IPSOS UPDATE

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

May 2020

Ipsos Knowledge Centre

GAME CHANGERS

Ipsos

WELCOME

Welcome to the May 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 we have started to produce *Signals* – a compilation of our research and analysis on many aspects of this topic.

See previous **editions:**

- **1** (13 March)
- **2** (26 March)
- **3** (9 April)
- **4** (23 April)

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IN THIS EDITION

CORONAVIRUS ROUND-UP

Taking stock of what we know so far as we move through the COVID-19 pandemic.

The coronavirus crisis sees governments, companies and individuals having to respond to an unprecedented set of challenges, as they grapple with the implications of this "once in a century" event. Our global coronavirus research has been following public opinion on different aspects of the pandemic since the start of February. The themes covered have progressed from views on the initial threat to life under lockdown to today's questions around what happens next. See the latest polls and reports on Ipsos.com.

We have also been exploring the conversations online, from the first discussions about coronavirus to the experience of lockdown. It provides a different commentary on the crisis to the one available through mainstream media, as this latest analysis from India shows.

Even as parts of the world begin to emerge from lockdown, it is unlikely we will simply snap back to pre-2020 behaviours. Our teams have been exploring how brands can be part of the customer routines and rituals emerging in our new 'low-touch' world.

Other papers look at changes to the brand-building playbook during times of crisis and why it is important to stay close to your customers, despite social distancing.

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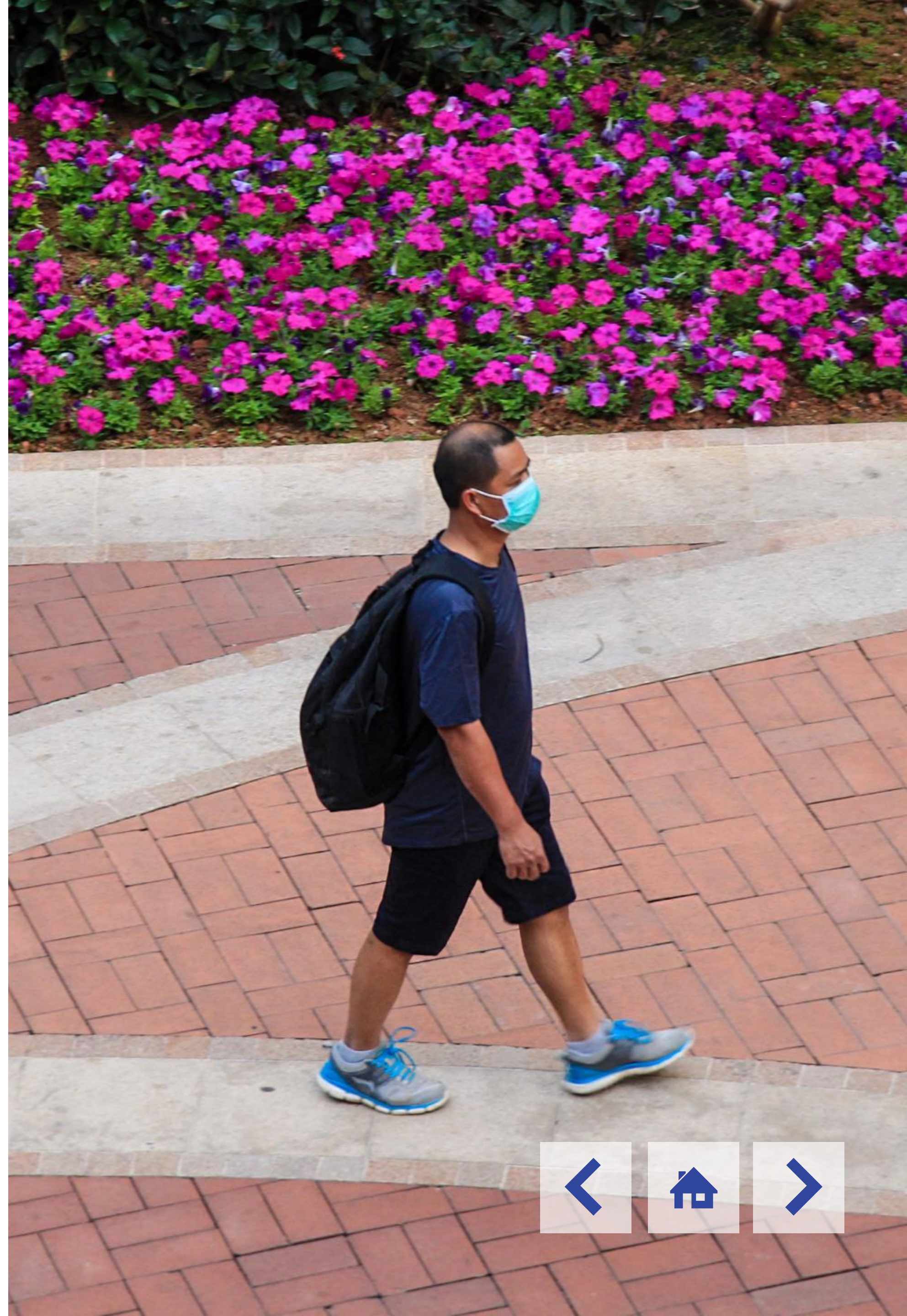

