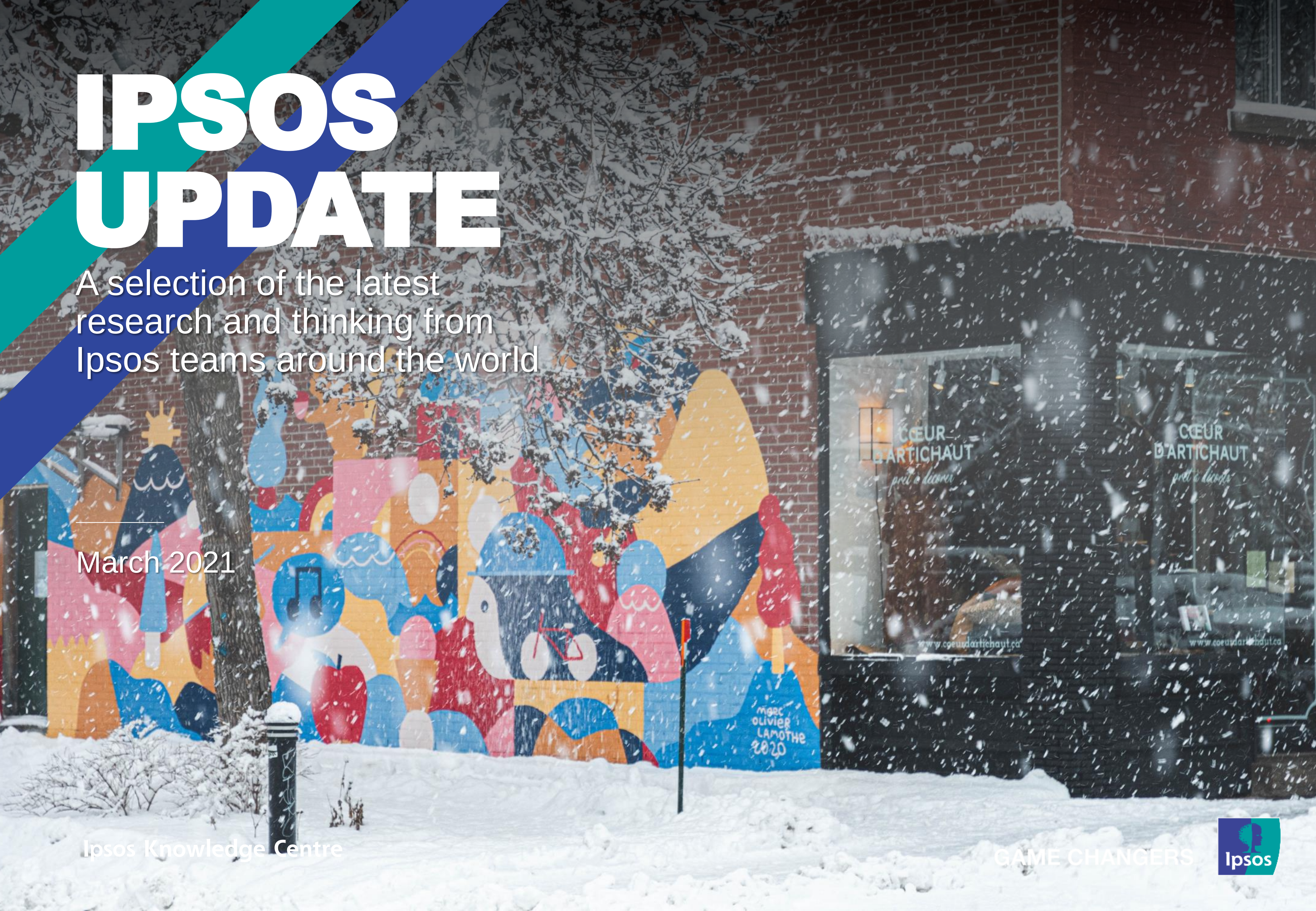
IPSOS UPDATE

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

March 2021



Ipsos Knowledge Centre

WELCOME

Welcome to the March 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

SHAPING THE FUTURE
Pathways to 2025 and beyond

At the beginning of 2021, decision-makers around the globe are thinking about what to do next. Where should resources be invested? Which disruptions will lead to continued change, and which will fade away?

SERVICE WITH A SMILE?
Delivering customer experience in the face of masks

How can an organisation create meaningful “masked moments” that encourage customers to return, spend and recommend, while also ensuring customers and staff stay safe?

