IPSOS UPDATE

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

November 2020

Ipsos Knowledge Centre

GAME CHANGERS

Ipsos

WELCOME

Welcome to the November 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.

IN THIS EDITION

STAYING AFLOAT IN TIMES OF CRISIS
Surviving in the 'No Normal'

We review the key findings (so far) from our research during the pandemic and explore how brands can respond to this multi-dimensional crisis. Central to our analysis are the particular experiences of different countries.

GLOBAL HAPPINESS IN 2020
Many people are staying happy during COVID-19

Across 27 countries, over six in 10 say they are happy today. The sources of happiness that have gained in importance during the pandemic era relate to relationships, health, and safety.

TAILORED FOR SUCCESS
Exploring personalised digital creative

A study on the impact of personalised banner advertising provides new evidence for those targeting particular audiences. We look at whether personalisation can better grab attention and grow brand relationships.

DATA DILEMMAS IN INDIA
A growing unease among connected Indians

A new Ipsos briefing paper looks at the conflict between the affinity people in India have for digital technology and their salient data anxieties today. We look at what this means for brands offering digital services.

TRUST MISPLACED?
The future of trust in media

In collaboration with 'The Trust Project', a new Ipsos report explores the factors affecting media trust and truth, including access to and affordability of quality news, technological changes and disinformation campaigns.

NATION BRAND INDEX
The international image of 50 countries ranked

Germany is held in high esteem internationally achieving the top 'Nation Brand' ranking for the fourth year running. The reputation of the US, China and some others take a hit in 2020.

PICTURES SPEAK LOUDER THAN WORDS
Towards a new understanding of brand choice

Ipsos' new 'metaphor elicitation' technique can uncover implicit drivers of brand choice and provide data that reflects how people really think and feel about products and brands, in their own words.

DRIVING QUALITY
Connecting quality satisfaction and customer loyalty

In the automotive sector, quality and loyalty move together. We share new evidence that the more satisfied a customer is with vehicle quality, the more a brand will enjoy a host of positive business outcomes.

STAYING AFLOAT DURING A CRISIS

How are we surviving in the 'No Normal'?

COVID-19 is a unique crisis, not only in terms of implications for health, but also the associated financial pressures. Six months into the pandemic, we found that one in two globally have been directly impacted by (or concerned about) at least one of these aspects.

In February, Ipsos began tracking the impact of the pandemic on consumer behaviour, attitudes and future outlook. Our survey has expanded to cover 16 countries and incorporates a longitudinal global ethnographic study for a balanced understanding of the crisis journey. Our white paper, *Staying Afloat During a Crisis*, reviews some of the key findings from our research during the pandemic – and how brands can respond to this multi-dimensional crisis.

The pandemic is playing out in a context of social upheaval and environmental degradation. Across 16 countries, concerns are split between COVID-19/Health (32%) and the Economy/Finances (33%) with Political/Social Inequality a significant part of the picture (22%). But, in Germany, the US, South Africa and France in particular, political and social issues assume even greater importance. For many people, these complicated dynamics are manifesting as a lack of control.

Our analysis brings together additional perspectives from behavioural science and some of the countries worst hit by the virus, including Brazil, Italy and the US.

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CORONAVIRUS SPOTLIGHTS

BRAZIL

Brazil's pandemic experience has been marked by high numbers of cases and deaths. Conflicting messaging from federal, regional and local governments plus the unstable position of the Minister of Health (changing three times at the peak of the pandemic) has added to the country's sense of confusion.

Out of 16 countries, we found Brazilians were among the most likely to report suffering anxiety and insomnia during COVID-19.

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ITALY

The outlook of Italians is more positive on a personal level than for the country as a whole. The Italian National Statistics Bureau is currently projecting a -14.3% decrease in Italy's GDP in the aftermath of the pandemic.

One emerging impact of the crisis is that it is exacerbating gender gaps: an estimated 70% of those returning to work after the end of the lockdown period were men. Meanwhile, 400,000 women have lost their jobs.

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SOUTH EAST ASIA

Nearly 11 months since the outbreak of COVID-19, the people of Southeast Asia remain concerned about contracting the virus and report impacts on their physical and mental health.

Income outlook is most positive in Vietnam and we see some improvements in Indonesia and the Philippines. However, across the six countries studied, many are still living in "cautious mode".