WHAT WORRIES THE WORLD?

Coronavirus overtakes all other issues in our regular *What Worries the World* survey with the highest level of concern recorded for any category to date.

Given the global coronavirus pandemic, Ipsos has included coronavirus/COVID-19 in its regular *What Worries the World* monitor in 28 countries. The first reading shows that it represents by far the greatest worry around the world and is top in 24 of the 28 countries surveyed.

For 61% of our global respondents, COVID-19 is identified as one of the most important issues facing their country today. The highest scores are seen in Malaysia (85%), Great Britain (77%), and Australia (74%).

After coronavirus, unemployment and healthcare make up the top three global concerns with 35% and 28% respectively considering these to be an important issue for country today.

More than half of our respondents (54%) across all countries think their country is heading in the wrong direction. Perhaps surprisingly, this represents a more positive picture than before the pandemic unfolded at the beginning of the year, when this figure stood at 61%.

This could reflect a sense of countries coming together and perhaps a guarded hope that affected nations are moving closer to recovery.

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EARTH DAY 2020

We find support for a "green" economic recovery as countries emerge from the pandemic.

Our annual survey for Earth Day finds that 71% of adults across 14 countries agree that, in the long term, climate change is as serious a crisis as Covid-19. Two-thirds (65%) of respondents also support a "green" economic recovery from the pandemic.

Climate change remains top of the public agenda in our survey as 37% of citizens around the world single it out as one of the most important environmental issues facing their country today – up 7 percentage points since 2018. We see greatest concern about climate change today in Japan (54%) and South Korea (51%), followed by Canada, Italy, and France (all 44%).

On average, 68% say their government will be failing them if it doesn't act now to combat climate change. We also find that 57% would be put off voting for a political party if they didn't take climate change seriously.

Other important environmental issues identified in the survey include air pollution (33%), dealing with the amount of waste we generate (32%), deforestation (26%), and water pollution (25%).

Looking at the changes people globally might limit their personal contribution to climate change, avoiding products with a lot of packaging comes top (57% say they are likely do this), while dietary changes such as consuming less dairy and red meat are the least popular actions (38% and 41% say they are likely to do this).