MIXED MODE RESEARCH
Not only a plan B

Mixed Mode has not always been readily embraced in the world of market research, but following the disruptions of 2020 there is good reason to believe its popularity will grow. We present the benefits and best practice.

SPOTLIGHT ON CANADA
The mood of the nation today

On the agenda: the public view on Canada’s lagging progress with vaccinations, international travel – largely on hold until 2022 – and the mental health impact of the second lockdown on people across the country.

HOUSING
Will the pandemic change how and where we live?

A new in-depth report on housing from our US team finds that, while wider housing and migration trends and aspirations remain unchanged, we do see differences in how we live in, and use, our homes.

FIRST IMPRESSIONS MATTER
Spontaneous reactions for stronger innovations

We present new findings on the first impressions that consumers form of a product, helping us to better understand what affects whether they are likely to purchase or disregard it.

REGRET
A powerful indicator of behaviour change

New Ipsos research with academic partners shows that feelings of regret (and anticipated regret) play a key role in how we make decisions. We look at three scenarios: online shopping, brand choice and vaccine intent.

MOBILITY TRENDS
The latest on the future of mobility

The constantly evolving mobility landscape has been greatly affected by the pandemic, yet the promising trajectory for electric vehicles continues. Ipsos experts track the latest developments at global and local levels.

SHAPING THE FUTURE

Certainties and uncertainties looking to the world of 2025 and beyond.

At the beginning of 2021, decision-makers around the globe are thinking pragmatically about what to do next. Where should resources be invested? Which of the many recent disruptions will lead to continued change, and which changes will fade away?

Ipsos' *Shaping 2025 and Beyond* report identifies the next challenges facing the world and how we might address them. We describe a core vision for 2025 – the most likely course of action – as well as three alternative trajectories. This gives businesses, governments and societies a lens for building actionable strategies for the coming years.

We can be certain of some aspects of our world in 2025. Long-term trends spanning the planet, people, technology and systems include the climate emergency, social connectivity, AI and automation, and the impact of inequality on the likes of health outcomes.

But the way the world responds to these certainties is not so simple to map. There are two key tensions: the economic picture and values (demographic, social and political). Will we face a swift or patchy economic recovery? Will new voices and approaches challenging our ways of doing things become more influential?

Ipsos' Futures team will continue to monitor the development of key events in the world, indications of which pathways are emerging that will shape how the world looks in 2025 and beyond.

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WHAT THE FUTURE: HOUSING

Will the pandemic change how and where we choose to live?

In the past year, many Americans have been forced to move or to work and learn from home; younger generations, higher-income earners and households with kids especially.

Our new report finds that wider housing and migration trends do not show significant change during the pandemic months, but what *has* changed is how we live in, and use, our homes.

With new survey data and expert interviews, we explore the following questions and their wider implications for housing, retailers and brands: Can our new homes support our newly flexible needs, will the pandemic permanently shift where we live, will we ever go back to our offices, and has the pandemic expanded our definition of home?

Some key findings include:

- 46% of Americans are decluttering and organising their homes more today than they were a year ago.
- 49% of adults aged 18-34 have moved, or considered moving, since March 2020.
- Half say that buying a home is difficult. Home-buyers' top priority is finding an affordable home to meet their needs.

