

IPSOS UPDATE

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

February 2021

Ipsos Knowledge Centre

GAME CHANGERS



WELCOME

Welcome to the February 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

HEALTHY HABITS DURING COVID TIMES?

New global survey on diet, weight and exercise

Three-quarters of people in 30 countries report changes to their weight, exercise, alcohol consumption or smoking since the pandemic began. Our global survey looks at attitudes and behaviours relating to dietary health.

ENTREPRENEURIAL SPIRIT

Entrepreneurialism is alive and well

Our 28-country survey explores the entrepreneurial characteristics and aspirations of people around the world. Three in 10 say they intend to start their own business in the next two years, but funding is the largest barrier.

FRANCE FLAIR 2021: NOW OR NEVER

A pessimistic outlook meets openness to change

Our new deep-dive report into French society today highlights the imbalances exposed by the pandemic and considers areas for urgent action. Ipsos experts discuss a range of the latest consumer trends.

SPOTLIGHT ON THE US

The fragile democracy of a divided nation

As the US swears in a new president, can its political divides be healed? These questions are addressed in a new publication on the future of democracy. We also look at the polling on Joe Biden's first weeks in office.

BRINGING SHOPPING AND DINING HOME

Turning to takeout and online shopping

A 28-country survey provides new numbers on consumer habits during the pandemic, focusing on the heavily disrupted retail and hospitality sector to find out what people are doing more or less of in unusual times.

THE POWER OF RESEARCH PANELS

The future of quality market research

Ipsos chooses to continually invest in online access panels because they deliver a consistent quality advantage over many other sources. This white paper presents the five pillars of quality panel research.

WHAT WORRIES THE WORLD?

Concern about Covid-19 increases once again

Our long-running tracker of the top social and political issues globally shows coronavirus concern to be at its highest level since May 2020. Meanwhile, consumer confidence is picking up, albeit modestly.

FOCUS ON SOUTH EAST ASIA

Research from Malaysia, Singapore and Thailand

As Malaysians settle into another stay at home order, we look at how the pandemic has affected work and trust. Also new from the region are studies on workplace harassment in Singapore and attitudes to beauty in Thailand.

HEALTHY HABITS IN COVID TIMES?

Findings from our new 30-country survey on diet, weight and exercise.

Globally, three-quarters of respondents report some change to their weight, exercise habits and alcohol consumption or smoking since the pandemic began. Almost one-third (31%) across 30 countries say they have gained weight during this time, ranging from over half of people in Chile and Brazil to fewer than one in 10 in China.

This comes despite many (45%) believing there is a clear link between obesity and suffering more severe symptoms of Covid-19. To reduce the likely severity of coronavirus symptoms, more people think exercise (38%) would help over losing weight (17%).

Currently, 45% of people say that they are currently trying to lose weight – but few say they are doing this due to the Covid-19 risk. This increases to 60% in Chile and stands at more than 50% in Spain, Peru, Saudi Arabia, Singapore and the USA. Of those looking to lose weight, more would look to achieve their goals through exercise and healthy eating than dieting. On the whole, reported exercise levels have not increased dramatically, although a greater number say they have been doing more during the pandemic (27%) than less (23%).

Meanwhile, 10% globally say they are drinking more alcohol since the start of the pandemic (rising to 21% in Australia and 20% in the US), while an equal proportion (9%) say they are drinking less.

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BRINGING SHOPPING AND DINING HOME

A 28-country survey on consumer habits during the pandemic.

How and where the world shops and dines has transformed during the coronavirus pandemic. Health orders to curb the spread of the virus have restricted non-essential trips and activities, causing particular disruption to the retail and hospitality sectors.

Our global survey in 28 countries finds that almost two-thirds (63%) of people report eating in-restaurant less often in recent months, and 43% say they have shopped online more often than before the pandemic. The numbers of restaurant-goers have declined most dramatically in Chile, Peru, Mexico and Argentina while the move to online shopping is reported most in Chile, Great Britain, Turkey and South Korea.

