

IPSOS UPDATE

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

April 2020

Ipsos Knowledge Centre

GAME CHANGERS



WELCOME

Welcome to the April 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.

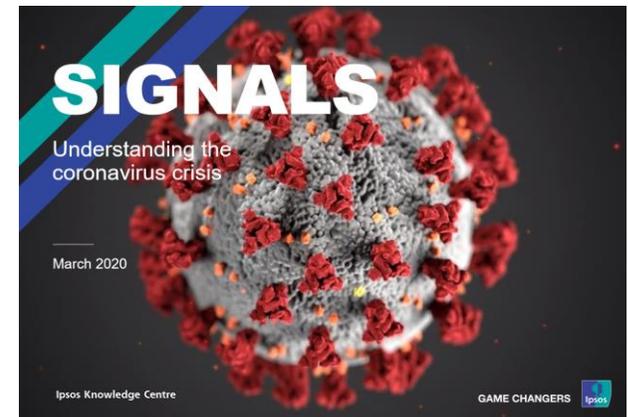
We hope you find this useful. Please email IKC@ipsos.com with any comments or ideas, or if you would like to subscribe to future editions.

Thank you.

THE CORONAVIRUS CRISIS

To understand the dynamics of the coronavirus outbreak around the world, Ipsos has launched *Signals* – a compilation of our research and analysis covering different aspects of the pandemic.

See **editions 1 (13 March)** and **2 (26 March)**, now available on [Ipsos.com](https://www.ipsos.com).



Please email: Simon.Atkinson@ipsos.com or Mandy.Turner@ipsos.com for more information.

IN THIS EDITION

RESPONDING TO CORONAVIRUS

Guidance for brands in these uncertain times

As many brands find themselves unsure how to act in the changing context of COVID-19, we offer some early thoughts on how they can adapt to behaviour change, engage with consumers and continue to innovate.

A NEW WORLD

Transitioning research online

The decision to move from offline to online research should not be “if”, but when. Drawing on 20 years of Ipsos’ experience globally, our new white paper advises what to consider when moving research online.

SINGAPORE’S PLASTIC PROBLEM

A nation at the limit

In Singapore, as in markets all over the world, demand for sustainable packaging is creating a new commercial imperative for brands. We explore the local story and find that 4 in 5 agree plastic waste is a problem.

SUSTAINABLE FASHION

An ethical turning point?

Giving someone else’s unwanted clothes or accessories a second life is gaining ground among the most affluent consumers and fashion followers. We look at what is driving the sustainable and second-hand fashion trend.

INTERNATIONAL WOMEN’S DAY

What is appropriate workplace behaviour?

We find a global gender divide on many aspects of equality at work, including the factors that hold men and women back and views on how people should behave.

REPRESENTING RACE

Noughts and crosses

If done well, content that tackles race representation and related issues can create more authentic and exciting storytelling for diverse audiences. We learn from the new screen adaption of the book *Noughts and Crosses*.

TOO MUCH INFORMATION

Think better, not bigger

There is no shortage of information to mine in today’s digital-first research context. Yet discovering insights means not just knowing more, but being able to judge what is important.

DIGITAL DOCTOR 2020

Connected health to empower patients

We explore how comfortable and engaged both patients and doctors are with digital and connected health. Our webinar presents the new global survey results and connects the findings to the COVID-19 global pandemic.

RESPONDING TO CORONAVIRUS

COVID-19 has caused our lives to operate in unfamiliar contexts and unpredictable patterns.

The speed and global spread of coronavirus has brought about huge shifts in our environment. In uncertain times, data is vital. This is why Ipsos is monitoring public opinion towards coronavirus around the world and releasing regular analysis of its impact.

Many brands are unsure whether to or how to act in these times. Our paper on [coronavirus and behaviour change](#) presents ideas for how brands can play enhanced roles in people's lives in times of coronavirus, for example by being a source of truth and positive impact, helping to build routines, and going virtual.

In another paper on [innovating in challenging times](#), we show that consumers are often more open to new ideas during times of crisis and businesses should continue to research.