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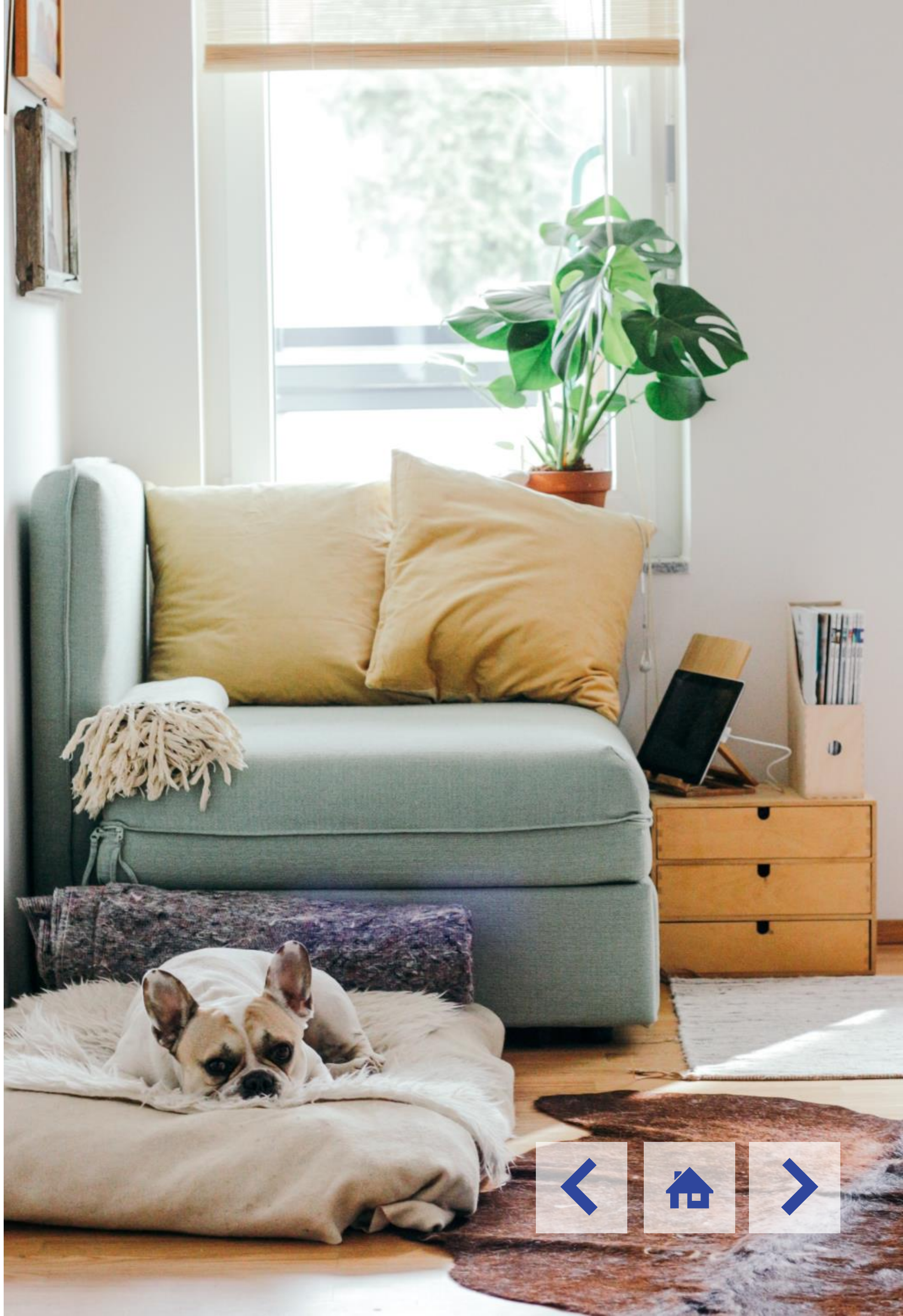

SERVICE WITH A SMILE?

Delivering customer service in the face of mask wearing.

Governments across the world have mandated a host of health and safety measures, including the wearing of face masks, to reduce the spread of Covid-19. Many of these regulations mean that customer experiences have fundamentally changed. This paper provides guidance for organisations looking to deliver positive customer experiences within these constraints.

Research shows that wearing face masks affect human rapport and relationship-building as they inhibit both emotion perception and communication. This is reflected in our study, which shows that customers often experience problems in being heard (54%) and understood (44%). Many also report feeling uncomfortable (42%) and enjoying the trip less (38%) – doubtless due to these difficulties.

While customers can still correctly identify a happy face more often than not, mask-wearing staff members can no longer rely so heavily on that "winning smile" to bring round disgruntled customers or to strengthen relationships.

There is no single magic solution, but important aspects to consider when facilitating interactions between employees and customers include: body language, eye contact, noise levels and visual aids.