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US

America has failed to respond to the pandemic in a unified way. Prior to COVID-19, the country was already experiencing fundamental changes to conventions and norms. Ipsos dubbed this era of American life the "Age of Uncertainty", notable for its declining trust in institutions, rising tribalism and political polarization. Evidence of this continues – with mask-wearing sharply divided along partisan lines, for example..

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TRUST MISPLACED?

A report on the future of trust in media.

Ipsos has collaborated with The Trust Project to identify and explore the key factors influencing the future of trust and truth in the media today. These include nationalist and populist sentiment, access and affordability of quality news, technological changes, and ongoing disinformation campaigns.

Trust Misplaced? references Global Advisor data from across 29 countries to highlight the public opinion that underpins these topics as it explores people's attitudes and experiences with media. The report also features a series of interviews with Ipsos leaders and publishers from Trust Project member organisations, discussing the survey findings and examining the conditions on the ground in local markets.

Key takeaways from the research include:

- **Finding trustworthy content:** More than eight in 10 people say they make sure the news they read, watch or listen to comes from trustworthy sources.
- **The "Fake News" problem:** Findings reveal we are roughly twice as confident in our own ability to spot fake news (59%) as we are confident that others in our country can (30%).
- **How much are we willing to pay?** 67% of adults say they only read news they can access for free and only 27% say are willing to pay for news from sources they trust.

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GLOBAL HAPPINESS IN 2020

Despite the COVID-19 pandemic, levels of happiness around the world have not dropped significantly.

Our 27-country survey finds that 63% of people say they are happy today, almost unchanged on last year's 64%.

But there are some significant shifts in many countries. Canada and Australia, last year's leaders in happiness, register a notable drop in 2020 as Canada falls to fourth place and Australia to sixth. Both countries still have over three-quarters (78% and 77%) maintaining that they are 'very' or 'somewhat' happy.

Levels of happiness have declined dramatically in Peru (-26 points) Chile (-15) Mexico (-13), India (-11) the United States (-9) and Spain (-8). On the other hand, it has increased by more than eight points in China, Russia, Malaysia and Argentina.

From a list of 29 potential sources of happiness, people say they are most likely to derive "the greatest happiness" from their health/physical well-being (selected by 55% globally), their relationship with their partner/spouse (49%) and their children (49%). Other important factors include 'feeling life has meaning' (48%) and 'living conditions' (45%). By contrast, 'time spent on social media' is far less impactful for how people feel about their lives (11%).

In the pandemic era, the sources of happiness that have gained in importance globally relate to relationships, health, and safety.

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TAILORED FOR SUCCESS

Measuring the value of personalised digital creative.

This paper looks at personalised digital creative and its impact on attention and brand measures in different categories. This case study looks at banner advertising for food and coffee in the UK and forms part of a research programme developed by an Ipsos and Nestlé partnership.

In this first pilot project, we learned that individual personalisation can have a positive impact on the brand relationship with some target audiences. People are more likely to agree that ads with higher levels of personalisation are informative and something they will talk about.

The higher the level of personalisation, the more granular the message delivery tends to be. Marketers need to consider whether to communicate a broad message and therefore personalise less, or a more complex message and personalise more.

This paper explores key questions for advertisers when embarking on a personalisation journey:

- What is the cost implication of different levels of personalisation?
- Which audiences do you want to reach and how do you design layered campaign messages for them?
- Do you lead with creative objectives or tailored ones?

