IPSOS UPDATE

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

August 2020

Ipsos Knowledge Centre

GAME CHANGERS

Ipsos

WELCOME

Welcome to the August 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 better understand the dynamics of the coronavirus crisis, we have been producing a fortnightly compilation called Signals – bringing together our research and analysis on different aspects of the pandemic, its aftermath and impact for the future.

See our tenth summary edition

We have also been running a series of webinars on the crisis, and in our next session we will be presenting new findings and perspectives from around the world.

Join us on 10th September at Session 1: 11am CET or Session 2: 5pm CET.

For more information, please email: Simon.Atkinson@Ipsos.com or Mandy.Turner@Ipsos.com for more information.

IN THIS EDITION

LEARNING FROM CORONAVIRUS
Looking back at the story so far

Our special summary edition of Signals recaps the key content we have featured across the series. Our latest releases include a look at how and when to resume activities.

WHAT WORRIES THE WORLD
Has concern for coronavirus peaked?

COVID-19 is the top concern across 27 nations for the fourth month running, but is down 20 points since it was first included in our survey. Meanwhile, six in 10 think their country is heading in the wrong direction.

PREMIUM BRANDS
A little happiness goes a long way

Although money is tight and job insecurity is high, people will still spend on affordable indulgences. By positioning themselves as much deserved “treats”, premium brands can thrive during tough economic times.

THE BEAUTY TRIANGLE
The role of beauty in China, Japan and Korea

Women in a trio of countries we refer to as ‘The Beauty Triangle’ are an important target audience for beauty brands today. Our survey and consumer segmentation highlights their enduring needs and motivations.

THE FOODSERVICE INDUSTRY
Are we on the verge of a new food culture?

Hotels, restaurants and catering represent one of the sectors most impacted by coronavirus and subsequent lockdowns. We look at how they can adapt alongside a review of recent trends in food habits.

VIRTUAL HEALTHCARE
The time is now for telehealth

The benefits of virtual care were well-known prior to COVID-19, but the pandemic has accelerated its uptake among physicians. Read our analysis of recent healthcare research, including Ipsos’ Digital Doctor 2020 survey.

A MATTER OF FACT?
Data science for market research insights

Big Data does not automatically translate into Big Insights. Instead of relying on “magic algorithms” a lot of work needs to happen in the background. We present eight simple expert rules for using and integrating data.

PLATFORMING PROGRESSIVISM
The role of the media amid social change

Given media brands’ ability to reach and influence large audiences, they must make careful decisions about the content they give a platform to, especially when times of social change demand action and accountability.

LEARNING FROM THE CORONAVIRUS CRISIS

Looking back at the story so far.

In the special tenth edition of our Signals digest, we look back at the research we have carried out in recent months, including:

- **The public mood** from our weekly opinion polling.
- **The bigger picture**, tracking emerging behaviours over time.
- **Research insights** on topics such as food, education, the environment, travel and media.
- **Expert perspectives** through our *Ipsos Views* papers.

We cover analysis, polls and reports from a range of countries, and provide links to our webinars and podcasts. See Signals #10.

Turning to the latest in our coronavirus surveys, parents in 16 countries have different ideas of when it will be safe to send their children back to school. But, a majority in 12 of the countries support restricting the number of days children attend in person.

And, while governments globally have shown some success in encouraging protective behaviours to stop COVID-19 from spreading, the focus will now shift to behavioural support strategies that enable the public to safety re-engage and resume activities.

Access more polls and reports via our COVID-19 hub page.

