IPSOS UPDATE

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

June 2020

Ipsos Knowledge Centre

WELCOME

Welcome to the June 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.

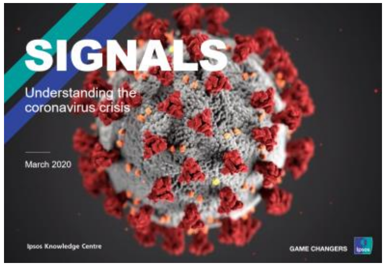
Thank you.

THE CORONAVIRUS CRISIS

To understand the dynamics of the coronavirus crisis, we produce a fortnightly compilation called Signals – bringing together our research and analysis on different aspects of the pandemic and its aftermath..

See **editions 1-6:**

1. 13 March
2. 26 March
3. 9 April
4. 23 April
5. 7 May
6. 20 May



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IN THIS EDITION

THE DYNAMICS OF THE CORONAVIRUS CRISIS
Adapting to new realities

Our latest analysis on the emerging impact of COVID-19 on innovation processes, audience measurement and the financial services industry, while also looking back at what we have learned from previous crises.

GLOBAL ATTITUDES TO WORK
More than a paycheque for most

Nine in ten people across 28 countries agree that work should be an important part of people's lives. Many expect to be capable of working for longer than they will be considered employable by others.

FORCES OF CUSTOMER EXPERIENCE
Building strong customer relationships

Our new 'forces of CX' framework presents six key elements that form strong customer-brand relationships, based on research across different sectors. New case studies illustrate how these work in practice.

NEW ZEALAND & AUSTRALIA ISSUES INDEX
More worrying about economy and employment

Recent public opinion surveys from both New Zealand and Australia show how a changing environment is having a significant impact on what their populations consider to be the top issues facing the nations today.

NEW FUTURES
The dawn of the "era of turbulence"

COVID-19 is today's challenge, but we need to get comfortable with uncertainty. While they acknowledge most predictions are wrong, our Futures team set out their latest thinking on future scenario planning.

WORLD WAR II
Marking the 75th anniversary of the end of the conflict

Our global survey finds that, 75 years on, the conflict is still a significant part of national identities and a majority of people around the world think it is still important to hold remembrance ceremonies.

HEALTH & SAFETY
Getting it right is good business

It is a new priority to make consumers feel safe in a bricks and mortar retail setting when stores reopen. We show what businesses need to do to meet expectations, supported by findings from our new Health & Safety Index.

ROBOTICS IN HEALTHCARE
The future of the operating room

While robotic technology for surgical procedures might sound futuristic, it isn't as far-fetched as we might imagine. This report outlines the history and developing uses of robotics as well as the view from leading surgeons.

THE DYNAMICS OF THE CORONAVIRUS CRISIS

A look at our latest research on the COVID-19 crisis as the world starts to adapt to new realities.

At a time when spending habits have changed dramatically, robust business planning remains key. Our paper *Forecasting in Challenging Times* examines what this means for innovation, with a focus on consumer-packaged goods.

With TV viewing and streaming content on the rise, *Keeping the Show on the Road* shows why now is not a time to stop measuring, but a time to investigate alternative, virus-resistant methods.

A new paper from our Customer Experience team, *The Forces of CX*, introduces a human-centric framework that can help organisations drive stronger relationships through a better understanding of customers' functional and relational needs.

Our US team has sketched out three possible visions of the future of financial services post-pandemic. The report draws on survey data around trust and spending and brings in expert views to help us understand where we are heading.

What can be learnt from previous crises? A new report presents the educational effect that previous times of crisis have had on Russian consumers to give some perspective of the present.

Find these and more in our series of Signals publications.

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NEW FUTURES

As we look to build a world after COVID-19, how should we be structuring our thinking and planning?

We need to get comfortable with uncertainty. Climate change, population shifts, inequality, and geopolitical tensions are all growing. In our data-dependent, interconnected global economy, disruptive global events are becoming more likely, and will have bigger impacts when they happen.

COVID-19 is today's challenge. But it is likely the first of many such events, rather than a single outlier. Investing now in planning for future uncertainty will help business, government, and society become more resilient.

Most predictions are wrong. But futures work, done right, is empowering. It helps focus attention on what can be changed now for a better tomorrow. Business and policy will help to create the future by using the opportunity to influence changing behaviours and values for the better.

Our Futures Advisory Board recommends organisations tackle the following four questions to help navigate the future:

- How will our values change over time?
- How different will the future be from what went before?
- How can I plan for multiple scenarios?
- What should I be monitoring and why?