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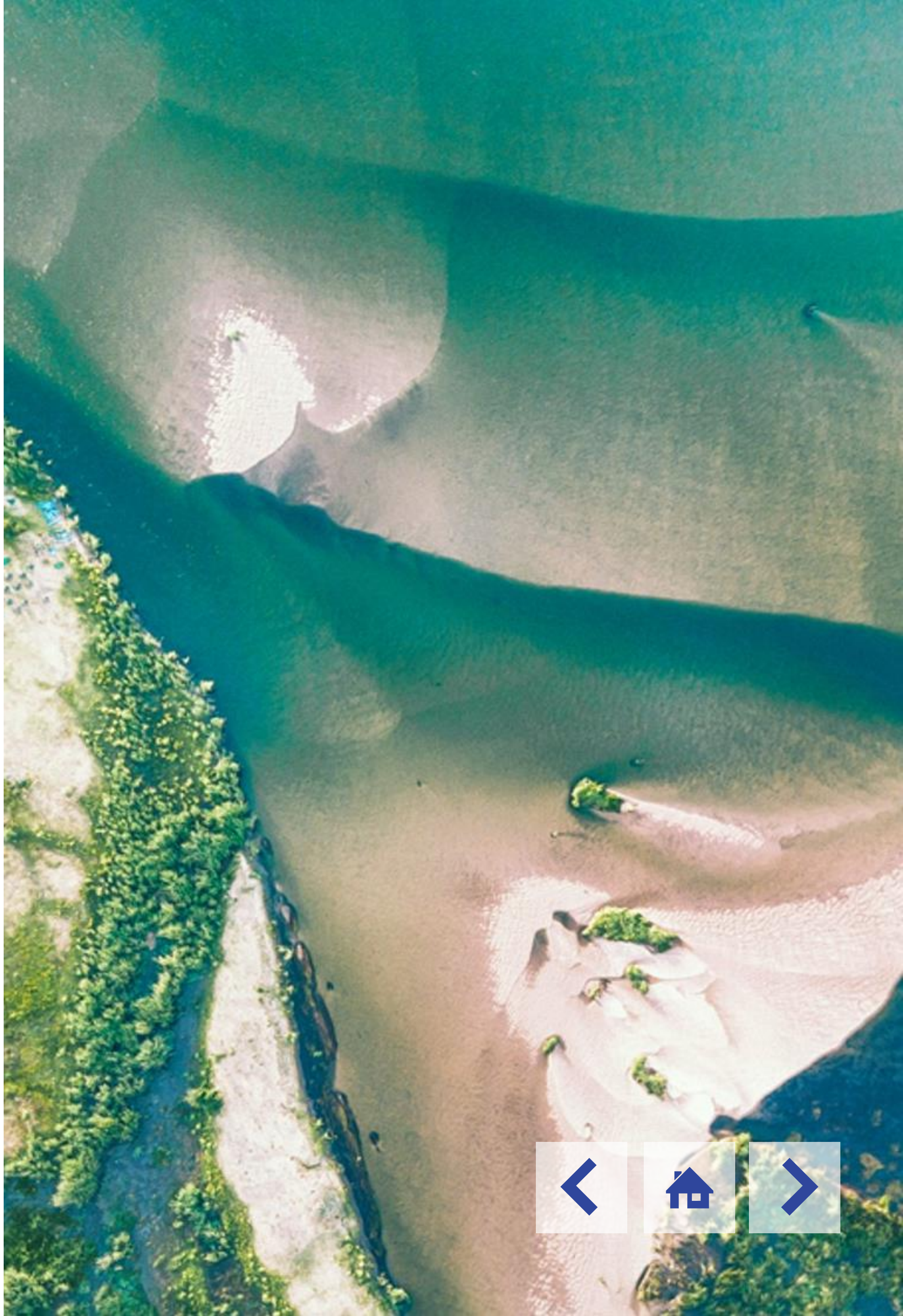

IPSOS REPUTATION COUNCIL 2020

Global perspectives on corporate reputation and how to meet the increasing demand for meaningful action.

For many companies, issues such as climate change, sustainability and social cohesion are already at the top of the corporate agenda. Stakeholders no longer assess the reputation and investment appeal of a company solely through financial markers, but want to see evidence of a company's broader role in society.

Our annual report on corporate reputation management presents the latest thinking and practice with the view from our 150 Reputation Council members in 19 countries.

Four in five council members (83%) agree that 'purpose-washing' (using the language of social purpose without genuine commitment to change) is still prevalent. For many organisations, moving from recognition to meaningful action remains a key challenge. We present some approaches to tackle this say-do gap, including: delivering sustainable products, cleaning up supply chains, committing to objective targets, and becoming corporate 'activists'.

This edition also covers communications in a disruptive environment which explores the major elements of the planning process, including timing, key inputs, the degree of distinction between internal and external communications, and major challenges the communicator faces – now and in the future.

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MOBILE FIRST SURVEY DESIGN

The mobile phone has reached ubiquity. This has implications for how we should design surveys.

Most of us do not leave home without it. We lose track of how many times per day we reach for it, to check our email, social media, or for navigation. There are 3.5 billion smartphone users in the world and this is forecasted to grow by several hundred million in the next few years, with China, India and the US leading the way.