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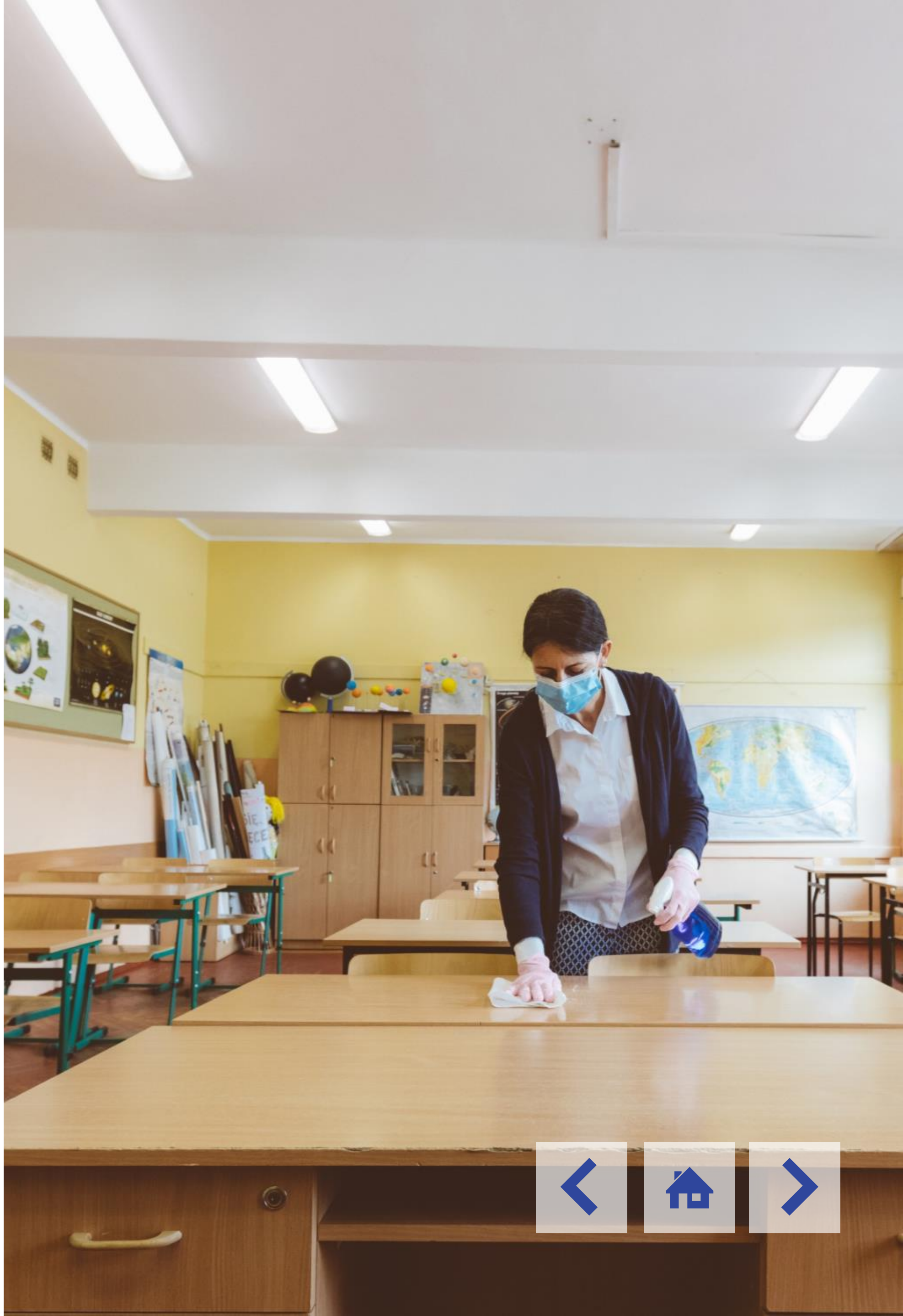

WHAT WORRIES THE WORLD?

Has concern about coronavirus peaked?

Our latest *What Worries the World* survey shows that COVID-19 remains the top concern across 27 nations for the fourth month running, although by a smaller margin than seen previously.

The top five global concerns are: Coronavirus (43%), Unemployment (40%), Poverty & social inequality (32%), Financial/political corruption (27%), and Crime & violence (24%).

In July, COVID-19 concern is down 20 points from April's high of 63% (when it was first included in the survey). Chile and India are the countries most concerned about coronavirus – both recording 61% – but only five percentage points separate the top eight countries. Coronavirus is the number one issue in 11 of 27 countries and joint-top in Brazil and Sweden.

Turning to the other issues, the countries currently most worried about Unemployment are Italy (62%), South Africa (60%), South Korea (59%), and Spain (59%). This month we see Crime & violence replace Healthcare as the fifth greatest global worry.

Currently, six in 10 worldwide (61%) say that things are heading in the wrong direction versus four in 10 (39%) that think their country is on the right track. Chile (84%), South Africa (79%), Hungary (77%), France and Belgium (both 73%) are the countries where citizens are most pessimistic about the state of their nation today.

