

IPSOS UPDATE

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

January 2021

Ipsos Knowledge Centre

GAME CHANGERS



WELCOME

Welcome to the January 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

GLOBAL PREDICTIONS 2021

Optimism for a better year ahead?

Our annual survey reveals what people think 2021 will bring. Starting with predictions about the pandemic, we gather the public view on topics ranging from economics and society to climate change and alien landings.

SHIFTING CONTEXT, SHIFTING PRIORITIES

Time for a strategic reset?

In a time of profound contextual change, where many people are pausing to re-prioritise, new Ipsos research explores how brands can adapt to the evolving decision criteria and expectations of consumers.

IPSOS FLAIR 2021: BRAZIL & RUSSIA

The local view of emerging societal trends

Two new 2021 editions of *Ipsos Flair* have just been released: we find Brazil grappling with the devastating effects of the virus while our Russia report looks at signals of consumer changes beyond the pandemic.

INDIGENOUS ISSUES IN AUSTRALIA

A more nuanced view of relations

Our study finds relations between the people of Australia are progressing, but complicated. While there is rising interest in Indigenous issues and support for a Treaty, some entrenched attitudes remain.

GREAT EXPECTATIONS

The latest developments in COVID-19 vaccines

As vaccinations against COVID-19 begin in some countries, our new paper charts the story so far and looks at some of the challenges ahead for vaccine manufacturers and society at large.

THE SCIENCE OF BEHAVIOUR CHANGE

Disrupted decision-making

Our behavioural science experts set out how to tackle a behaviour change challenge in uncertain environments, using a practical Ipsos framework that directly links problem diagnosis to intervention design.

REFLECTIONS FROM THE US & UK

A look back on 2020 in two nations

The year drew to a close with Americans rather less convinced “America is great” than they were three years ago. Meanwhile, we build a picture of the UK’s year with key stats from the 2020 edition of the Almanac.

FOOD TRENDS

Research from India, Egypt and Switzerland

A round-up of international research on food trends includes an exploration of the role of food in Indian culture and tradition, alongside new analysis from Switzerland and Egypt and a detailed look at meat replacements.

GLOBAL PREDICTIONS FOR 2021

Cautious optimism for the year ahead as people rate 2020 the worst year for some time.

Our 31-country survey found nine in 10 saying 2020 was a bad year for their country. Looking ahead, optimism for the future is mixed as people worry about the long-term impact of COVID-19. Six in 10 think that a successful vaccine will become widely available in their country in 2021. However, almost half of people globally (47%) also believe there will be a new global pandemic caused by a new virus.

Only four in 10 (41%) think life in their country will get back to normal after COVID-19 in 2021 and fewer still (32%) expect the economy to fully recover. Great Britain and France are least optimistic here, with 23% and 16% respectively anticipating this.

Other findings from our annual *Predictions* survey include:

- 75% think that average global temperatures will increase.
- Two-thirds (66%) expect income inequality in their country to rise over the next year.
- A third (34%) expect the number of people living in big cities in their country to shrink, but half (52%) think this is unlikely.
- Relatively few are worried about the human race as a whole: 16% say it is likely that humans will become extinct in 2021.

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GREAT EXPECTATIONS: COVID-19 VACCINES

As vaccinations begin, we explore the dynamics and developments of this historic challenge.

The speed at which a vaccine for COVID-19 has been developed has been ground-breaking. In April 2020, [two-thirds of people in the UK](#) thought it would take at least 12 months before the general public would start being vaccinated. Now, as we enter 2021, multiple countries have approved vaccines for use.

However, getting approval and beginning to vaccinate the vulnerable is the start of the process of moving beyond the virus. As our new paper highlights, vaccine manufacturers will face similar challenges concerning adoption and distribution.