We are seeing this preference for mobile reflected in how people are taking surveys – in the last quarter of 2019, most new Ipsos panellists (73%) joined using their mobile phones.

Mobile first survey design goes one step further than device agnostic to enhance accessibility and usability for participants.

Our new *Ipsos Views* paper outlines the benefits, which include:

- Interacting with people in a way that is relevant and fits with their lives.
- Boosting representative access for target audiences.
- Improving surveys taken on PCs too – if it works on the smallest of screens, it will also work on the largest.
- Capitalising on additional valuable data sets offered by smartphone capabilities.

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MULTI-SOURCE HEALTHCARE DATA

Generating business insights will change as we embrace a multi-data source reality.

Big Data and data science is increasingly disrupting established marketing and commercial practices in pharmaceutical organisations. Many are accessing new data sources and using powerful analytic tools to make sense of otherwise unmanageable sets of information. In healthcare, this affects drug development, clinical trial design, health service delivery and diagnostics.

Our paper shows how analysing and integrating data from a variety of sources allows pharma companies to both better understand the multiple stakeholders they interact with, and to become more customer and patient-centric.

A range of diverse data sources, including patient record forms, wearables or home devices and survey open-ends, can all be brought together for analysis. Primary research also has a central role, filling in any gaps and adding the human story to the multiple ‘real world’ data sources.

The unconventional combination of data science and qualitative research will be key for marketing insight professionals of the future, with qualitative research likely to become the best friend of the data scientist, and vice versa.

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MEDIA CONSUMPTION IN CONTEXT

The first weeks of lockdown show how the pandemic is changing how and why we watch TV.

During the COVID-19 lockdown, our media habits are changing as people look to fill increased hours at home.

During the first week of the UK's lockdown, we saw increases in time spent viewing TV (+18%), online (+28%), and on social media (+48%). With media in the important position of still being able to bring people together, our report recommends ways for media brands to connect with their audiences, stay relevant, and fulfil enduring needs.

To help us understand the changes to TV viewing, a new Ipsos study for Thinkbox uses weekly video diaries to hear from 12 UK households. It finds TV news is more than ever an important source of reliable information, although it can cause feelings of sadness and anxiety. Families are finding comfort in 'nostalgic' programmes and choosing content with universal appeal.

Our US team's report on the evolved role of TV in the 'lockdown family household' finds that TV is not only filling a time gap but also playing new and different roles: that of 'entertainer; 'informer'; 'commercial break', and 'babysitter'.

In the MENA region, we find that average TV viewing time in Saudi Arabia has increased by one hour to just over six hours per week.

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SPORTS AND ACTIVITY

We look at levels of sporting activity before the pandemic and changes to exercise habits since.

In spite of the restrictions to daily life imposed by COVID-19 in recent weeks and months, two in three French people (66%) are regularly exercising during lockdown. Our sport/health tracker finds:

- 75% of the French population have changed their usual exercise habits since the lockdown.
- 55% of those exercising indoors are doing so through virtual classes, but 20% say they do not have space in their homes.
- People see exercise to be beneficial physically (93%) and psychologically (88%) during these times.

While a majority are staying active, six in ten overall say they've reduced their level of activity since being locked in their homes. However, 24% of those under 35 say they've actually increased it.

Meanwhile, our latest Active Lives Survey for Sport England finds that activity levels for adults aged 16+ were at a record high before the coronavirus pandemic. Over six in ten fell into the 'active' category, achieving an average of 150+ minutes of exercise a week – including walking, cycling, swimming and team sports.

Walking for leisure is the most popular form of activity, up by 1.2 million since last year, while we see drops in other categories such as running and athletics, fitness activities and swimming.