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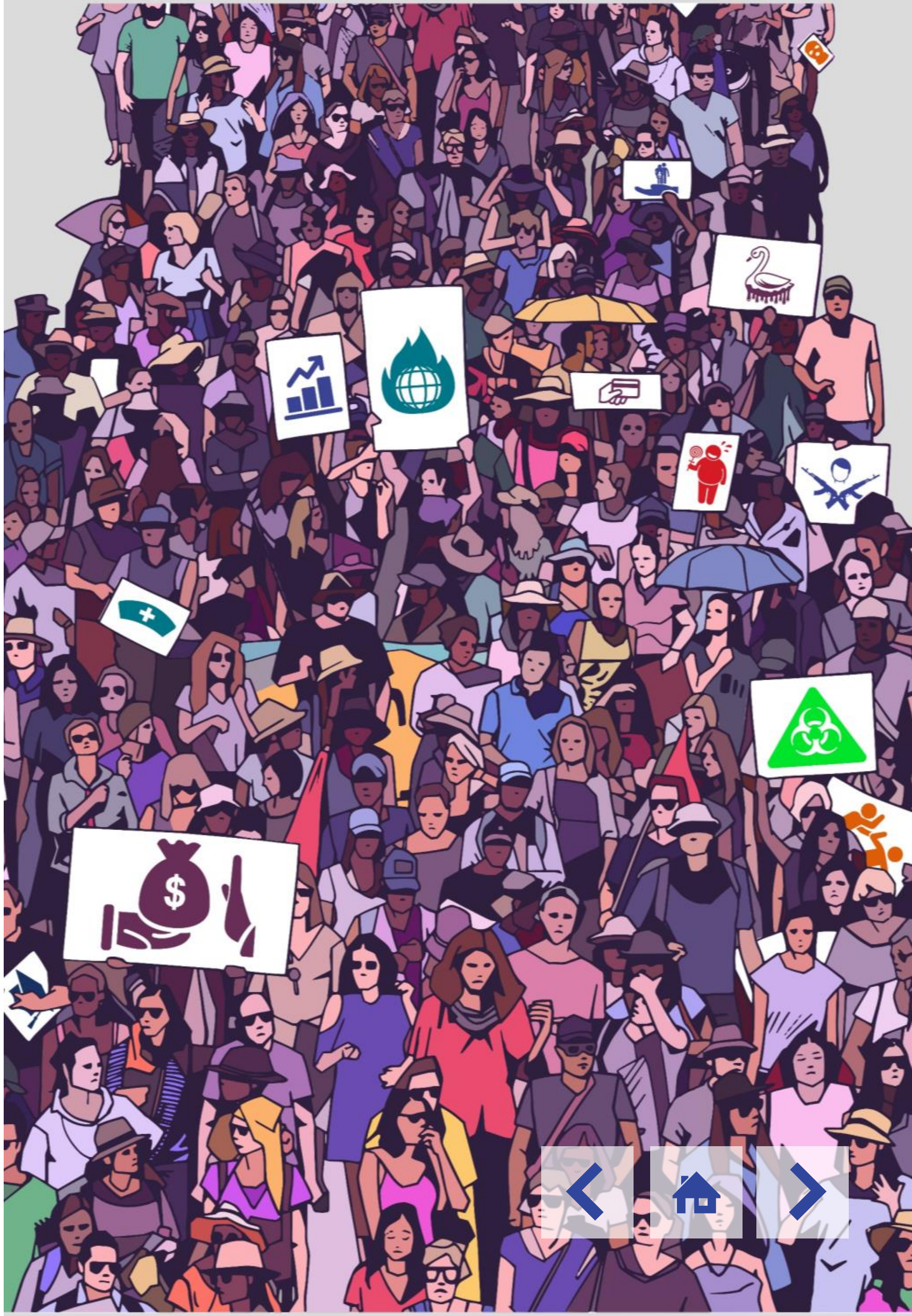

VIRTUAL HEALTHCARE

The time is now for telehealth and virtual care to become mainstream.

The benefits of virtual care, which enables healthcare providers to interact remotely with their patients, were recognised even before COVID-19. Among them, convenience of care, increased access, improved worker productivity, decreased costs, and clinician time savings all carry appeal for under-resourced healthcare systems around the world.

While roll-out has remained limited, the pandemic has propelled virtual care into the mainstream, making it something to be experienced by many more people much sooner than expected. But will this permanently shift the culture towards remote healthcare?

Ipsos' Digital Doctor 2020 survey (conducted prior to COVID-19) found that half of doctors across 21 countries reported never having used telehealth, with over one-third of non-users expecting to use it more in the next 12 months. But the crisis will undoubtedly accelerate uptake: now, 76% of doctors believe they will do more virtual visits after the pandemic.

We see the future as one of blended healthcare (combining digital and face-to-face), supported by four key pillars for the sustainable and widespread uptake of virtual care: (1) digital care pathways for specific disease areas, (2) high-quality digital platforms, (3) robust training, and (4) remote monitoring and self-testing capabilities.