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GLOBAL ATTITUDES TOWARDS WORK

A 28-country survey shows a near-universal view that work should be an important part of people's lives.

At a time when many people around the world have been furloughed or lost their jobs due to COVID-19, we find that nine in ten (92%) adults consider work an important part of people's lives.

The countries where this view is most widely held are Colombia and Malaysia (98%), Mexico and Peru (97%), and Argentina (96%). On the other hand, the view that work should not be so important in people's lives is most prevalent in Germany (21%), the Netherlands (19%), and France and Japan (16% each).

Globally, 70% of employees say that most of what they do on a typical workday is interesting while only 30% say it is boring.

On average, people would like to retire at 57 years old, but expect that they will need to continue working up to the age of 59. The age until which people think they will need to work before they can retire ranges from 48 in Malaysia, 51 in Saudi Arabia, and 52 in Poland to 64 in in Germany, Great Britain, Japan, Sweden and the US, 65 in Australia, and 67 in the Netherlands.

The survey also highlights a gap between the maximum age at which someone thinks they will be considered employable (49 years old) and when they feel they are capable of working (60 years old).

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WORLD WAR II

To mark the 75th anniversary of the end of WWII, our survey explores global attitudes towards the conflict.

A majority in 16 of the 28 countries surveyed, and an average of 55% worldwide, agree that it is important to hold ceremonies in remembrance of the occasion. While those aged 50-74 are most likely to agree with this (61%), a majority of those aged 35-49 and those under the age of 35 also agree (both 52%).

Russia, Great Britain, Ukraine, the United States, China, and Poland are the countries whose citizens most tend to be proud of their nation's role in the conflict. The belief that it is important to commemorate World War II is not necessarily tied to pride in the role one's own country had in it. Several European nations whose citizens are more divided on this (the Netherlands, France, Belgium, Sweden, and Italy) also consider such ceremonies important.

Many around the world have a direct, familial link to the conflict. 40% of those surveyed report having relatives or ancestors that served in the armed forces during World War II. This includes 21% who report that some of their relatives/ancestors died fighting and 15% who say family members died as a result of genocide, massacres, bombings, disease, or starvation during the war.

The influence of World War II is still felt strongly in countries around the world. Globally, 42% agree that political life in their country is still influenced by the events of the conflict. This view is most widely held in Poland, China, Germany, Russia, and Great Britain.

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THE FORCES OF CUSTOMER EXPERIENCE

We share how brands are acting on the key forces of our CX framework throughout challenging times.

‘The Forces of Customer Experience’ is human-centric framework that helps organisations drive stronger relationships through a better understanding of customers’ functional and relational needs.

Through our research and analysis spanning nine sectors, we have distilled the essence of emotional attachment into six key ingredients – or forces – of customer experience which represent the building blocks of relationship strength. By refocusing their efforts on these, organisations will be able to address what truly matters, with the ultimate goal of delivering a ‘Return on Customer Experience Investment’ (ROCXI).

How organisations have responded to their customers and employees throughout the COVID-19 crisis has been a true sign of their culture and ability to adapt. We take a closer look at how some of the world’s biggest brands have used our framework’s ‘forces’ to deliver exceptional customer experience since the pandemic began: Fairness, Certainty, Control, Status, Belonging, and Enjoyment.

Listen to the podcast on the forces of customer experience.

Sharing more of our latest CX thinking, a new podcast covers some of key themes from the recent paper *Mystery Calling*, the impact of COVID-19 on contact centres, and how mystery calling can help.

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HEALTH & SAFETY

How retailers can meet new expectations and regulations to improve trust, loyalty, and profits.

Health and safety has become the most important element of customer experience today. As bricks and mortar retail opens up again coming out of the COVID-19 pandemic, it will be different to before and consumers will be hesitant: 30% of Americans say it will take at least three months before they feel comfortable in-store.

Our new Health & Safety Index finds that six in ten say they will stop shopping at retailers who are not taking health and safety seriously, making it a business imperative to cater for this new priority.

Brands and businesses will have to adapt to meet consumer standards, retain their trust, and comply with regulations. For the brands that get it right, there is an opportunity to gain market share, charge a premium, and increase enterprise value.

Our new report looks at how to reopen with confidence and answers three important questions for businesses:

- What are consumers' new and evolving attitudes towards health and safety?
- What specific actions can brands take to make consumers feel safe while shopping or eating at their locations?
- What can brands do to proactively measure and manage health and safety across their retail network?

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TOP ISSUES IN NEW ZEALAND & AUSTRALIA

We compare the changing concerns of people in New Zealand and Australia.