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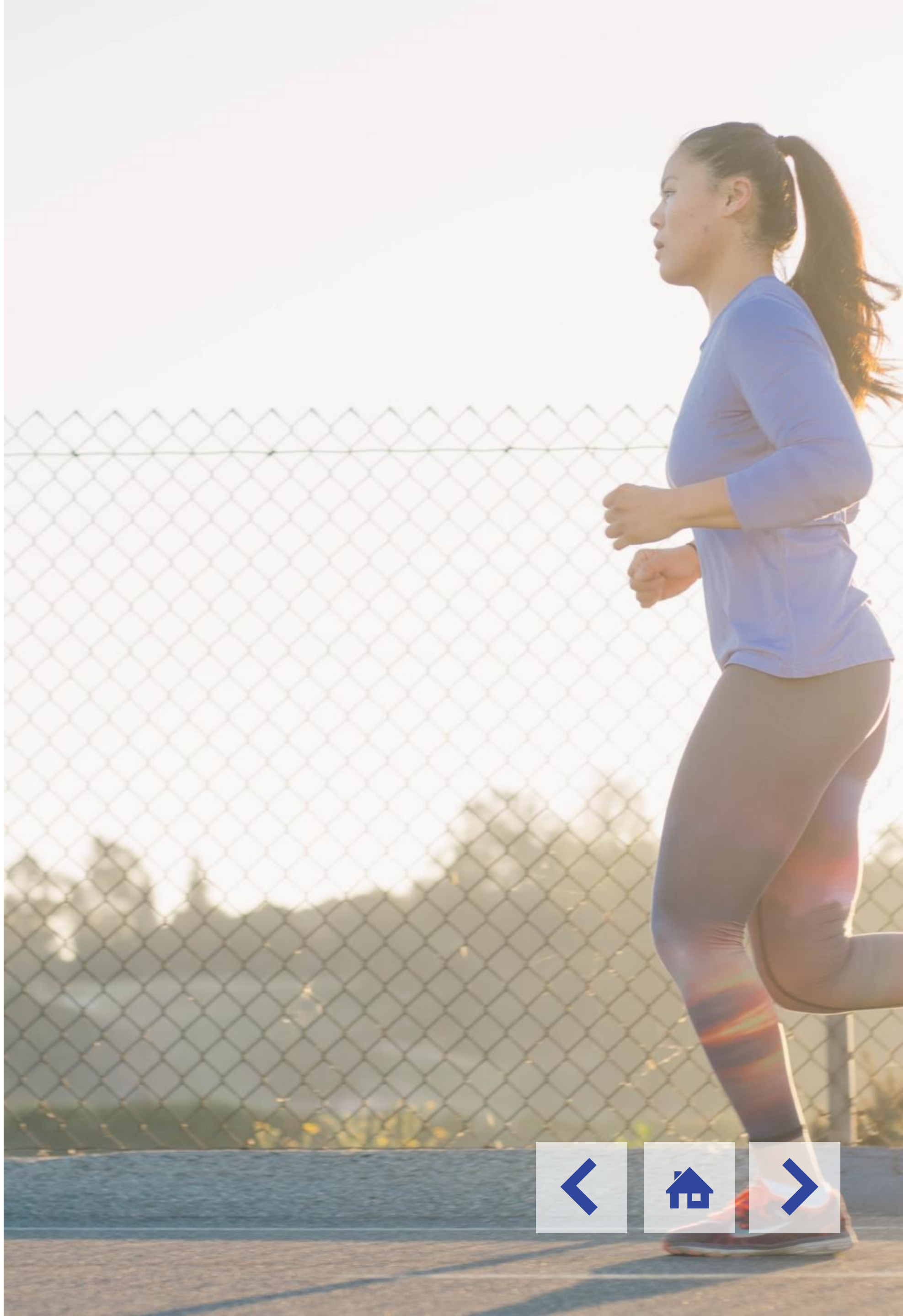

SHORTCUTS

ALEXA, MUMMY AND ME

The current COVID-19 lockdown presents a pivotal moment for the integration of voice technology into family life. While families are spending more time at home, they are looking to engage more with media content and willing to experiment with new technologies.

This presents an opportunity for voice tech and for brands looking to reach new audiences, both during and post lockdown. Patterns that are established in this period could lead to long-term opportunities for brands and content providers.

Our latest ethnographic research shows that audiences are keen to know more about voice tech and engage with a technology that they feel brings a different media experience to their homes.

Additionally, they are looking for voice tech to fill different roles including: teacher, magician and comedian. However, our research also reveals that for voice tech to become ingrained in daily life in the long-term it must first overcome some barriers, both technical and perceived.