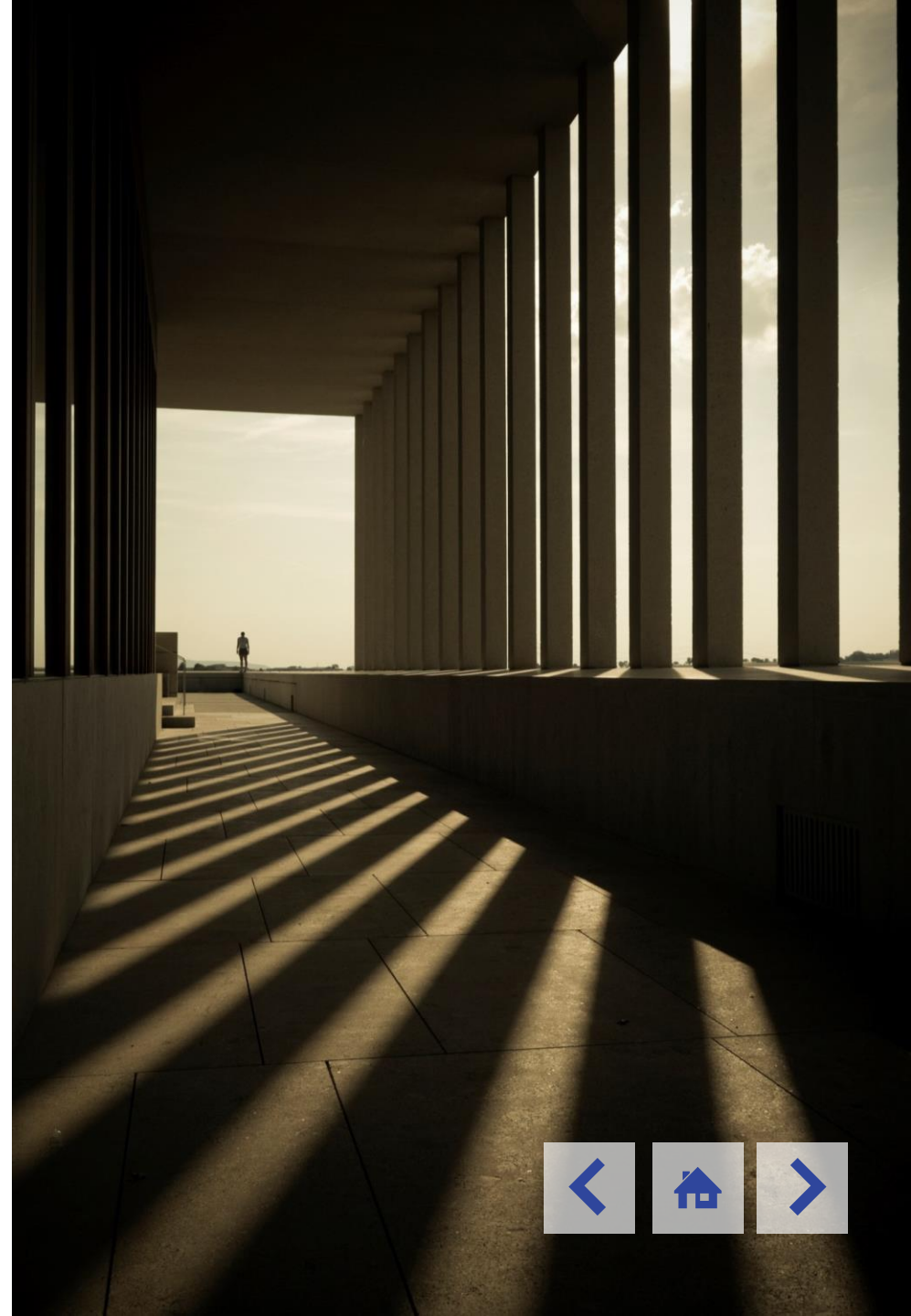
Downstream considerations relating to the impact of early launches, their effect on patient populations, and the implications for reopening strategies and economic recovery are very real. All this highlights the importance of understanding demand for the vaccine.

As Ipsos continues to conduct research on vaccines, you can find the latest on [our dedicated web page](#). Recent publications include a paper on those who aren't necessarily *against* vaccinations but are [vaccine hesitant](#), and the latest on [public intent to get vaccinated](#) – which is rising in the US and the UK, but falling in many other countries.

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SHIFTING CONTEXT, SHIFTING PRIORITIES

Time for a strategic reset?

The shifting sands of our current multidimensional crisis have undoubtedly impacted the context in which we live our lives and the decisions we make. We socialise differently, we work together differently, we prioritise differently, we buy differently, we consume differently – and we decide differently.

In this paper, we explain why the time is right for brands to review their strategy and the foundational insights on which it is based.

Referencing Ipsos' [Brand Health Tracking](#) Database, we explore the growing evidence of how people are making new and different decisions in response to the changing context they are now experiencing – comparing data from time periods before and during the pandemic. We also delve into the concept of “wilful blindness” and its relationship to consumer priorities.

