

IPSOS UPDATE

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

September 2020

Ipsos Knowledge Centre

GAME CHANGERS



WELCOME

Welcome to the September 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**](mailto:IKC@ipsos.com) with any comments or ideas, or if you would like to subscribe to future editions.

Thank you.

IN THIS EDITION

WHAT WORRIES THE WORLD?

Concern about coronavirus rebounds

In a reminder that Coronavirus is not likely to go away any time soon, the number of people saying COVID-19 is a top concern today has increased in many countries – reversing the gradual decline seen since April.

GLOBAL VIEWS TOWARDS ABORTION

Widespread acceptance across 25 countries

Seven in 10 worldwide think that abortion should be permitted, with women and those with higher levels of education more likely to agree that a woman has the right to make her own decision.

CULTURAL BIAS

When difference doesn't mean different

Global research studies can be at risk from the age-old research problem of cultural response bias. We show how it is possible to make comparing results across countries more reliable.

RUSSIA TRENDVISION

The state of the nation

Our annual report covers the national economic outlook and explores the public mood amid Coronavirus. While Russians are among the most keen to return to 'normal', we look at how values and behaviours are shifting.

POLITICAL TRUST DURING CORONAVIRUS

The renewed importance of political competence

Trust is a vital element of controlling the spread of a pandemic. Our study in Australia, Italy, the UK and the US shows how the public evaluate their political leadership's response to COVID-19.

CLEAN, GREEN AND AFFORDABLE

Striking the right balance between shifting priorities

Packaging in post-Coronavirus times must consider competing tensions: the newly acute emphasis on hygiene, sustainability in the time of climate emergency, and the need to deliver value during a recession.

REPUTATIONAL RESILIENCE

Preparing for future crises

Developed with our Reputation Council, we set out five essential points for building reputational resilience to put organisations in a strong position to tackle corporate communication challenges.

THE US ELECTION

The latest polling on the upcoming election

Joe Biden currently holds the lead over President Trump while a majority approve of Biden's choice of Kamala Harris as his VP. We look at the latest dynamics in the run-up to November's presidential election.

WHAT WORRIES THE WORLD?

Coronavirus concern rebounds in August.

COVID-19 has been the primary preoccupation for individuals, societies and governments around the world throughout this year. This is reflected in our 27-country *What Worries the World* survey: since we began tracking levels of concern about Coronavirus, it has held the top spot over 17 other social and political issues – now for five consecutive months.

Serving as a reminder that Coronavirus is not likely to go away any time soon, August's results show that the proportion of respondents saying that COVID-19 is one of the most important issues facing their country today has increased by 3 percentage points from last month, to 46%. This marks a change in direction from the gradual decline we had been seeing since April.

While Australia, Japan and Malaysia are the countries currently most concerned about Coronavirus, increases in Belgium, France and Germany make it the top issue in these countries once again.

