IPSOS UPDATE

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

December 2020

Ipsos Knowledge Centre

GAME CHANGERS

Ipsos

WELCOME

Welcome to the December 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

GLOBAL HEALTH SERVICE MONITOR 2020
The challenges facing health systems today

Our 27-country survey finds ratings of local healthcare services to be on the rise, despite the pandemic. We look at what the public think are the biggest health problems and health care challenges in their country today.

GENDER INEQUALITY & THE PANDEMIC
An emergency within an emergency

New international Ipsos research highlights the persistence of gender inequalities which are being exacerbated by the pandemic. The reports cover the impact on women's financial wellbeing & mental/physical health.

THE SUSTAINABILITY IMPERATIVE
Business as usual is no longer viable

Our new white paper outlines how organisations should approach sustainability, grounded in the latest consumer research. Two separate reports provide deep-dives on waste and the food sector.

BLACK FRIDAY 2020
Time to breathe new life into the retail stalwart?

Black Friday this year was like no other. A lot was riding on how consumers would react to the annual bargain-fest - and on whether retailers would be able to deliver in a disrupted environment. Explore our in-depth analysis.

CRACKING THE CODE FOR VOICE COMMERCE
Are we ready to shop using voice assistants?

Voice assistants are already a part of our lives, but using them to help us shop is an untapped opportunity. As familiarity grows with this powerful tool, so will consumers' confidence and expectations.

MONEY TALKS OR BUDGET WALKS
A focus on customer experience

Customer experience can be the difference between organisational success and failure. In this paper, our experts present their analysis on how to deliver a return on CX investment (ROCXI).

UNSTRUCTURED DATA TO INTELLIGENCE
The power of social media analytics

Social intelligence and analytics is an exciting and still emerging area. In this new paper we reflect on evolving best practice and present three building blocks of a successful social intelligence research programme.

WORLD AFFAIRS
Views on international security and the EU

Ipsos research for the Halifax International Security Forum looks at which countries show greatest global leadership. A separate study explores how people in 9 member states evaluate the impact of the European Union.

GLOBAL HEALTH SERVICE MONITOR

Public attitudes towards their country's health services and the biggest health problems today.

Against the backdrop of the pandemic, our new 27-country survey finds ratings of local health services to be on the increase. Trust in them to provide the best care is up 9 points since 2018 and overall satisfaction with the quality of healthcare available is up 5 points.

Australians are most satisfied with their country's quality of healthcare (81% say it is good/very good), ahead of Netherlands (76%) and Great Britain (75%). Trust in the system is highest in Malaysia (75%), followed by Australia and China (both 74%).

The public considers Coronavirus to be the top health problem today, followed by cancer, mental health, stress and obesity. At the present time, almost twice as many say COVID-19 is a pressing health concern facing their country than cancer (72% vs. 34%).

Access to treatment/waiting times emerges as the biggest challenge to healthcare systems, followed by understaffing. Cost is also a key issue in many countries – especially in Chile and the US.

One in three globally expects their healthcare service to improve in the future. Twice as many think they will get better than get worse, but countries with more established health systems tend to be more pessimistic, with France and Great Britain leading this group.

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GENDER INEQUALITY IN THE PANDEMIC

An emergency within an emergency, as women around the world suffer the impacts of COVID-19.

An Ipsos survey for the Women's Forum in seven countries (Canada, France, Germany, Italy, Japan, the UK and the US) highlights the need to act urgently to tackle gender inequalities, which are being exacerbated by the pandemic.

More women than men say they are afraid of the future (73% vs. 63%) and more have experienced burnout, anxiety or depression since the arrival of COVID-19 (59% vs. 46%). The report also finds gender stereotypes to be widespread. Over half (53%) agree that "you can't have it all", i.e. to be a good mother, you must make professional sacrifices.

Two reports by AXA based on Ipsos research in eight countries (France, Germany, Italy, Mexico, Nigeria, Spain, Thailand and the UK) look into the impacts of COVID-19 on women's financial wellbeing and mental/physical health. Among the key findings:

- Nearly half of women (47%) have had to use their savings or ask friends and family for support to make ends meet.
- Women's health has deteriorated: more than half report mental health problems starting or worsening at this time while many have missed important health appointments.