Although in-person dining may not be an option currently, people are still supporting their local restaurants; almost one-quarter (23%) say they are getting takeaways or deliveries more often while 45% are doing this just as often as they did before the pandemic hit.

Buying locally – whether from local farmers and manufacturers, businesses, or restaurants – is largely unchanged compared to before the pandemic. 61% say they are buying from them as often as they did before the Covid-19.

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ENTREPRENEURIAL SPIRIT

Entrepreneurial spirit is alive and well, despite current challenges.

Seven in 10 people worldwide are seen to possess qualities that are important for an entrepreneur, including one-third who are considered to have a strong entrepreneurial spirit. This is determined by an index of 18 key characteristics, ranging from having a strong work ethic to a liking for taking calculated risks.

Our 28-country Ipsos survey finds Colombians to have the strongest entrepreneurial spirit, followed by South Africa and Peru. At the other end of the scale, people in Japan, South Korea, the Netherlands and France rank lowest.

Three in 10 who have started a business in the last year say they were motivated to do so by the pandemic. Looking forward, almost one-third of global citizens say they are likely to start a business in the next two years, but there are large differences between countries.

Entrepreneurial aspirations among “non-traditional” groups, including women and those with lower income and education levels, have increased since 2018.

Funding is the top barrier to starting a business in most countries, however interest is a larger factor in the Netherlands, Great Britain, Sweden, Germany, the US and Canada.

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THE POWER OF RESEARCH PANELS

The future of quality market research.

Accessing the right respondents at the right time is the foundation of effective market research. A technology-driven evolution of data collection methods means that many different channels have emerged for accessing participants. However, properly managed online access research panels will remain central to the future of market research insights.

Ipsos chooses to continually invest in panels because they deliver a consistent quality advantage over many other sources. The success of high-quality panel research is built on five main pillars:

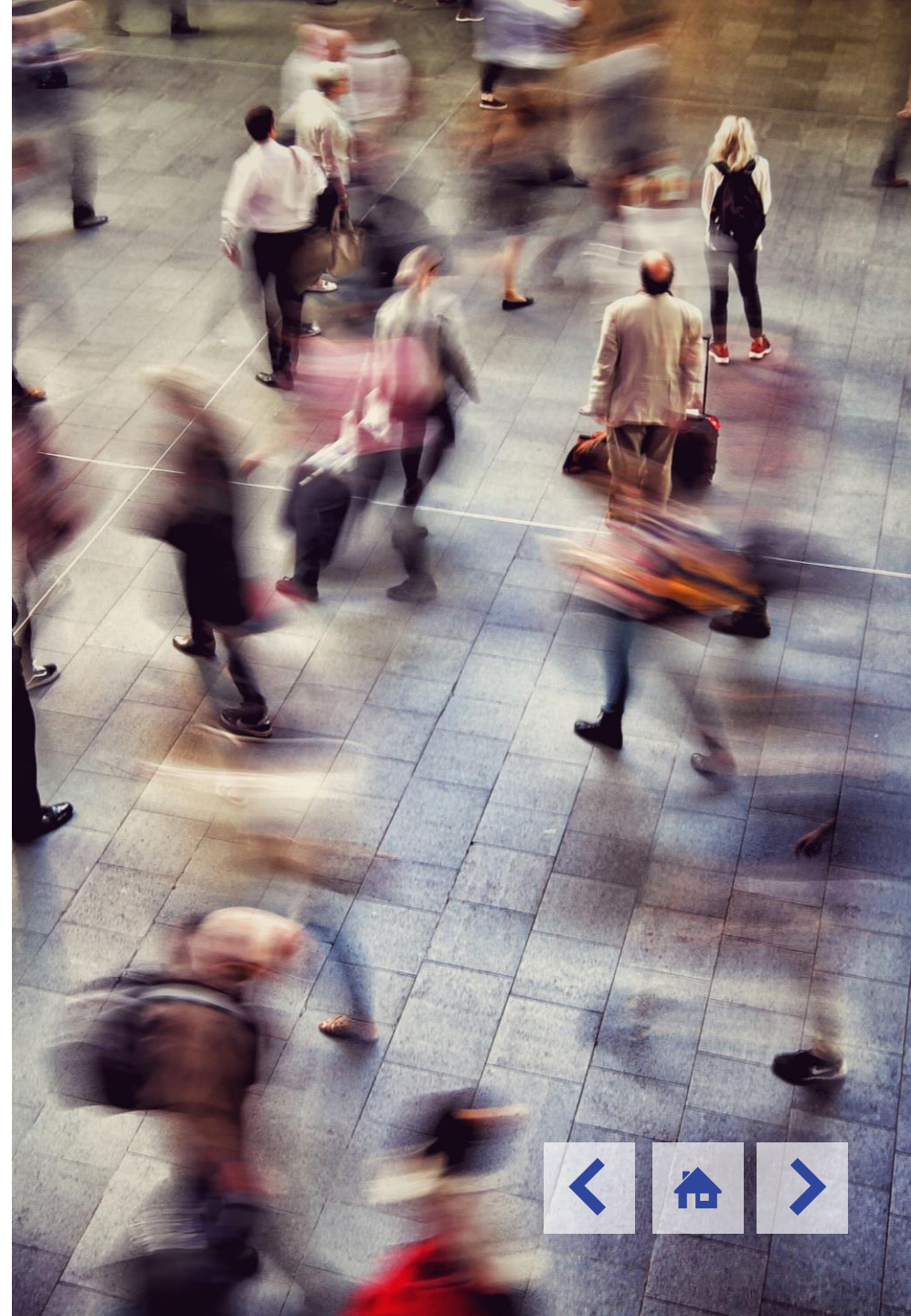
1. **Sample Stability**
2. **Rigorous Sampling Process**
3. **Quality Respondents**
4. **Respondent Engagement**
5. **Respondent Trust**

In this paper, we explore these five aspects in more detail. We also present new developments, such as the shift of high-engagement qualitative research online – which has been accelerated by the Covid-19 pandemic.

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FLAIR FRANCE 2021: NOW OR NEVER

As the year begins, France is very pessimistic for what lies ahead, but is open to new consumer trends.

The first *Ipsos Flair* in France since 2018 finds the country under a cloud of negativity. This is reflected in over three-quarters of the French public thinking the country is headed in the wrong direction. Only 53% are optimistic this year will be a better year than 2020.

The Covid-19 pandemic has revealed and accentuated many issues affecting the country. Businesses were not ready for the digital demands the last year brought, both in terms of working from home and eCommerce: fewer than one-third of French retailers sell their products online compared to over 70% of their German counterparts.

Conversely, French consumers have taken advantage of being stuck in lockdown and have embraced living their lives from the sofa. Shoppers able to afford luxury products have taken greater interest in health and wellness products. On attitudes to money, 'more money' or a 'good financial situation' is almost as important to the happiness of French people as health and family life.

Other consumer trends that have emerged recently include a desire for purposeful brands, a seamless omnichannel shopping experience, and the growth of telemedicine, which had struggled to break through in France to the same extent as in other markets.

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WHAT WORRIES THE WORLD?

Coronavirus concern is at its highest level globally since May 2020.

The January 2021 results of our *What Worries the World* survey find one in two (50%) respondents across 27 nations saying that Coronavirus is one of the top issues facing their country today. This rises to 70% in Japan and Malaysia while many other nations show significant month-on-month increases in concern including South Africa, the Netherlands, Argentina, Australia and Peru.

Unemployment remains the second-ranked issue globally, followed by Poverty & social inequality, Financial/political corruption and Healthcare, which moves into fifth place this month.

