

# IPSOS UPDATE

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

October 2020

# WELCOME

Welcome to the October 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

## DANCING WITH DUALITY

Brand growth in a mindful and mindless world

Ipsos' understanding of how brands grow is grounded in the latest scientific thinking about how people make decisions in today's environment, as we are presented with more choices than we can often manage.

## TAKING A STAND

Corporate communications in the age of COVID-19

Companies will be an integral part of the recovery process of the crisis. Case studies from France, Japan and the US highlight how the public perceive companies in the context of the current global pandemic.

## THE FUTURE OF MONEY

Are we ready for a cashless future?

Real or virtual, hard cash or crypto coins, money will always be power. The question is, how much of that is shifting, in what directions and how quickly? Our new *What the Future* publication explores the topic of money.

## FRENCH FAULT LINES

The divisions cutting across French society today

The 2020 edition of our annual report finds a particularly pessimistic French public: 78% say that the country is in decline. We find a demand for authority alongside high levels of mistrust, and concerns on many issues.

## BIGGER INNOVATIONS NEED BIGGER DATA

How to identify the gaps *and* the solutions

Innovation research has long shown "lead users" to be the real pioneers. Read the latest on our Innovation Spaces methodology and how it helped to discover new healthcare products to meet emerging needs.

## MARKETING IN CHANGING TIMES

Reassessing the eight motivators of purchase

How people buy a brand may change over time, but *why* people buy a brand is less likely to change. This article considers the fundamental motivations of purchase in the context of COVID-19.

## WHAT WORRIES THE WORLD

How has Coronavirus shaped concerns?

September's *What Worries the World* results confirm COVID-19 as the top concern for six consecutive months while Unemployment worry runs at elevated levels. Six in 10 globally say their country is on the wrong track.

## THE IMAGE OF THE UNITED STATES

A chequered balance sheet

How the US is seen around the world is the focus of a new 29-country survey. The strongest aspect of America's image is its powerful economy; the country's ratings are lowest on respect for its neighbours.



# DANCING WITH DUALITY

Achieving brand growth in a mindful and mindless world.

Our world presents more choices than we can manage, with more brands and products becoming available through more tech-enabled channels. This offers the benefit of access to almost anything, presenting people with all manner of options.

Ipsos' understanding of how brands grow, presented in our new brand narrative, is grounded in the latest scientific thinking about how people make decisions in this environment.

While brand choice is often more *mindless*, making use of shortcuts, this doesn't paint a full picture. In many cases, more *mindful* choices take over – triggered by context, motivations, emotions, values, or past experiences.

We as whole people are engaged with our decisions, so how we choose products and brands is complex and nuanced. We do not only respond either automatically or deliberately, but the choices we make fall along a mindful to mindless continuum.

With this knowledge of how brand relationships form and choices are made, we are in a better position to influence them. Ways for brands to design successful strategies to connect with consumers include: stage an intervention, be unique, deliver on promises and “measure up” against consumers' functional and emotional goals.

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# BIGGER INNOVATIONS NEED BIGGER DATA

Using consumer “signals” to identify new Innovation Spaces.

Innovation research has long shown that it is the “lead users”, not companies or manufacturers, who are the real pioneers. They are ahead of market demand, discovering new products and services.

During COVID-19, we have seen a huge number of new user innovations gain wide public interest: people have created ventilators from scuba diving equipment or espresso machines out of frugality and necessity. They have also come together through the web to collaborate and find solutions to emerging needs.

Ipsos’ new Innovation Spaces methodology applies semantic AI algorithms to user-generated social data. This improves the efficiency and expense of identifying commercially promising lead user innovation whitespaces in the wide field of consumer goods.

Our initial academic proof of concept uncovered product innovations in the kitesurfing domain. More recently, we looked at product innovation in cold and flu management. With three years of social data, we could map existing and emerging needs (e.g. natural, immune boosting products) and discover some innovative user solutions (e.g. a rollerball nose decongestant).

User-led early innovation research offers new opportunities for a truly consumer-centric corporate innovation strategy.

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# TAKING A STAND IN THE AGE OF COVID-19

A corporate communications perspective.

Companies will be an integral part of the recovery process from the crisis the world finds itself in today. Featuring case studies from France, Japan and the US, this new *Ipsos Views* paper from our Corporate Reputation team explores the perception of companies within the context of the current global pandemic.