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SUSTAINABILITY FOCUS

THE SUSTAINABILITY IMPERATIVE

In the midst of a global pandemic, economic recession, and social unrest, is sustainability still a priority? Our response is a definitive yes.

Sustainability can be a complex and nebulous topic for businesses and consumers alike. In our new white paper we present Ipsos' view of sustainability and offer guidance for organisations to define, manage and communicate their sustainability strategy in the light of growing international recognition that "business as usual" is no longer viable.

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WHAT THE FUTURE: WASTE

Waste is one of the many environmental problems we face, along with pollution and climate change. And waste is an issue that market research is particularly well-suited to help address. The need for better, less wasteful, products and services couldn't be more urgent. Brands need to take decisive action and communicate this to consumers.

This edition of *What the Future* shares new Ipsos research and analysis on the topic, specifically the role of brands in a sustainable future, energy consumption, food waste and the experience economy.

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THE FOOD SAFETY – ENVIRONMENT DILEMMA

An Ipsos survey in Australia, Brazil, China, France, India, Nigeria, Pakistan, Russia and USA for the 2020 Tetra Pak Index highlights the emerging consumer dilemma of balancing food safety and food security concerns with continued worries about the environment.

The report also highlights how food waste is rising up the agenda. It is now considered a problem by more than three in four people, and is identified as a key environmental issue that individuals and manufacturers should take action on.

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BLACK FRIDAY 2020

Time to breathe new life into the retail stalwart?

Black Friday in 2020 was like no other. With many countries still in lockdown or facing ongoing restrictions during the run-up to the holiday season, a lot was riding on how consumers would react to the lure of the bargain-fest and how well retailers will execute their operational plans given the challenges posed by COVID-19.

This paper tells the story of how Black Friday has transformed from its roots in 1960s America to today's multi-day, digital retail extravaganza with participants around the world. It has potential to grow further, thanks to the expansion of online retail. But with maturity come new challenges. For example:

- Growing competition from other retail events
- Relevance in a channel-agnostic marketplace
- Constraints on fulfilment

Our analysis looks at how the event will fare amid recent environmental backlash against Black Friday and changing attitudes towards conspicuous consumption today.

The top tactics for retailers we identified for this unique year include: go fast and go early, drive sales online, promote click-and-collect, and optimise shopping on mobile devices.

Explore this year's white paper for more on how retailers can steer safe passage through these dark and dramatic days.

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CRACKING THE CODE FOR VOICE COMMERCE

Identifying the barriers and opportunities to accelerate adoption of voice-assisted purchasing.

Voice assistants are already a part of our lives, built into our smartphones, watches, headphones, speakers, refrigerators, and home hubs. Everywhere we go they are there with us, ready to assist. However, many of us lack the confidence or inclination to use them to help us shop.

Buying products or services using our voice (also known as Voice Commerce or V-Comm) remains widely untapped, with the devices used mostly for low-risk tasks, such as playing music, looking up information or checking the weather. But, as comfort with these simple tasks increases, so do user expectations.

More than half of consumers (57%) in the US think that a voice assistant could make a purchase on their behalf by 2021 and, more importantly, people expect this to be a way of life by 2024, with 92% predicting voice assistants will help with shopping.

This represents a key moment in the consumer adoption journey: people are open to Voice Commerce but need an offer that inspires them. With the window of opportunity open, it falls upon technology companies and brand partners to push forward with the right offers before consumers lose interest. Now is the time to build confidence with this powerful tool that could revolutionize the way we shop.