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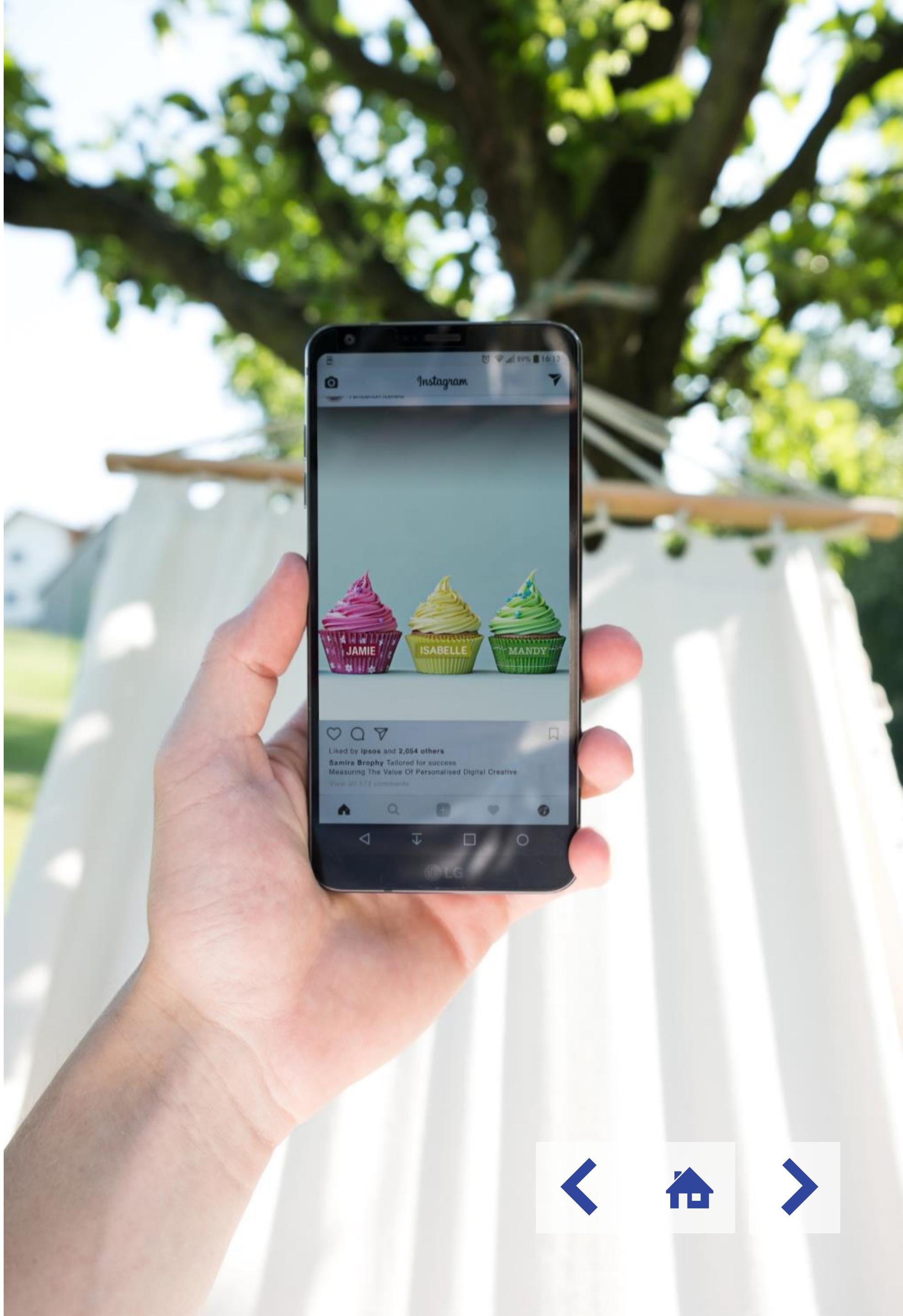

PICTURES SPEAK LOUDER THAN WORDS

Towards a new understanding of brand choice.

Traditional quantitative research has relied heavily on stated responses, often using long lists of attributes. While there is still room for this kind of measurement, it does not always adequately capture people's less conscious needs.

Decision-making is often influenced by intuition, so it is important to identify less conscious desires as well as the mental shortcuts people use when considering brands.

Ipsos has developed a new "metaphor elicitation" technique to uncover these implicit brand choice influencers. This builds on the traditional survey to capture non-conscious decision-making in a way that is efficient, scalable, and accessible.

Metaphor elicitation can capture important implicit drivers of brand choice. The projective technique helps respondents to avoid over-rationalization and provide more intuitive responses. It also generates a deeper, more granular understanding of emotional benefits and provides rich data that reflects how people really think and feel about products and brands, in their own words.

By getting a truer consumer-centric measure of influence, marketers can better position their brands, optimize their portfolios and uncover innovation opportunities.