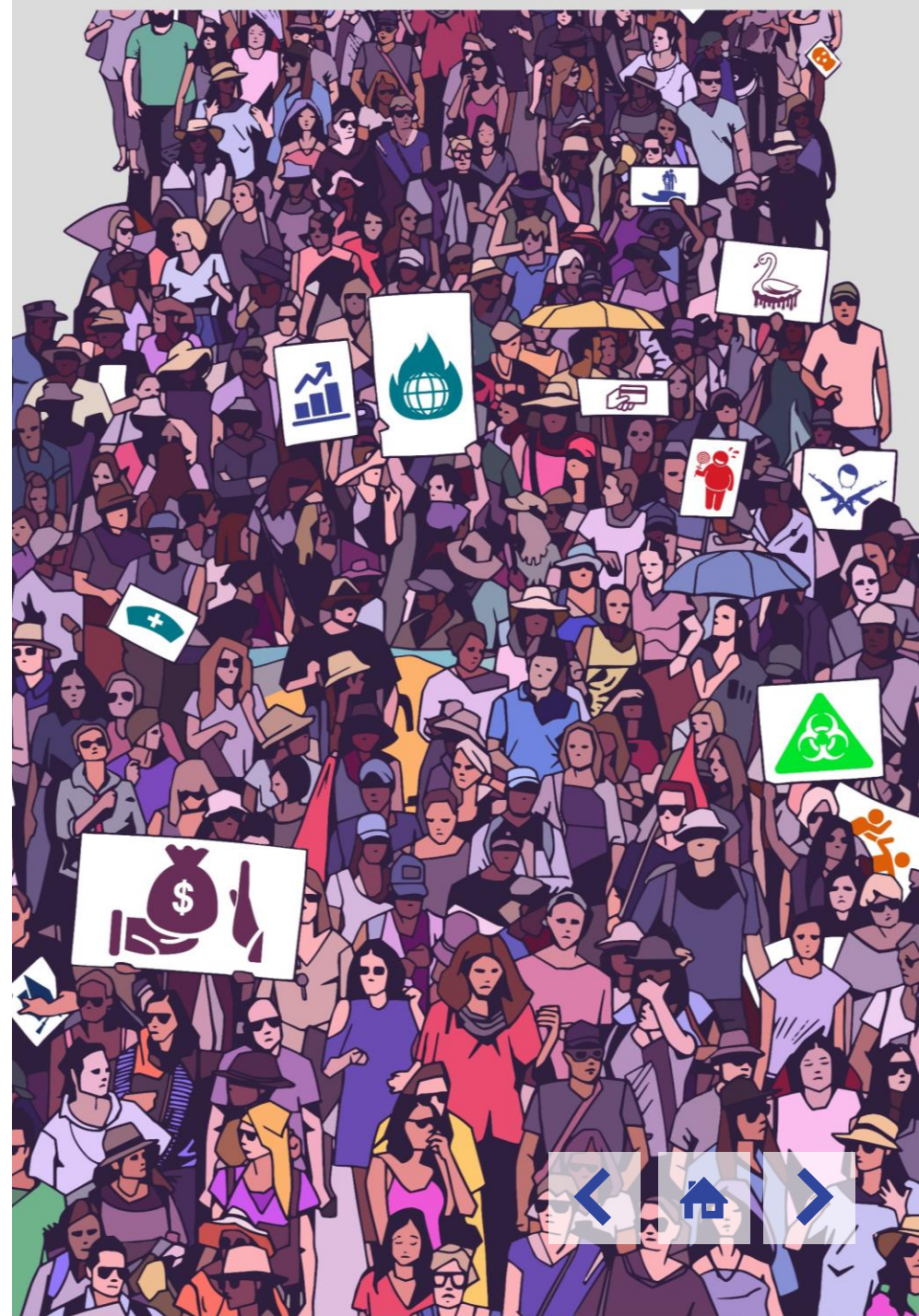
Meanwhile, 61% of respondents globally say that things in their country are heading in the wrong direction. This sentiment is strongest in Chile (84%), South Africa (79%), Hungary (77%), France and Belgium (both 73%).

The top five global concerns in August 2020 are: Coronavirus (46%), Unemployment (40%), Poverty & social inequality (30%), Financial/political corruption (27%), and Crime & violence (24%).

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POLITICAL TRUST DURING COVID-19

We look at what affects public trust and perceived competence in managing the pandemic.

Trust is a crucial element of bringing COVID-19 under control. While the crisis initially produced a 'rally-around-the-flag' effect as citizens sought protection from the authorities, we are now seeing the public making reasoned judgements on how competently their country's leaders have managed the pandemic.

Our report for the TrustGov project and the Museum of Australian Democracy finds political trust in Australia, Italy, the UK and the US is closely connected to each nation's own experience of COVID-19.

Results show perception of the virus as a personal threat to be strongest in the UK (where the rate of deaths per capita was highest at the time) and concerns about the economic threat greater in the UK and Italy (countries subject to tighter containment measures) than in the US and Australia.

But judging political competence is more than assessing threat against outcomes – it relates more broadly to how they managed the process, stakeholders and interests.

Of these four countries, Australia's Prime Minister Scott Morrison scores highest, with 66% of Australians saying he has managed the outbreak competently, followed by Giuseppe Conte (50%), Boris Johnson (37%), and Donald Trump (35%).

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GLOBAL VIEWS TOWARDS ABORTION

Only 5% say abortion should not be permitted.

Our 25-country survey finds that, on average, 70% say that abortion should be permitted. But this is down from 75% in 2016 and is two percentage points lower than when the poll began in 2014.

This figure comprises 44% who say abortion should be permitted whenever a woman decides she wants one and 26% who would restrict this to certain circumstances. Only 5% say that abortion should not be permitted under any circumstances.

The right of women to have an abortion is most widely accepted in Europe, with Sweden (88%), Belgium (87%), France (84%), Great Britain, the Netherlands and Spain (83% in all three) at the top of the list. Meanwhile, support is lowest in Malaysia (24%), Peru (48%), Brazil (53%), Turkey (56%) and India (63%).

Latin America shows lower levels of acceptance: 62% of adults surveyed across the region say abortion should be permitted (eight points lower than the global average). This varies between countries, from 48% in Peru and 53% in Brazil to 72% in Argentina.