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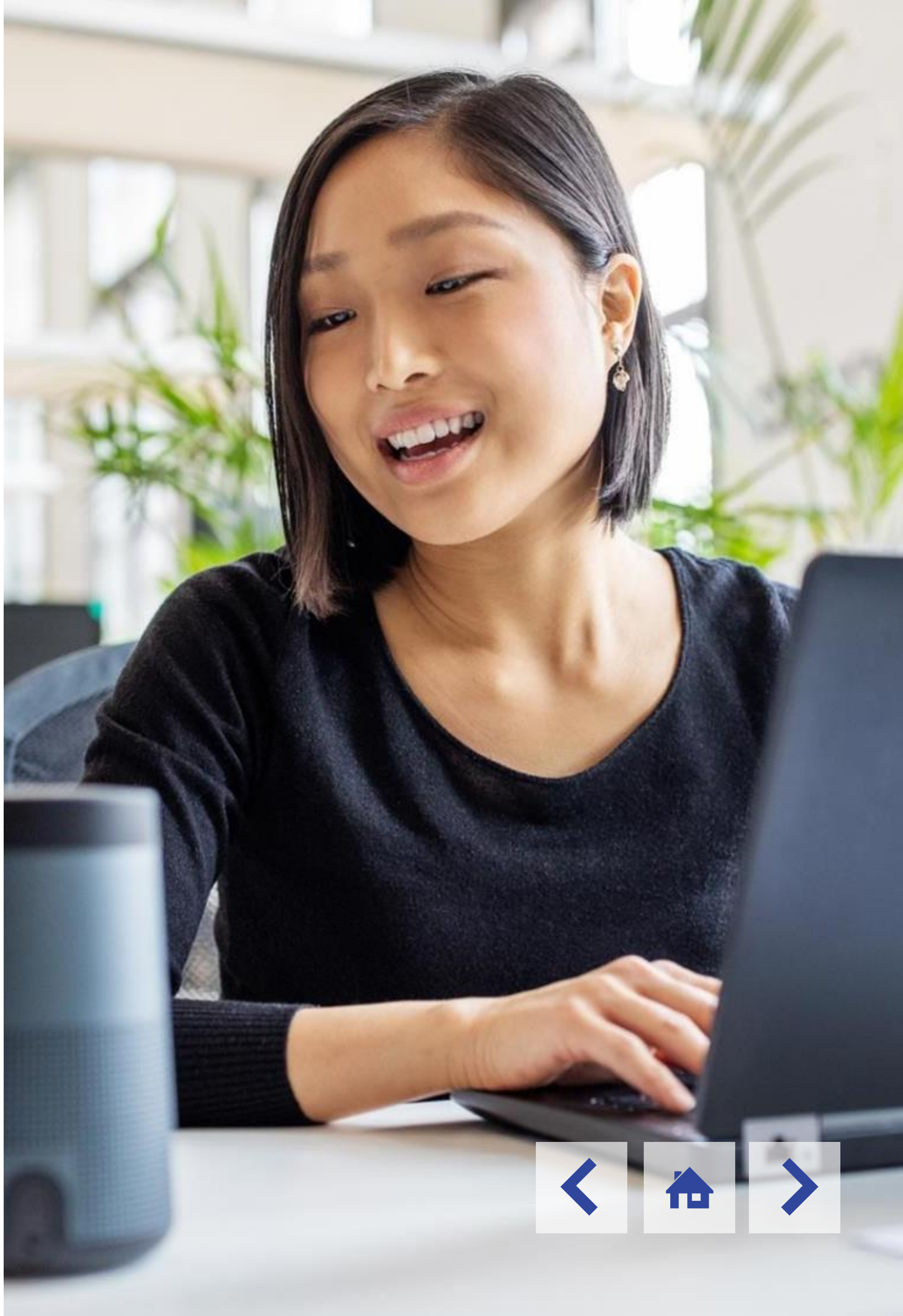

MONEY TALKS OR BUDGET WALKS

Delivering a Return on Customer Experience Investment: ROCXI.

Customer experience (CX) is a business imperative that can be the difference between organisational success or failure. It is key to differentiating an organisation's offer, and an increasingly powerful driver of brand choice, loyalty and genuine advocacy.

CX professionals are in the spotlight; they are being expected to do more with less. Results need to be tangible and impact must be felt. Unlocking CX potential is a game changer.

In this new paper from Ipsos' Customer Experience team, we address the link between CX success and the financial performance of organisations: ROCXI: Delivering a Return on CX Investment.

We demonstrate the importance of CX in building a powerful business case for change and how to set about quantifying the impact of CX on business performance, unlocking resources and prioritising spend accordingly.

In addition to the paper, you can listen to Series 2, Episode 2 of our Customer Perspective podcast: Delivering a Return on CX Investment (ROCXI). We discuss the practical steps involved in financial linkage modelling.