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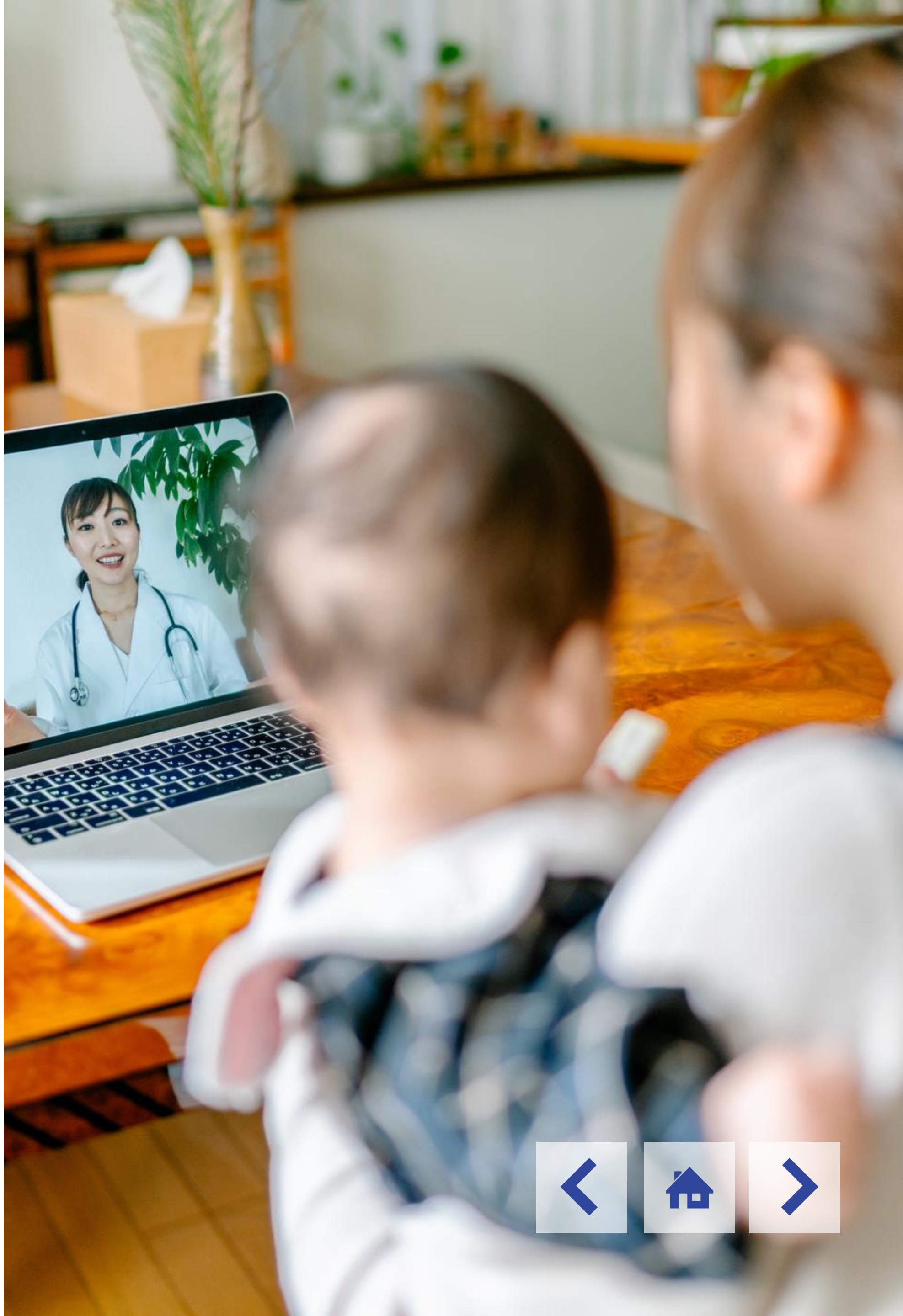

A MATTER OF FACT?

Eight practical steps to making Big Data work for marketing insights.

Data science has been a part of insight generation and targeting for years, but the challenge today is to make better use of a vast amount of what we call “unrequested” or "real-world evidence" data that is collected for purposes other than market research.

There are exciting opportunities in the journey of mastering new data sources as well as some possible pitfalls along the way. But these can be avoided – if you know where to look.

It has become clear that Big Data does not automatically translate into Big Insights. Data quality is the key problem that data scientists must grapple with. And more complex questions require more diverse data, bringing more quality issues.

In this paper, read the eight rules from Ipsos’ data experts on how to most effectively use data science for market research, including:

- Have clear objectives and hypotheses. Mining data without a sense of direction won’t lead you to insights.
- Don’t believe in magic algorithms! If the data is bad or the coverage is poor, even the best AI algorithms are useless.
- Use qualitative and observational research to bring out the human story from the data.