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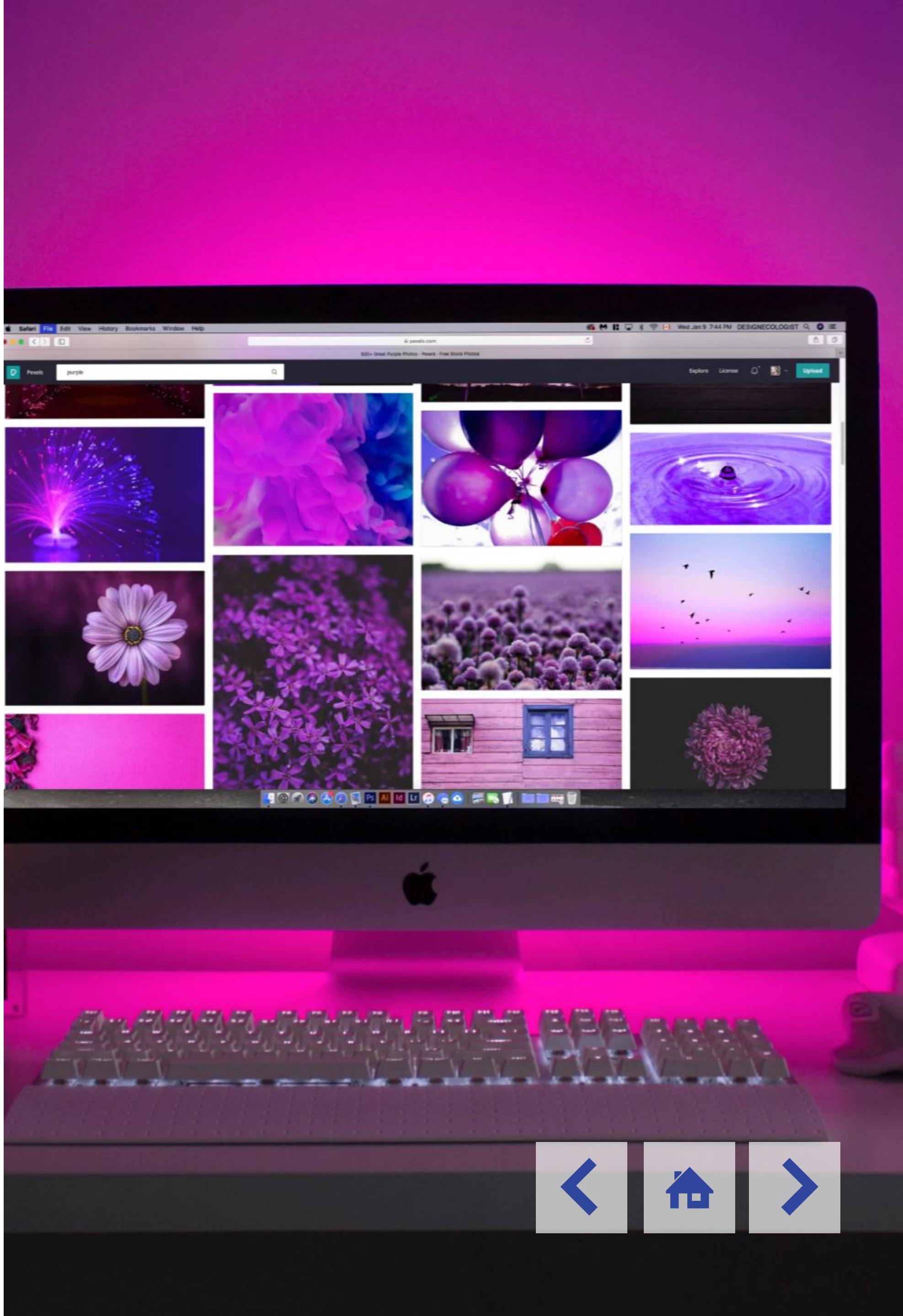

DRIVING QUALITY

Quantifying the connection between quality and loyalty in automotive purchase.

Most people intuitively recognise that delivering great quality vehicles is a top value priority for automotive manufacturers. But there is always a need to demonstrate the bottom-line impact. Ipsos has been integrating data from quality tracking and customer loyalty over time to show how vehicle quality satisfaction contributes to long-term profitability.

Improved quality ratings result in a host of positive impacts. Customers satisfied with vehicle quality are more likely to:

- Be loyal
- Incur lower costs
- Spread their positive experience through word of mouth
- Pay a premium for great quality vehicles

Looking at *why* people choose a vehicle, 'quality' is the most common reason given, while reliability, familiarity and reputation are also important purchase considerations. People are more likely to switch car brands if they experience problems with a prior vehicle. Understanding these "Things Gone Wrong" is critical for improving customer satisfaction and retention.

Our findings confirm that quality and loyalty move together. The more satisfied a customer is with vehicle quality, the more a brand will enjoy a host of positive business outcomes.

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DATA DILEMMAS

A growing unease among connected Indians.