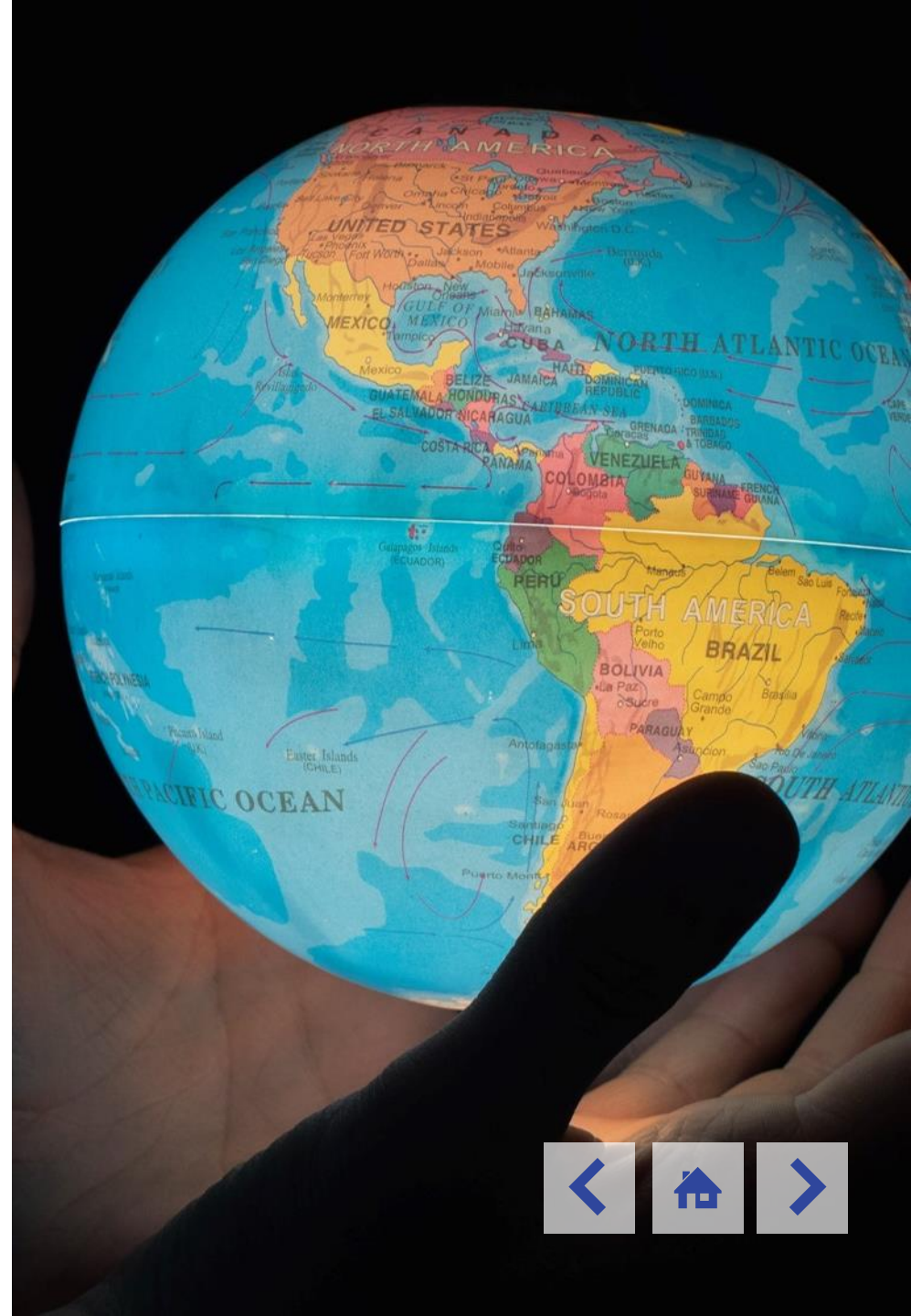
When asked about where things are heading, 62% globally say that their country is on the wrong track. This view is currently strongest in Peru (83%), followed by South Africa (78%), Chile (77%) and Poland (76%). With 75% saying things are heading in the wrong direction, the US now joins the top five most pessimistic countries, marking a dramatic change from this time last year when it ranked among five most optimistic countries.