With people relying on companies to contribute to the recovery, we also set out some specific suggestions for companies taking a stand:

- **Above all, be relevant and authentic:** A position which is aligned with a strong social purpose that is true to your values can bring benefits beyond the purely altruistic – creating a real connection with customers, helping to attract the best talent and leading to better engagement with influencers.
- **Practice what you preach:** Any stance will lack credibility if the business cannot show a track record of action. If you are taking a stand on diversity, you must be sure you measure up within your own business.
- **Understand the risks:** Taking a bold stand will be inherently divisive, but if an issue lies at the heart of your corporate purpose, then not speaking out may be the bigger risk.

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# MARKETING IN CHANGING TIMES

Reassessing the motivators of purchase in the context of COVID-19.

The COVID-19 pandemic is a unique event that marketers, like all of us, are experiencing for the first time. Planning for brands during these extraordinary times presents a real challenge and requires new tools and strategies for success.

While we agree that *how* people buy a brand and the context of purchase may change over time, what does not change is *why* people buy a brand. Most brand purchase behaviours can be linked back to one of the same fundamental motivations.

In this article, we make a case for marketers to:

- Be mindful of the basic human motivations that influence brand purchase and consumption.
- Adapt brand messaging to reflect the changing times while staying true to the basic motivation that the brand fulfils.

Using the Ipsos Censydiam framework, we highlight the eight basic human motivations that influence brand purchase. We also review how brands are adapting their messaging during the COVID-19 pandemic to address these basic motivations, showcasing several examples.

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# THE FUTURE OF MONEY

## Our evolving relationship with money.

The pandemic has likely accelerated pre-existing conditions in the financial world: most importantly, a shift to digital transactions, virtual currencies and a fundamental need to connect at-risk populations to financial services that allow them to save, build wealth, and take part in the economy. Whatever the economy may look like on the other side, many of these trends will remain.

The latest edition of our *What the Future* series explores the future of money with insights from new global data and perspectives from key industry figures. It includes chapters on:

- **Cryptocurrencies:** Despite the potential to become the equivalent of a de facto global currency, critical barriers to cryptocurrency adoption include trust and familiarity – both of which favour traditional banks.
- **Financial inclusion:** 89% of Americans use a bank, but this figure is lower for younger and Black and Hispanic people. We look at financial participation in an increasingly digital world.
- **The gig economy:** With more earning at least part of their income through contract work, how can financial services help people find stability – especially during the pandemic.

For more on these topics, watch our [Future of Money](#) webinar.

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# WHAT WORRIES THE WORLD?

Six months of data reveal how Coronavirus has shaped concerns across 27 countries.

Throughout the pandemic, we have been reporting that Coronavirus has claimed the title of the world's greatest concern in our 27-country *What Worries the World* survey. Since we began tracking levels of the virus against 17 other existing issues in April 2020, it has maintained top position month after month. September's results are consistent: 45% of people globally say that COVID-19 is one of the biggest issues facing their country today.

Nations in the Asia-Pacific region appear to be most concerned about Coronavirus in September, with South Korea (72%), Australia (63%), Japan (60%) and Malaysia (58%) heading the rankings.