In a time of profound internal and external contextual change, where people are pausing to re-prioritise, brands need to adapt to deliver against different consumer decision criteria and expectations.

Our latest KEYS webinar looking back at 2020 features two of the authors, Jim Needell and Claudia Meillat, discussing the research behind the paper in more detail. [Watch the recording](#).

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THE SCIENCE OF BEHAVIOUR CHANGE

How do people navigate the world when routines are disrupted?

Governments, businesses and individuals are all interested in behaviour change for a range of reasons, but only recently has it started to become a discipline in its own right. Our understanding of the mechanisms underpinning behaviour is advancing while the contours of our external environment are changing due to large-scale trends such as climate change, digitisation, ageing populations, mass migration, and now, COVID-19.

In this paper, our behavioural science experts set out how to tackle a behaviour change challenge when people are perhaps less reliant on routine in shifting and uncertain environments. This uses a practical framework that directly links diagnosis of the problem through to intervention design.

Ipsos has used this approach in a range of commercial and public sector contexts, including financial wellbeing, vaccination behaviour, cyber security, recycling and public transport. The paper includes a case study on managing safe re-engagement with the economy as people began to resume normal activities after the first wave of COVID-19 lockdowns.

Hear more from the authors in our [podcast](#) on this subject. The paper is also available [in Spanish](#).

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IPSOS FLAIR 2021

BRAZIL: IN SICKNESS AND IN HEALTH



Flair Brazil 2021 looks at a country grappling with many societal issues. Brazil has been ravaged by COVID-19, with only the US suffering more deaths from the virus.

The pandemic has brought many issues which were hiding under the surface to the fore in Brazil. For example, Coronavirus has exposed the deep social inequalities in the country in terms of access to healthcare and the internet, especially for the most vulnerable.

Racial issues have intensified. While multiracialism has always been a key component of Brazilian identity, this never meant that people from different ethnicities shared an equal footing.

[*Flair Brazil 2021 is available in full in Portuguese.*](#)

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RUSSIA: PROGRESS



Flair Russia 2021 looks forward, seeking to uncover the signals of the future we can see today. Of course, COVID-19 has brought about huge changes in consumer behaviour in Russia, but what can this tell us of what will happen beyond the pandemic? Trends emerging over the last year include:

- The rise of domestic tourism: Russian tourists can be satisfied with the choices on offer locally.
- The growth of functional food and drinks, although this surge is limited to trials and episodic consumption.
- “Anti-consumption” among a growing segment of consumers who are putting the environment first.

[*Flair Russia 2021 is available in full in Russian.*](#)

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REFLECTIONS ON 2020



2020 drew to a close with Americans rather less convinced that “America is great” than they were three years ago. [The latest reading](#) from our US team finds 37% giving America a score of 8/10 or higher, down from 51% in 2017. This fall has been driven by Democrats and Independents. Republicans, by contrast, are still much closer to where they were at the start of the Trump era.

A very unusual end-of-year holiday season started with an affirmation from more than eight in ten Americans that [traditional holiday foods](#) can help re-establish normalcy. One key finding from our investigation: 84% agree that milk and cookies are “a classic holiday duo”.

As we look ahead to the coming period, a number of questions remain around how working patterns will change after the pandemic. [Our latest study](#) finds one in three employed Americans expecting to be able to work from home at least some of the time when Coronavirus finally recedes.

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Each year, the Ipsos MORI Almanac sets out our team’s reflections on the events of the last 12 months. Our latest edition includes a series of key numbers which help to build the story of the country’s mindset during this unpredictable period:

- Going into 2020, 4% believed that infectious diseases would be a threat to health.
- 15% say government Covid measures have been too strict.
- 38% told us (in May) that they had been having more vivid dreams than usual.
- 41% of current pet owners got a new pet during lockdown.
- 51% of Britons support the aims of the Black Lives Matter movement.
- 72% want to buy from brands that reflect their values.
- 73% say that failing to address the climate emergency would be harmful to future generations.

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INDIGENOUS ISSUES IN AUSTRALIA

Rising interest in Indigenous people's issues, but "modern racism" remains.

Only one-quarter of non-Indigenous Australians have regular contact with Aboriginal and/or Torres Strait Island people. Yet, half (49%) of non-Indigenous Australians are interested in Indigenous issues. Just 23% say they are not interested.

Two-thirds of Australians (67%) consider a treaty between the Australian government and Indigenous peoples to be important for reconciliation. This is higher among females (72%) and those aged 18-39 (71%). For people who do not think a treaty is important, many share the opinion that Aboriginal people already have "more than their fair share" and it is "time to move on".