Our New Zealand Issues Monitor shows that the economy has replaced housing to become the number one issue of concern for 47% of New Zealanders today, representing an almost fourfold increase from 13% in March 2020.

Like the economy, unemployment also moved up from a historically low position to take the second ranked position in the Issues Monitor, with 41% concerned. These significant changes clearly reflect the challenges facing the country as a result of COVID-19.

Other findings show the Labour-led coalition government has recorded its highest rating since winning the 2017 General Election (7.6 out of 10), and one in two New Zealanders say their current quality of life is 'very good'.

Turning to its trans-Tasman neighbour, Australia has also seen the economy (53%) and unemployment (43%) become its citizens' top issues today. We see a marked decrease in concern about healthcare (-19 points) which leaves the top spot. Australia's Issues Index shows both month-to-month and long-term trends.

It also finds Australians favouring the Coalition to the ALP as the party most capable to manage economic and employment issues.

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ROBOTICS IN HEALTHCARE

Preparing for a future of robotic technology in the operating room.

Robotic surgery was initially developed for the military to enable surgeons to operate on wounded soldiers from a remote and safe location. They first entered the civilian operating room two decades ago, and while you may expect this to have an immediate and transformative effect, it takes around 20 years for innovations to reap productivity benefits. But we are now seeing a broadening of robotic design and expansion of its use.

Operating rooms (ORs) are one of the most critical areas and highest cost centres of a hospital, in some cases making up over 40% of total expenses. This makes them a prime target for innovation to improve efficiency and precision.

Recent years have seen a significant rise in the use of sophisticated and automated technology in the OR, including high-resolution displays and surgical cameras, speech recognition software, apps such as “Touch Surgery,” augmented and virtual reality and other “smart hospital” technology.

This report presents the views of leading robotics surgeons around the world on what has worked well, where improvements are needed, and what the future will hold for robotic surgery.

Find out more in our EU & APAC or USA webinars on 15 July.

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SHORTCUTS

EUROVISION SONG CONTEST

The 65th Eurovision Song Contest was replaced by a special television broadcast featuring songs from 41 participating countries in a non-competitive format.

Ahead of the event, Ipsos conducted a global survey to gauge interest in the event among 13 countries that have participated in the event, and another 15 countries across the world.

Across the 12 European countries and Australia, almost all say they have heard of the Eurovision Song Contest (93%), a majority say they have watched it (63%), and a few (10%) have voted for a contestant at least once. Viewership drops to one in five (17%) outside these countries.

People from Sweden are most likely to have watched the Eurovision Song Contest (86%), followed by Turkey (82%) and Spain (80%).

Swedish enthusiasm may have something to do with previous success, as ABBA's 1974 hit Waterloo emerged as the most popular song to come out of the show. One in three (36%) across the 11 participating countries selected this as their favourite.

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SOCIAL INTELLIGENCE: GAMING

Video games have grown exponentially in popularity with players old and new throughout the COVID-19 pandemic, acting both as a form of entertainment and as a platform for social interaction.

Conversation volume analysis shows that Microsoft is the leading gaming developer, followed by Epic Games and Nintendo.

There has been a 130% increase in multiplayer engagement for Microsoft's XBOX Game Pass. Meanwhile, gamers worldwide racked up a total of over 3.2 billion hours playing Epic Games' Fortnite.

Our analysis of social conversations also looked at hashtags and emojis associated with the gaming industry. The diversity of hashtags used include #PlayApartTogether, which encourages social distancing among fans by connecting through video games.

The most used emojis give the impression that players are excited, engaged and happy.

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INSIGHT OUT PODCAST: CULTURE

In this episode of *Insight Out*, Emma Grand speaks to Karina Sanmartin and Valentina Rodríguez, Curation Practice Leads from Ipsos UU Spain, about how culture intersects and underpins the post-modern world of branding and why this cultural understanding is so critical today.

They explore the concept of Cultural Transferability and discuss how brands can bridge the gap between a universal brand essence and local market needs.

Culture is at the heart of the way humans make sense of the world around us. It forms the core of our societies and drives our behaviours in ways that we cannot easily articulate. Our world is turning global, yet our local culture is still something we're attached to. Brands need to know how to work with that ambivalence.

Navigating the global-local culture is risky if you have no orientation. We've seen traditions shifting, movements that stick, generations that are challenging the status quo, The question being how we can make visible what we have not yet had a chance to see.

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All the information within this *Ipsos Update* is in the public domain – and is therefore available to both Ipsos colleagues and clients.

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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