People want to continue to hear from brands. [The creative fightback](#) finds that above all, customers want brands and advertising to offer them a sense of security and normalcy, followed by positivity – specifically messages of hope, comfort and calm.

For all the latest research on coronavirus as it is released, please see the [COVID-19 home page](#) on the Ipsos website.

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INTERNATIONAL WOMEN'S DAY 2020

Globally, half of men think there is gender equality in the workplace, but only three in ten women agree.

To mark International Women's Day on 8th March 2020, Ipsos explored attitudes towards gender equality in the workplace across 27 countries. It found that more men than women (49% vs. 32%) think that workplaces in their country treat both sexes equally.

Gender inequality is felt to be greatest in Brazil, Japan, and France where 72%, 71% and 69% of respondents respectively disagree that men and women are treated equally in the workplace.

We also find differences in opinion on appropriate behaviour at work. For example, 28% of men globally think it's acceptable to tell jokes or stories of a sexual nature, but only 16% of women agree.

People in Sweden (69%), South Africa (68%) and Spain (63%) are most likely to say they would feel confident to confront a senior colleague who makes a sexist comment, while people in Japan (31%), Poland (32%) and France (38%) are least likely.

Of a range of factors that could harm someone's career – such as working part-time or having romantic relationships at work – 'childcare responsibilities' is thought to impact women most, with 35% globally agreeing this is more likely to damage a woman's career than a man's. This figure rises to above 40% in a number of countries including Spain, Chile, Great Britain and Italy.

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A NEW WORLD

The decision to move research from offline to online should not be “if”, but *when*.

Online research is now more viable globally thanks to advances in technology and increased access to the internet. Transitioning research programs from offline to online offers time and cost benefits, as well as new capabilities.

But the decision to do so is not always an easy one, as change often brings disruption to data trends. Online and offline are certainly not interchangeable: the same survey run offline and online is likely to produce substantially different raw data.

It is possible to prepare for and manage these changes. We recommend considering each transition on a case-by-case basis. Where online is a good fit, transitions can be managed by either making a clean break with the past or by measuring data trend changes through parallel testing.

Drawing on Ipsos’ experience, this white paper shows how to make informed decisions around online transition and what to expect along the way. Some general points of best practice include:

- Anticipate changes to the data when transitioning
- Measure correlations between offline and online, as they could still lead to the same businesses decisions
- Minimise differences in how the survey is presented in the new online channel

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REPRESENTING RACE

How can content creators deliver broad appeal, present diversity, and navigate cultural sensitivity?

The popular teen fiction book *Noughts and Crosses*, set in an alternative historical scenario where Africa colonised the world, is now a TV series. This adaptation has the potential to tap into contemporary social discourses about race and power dynamics, from #BlackLivesMatter to reverse racism. But this is also incredibly ambitious and brings a real risk of misinterpretation.

Our latest 'Pillars of Popular Culture' study sets out how to approach content where representation is vital to success, including how researchers can shape, refine and evaluate its performance.

During this process, it is important to scope the cultural landscape to understand the context at the point of launch. Cultural analysts can use case studies to set out best and worse case scenarios.

An important focus for the content is to build real and authentic worlds. Sharing the concept, narrative and depiction with relevant audiences will ensure authenticity. This requires in-depth qualitative conversations through interviewing or sensitively handled group sessions. Content creators can also pick up on nuances of character and culturally-attuned behaviours in this process.

At the same time, content creators must not focus too much on one aspect of an individual's identity, which can feel stereotypical, and instead aim to depict multifaceted characters with depth.

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THE 'TOO MUCH INFORMATION' AGE

In a world of constant data flow, how can you avoid the pitfalls of trying to analyse too much?

Our 'Information Age' is turning into a 'Too Much Information Age'. We hear from businesses that there is by no means a shortage of new data to mine: everyone has access to data and can claim to discover new and useful findings.

In research, we are seeing an important shift to a digital-first approach with more triangulation of data sets. This means not just knowing more, but being able to judge what is important.