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AFFORDABLE INDULGENCES

A little happiness goes a long way.

The pandemic has had a wide-reaching impact on the economy with the collapse in activity putting the brakes on global growth. Against a background of rising unemployment and growing financial concerns, people have curtailed spending. But there is always a need for pleasure through consumption.

You might naturally expect premium brands to do badly during an economic downturn. However, when viewed as affordable indulgences, we can see scope for some to perform even better.

People don’t completely abandon premium brands in times of recession. Small indulgences can bring a little joy into an otherwise bleak time, magnifying the role premium brands can play.

This paper is grounded in a 16-country research study which groups purchases into four categories: “Essentials”, “Treats”, “Postponables” and “Expendables”, to see how each is prioritised – or reprioritised – in recessionary times and in different geographies.

Findings show that, during COVID-19, individuals are willing to pay more for items seen as “treats” – such as beer and make-up. Understanding these consumer perceptions allow brands to identify the right products to position as aspirational yet affordable indulgences, satisfying consumers’ continued need for happiness, satisfaction or comfort in the things that they buy.

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THE BEAUTY TRIANGLE

The role of beauty for women in China, Korea and Japan.

China, Korea and Japan – a trio we refer to as The Beauty Triangle – are key markets for beauty and not only within the confines of their own shores. They are expected to drive much of the beauty category growth over the next few years, with their innovation and trends influencing attitudes and behaviours throughout the world.

Ipsos' research to understand the needs and motivations of women in these three markets has revealed both commonalities and diversity within the Beauty Triangle. For example:

- 84% of women across China, Korea and Japan agree that the inner self and balance is key to them feeling beautiful, compared to 71% that mention appearance.
- There is a common search for empowerment and the evolution of 'beauty for others' to 'beauty for oneself'.
- Our consumer segmentation reveals six types of consumer ranging from "The Striver" to "The Upholder".

While the COVID-19 pandemic has accelerated trends and induced new behaviours for women in the Beauty Triangle, their deeply-rooted motivations are likely to remain. This article finds insights that will help cosmetics brands to stay close to these important consumers in ways that are relevant and meaningful.

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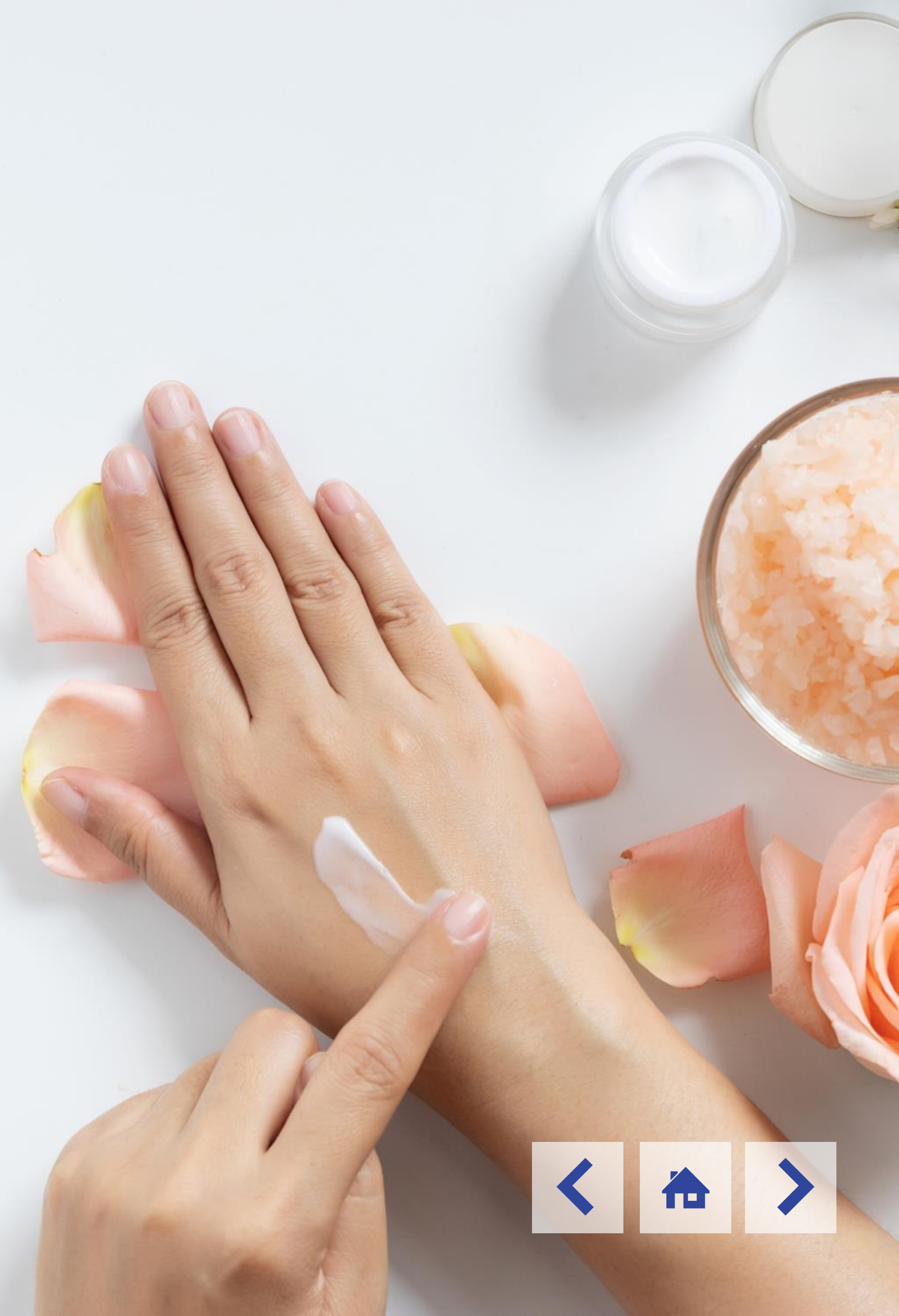