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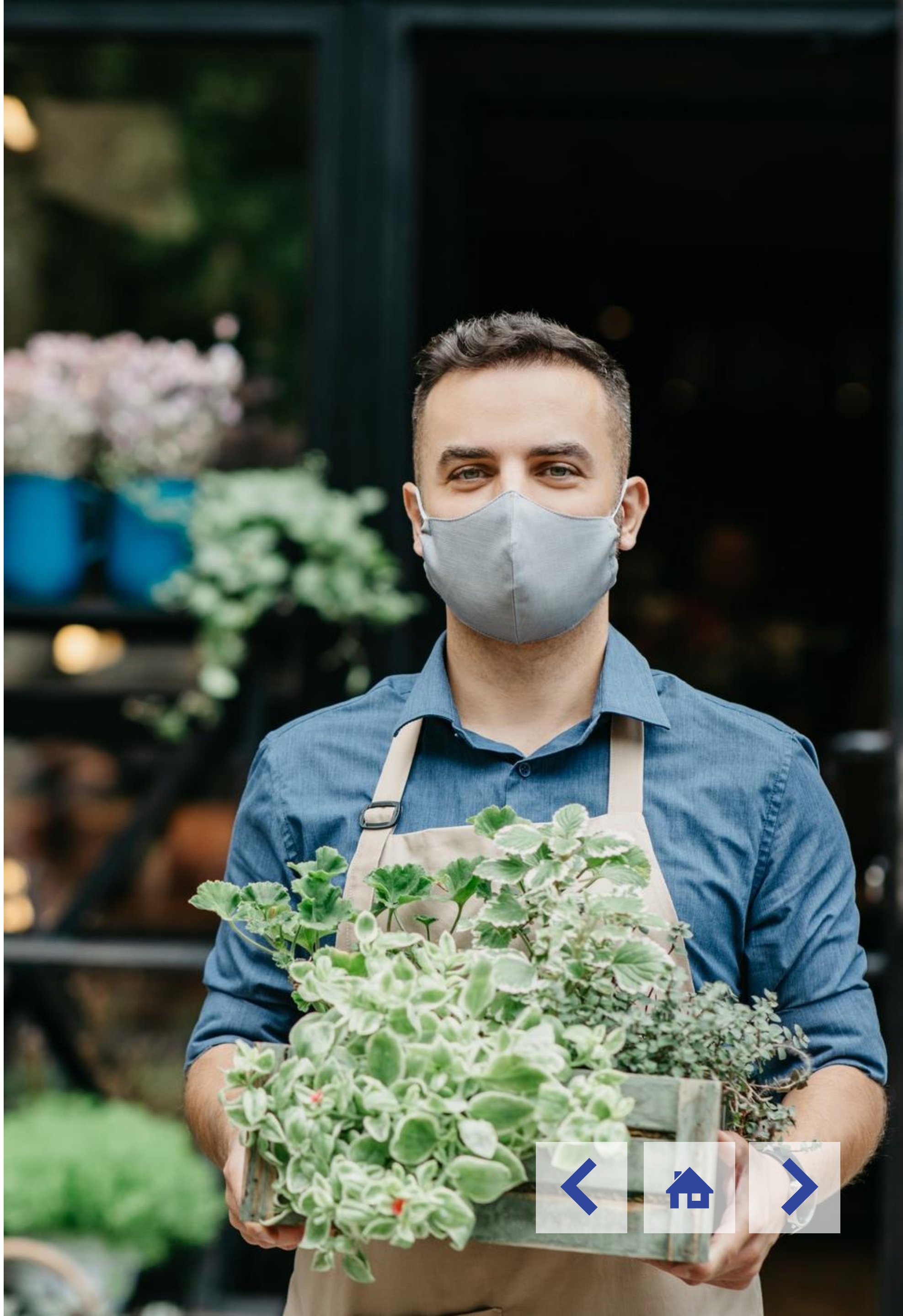

FIRST IMPRESSIONS MATTER

Spontaneous reactions for stronger innovations.

Many factors shape the impressions we form of people that we meet for the first time. These, in turn, influence how we behave towards them. The same can be said for products, which is why Ipsos uses the analogy of speed-dating in its innovation research.

In *First Impressions Matter*, we present new findings on how the first impressions that consumers form of a new product can determine whether they move towards a purchase or disengage completely, testing in particular the packaging and brand name.

Our key points underpinning how first impressions can be used to create product success are:

- **Fulfil an unmet need** – What is special about your product?
- **Understand any negative barriers** – The positives are only half the picture.
- **Dress for success** – Stand out through package and product design.
- **Be innovative** – Just being novel or interesting is not enough.
- **Be clear** – Clarity is needed to convince consumers.

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EMBRACING MIXED MODE

More than just a plan B, mixed mode design brings a host of benefits to research programmes.

Mixed Mode Research is not a new topic in the world of market research, but it has not yet been readily embraced. The disruptive forces that shaped 2020 have made Mixed Mode research increasingly relevant, especially for social and audience measurement research.