This report presents three 'smart moves' when it comes to approaching digital data in 2020: discover, prioritise and triangulate. This means finding what information is out there, deciding what you need to know and where you can get it from, then pulling together the different threads to create the full picture.

Triangulation is a great way to build robustness into data sets. The addition of social media data, search terms and online audience profiling to more traditional research methods builds more complete, real pictures of people – so long as we know how to look at it.

To avoid the challenges that the Too Much Information Age poses, we need to think *better* rather than bigger, and remember that more is not always more useful.

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SINGAPORE'S PLASTIC PROBLEM

Plastic waste production is exceeding the densely populated country's capacity to process it all.

In 2018, Singapore generated nearly 950,000 tonnes of plastic waste, but only 4% was recycled – the lowest rate in 15 years.

Singapore is a developed country with the 7th highest GDP per capita in the world. It is also a place where plastic bags and other single-use plastics have become cheaply and widely available. Three billion plastic bags are used for an average of just 12 minutes in Singapore.

Land scarcity and therefore a lack of landfills and recycling plants in Singapore makes the issue of waste more urgent. To deal with the issue, the country would need to build a new waste-to-energy plant every 10 years and a new landfill every 30 years.

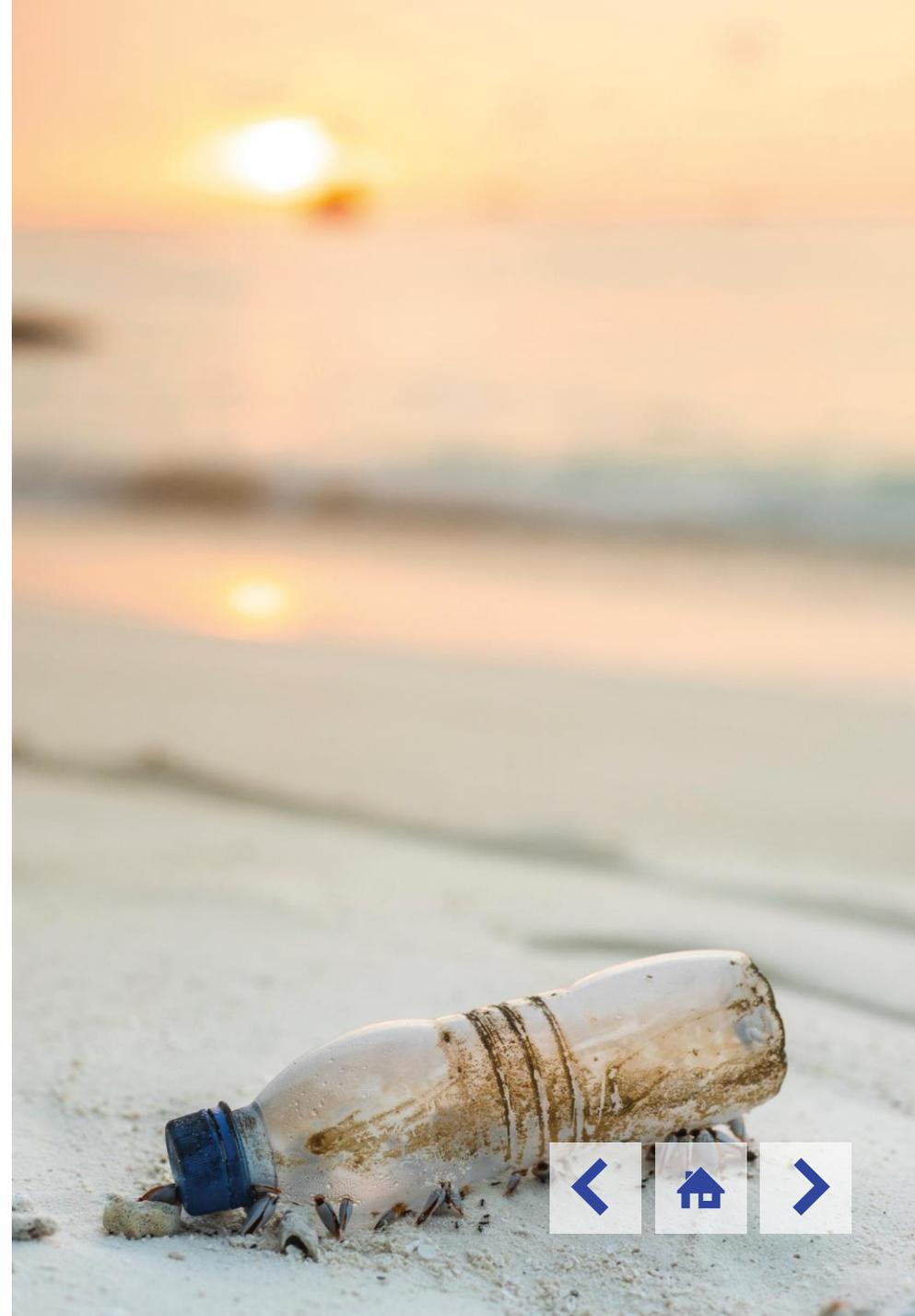
In Singapore, as in markets all over the world, consumer sentiment is shaping new expectations and behaviours around sustainable packaging, creating a new commercial imperative for brands. While four in five Singaporeans agree that the excessive use of plastics is a problem, around half this proportion would accept a small price increase to support the phasing out of single-use or non-biodegradable plastics.

