saying it is likely, vs. 46% who say it is not).

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SHORTCUTS

WHAT WORRIES THE WORLD?

We start the year with the majority across all countries (61% on average) saying that things in their country are heading in the wrong direction.

The countries that are least optimistic on this measure today include Italy (83%), South Africa (79%), France (79%) and Spain (78%).

Our monthly *What Worries the World* survey presents a global view of the social and political issues that are most concerning to the public across 28 countries.

The latest results from January 2020 show 'Poverty & social inequality' to be the greatest concern worldwide, with 34% across all countries saying it is a top issue for their country. This is ahead of 'Unemployment' (31%), 'Financial/political corruption' and 'Crime & violence' (both 30%).

Looking back on a decade of survey data, we see both stability and change. Unemployment was historically the biggest concern worldwide until mid-2018, when Poverty & social inequality took the top spot. Since then, a much closer gap between the top three issues has been evident, despite great variations between countries.

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JOBS AND AUTOMATION

Our survey for the World Economic Forum in 28 countries looks at public expectations around the likelihood of jobs being automated and levels of confidence in skills and employment.

Over one-third (35%) of workers across 28 countries think it is likely their job will be automated in the next 10 years. People are most likely to anticipate their work being automated in India (71%), Saudi Arabia (56%), China (55%), Brazil (51%) and Mexico (50%).

By contrast, only 14% in Germany and Hungary, 16% in the Netherlands, 17% in Great Britain and 19% in France say it is likely.

While people in India are most likely to expect their work to be automated, they are also most confident that they have the skills needed for their job to continue to exist.

More widely, seven in ten (69%) workers across the 28 countries are confident that they have the skills necessary to keep their current form of employment.

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HOW TO BE A WORKSHOP GURU

Return on investment (ROI) for research is even more important in today's agile times, as we are seeing a focus on maximising the business impact of research findings. This means that there is a growing focus on the crucial step of "activation".

Veronique Verellen, Ipsos UU's Global Service Lead of Censydiam Qual and Workshops, joins Emma Grand on the latest episode of our *Insight Out* podcast to discuss how to facilitate workshops and use them to action and implement research, sharing some of the lessons she has learned.

Workshops with clients aim to provide a human-centric experience that will build empathy to drive relevant actions.

Challenges may include establishing clear objectives for the workshops. But the success of workshops is 80% based on preparation and 20% on facilitation.

Inviting consumers themselves to share real-life experiences and stories in workshops can be a helpful move to help key stakeholders see familiar topics in different ways.

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LINK SUMMARY

2020 PREDICTIONS

Read more: https://www.ipsos.com/en/global-predictions-2020

Download: https://www.ipsos.com/sites/default/files/ct/news/documents/2020-01/predictions-2020-global-advisor-charts-ipsos.pdf

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GLOBAL ATTITUDES TOWARDS GENDER

Read more: https://future.ipsos.com/category/gender

Download: https://www.ipsos.com/sites/default/files/ct/news/documents/2020-01/global-advisor-gender-2020.pdf

Contact: Matt.Carmichael@Ipsos.com

CLIMATE CHANGE AND BEHAVIOUR CHANGE

Read more: https://www.ipsos.com/en/saving-planet-starts-home

Download: https://www.ipsos.com/sites/default/files/ct/news/documents/2020-01/report-global-advisor-climate-change-consumer-behavior-final_0.pdf

Contact: Nicolas.Boyon@Ipsos.com

THE EVOLUTION OF SHOPPER BEHAVIOUR

Read more: https://www.ipsos.com/en/evolution-shopper-behaviour-2020

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ENTERTAINMENT IN INDIA

Read more: https://www.ipsos.com/en/evolution-entertainment-india

Download: https://www.ipsos.com/sites/default/files/ct/publication/documents/2020-01/evolution-of-entertainment-in-india.pdf

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SOCIAL MOBILITY

Read more: https://www.ipsos.com/en/global-divide-social-mobility

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GLOBAL EDUCATION BAROMETER

Read more: https://www.ipsos.com/en/wise-global-education-barometer-2020

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Contact: Amandine.Lama@Ipsos.com

MILLENNIALS ON WAR

Read more: https://www.ipsos.com/en/millennials-are-against-use-nuclear-weapons-any-circumstances

Download: https://www.ipsos.com/sites/default/files/ct/news/documents/2020-01/ipsos_millennials_on_war_full_report_1.pdf

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SHORTCUTS SUMMARY

WHAT WORRIES THE WORLD?

Read more: https://www.ipsos.com/en/what-worries-world-january-2020

JOBS AND AUTOMATION

Read more:
https://www.ipsos.com/sites/default/files/ct/news/documents/2020-01/report-jobs-and-automation-global-advisor.pdf

HOW TO BE A WORKSHOP GURU

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

Please email IKC@ipsos.com with any comments, including ideas for future content.

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