Women in general and adults with a higher education show higher acceptance, particularly in saying abortion is a woman's decision.

Another study shows that women in the UK, India and South Africa found [access to abortion services](#) had reduced during COVID-19.

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CLEAN, GREEN AND AFFORDABLE

Finding the right balance between competing demands in packaging.

Ipsos research has demonstrated public concern about sustainable packaging. Consumers recognise their role in avoiding detrimental environmental impacts but expect businesses to take a lead in this. 'Dealing with the amount of waste we create' is a top environmental concern, alongside global warming and air pollution. Meanwhile, "plastic packaging" has increased significantly as a Google search term over the last couple of years.

However, as these attitudes were shaped in a period of relative socio-economic stability, the picture may change as a result of the COVID-19 pandemic. Ensuring hygiene and consumer health is a function of packaging that is now given greater emphasis.

Our research in 14 countries points to a third competing demand: price. When choosing between similar products, almost half say that cost would be a deciding factor, with hygienic and eco-friendly packaging secondary considerations. This supports the theory that changes in purchase behaviour towards more sustainable choices will only happen where there is no compromise to cost.

Our new paper discusses the important factors of sustainability, hygiene and value in consumer packaged goods and includes new claims testing research, showing which messages on product packaging most resonate with consumers.

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CULTURAL BIAS IN RESEARCH STUDIES

When difference doesn't mean different.

Conducting global studies often provides better value for money than carrying out a series of individual country studies and offers a degree of standardisation across markets. However, they remain at risk from an age-old research problem: cultural response bias.

Cultural response bias makes it very difficult to compare results between countries and reliably gauge whether disparities are the result of true differences in the performance measured, or simply due to cultural response styles. However, it does not necessarily follow that comparing results is unreliable.

Looking specifically at customer experience research, our paper provides a fresh examination of cultural response bias. Using Ipsos' newly formed global benchmark database spanning more than 100 countries and 30 sectors, we highlight examples of cultural response bias and how best to address it.

We recommend two ways forward: to calculate and apply a calibration factor to results where it is possible to isolate the cultural bias, or to avoid using absolute scores by focusing instead on rankings vs. competitors.

Carefully considering cultural response bias when setting up or reviewing a research programme allows its impact to be controlled, and for the results to be more reliably interpreted.

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REPUTATIONAL RESILIENCE

How to prepare before crisis strikes.

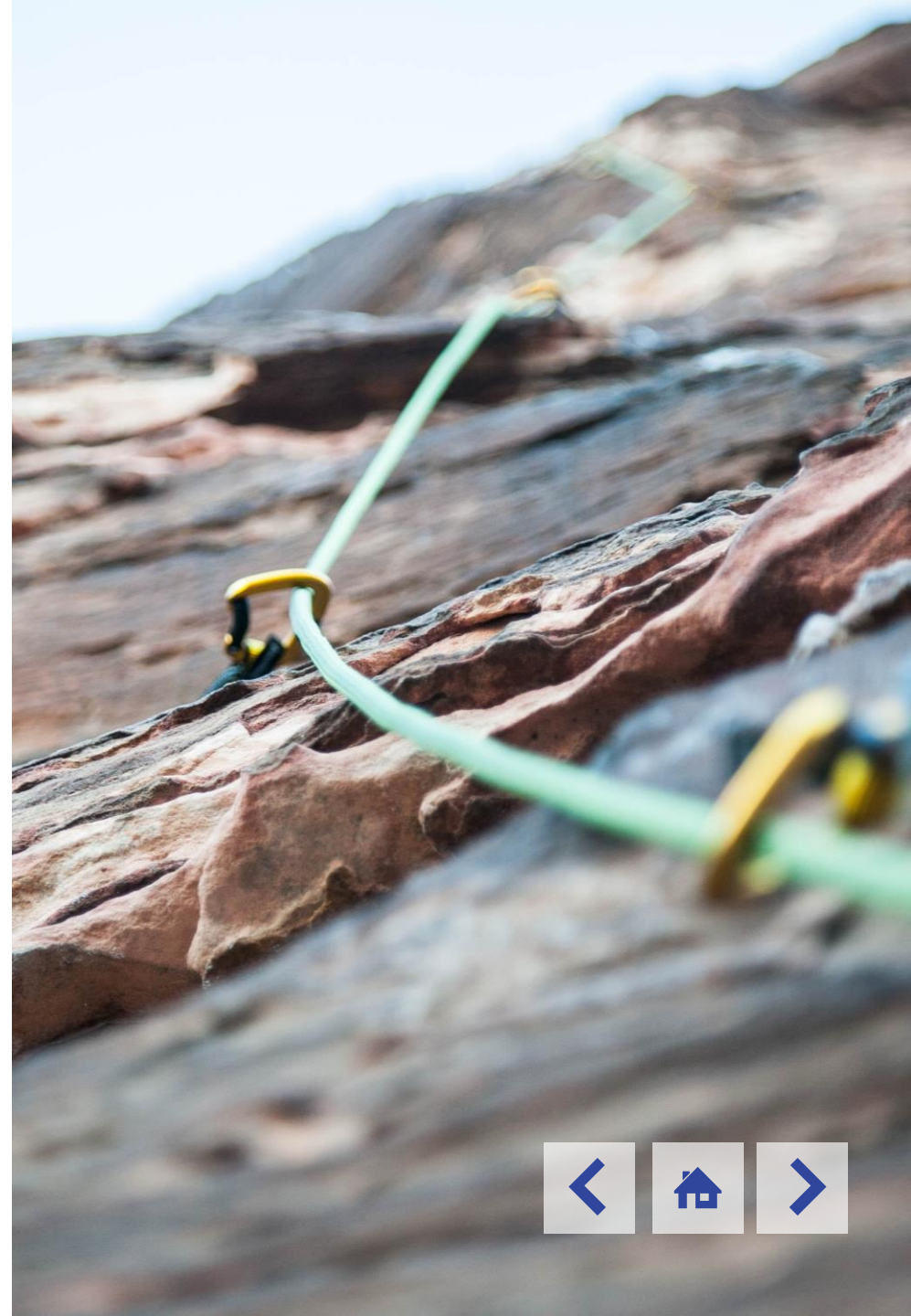
Corporate communication has come into sharp focus in 2020 as organisations have had to respond to the fallouts from the pandemic – some pivoting to support their customers, communities, suppliers and employees, and others making wrong-footed moves that ended up eroding reputation.