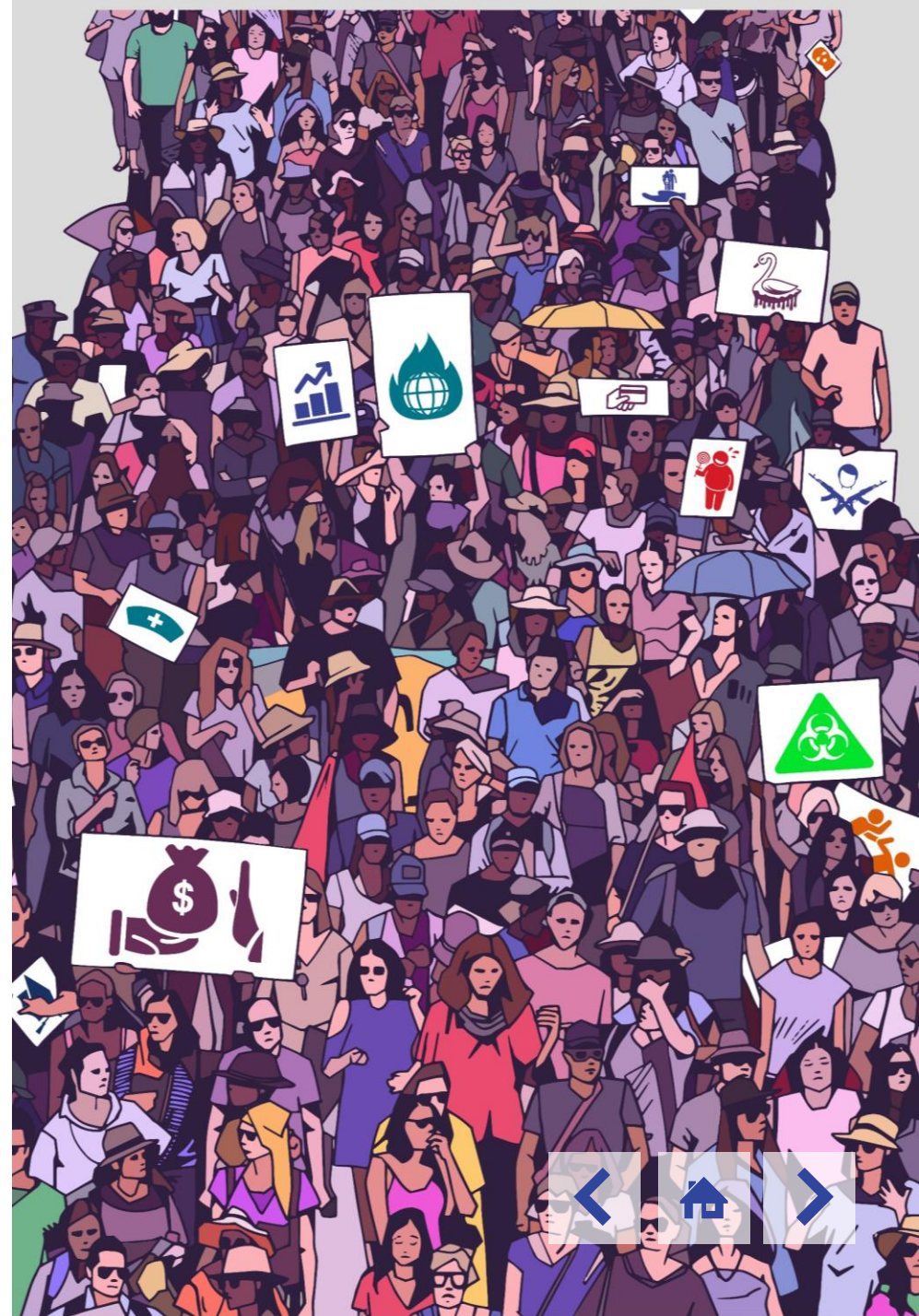
With six months of data, we can see some trends emerging in an unstable reality – even if it is too early to see what the “new normal” setting might look like. Issues such as Poverty & Social Inequality appear to be restoring to pre-pandemic levels. However Unemployment is recording greater levels of concern than we had been seeing over the previous 12 months.

Across the 27 nations, more than six in ten (62%) say that things in their country are on the wrong track. The countries where even larger majorities share this negative outlook are South Africa (86%), Belgium (78%), Chile (76%), Spain (74%) and France (73%).

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# FRENCH FAULT LINES

The people of France assess the nation in 2020.

Pessimism is the rule in France and optimism the very rare exception, but this year the nation's mood is particularly gloomy: 78% agree that France is “in decline” (up 5 points since last year) and the public is divided on whether this decline is reversible.

The COVID-19 epidemic is the issue of the day, with nearly half (49%) expressing concern – rising to 61% of those over 70 years old. Bread-and-butter issues such as purchasing power (39%), the welfare state (37%) and rising inequality (23%) feature on the list of French preoccupations. Meanwhile, 36% are concerned about the environment – rising to 42% among those under 35. Crime/law and order is also matter of concern for 36%, but this time more so for people aged 60+ (52%).