This paper examines attitudes towards plastic packaging and waste in Singapore, and looks at how brands can drive change.

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SUSTAINABLE FASHION

A boom in the second-hand market suggests the fashion world may be at an ethical turning-point.

Globally, four in ten have purchased fashion apparel, shoes or accessories from a second-hand retailer. This is even higher in Peru (62%), Chile (57%), Saudi Arabia and Mexico (both 55%), while half of consumers in China and the Netherlands have never done so.

This trend is also gaining traction in the luxury sector. Ipsos' latest *World Luxury Tracking* study shows a considerable rise in second-hand luxury product purchases, up 11 points in the US and 9 points in Europe between 2017 and 2019.

But luxury retailers have a way to go to gain credibility with the general public. A majority (63%) of our respondents in 27 countries think that luxury brands are no more environmentally friendly than other brands. Some have only just started making small steps towards a cleaner way of making tomorrow's fashion.

Niche brands tend to set an example in sustainability, for example by producing vegan products. This has helped brands that were formerly under the radar to become more well-known.

Bigger players in the industry face a more complex sustainability challenge given their scale. They are expected to not only do more for cleaner production, but also be more transparent in their communication on the matter.

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DIGITAL DOCTOR 2020

Our 21-country study takes a comprehensive look into the digital transformation of healthcare.

Our survey explores the views, behaviours and attitudes of 1,700 doctors when it comes to digital communication channels, the use of wearables, apps to obtain patient-generated health data, telehealth and virtual care, digital therapeutics, and much more.

Certain aspects of digital health are coming to the forefront in the context of COVID-19, for example:

- Telehealth and virtual care visits happening at scale.
- Self-testing and home-testing kits.
- An influx of chatbots on apps or platforms to help diagnose symptoms and guide next steps.
- Using data to understand global population health.