While the research shows some signs of progress when it comes to relations between Aboriginal and/or Torres Strait Islander peoples and non-Indigenous people, we found that some current attitudes indicate the presence of modern racism. For example, almost half (47%) say that money given to Aboriginal and/or Torres Strait Islander groups for housing and health programs is often wasted because they "cannot manage it".

See a [video review of 2020](#), which looks in detail at developments in geopolitical tensions, the digital shift, brand growth and the environment from an Australia/New Zealand perspective.

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FOOD FOCUS

DIETS, SUPERFOOD & WELLBEING IN INDIA



A country of 1.3 billion people has as much diversity in its food habits as it has in its people. Food plays a strong part of Indian culture and tradition.

In new Ipsos briefing paper, local experts explore the latest food and wellness trends in India, with a focus on the changes seen as a result of the COVID-19 pandemic. These include holistic health goals and an emphasis on nutrition and safety. We also find snacking and indulgence are important to Indians, who set aside conscious eating to make space for traditions.

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INTERNATIONAL FOOD TRENDS



Our Swiss team have been exploring global food trends relating to consumer priorities such as health, wellness and sustainability alongside local examples from Switzerland. We also explore the effects of COVID-19 on eating habits and home-cooking in a new [podcast and report](#).

Meanwhile, our [report on food trends in Egypt](#) looks at how eating habits are changing in the country. It finds six in 10 Egyptians have become more health-conscious during the pandemic and half report eating more balanced meals.

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MEAT REPLACEMENTS



An analysis of online conversations reveals why consumers (whether vegetarian/vegan or not) choose meat replacements.

This case study by Synthesio, Ipsos' social data intelligence company, shows how trend analysis helped a brand to update its positioning.

A look at the top content of the past year allowed the brand to find strategies to increase their visibility. The best tactics proved to be using buzz words, making partnerships and celebrity endorsements.

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SHORTCUTS

IPSOS YEAR IN REVIEW 2020

In an [infographic](#) covering 10 key themes, we present some Ipsos research highlights you may have missed during the dizzying events of 2020. This covers climate change, digital lives, world affairs and more.

Amid desires for a return to 'normal' after the pandemic, there are also indications of an [appetite for change](#): 86% globally say they want the world to change significantly and 72% say the same about their own lives.

Health and physical wellness is the top [source of greatest happiness](#) globally. We looked at the [top health issues](#) facing people today and found increasing [trust in health services](#) to provide a good standard of care.

We found women disproportionately affected by COVID-19, both in terms of [health](#) and [finances](#). Last year we also looked at [gender disparities in the workplace](#) and perceptions of the [role of women](#) in society

[Lives Disrupted](#) looks back at how the COVID-19 crisis unfolded throughout 2020.

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INTERNATIONAL VIEWS ON CLIMATE CHANGE

A 30-country Ipsos survey conducted for EDF's International Climate Change report shows that the COVID-19 crisis has not eclipsed concerns about the environment – indeed it may have even strengthened it in some countries.

On average, six in 10 say that they are paying more attention to their environmental impact as a result of COVID-19, with more saying this is the case in the Middle East and South America, but fewer in Europe.

The report finds some confusion around the causes of climate change, as well as some climate scepticism: one third (32%) of respondents globally do not associate climate change with human activity.

More think successfully fighting climate change will involve a change in lifestyles than technological innovation (54% vs. 29%). Two-thirds (65%) say that they have made changes to their lives to combat climate change in the past 12 months. But there are expectations on government and business to take action, too.

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THE FORCES OF CX IN LATAM

The Forces of Customer Experience is a human-centric framework that helps organisations better design and deliver customer experience, so that it drives true competitive advantage and a better Return on CX Investment (ROCXI).

Based on the original [Forces of CX framework](#), this paper presents new analysis of consumer evaluations across seven Latin American markets: Argentina, Brazil, Chile, Colombia, Ecuador, Mexico and Peru.

We show how each of the five 'Forces' (Enjoyment, Belonging, Certainty, Fair treatment, Control and Status) vary in importance across countries, sectors and brands. In over half of the markets surveyed, 'Belonging' is the top driver. This shows that people value brands that show through customer experience that they care and share their values.

Find the paper in [English](#) and [Spanish](#). You can also listen to the [Customer Perspective podcast](#) based on this paper.

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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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