THE FUTURE OF FOODSERVICE

COVID-19's challenge to the catering industry.

The HoReCa (hotels, restaurants and catering) sector has been badly affected by coronavirus with lockdowns globally dramatically reducing its out-of-home (OOH) business – which accounted for one-third of all food and beverage sales prior to coronavirus.

Our new piece on the HoReCa industry starts with the central challenge: consumers are unlikely to immediately return to pre-outbreak levels of spending. So, in adapting to new realities, organisations must also find new opportunities, for example direct-to-consumer offerings with subscription-based models.

A major transformation of the foodservice business was already underway with the fast growth of food delivery. This will likely continue to grow at the expense of on-trade consumption.

Another factor is the rise of the home chef. "Foodies" have been enjoying spending more time in their home kitchen, where cooking is becoming more of a hobby than a chore for many.

With more on food and beverage trends during the pandemic, *What the Future: Food* asks: are we on the verge of a new food culture? Exploring questions such as will we continue to eat out and how will restaurants adapt. With fresh data and expert perspectives, it sets out three possible future scenarios ranging from best- to worst-case for the foodservice industry.

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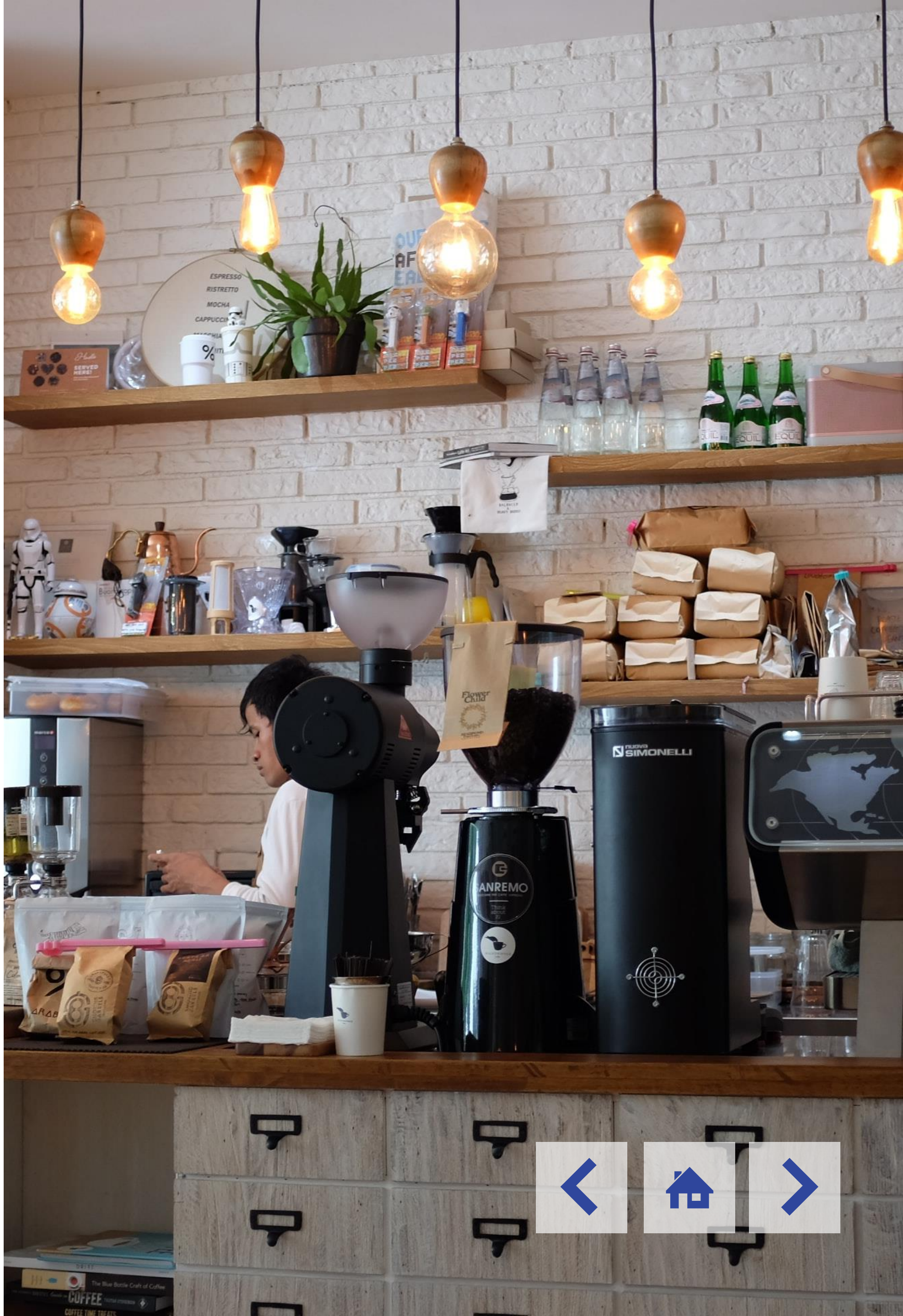