Our [Global Consumer Confidence Index](#) shows a cautiously positive trend as we move into 2021. Representing views on jobs, expectations and investment in 24 countries, the index is now at its highest level since April 2020. But it remains 5.2 points down on January 2020 and 3.2 points short of its 10-year historical average.

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SPOTLIGHT ON THE US

As America swears in a new president, can the nation's political divides be healed?

Joe Biden has taken office at a time of deep divisions in American society. The President's [inauguration speech](#), considered 'good' or 'very good' by more than eight in 10 Americans (including 97% of Democrats and 72% of Republicans), stressed the importance of unity. Two-thirds of Americans (67%) believe Biden when he says he will be a [president for all Americans](#). This includes 92% of Democrats, 48% of Republicans and 58% of Independents. See [Cliff's Take](#) for more on these latest numbers.

An in-depth analysis of the strong partisan divide apparent in the US today can be found in Ipsos' new publication [What the Future: Democracy](#). It finds America's democracy is in a fragile state: only 25% of say that it is strong and just one in 10 say the country is united.

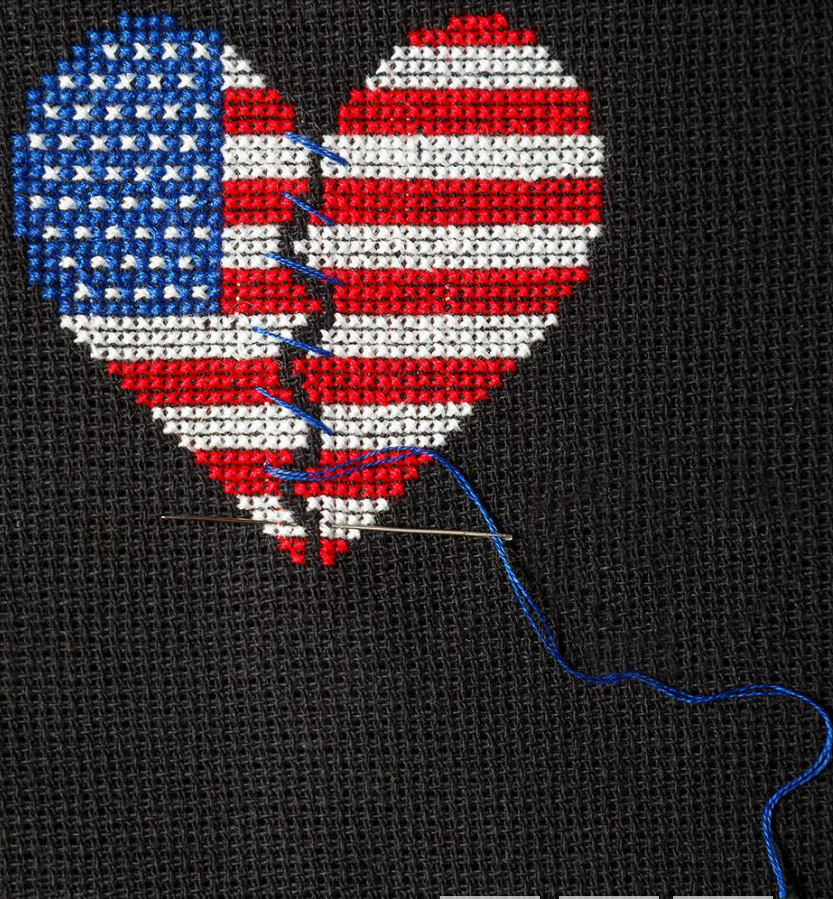
While 90% of Americans agree that democracy is a good way of running a country, it is less clear how it can be fixed if the public disagree about what is broken. The report sheds light on this issue, looking at what it means to be a good American, bias in institutions, disinformation and policy areas for common ground.