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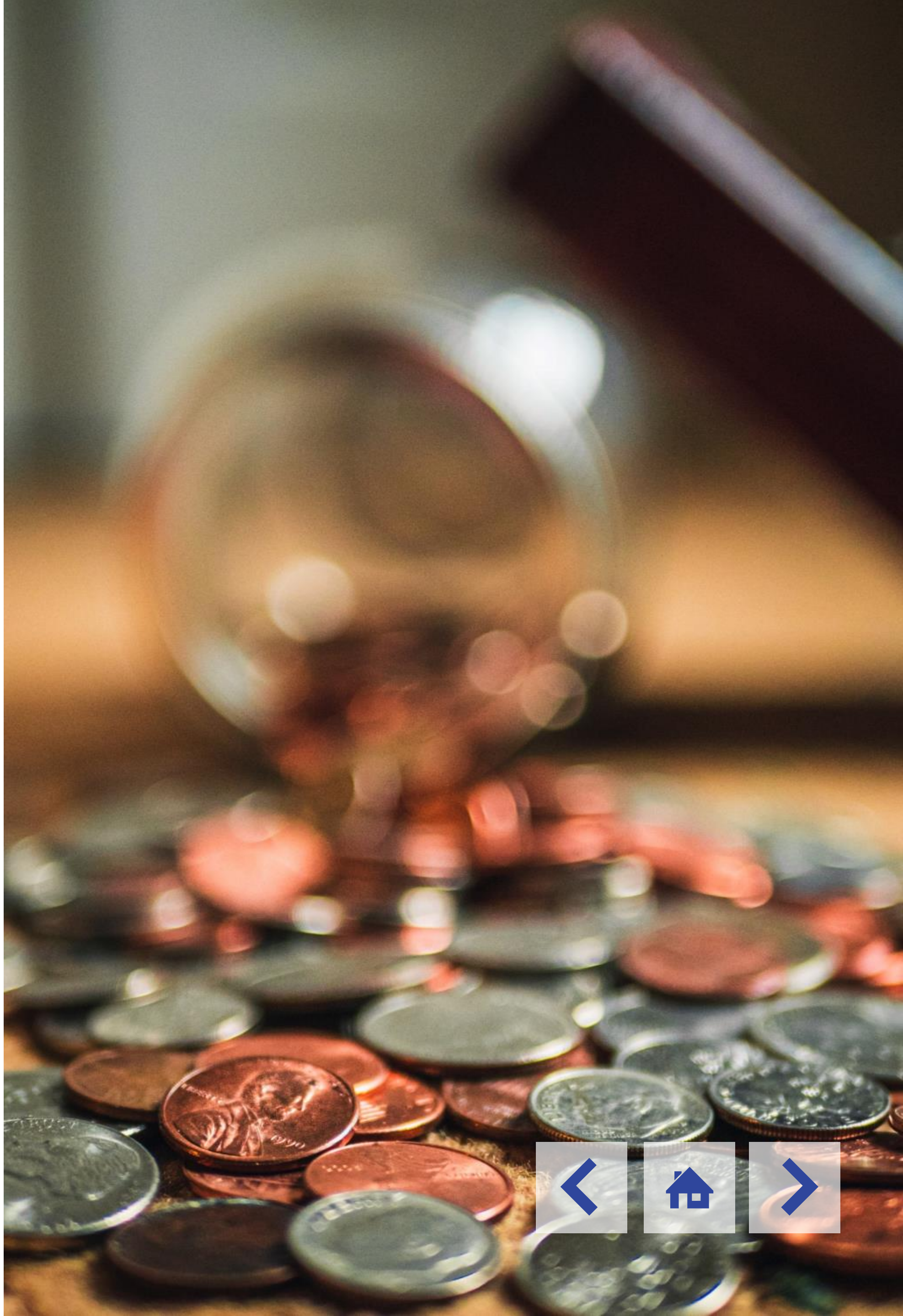

FROM UNSTRUCTURED DATA TO INTELLIGENCE

Uncovering the power of social media analytics.

The area of social intelligence and analytics is exciting and still emerging. In this new paper we examine the journey of social media data – from tech platforms to research solutions.

Based on our experience, we have observed three broad methodological building blocks of a meaningful social media intelligence programme:

- **Social media intelligence platforms**
- **AI-led advanced analytics**
- **Human-driven insight discovery**

On their own, each building block brings something useful to answering critical client questions. Combined, they bring powerful insight. To demonstrate these building blocks in action, the paper draws on COVID-19-related social intelligence data to better understand the status and implications of the pandemic.

We also dispel some common myths around social intelligence analytics and explore the key factors to consider when evaluating the pros and cons of different research approaches.