One of our Reputation Council members said: “The way we behave and engage with stakeholders during the crisis is going to reframe how we’re perceived when we come out of it”. COVID-19 is certainly the biggest crisis of a generation, but it may not be the last.

More corporate crises are likely to arise, and this unfortunate fact means that organisations must be prepared. By building reputation resilience, they can protect themselves from times of crisis.

Based on further conversations with the Council, made up of 150 senior communicators from the world’s largest organisations, we set out the keys to building reputational resilience, which include:

- Understand and invest in stakeholder relationships.
- Monitor and manage risk.
- Resilience begins at the top.

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RUSSIA TRENDVISION

Creating new possibilities through change.

Our annual report on social and consumer trends in Russia finds that, while a majority (75%) feel they are living in dangerous and anxious times, a similar proportion feel able to change their lives. This sense of hope shows in our international surveys, as Russians are often among the most willing to re-engage with normal life.

A segmentation of attitudes reveals how people across life stages and with different needs have responded to the recent crisis. While parents and older people are more anxious, young people appear susceptible to a negative outlook (life satisfaction at 28% vs. 32% last year), and are more likely to have suffered job losses.

Maintaining a healthy lifestyle is still the priority goal for Russians today (45%), but it has dropped by five points while employment and income (22%) has increased by the same margin.

In order to guide brands as society settles into new configurations, we look at signs of changing values and behaviours across aspects of Russian life such as:

- Physical and digital security
- The importance of humanity, empathy and trust
- The shift to online
- Accelerating vs. slowing down

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THE US ELECTION

A look at the dynamics, trends and latest data in the run-up to November's presidential election.

Our US team's latest election polling shows Joe Biden is holding an eight-point lead ahead of President Trump among registered voters. This is larger than the lead Clinton held over Trump at the same point in the 2016 race, but smaller than the proportion of yet undecided voters (12%), so much can change yet.

Overall, Biden is considered stronger on two of the most important presidential traits according to the US public: helping the nation recover from coronavirus, and restoring trust in the American government (both +11). However, Trump leads on the economy/job creation, the third most important criteria, by six points.

Biden's selection of Kamala Harris as Vice President was looked on favourably by the public: 52% of registered voters approved and 57% considered Harris' nomination a historic moment for America.

Three-quarters of Americans disapprove of delaying Election Day, due to take place on 3rd November. Four in 10 consider this suggestion a political manoeuvre by Trump to give himself a better chance of winning. Meanwhile, there are concerns about election integrity as 68% are concerned about voter suppression (a particular concern among Democrats) and 69% worry about organised voter fraud, especially Republicans.

Hear more about the election in our latest *Inside Track* [webinar](#).