Find the latest content from the US team on their website, including "[America the Uncertain](#)", an on-demand webinar on trends shaping the Biden administration and the new President's approval ratings so far.

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FOCUS ON SOUTH EAST ASIA

Malaysia



As Malaysia settles in to another movement control order, an Ipsos global study on the [pandemic's impact on the workforce](#) finds 65% of Malaysians working from home. A majority are struggling to cope with the balance of work and home life, as well as isolation.

Despite the difficult year that 2020 has been, trust in corporations and institutions in Malaysia do not seem to have been affected: [Ipsos' Trust Index in Malaysia](#) shows an increase from 46% to 50%, with some variations by industry and sectors..

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Singapore



A survey by Ipsos and gender equality organisation AWARE reveals a high prevalence of [workplace sexual harassment in Singapore](#), as well as a gap in understanding what this constitutes. One in five report being sexually harassed at work in the past five years, rising to two in five when asked about specific situations.

Predictions for the coming year show [Singaporeans](#) to be relatively more optimistic than other parts of the world, but there is significant concern that the local economy will not fully recover in 2021.

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Thailand



A study on perceptions of beauty in Thailand finds two-thirds of the public saying they are confident in their appearance – at odds with the expectation that increasing social media usage has contributed to a growing dissatisfaction with body image.

A large majority (87%) approve of plastic surgery and 38% say they have either considered it or had it themselves. We find men and women to equally confident in their appearance, and while older people tend to be less confident, they are also less likely to say they will get plastic surgery-

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Look out for the February release of “[Living in Crisis](#)”, our study on the evolving consumer opinions and behaviours in six South East Asian countries.



SHORTCUTS

ATTITUDES TO VACCINES

Initial hesitancy among the public about getting vaccinated is rapidly transitioning to a growing global demand for immediate access to vaccines.

Our latest polling shows large increases in the number of people saying they would get a Covid vaccine, with highest agreement in Brazil and the UK (both 86%), followed by China (83%), Mexico (81%) and Italy (80%).

Worry about side-effects remains the most compelling reason among those not wanting to take the vaccine. This come ahead of concerns about efficacy, feeling that Covid-19 is not a high enough risk, or being against vaccines in general.

Older citizens, the more affluent and those with higher trust in government are the groups most interested in getting to the front of the line for vaccines.

We find that, overall, men are more likely than women to be willing to get the vaccine, although this gap evens out when looking at younger age groups.

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PUBLIC OPINION RESEARCH

A 28-country Ipsos survey for the World Economic Forum looks at public attitudes and expectations around seven key issues today; health, employment, training/education, climate change, inequality, international relations and access to technology. We find more people expecting the following to get worse in the next 12 months:

- Employment opportunities (41%)
- The pace of climate change (38%)
- General health conditions (32%)

On the other hand, there is optimism that the availability of digital tools/technology and opportunities for training and education will improve.

With an awareness that future predictions and expectations are often wrong, we analyse the nature of misperceptions and how they affect our worldview in a new report prepared for the World Economic Forum Davos 2021 meeting.

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BRAND GROWTH Q&A

Following on from the recent release of Ipsos' refreshed brand growth story, *Dancing with Duality*, Gillian Drewett, contributing author and expert in Ipsos' Brand Health Tracking offer speaks to Simon Atkinson from the Ipsos Knowledge Centre about the importance of brand tracking research, what we know about consumer decision-making, and the fundamentals of achieving sustainable brand growth in today's context.

During the interview, Gillian tells us: "Brands have been intervening and influencing forever, but we are now able to do it better because we know so much more about how people make decisions. The context has an impact, what's going on around us has an impact, and even the broader environment has an impact."

You can read the transcript of the Q&A, listen to the full interview, or watch five short clips on [ipsos.com](https://www.ipsos.com).

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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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