In our new briefing paper on India, we look at the affinity Indians have for digital technology, their salient data anxieties and the conflicting mindset this creates. We also highlight the implications of this mindset for brands – especially those which offer digital services.

Key takeaways include:

- **The social media dilemma**: Research shows Indians are particularly distrustful of social media platforms. However, this doesn't seem to be a barrier to entering the digital world – social media users in India have more than doubled in the last five years from 168 million in 2016 to 376 million in 2020.
- **Fears of financial fraud**: Though banks and financial institutions are well regarded when it comes to data protection, there is still considerable anxiety about the potential of a material loss – including worries about theft of critical financial information - while conducting cashless transactions, especially online.
- **Big brother complex**: Reliable data is the critical foundation for e-governance and efficient implementation of many welfare schemes, but the extensive data collection and data integration that the government bodies are undertaking is a great source of unease.

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NATION BRAND INDEX

The international image of 50 countries ranked.

Germany retains top position in the 2020 Anholt-Ipsos Nation Brands Index (NBI) for the fourth year in a row, enjoying the strongest international reputation of 50 nations measured. Great Britain rises from fourth to second position, ahead of Canada.

Germany's leading advantage is its consistent strengths across multiple categories, particularly exports, immigration, investment, culture, and governance. People from around the world feel positive about buying German products, consider Germans to be employable, and see the appeal of investing in German businesses, placing Germany first in all three categories for 2020.

This year sees shifts in the rankings as the perceptions of certain nations take a hit. France has slipped three positions from second place in 2019 to fifth in 2020. The US (which has held NBI's top spot on seven occasions – most recently in 2016) continues to fall in the rankings, down from sixth place to tenth this year. The United States' decline is driven by souring public opinion in areas including governance, people and tourism. Meanwhile, China has remained stable over the past four years, but falls 12 positions to 35th place this year.

Australia and New Zealand both have the highest rankings ever recorded for their countries, moving up by two positions each: Australia becomes the nation with the 8th strongest image while New Zealand takes number 12. It is possible that their handling of the global public has positively impacted their global standings.

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CITIES AND INFRASTRUCTURE

INFRASTRUCTURE INDEX

Eight in 10 people around the world believe that investment in infrastructure will create new jobs and boost their countries' economies in the wake of the coronavirus pandemic, according to Ipsos' latest Global Infrastructure Index.

On average, 43% of the public across all nations are satisfied with their country's infrastructure (including road, rail and air networks, energy, water, broadband and communications). Water supply/sewerage and solar energy infrastructure are the top two investment priorities.

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LIVEABLE CITIES

A report by the European Commission using Ipsos research across 83 European cities presents city-dwellers' experiences and opinions on urban life. Findings include:

- Nine in 10 are satisfied living in their city.
- Many worry about jobs and housing – only two in five think it is easy to find a job in their city.

Another report on [London and Paris] compares the residents' perceptions of their cities on the eve of the pandemic.

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ATTITUDES TOWARDS 5G IN EUROPE

Almost all Europeans have heard about 5G, however only one in four claim to have a good understanding about it. An Ipsos survey in 23 European countries looks at the public view of 5G, including awareness, understanding, myths and benefits.

- A majority (54%) feel positive towards 5G while 10% have a negative view.
- People are more likely to say 5G will be important for business and future innovations than for their personal day-to-day lives.

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US PRESIDENTAL ELECTION

THE GLOBAL VIEW

An Ipsos' Global Advisor survey (conducted September 25-October 9) finds that, if people outside of America could vote in the 2020 US presidential election, 48% would cast a ballot for former Vice President Joe Biden. By comparison, 17% would choose incumbent President Donald Trump. We find greatest support for Biden in Sweden, Belgium, Mexico, Germany, the Netherlands and Canada.

Across the 24 countries, 39% expected Biden to win while 27% thought that Trump would be re-elected.

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BRAND BIDEN VS. BRAND TRUMP

What happens when we use the latest commercial brand measurement tools to assess Brand Biden and Brand Trump? We looked at the candidates through a different lens, measuring closeness through Attitudinal Equity and mapping what the public associates with the two contenders using our Brand Mental Networks approach.

It finds strong intensity - both positive and negative - around Brand Trump, illustrating how he has strong supporters *and* opponents. On the other hand, the more muted Brand Biden carries a slight equity advantage.