PLATFORMING PROGRESSIVISM

What is the role of media providers in and amongst social change?

We are living through a moment of real social change. Following the tragic death of George Floyd, we can see a re-evaluation of social norms taking place across society. The #MeToo and Black Lives Matter movements are a manifestation of this. Directly challenging the status quo, they raise awareness, ask for enduring allyship, call out virtue signalling, and demand action.

The central idea of progressivism is that we can't all be individually responsible for the mistakes and actions of the past, but we can take collective action to learn, improve, and lead future generations into a fairer and more equal society.

Strong actions have been taken, such as the removal of statues, Twitter accounts and historic TV shows, as part of progressivism is questioning of who and what we provide a platform to.

Media providers must make choices amid the complexities of current issues – do they de-platform, amend or contextualise content, or do nothing? And what would be the consequences?

This paper from our UK team forms part of their *Pillars of Popular Culture* series. It explores the role media providers play in shaping audience's opinions and representing a progressive society.

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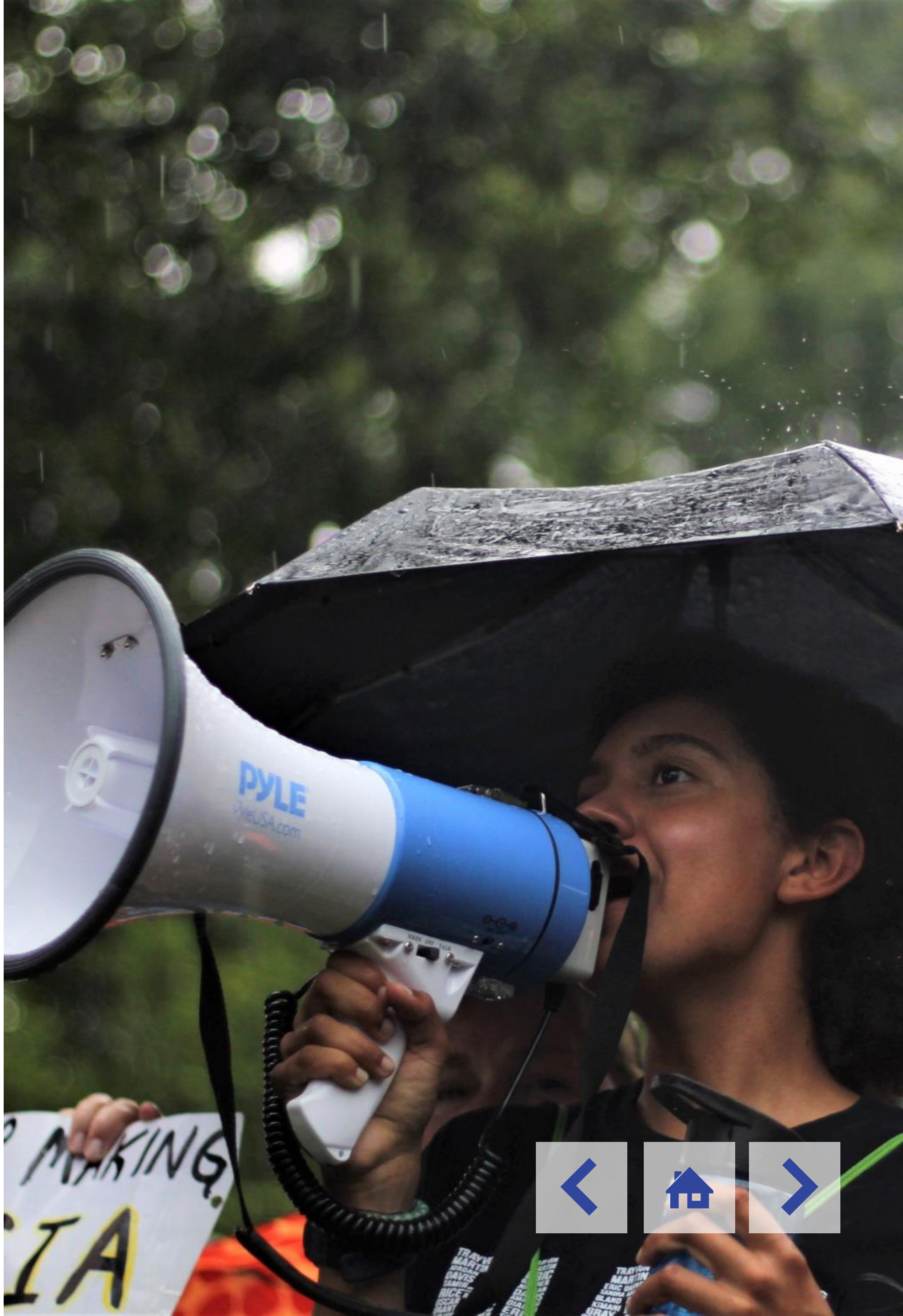

SHORTCUTS

ONLINE SHOPPING

COVID-19 has changed the way Americans carry out their daily activities, from healthcare to socialising and grocery shopping. Ipsos data shows many people are trying online services in different categories for the first time. But as usage increases, it's not clear if people will continue to use these platforms when restrictions are eased. That will depend in part on how good their experience has been with the technology and service they have tried.

We present a US study using Ipsos' User Experience (UX) Score metric to evaluate purchasing apps. It includes a deep dive into grocery and apparel to see how different brands' apps stack up. The tool allows businesses to measure usability, relevance and aesthetics with real customers.

Top tips for eCommerce apps include:

1. Let customers be "guests", removing as many barriers as possible.

2. Provide accurate and comprehensive search with robust filters and sorting.