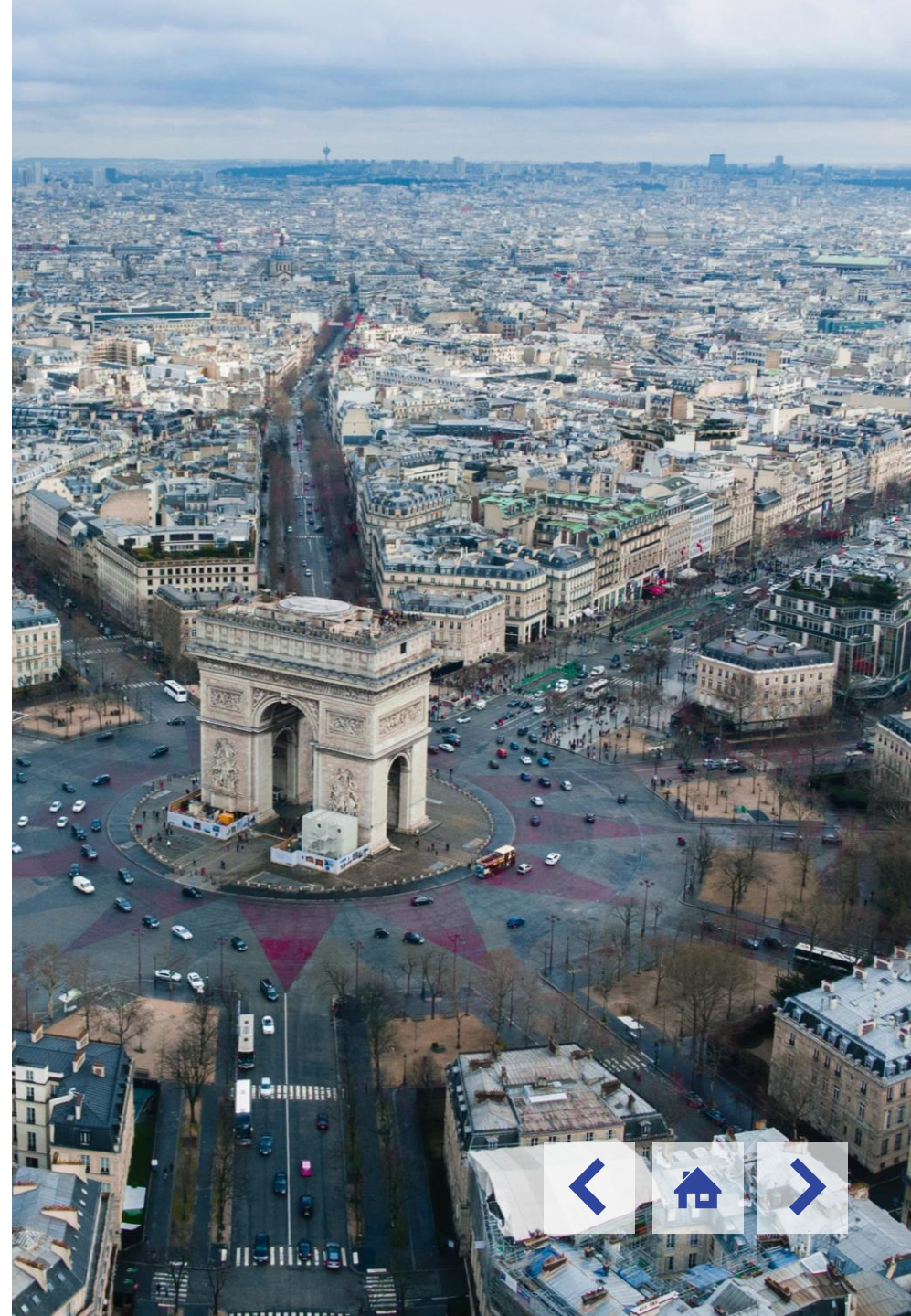
A strong demand for authority emerges from this survey: 88% agree that “authority is too often contested”. Yet the French also show very little trust in those occupying positions of authority: 12% think that decisions made by “elites” are generally in the public's interest, and half (51%) think that they even make decisions which they know to be against the interests of a majority.

Less than half of the French public trust large businesses (47%) or banks (40%), but fewer trust the media (24%) or political parties (11%). And although there is majority support for a more participative and deliberative democratic process (57%), we find eight in 10 agreeing that “France needs a true leader to restore order”.

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# THE IMAGE OF THE UNITED STATES

## A chequered balance sheet.

How the US is seen around the world is the focus of a new 29-country Ipsos Global Advisor survey. Participants were asked to rate America's performance on 13 different topics.

First and foremost, people around the world see the US as an economic powerhouse. The country's strongest image ratings are for "having a strong economy", with 48% saying it is above average, compared with 19% who give it a below average score. This +29 rating for the economy is accompanied by a +17 balance for "contributes to the global economy", +13 for "its people have a good standard of living" and +9 for "is a good country in which to invest".

At the other end of the spectrum, the US is in negative territory when it comes to "respects its neighbours and other countries" (-34), "respects human rights" (-24) and "contributes to peace and cooperation" (-22).