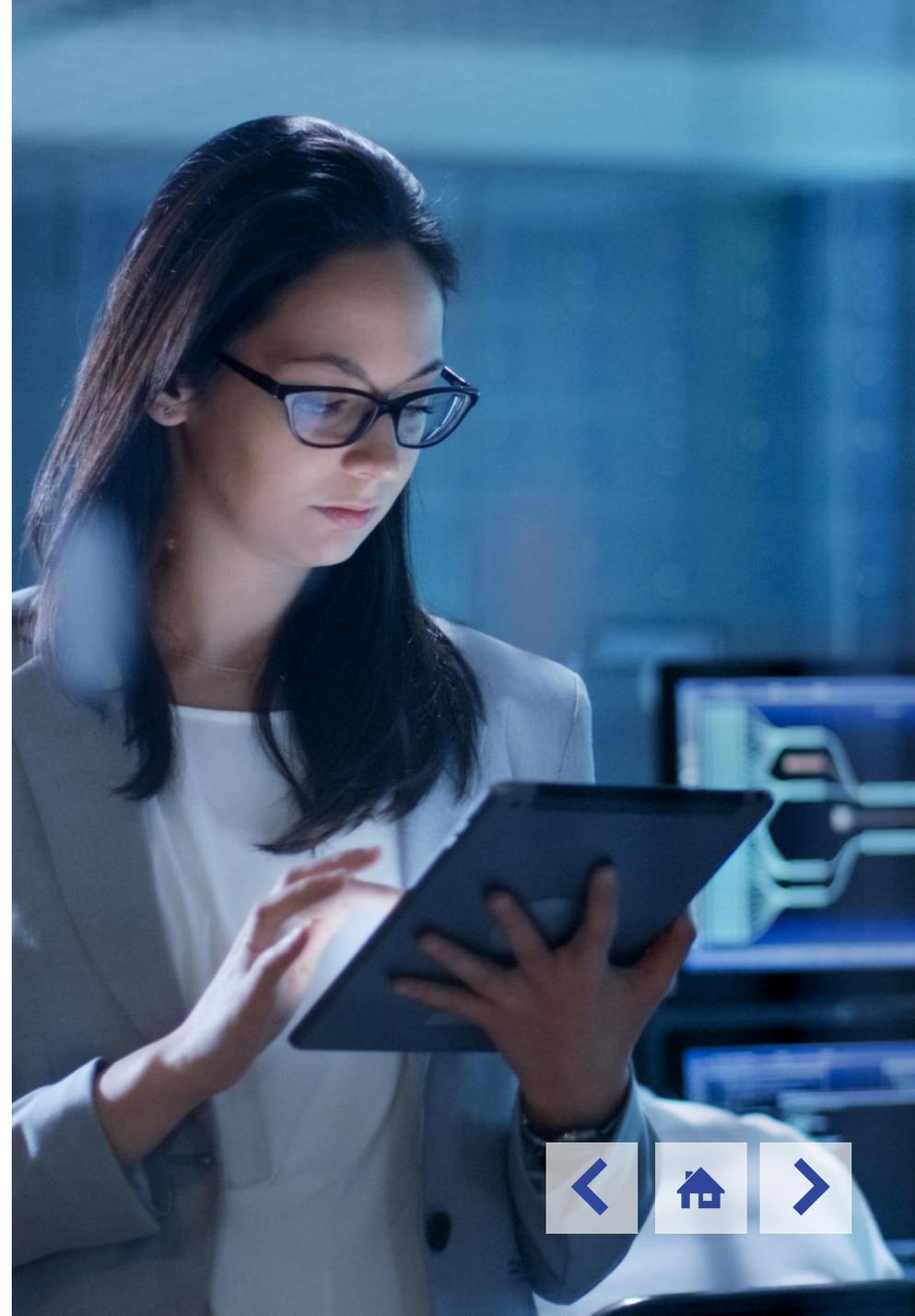
We find that 43% globally would feel comfortable replacing their routine visit to the doctor with a video call. Meanwhile, 42% would feel comfortable undergoing minor surgery performed by a robot and 28% for major surgery (such as a heart bypass). Our webinar reviews some key learnings.

Overall, awareness of new technologies is high, but specific knowledge in relation to healthcare is limited. Connected health devices are playing a key role today, and are likely to grow in the future.

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SHORTCUTS

GLOBAL TRENDS & COVID-19

With the whole world affected by COVID-19, the IpsosTrends and Futures team have been reflecting on what this crisis could mean for the future in the light of *Ipsos Global Trends 2020*.

This work is based on a theory of change in which macro forces usually slowly impact human beliefs, trends and groups of 'signals' over time. Sudden shocks to the system – like COVID-19 – cause immediate seismic shifts in everyday life and can accelerate change and disrupt our norms. However, it takes much longer to shift underlying trends and macro forces before a 'new normal' is created.