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INTERNATIONAL SECURITY

The public view on global threats, international leadership and efforts to control COVID-19.

A 28-country Ipsos survey for the Halifax International Security Forum explores security in world affairs, focusing on the pandemic.

In a logical move considering the experience of 2020, the public now see a health epidemic as being the biggest threat over the next twelve months (+27 points since last year). Some 78% globally agree this is a real threat, overtaking the threat of being hacked (74%), which had been top of the list for a number of years. Other top issues of concern are the threats of a nuclear, biological or chemical attack (67%) and a major natural disaster (65%).

New Zealand earns top marks for its response to COVID-19, with 74% across all countries saying the nation has demonstrated good leadership. At the other end of the scale, only 22% think that the same can be said of the US. When asked about current security measures, two in three (67%) agree that their country should close their borders to stop the spread of COVID-19. This is likely due to relatively few (33%) believing the virus is contained.

Looking at which countries are expected to have a positive influence on world affairs in the coming decade, Canada comes top again in 2020 (81%), followed by Germany (78%). China falls 11 points to an overall score of 42%. Meanwhile 50% think that the US will have a positive impact. (The survey was conducted pre-election).

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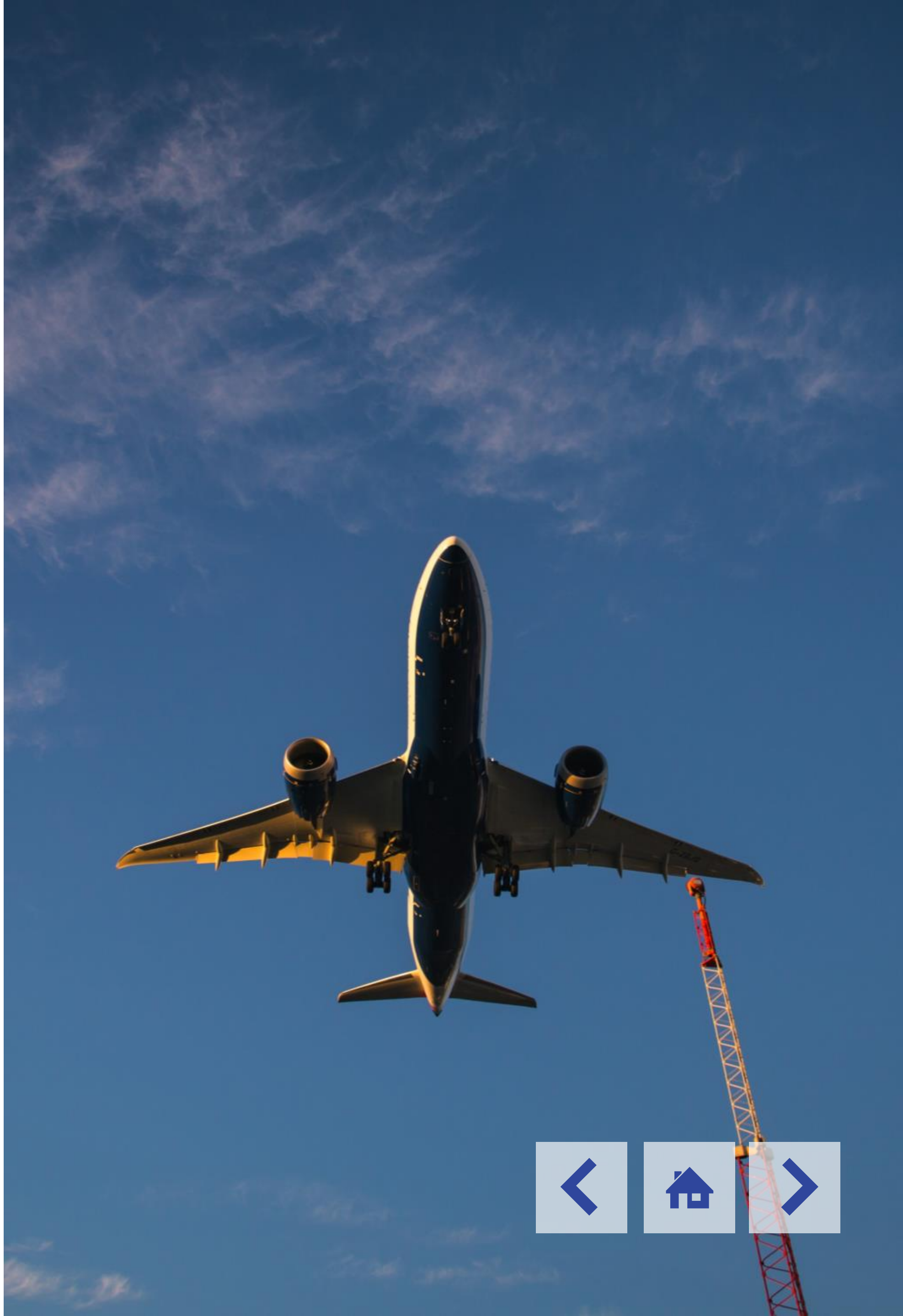