Americans tend to see their country in a more positive light than do their fellow-world citizens. Across the full basket of measures, US respondents award it a mean score of +22. But four countries give the US even higher ratings than Americans do themselves: India (+34), Poland (+29), Israel (+27) and Brazil (+22).

Meanwhile, the British give the US an average score of -22, with America's neighbours in Canada more critical, at -29. Most negative of all are the Netherlands (-42), Belgium (-41) and Germany (-37).

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# COUNTDOWN TO NOV 3<sup>rd</sup>: THE US ELECTION

## THE ISSUES



The presidential debates began against the backdrop of new FiveThirtyEight/Ipsos polling which found COVID-19 (32%) and the economy (22%) to be the most important issues facing the country.

Those who think the coronavirus outbreak is the main issue prefer Biden to Trump by a margin of almost three-to-one.

But among people who think the economy is the main issue, there is a preference for Trump over Biden by a two-to-one margin.

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## A GUIDED TOUR



Every week, Ipsos' Cliff Young provides a guide for followers of the US election. His latest piece reminds us to be careful in our reading of the latest numbers.

The mixed signals ahead of us include a Biden lead in some key swing states, set against fairly resilient approval ratings for Trump.

The death of Justice Ginsburg is not expected to have a major impact on the election, regardless of its longer-term impact on the Supreme Court.

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## ADVERTISING



In election season, ads are swimming in a sea of political campaign messages across every channel. What to do?

We exposed US respondents to test ads in two sets of contexts, one in a "standard" environment, the other composed of a variety of political ads from both sides of the ideological spectrum. Our research finds that brands can still break through in a heavily political environment, and at the same level as any other time on the calendar.

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## MORE UPDATES



Check the [Ipsos US](#) website and [Twitter feed](#) for the latest polling and analysis on the campaign.

For a deeper breakdown of the election landscape, including candidate by candidate comparisons, please visit the [Political Atlas](#), an interactive forecasting tool co-developed by Ipsos and the UVA Center for Politics.

For a pre-election briefing, join us at our final webinar of the campaign on [29th October](#).

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# SHORTCUTS

## BRITAIN'S ROLE IN THE WORLD

As we near the end of the Brexit transition period, an Ipsos poll for EU | UK Forum looks at the future of Britain's relationship with the European Union and finds the British public are losing confidence in their country's position and influence in the world.

Just under half of Britons (49%) believe that Great Britain is a force for good in the world, down 10 points since April 2019.

The study finds that 38% believe that Britain should stop pretending it is an important power in the world (up five points on the previous reading). Despite this, more say that Britain should increase its influence around the world than reduce it (36% vs. 16%).

Europe remains Britain's most important relationship for four in 10, but half as many (two in 10) select the Commonwealth or the United States instead. A majority think maintaining a close relationship with the European Union is important despite Brexit, but only 39% think that is likely now, down 13 points since April 2019.

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## ROMA & TRAVELLERS

An Ipsos study for the European Union Agency for Fundamental Rights highlights the poverty and discrimination experienced by Roma and Traveller families in Western Europe (Belgium, France, Ireland, the Netherlands, Sweden and the United Kingdom). Some of the findings include:

- The life expectancy of Roma and Travellers is around 10 years lower than in the general population.
- A quarter of Roma and Traveller children live in households that cannot afford to pay for essential living costs, such as nutritious food, heating, or rent.
- Two-thirds of Roma and Traveller children leave school with only lower-secondary education.
- Around one in 10 Roma or Travellers reported discrimination when accessing healthcare in the last year, while 36% of Roma or Traveller men cited their health as a reason for not seeking work.

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## IPSOS PODCASTS

The second season of *[Insight Out](#)*, a podcast from Ipsos UU, continues with special guest host, Cristina Craciun, Ipsos UU's LATAM Transformation Leader, talking with Tania Caro, videographer from Ipsos UU Chile, about how the power of video can reveal deep human insights needed to humanize business.

They discuss how video can make ideas travel faster, engage your audiences and generate empathy, by illuminating stories that could otherwise remain unasked and untold.

Meanwhile, the latest edition of *[Customer Perspective](#)*, the Ipsos podcast on all things related to customer experience, sees Jean-Francois (JF) Damais, our CX Chief Research Officer at Ipsos, leading the conversation about delivering a Return on CX Investment (ROCXI). Giving practical steps and examples, this builds on the previous week's discussion with Matt Cahill from McDonald's about the importance of defining the end business goal and the power of analytics in making a case for CX improvements.

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# CONTACT

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](mailto:IKC@ipsos.com) with any comments, including ideas for future content.

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