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THE LATEST ANALYSIS

At the time of writing, millions of Americans have already cast their votes, but the result of the election was as yet unknown. To provide context to the campaign and its aftermath, our US team set out some of the key election dynamics including (of course) coronavirus, demographics such as white suburban women, and the role of mail-in votes.

Watch our latest monthly webinar on American politics and find the latest polls, reports and coverage on the Ipsos US website.

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THE ECONOMIC CLIMATE

GLOBAL CONSUMER CONFIDENCE INDEX

Ipsos' Global Consumer Confidence Index is the average of each of the National Indices of 24 world markets, covering the public view on expectations, jobs, and investments

At 42.2, the latest Index continues to show gains after bottoming out in June. However, it remains 6.4 points lower than its pre-pandemic level and nearly five points lower than its historic average spanning over 10 years.

The Expectations Index is up significantly in 18 of 24 countries, but the Jobs Index remains relatively flat.

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WHAT WORRIES THE WORLD?

Our *What Worries the World* survey, which tracks levels of public concern on topical issues in 27 countries, has shown unemployment become a greater concern in recent months – second only to coronavirus.

In October, 38% of our total respondents say unemployment is a top concern for their country – down from 42% in May and June, but seven points higher than January 2020.

The countries recording highest levels of worry about jobs today are South Africa, Italy, South Korea and Spain, where six in 10 select this issue.

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JOB CONFIDENCE

A survey for the World Economic Forum finds that 54% of employed adults from 27 countries say they are concerned about losing their job in the next 12 months (17% are very concerned and 37% somewhat concerned).

This ranges from 75% in Russia, 73% in Spain and 71% in Malaysia, to just 26% in Germany, 30% in Sweden, and 36% in both the Netherlands and the US.

Two-thirds (67%) are confident they can develop skills for the future on the job with their current employer.

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SHORTCUTS

FUTURE RISKS

Each year, Axa's Future Risks Report charts perceptions of emerging risks, according to a panel of risk management experts and the general public across 15 countries.

Conducted in partnership with geopolitical analysis consultancy Eurasia Group, this year's ranking is marked by the coronavirus crisis, with pandemics and infectious diseases rising from 8th place in 2019 to 1st in 2020.

Climate change-related risk comes in second, dropping from the top spot it has held for years. It remains the top risk in Europe but falls to third place in Asia-Pacific region and the Americas. The drop is particularly marked in North America, where the share of experts who consider this a "major" risk has fallen from 71% in 2019 to 46% in 2020.

Cybersecurity risk, ranked third, increases in prominence this year, linked with the accelerated adoption of new technologies and the explosion of cyberattacks during lockdown.

Geopolitical instability and social unrest/local conflicts make up the top five.

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WORLD LUXURY TRACKING

Ipsos' World Luxury Tracking study for 2020 presents luxury consumption trends across China, North America and Europe.

There are shared experiences across the continents. For example, luxury has become digital: 70% of Chinese, 51% of Americans and 35% of Europeans have bought luxury products online during the pandemic, and they plan to continue doing so in the future.

In China there is a strong confidence in the country's economic recovery. Many say luxury is essential in their lives and one in two now have more desire to purchase luxury items.

The American view of luxury is an escape from the anxiety-provoking reality of COVID-19, which has deeply affected their nation. They are looking for creativity and innovation.

Europeans express less confidence in their countries' economies and are seeking the comfort of luxury experiences over traditional luxury items. There is an increasing interest in wellness and ethical brands.

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WEBINARS & PODCASTS

This year's seasonal shopping season will be like no other, as consumers, manufacturers and retailers struggle to adapt to our ever-changing circumstances. Please join us at our next Ipsos global client webinar where we will be exploring the dynamics of today's "Retail Rollercoaster" with the help of Ipsos' experts. It follows on from our recent session, with Dimas Gimeno, former CEO of El Corte Ingles. For details, see our webinar home page.

Meanwhile, our recent *Customer Perspective* podcast includes a discussion with Sofía Suárez of Nestlé Mexico, along with Ipsos in Mexico's Luis Brizuela. The conversation ranges from changing shopper behaviours to how companies are responding and how expectations are evolving.

As we start to take stock of 2020, our latest Creative Corner video sees Ipsos' Shaun Dix and Pedr Howard in conversation with Traci Alford, CEO of Effie worldwide. They discuss what it takes to make an Effie gold winner and share their insights on effective creativity, including their own favourite ads.

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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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