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GLOBAL CONSUMER CONFIDENCE

April 2020's Global Consumer Confidence Index fell to its lowest level in more than seven years.

The Expectations Index, which reflects consumers' outlook on their job, financial situation, and local economy showed an even bleaker picture – declining to the lowest point in its decade-long history.

Since the first reports of the coronavirus outbreak in January, all but one of the 24 countries have registered a significant drop in their National Index.

Key findings include:

- Eight countries show a three-month decline of five points or more: Australia, Israel, the US, Mexico, Canada, Hungary, Italy and Japan.
- In 18 of the 24 countries, the National Index is at its lowest point in at least five years. And in six countries (Australia, Canada, Israel, Russia, South Africa and Sweden), consumer confidence has not been this low since Ipsos started measuring it.

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CUSTOMER PERSPECTIVE PODCAST

Customer Perspective is a new weekly podcast for anyone involved in delivering an organisation's brand promise to its customers.

The first episode sees hosts Ipsos' Helen Wilson and Trevor Clarke talk to Ben Llewellyn, Global Service Line Leader of Customer Experience at Ipsos, about the disruption that coronavirus is having on society, business and customers. They address some of these tough questions, focusing in particular on its impact on the measurement and management of CX programmes.

Read more about why Customer Experience still matters amid coronavirus and social distancing.

The second episode gets to grips with 'Channel Performance' – what this means and how we go about measuring it, including via mystery shopping. The podcast guests are Craig Bradley, Global Head of Channel Performance at Ipsos, and Becky Harris, Head of Channel Performance, Ipsos in Canada.

Read more about how to design a better mystery shopping programme.

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LINK SUMMARY

CORONAVIRUS ROUND-UP

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

Download: https://www.ipsos.com/en/brand-rituals-low-touch-world

Contact: Simon.Atkinson@Ipsos.com

WHAT WORRIES THE WORLD?

Read more: https://www.ipsos.com/en/coronavirus-dominates-global-worries

Download: https://www.ipsos.com/sites/default/files/ct/news/documents/2020-04/whatworriesworld_april2020_global.pdf

Contact: Simon.Atkinson@Ipsos.com

EARTH DAY 2020

Read more: https://www.ipsos.com/en/two-thirds-citizens-around-world-agree-climate-change-serious-crisis-coronavirus

Download: https://www.ipsos.com/sites/default/files/ct/news/documents/2020-04/earth-day-2020-ipsos.pdf

Contact: Emily.Gray@Ipsos.com

IPSOS REPUTATION COUNCIL 2020

Read more: https://www.ipsos.com/en/reputation-council-report-2020

Download: https://www.ipsos.com/sites/default/files/ct/publication/documents/2020-04/the-ipsos-reputation-council-report-april-2020_1.pdf

Contact: Milorad.Ajder@Ipsos.com

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MOBILE FIRST SURVEY DESIGN

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Contact: Leah.McTiernan@Ipsos.com

MULTI-SOURCE HEALTHCARE DATA

Read more: https://www.ipsos.com/en/multi-source-healthcare-data

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Contact: Theano.Anastasopoulou@Ipsos.com

MEDIA IN CONTEXT

Read more: https://www.ipsos.com/en/knowledge/overview

Download: https://www.ipsos.com/sites/default/files/ct/publication/documents/2020-04/media_in_context_final.pdf

Contact: Beckie.Goodfield@Ipsos.com

SPORTS & ACTIVIT|Y

Read more: https://www.ipsos.com/ipsos-mori/en-uk/active-lives-survey-sport-recreational-and-fitness-activities-adults-aged-16-england

Download: https://www.ipsos.com/fr-fr/66-des-francais-pratiquent-une-activite-sportive-au-moins-une-fois-par-semaine-les-consequences-du

Contact: Etienne.Mercier@Ipsos.com

SHORTCUTS SUMMARY

ALEXA, MUMMY AND ME

Read more:
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GLOBAL CONSUMER CONFIDENCE

Read more: https://www.ipsos.com/en/global-consumer-confidence-its-lowest-years

CUSTOMER PERSPECTIVE PODCAST

Read more:
https://www.ipsos.com/en/customer-perspective-ipsos-podcast

CONTACT

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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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