3. Make it easy for users to keep shopping.

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SPOTLIGHT ON MENA

Climate change has been a main concern around the world as the challenges presented by global warming become ever clearer. We surveyed citizens in the MENA region to identify their perceptions of the causes and implications of the phenomenon.

The majority believe that climate change exists, however opinions were divided between those who think that this is caused by human activity (41%) and those who believe that it is part of the cycle of nature (47%).

We also see public opinion split when it comes to who holds responsibility for ensuring environmental sustainability. The highest percentage say this lies with society itself (41%), while a sizeable proportion also say that government (32%) and businesses (27%) have a part to play.

Some people are taking actions to fight climate change, such as using energy-saving lights, reducing water usage and recycling at home.

Countries covered: Saudi Arabia, UAE, Kuwait, Jordan, Egypt, Tunisia and Morocco.

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CUSTOMER PERSPECTIVE

In the first season of Ipsos' *Customer Perspective* podcast, we have been exploring all things related to customer experience and mystery shopping, with expert commentaries on how organisations can deliver on their brand promise. Catch up on the latest episodes:

Episode 15, Mystery Shopping in the Digital Channel: Hear from Darren Burgess, Deputy MD of our Ipsos UK Mystery Shopping – Channel Performance business speak about how mystery shopping can help to evaluate and improve digital platforms.

Episode 14, Talking CX Tech: Sven Heine, Ipsos CX Global COO, and Dan Zuckerman, VP of CX in the US, talk 'CX Tech', including the role of technology in customer experience programmes and where it's heading.

Episode 13, Taking Mystery Shopping to the Next Level: Reena Roy, Vice President of Ipsos Channel Performance in the US talks about strategic and tactical decision-making, better design, execution and impact, and different approaches being employed across a range of sectors, including high-end luxury.

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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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