THE EUROPEAN PROJECT

Declining numbers say that the European Union is on the wrong track.

Our study on citizens' views of the European Union finds that some of the later joiners are more positive than countries who have been members since its creation.

Across the nine member states surveyed (Belgium, France, Germany, Hungary, Italy, the Netherlands, Poland, Spain and Sweden), almost half (47%) believe Europe has been made stronger by the European Union. Agreement is highest in Sweden (58%) and lowest in France (35%). When asked about the impact of the European Union on their own country, almost two in five (42%) say it has made it stronger. Hungary and Poland are most positive about this (55% and 53%) while the French show less enthusiasm (28%).

Nearly half of respondents agree that together the countries of the European Union have more influence on the rest of the world (46% - down from 51% in 2017) and are stronger in solving global problems (47%). Sweden and the Netherlands are the most positive about the EU boosting the global influence of countries in the EU, while France and Italy are less sure.

On handling the Coronavirus pandemic, 27% say the EU has been involved "about the right amount" and 39% "not enough", while 9% say it has "been involved too much.

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SHORTCUTS

WHAT WORRIES THE WORLD?

Global concern about Coronavirus is once again on the increase. The issue – leading our ranking of global worries for eight months – is up three points in November, with a total of 47% saying COVID-19 is a top concern for their country. Malaysia is the most worried (78%), while Sweden sees a large increase this month (44% are now concerned, up 22 percentage points).

Unemployment, Poverty & social inequality, Financial/political corruption and Crime & violence complete the global top five worries.

Almost two-thirds (64%) of people globally say their country is on the wrong track. At 87%, Poland is the least optimistic about where things are heading. South Africa and France also record high levels of pessimism (both 80%).

Ipsos' *What Worries the World* survey tracks public opinion on the most important social and political issues across 27 countries today, drawing on 10 years of data to place the latest scores in context.

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IPSOS GLOBAL TRENDS: BEYOND THE PANDEMIC

We are now almost a year into the COVID-19 pandemic. This year, we have been monitoring the impact of coronavirus on citizens and consumers around the world through the lenses of values and trends established in *Ipsos Global Trends 2020*. In September 2020, we undertook additional research in seven markets (the US, China, Great Britain, Germany, France, Italy and Brazil) to provide a new perspective on the changes caused by the pandemic.

We identified six areas that have registered the most change – those associated with climate, healthcare, the role of brands, globalisation and reactions to uncertainty & inequality.

At this stage in the pandemic, we have seen less change in those trends tied to our deeper, 'big picture' values , including hedonism, the appeal of nostalgia, feeling overwhelmed by modern life and views on income inequality.

Watch our recent webinar on Ipsos Global Trends beyond the pandemic.

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ATTITUDES TO VACCINES

As the race to launch a COVID-19 vaccine continues at speed, the world faces many more questions than answers – not only about when we might have a vaccine, but who will get it first, how will they get it and are they willing to have it? And how far will it take us on the journey back to "normal"?

This November, we find 73% across 15 countries saying that they would get a vaccine for COVID-19 if it were available, which is down 4 points on August levels. Rather fewer, 52%, say they would do so within three months.

Those who do not intend to take a vaccine cite concern about side effects and the speed at which it is moving through clinical trials.

Looking more deeply into vaccine hesitancy, our experts in behavioural science and healthcare have been exploring how beliefs and behaviours around vaccines are formed and maintained – are they rooted in individual perceptions or driven by social, political, or cultural factors?

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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 with any comments, including ideas for future content.

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