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CORONAVIRUS: LATEST FROM THE COUNTRIES

UK



Ipsos MORI has published three new studies with Kings College London:

- **Coronavirus Uncertainties:** Half of the population (53%) say they would get a vaccine against coronavirus.
- **Living with COVID-19:** 86% say they would find it acceptable for employees to choose where they work.
- **Who is most affected?:** The public are twice as likely to say that the crisis has had a more negative impact on men - despite more women reporting feeling the strain.

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PERU



A new survey on COVID-19 myths and attitudes towards a vaccine finds that 75% of Peruvians would get a vaccine against Coronavirus, if it became available. Opinion is more divided on whether a vaccine should be made obligatory.

Two-thirds of those surveyed (66%) believe the virus was created by people in a laboratory.

Approval for President Martin Vizcarra, now at 60%, has fallen from the 87% recorded after the state of emergency was declared but is still higher than levels seen before the outbreak.

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US



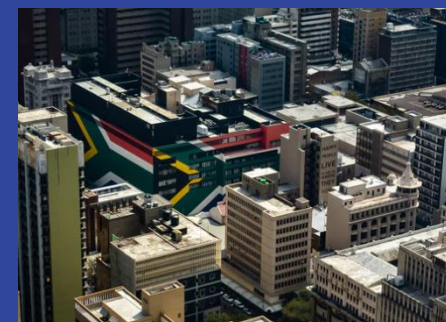
The latest Ipsos-Axios Coronavirus Index finds that 58% of Americans know someone who has tested positive, a new high point, while 22% know someone who has died.

Americans report being more likely to trust what Joe Biden says about coronavirus than President Donald Trump (46% vs. 31%).

While levels of concern with the coronavirus remain high, the perception of risk is somewhat declining. Two-thirds (65%) say that returning to their pre-COVID lives is risky, down from 71% at the beginning of August.

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SOUTH AFRICA



A recent webinar from our South Africa team explores the tension between the economic downturn and the COVID-19 pandemic.

Comparing public opinion against other countries shows South Africans to be more pessimistic about where the country is heading and among the most anxious about resuming normal activities.

The pandemic has negatively impacted an already struggling economy. Over three-quarters state that their job security/salary has been affected, and unemployment is currently the country's top concern.

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SHORTCUTS

SPOTLIGHT ON IRELAND

Our *Perils of Perception* study conducted in Ireland explores the differences between how citizens see the country and the way it really is – looking at the likes of immigration, health and economics.

The results suggest that two of the key issues from February's election, health and housing, may have been seen as more problematic than was actually the case: while 70% of Irish people own their own home, people guessed only 49% did. And fewer people smoke and drink than the public estimates – by considerable margins (23 and 21 points).

In other findings:

- The Irish are happier than they think: 86% describe themselves as content, higher than the average guess of 55%.
- The urban/rural divide may be overstated, as the public think 41% of the population lives in Dublin, but the actual figure is 28%.

The survey also looks more closely at how Coronavirus may have distorted perceptions of risk. In relation to other health concerns, the Irish are more than five times more concerned about catching COVID-19 than they are about having a heart attack, and three times more concerned about this than being in a car accident.

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NATION BRAND INDEX

The 2020 Ipsos-Anholt Nation Brand Index report focuses on perceptions of how well countries have handled the Coronavirus health crisis to explore the reputational impact and prospects for the tourism industry.

It shows that good governance in this respect is key to a country's positive international reputation, and attractiveness as a travel destination.

Domestic tourism looks to be a more popular option in the future: understandably, people in 19 of the 20 countries surveyed would be more comfortable travelling within their own borders than internationally.

But many are still open to international travel. Germany, Switzerland, Canada, New Zealand and Japan are the countries with the greatest appeal as travel destinations, based on their handling of the health crisis.

Meanwhile, the United States ranks last out of the 50 measured nations in net favourability for its handling of healthcare crises.

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PODCASTS & WEBINARS

Ipsos continues to present our latest research and analysis on a range of topics through webinars and podcasts. Below we share some recent recordings and future events:

- We discuss how cultural differences directly and indirectly influence responses to COVID-19 in different countries with Oliver Sweet, the Head of the Ipsos Ethnography Centre of Excellence in the UK. Find more *Insight Out* episodes on qualitative research.
- One in four kids in the US are now listening to podcasts as the emerges as a new parenting and educational tool. Find more from our Kids & Family Study in our 15th September webinar.
- How can we use social data to stay relevant to consumers in South-East Asia? Watch our webinar recording.
- Building on our series of global webinars on Coronavirus, we will be discussing the latest on the pandemic in the first event of a new series on 10th September. Register for Session 1 or Session 2.

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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.

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