Equally, when shocks occur, people look for ways to reinforce what they already think, or that they want to believe to be true.

Will family matter more now many families are closer together? Will offices diminish and shrink? Whatever the future holds, our underlying values will continue to constitute the framework through which we interpret the world.

Ipsos Global Trends explores people's values in depth and maps signals from today's COVID-19 crisis onto this framework.

[READ MORE](#)

THE INSIDE TRACK: US ELECTION

In this era of uncertainty, making sense of current events and keeping track of social change is as hard as it has ever been. Every month, the Ipsos political polling team in the US will present an update on the latest public opinion trends to help you separate the meaningful from the noise.

For a deeper breakdown of the election landscape, including candidate by candidate comparisons, visit the [Political Atlas](#), our interactive forecasting tool.

This month's analysis shows that Americans are souring on the government's response to the crisis. President Trump maintains stable approval scores – 41% approve and 54% disapprove. But these ratings are closely linked with the state of the economy, so this could change as the country reacts to COVID-19.

Meanwhile, current frontrunner in the Democratic primaries, Joe Biden, advances with most seeing him as electable.

Read more below for more on the state of politics in the US today. You can also register for the next [monthly webinar](#) on 16 April.

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INSIGHT OUT PODCAST: SEMIOTICS

The second season of *Insight Out* from Ipsos UU sets out to explore cultural intelligence and the ways that culture influences the things we do (and don't do), things we may not even be aware of, and how that cultural understanding can help businesses.

In this episode, Monique Centrone, Head of the Ipsos Semiotics practice in the UK, talks about how semiotics can identify the important elements of what a brand conveys and how this understanding can be used to make successful connections with consumers.

Semiotics is a way of understanding how people communicate, perceive things, interpret meaning and form judgements. It looks at information input that people are bombarded with in their environment and constantly have to organise and make sense of.

We find that brands don't always plan as deeply as they could to stay up-to-date and refresh their identity, and that semiotics can help by understanding the layered connections and sentiments underneath language and visuals.

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LINK SUMMARY

RESPONDING TO CORONAVIRUS

Read more: <https://www.ipsos.com/en/public-opinion-covid-19-outbreak>

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<https://www.ipsos.com/sites/default/files/ct/publication/documents/2020-03/coronavirus-behavior-change-ipsos.pdf>

Contact: Natalie.Lacey@Ipsos.com

INTERNATIONAL WOMEN'S DAY 2020

Read more: <https://www.ipsos.com/en/hard-days-work-global-attitudes-gender-equality-workplace>

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<https://www.ipsos.com/sites/default/files/ct/news/documents/2020-03/international-women-day-2020-ipsos.pdf>

Contact: Kelly.Beaver@Ipsos.com

A NEW WORLD

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Contact: Leah.McTiernan@Ipsos.com

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SINGAPORE’S PLASTIC PROBLEM

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SUSTAINABLE FASHION

Read more: <https://www.ipsos.com/en/fashion-ethical-turning-point>

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<https://www.ipsos.com/sites/default/files/ct/publication/documents/2020-03/global-advisor-on-fashion.pdf>

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DIGITAL DOCTOR 2020

Read more: <https://www.ipsos.com/en/webinar-digital-doctor-2020-21-country-study-doctors-perspectives-digital-and-connected-health>

Download: <https://www.ipsos.com/sites/default/files/ipsos-digital-doctor-2020-report.pdf>

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GLOBAL TRENDS & COVID-19

Read more:

https://www.languagemagazine.com/2020/01/24/americans-worry-most-about-their-accents/?fbclid=IwAR2LFdZrNXdgHqRNN4xQqOzIEeqAcv8RNlqJLnNetWqj_xXsf9_4U8smeGE

THE INSIDE TRACK: US ELECTION

Read more: <https://www.ipsos.com/en-us/knowledge/society/The-Inside-Track-Election-2020-november>

INSIGHT OUT PODCAST: SEMIOTICS

Read more:

<https://www.ipsos.com/en/insight-out-ipsos-uu-podcast>

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