To allow for continuity of research programmes during Covid-19, Ipsos has worked to redesign studies using multiple methods in recruitment and data collection. But Mixed Mode is not only a plan B. It brings additional benefits such as improving representativity, response rates, and cost-savings – when managed well.

There is good reason to believe that a Mixed Mode research design will become increasingly popular for new and established research programmes. This paper outlines:

- Why now is the time to embrace Mixed Mode.
- Benefits and best practices.
- Ipsos' "Contactless" Mixed Mode approach.
- Examples of studies that have successfully made this methodological transition.

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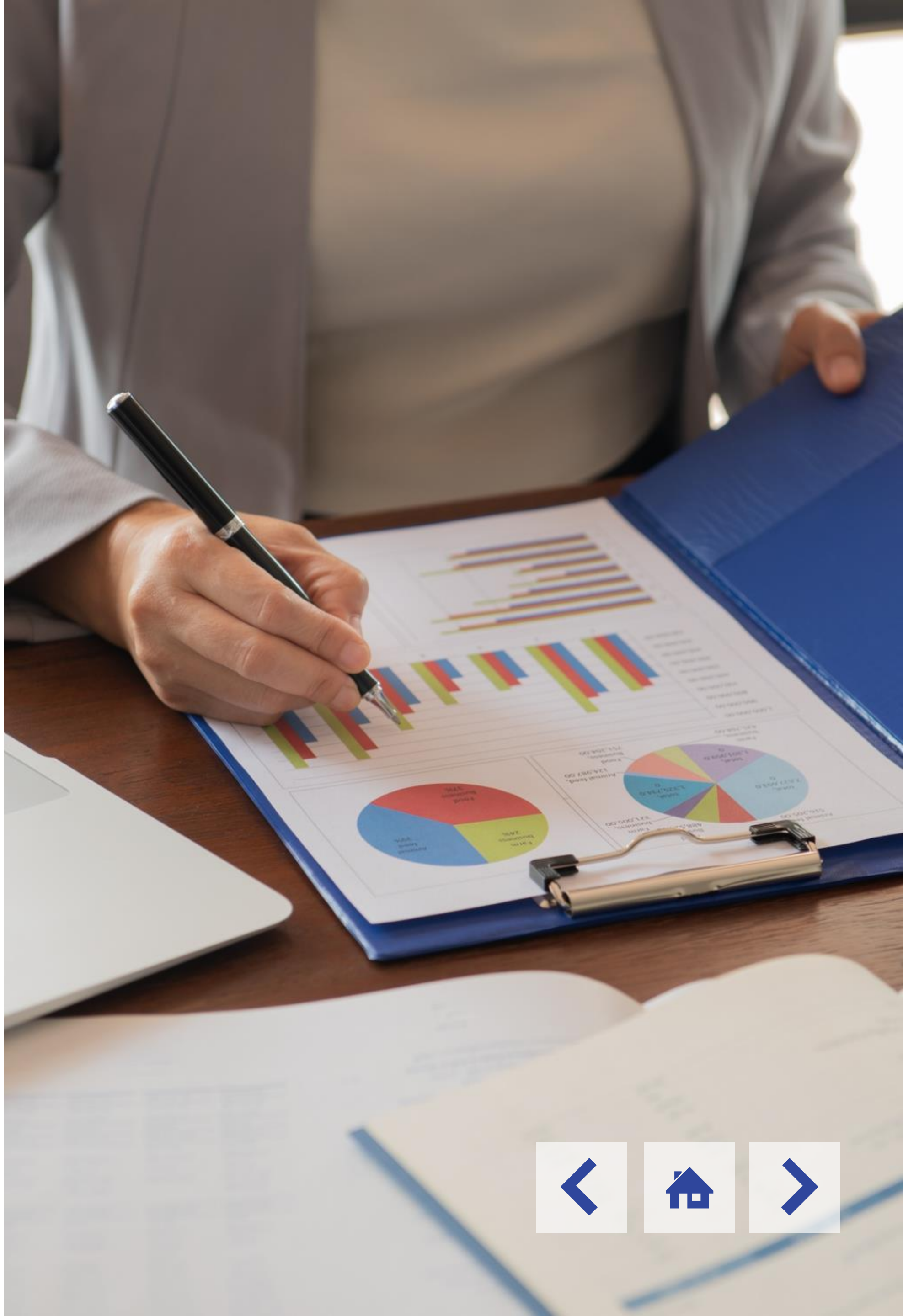

MAKING THE MOST OF OUR REGRETS

Tapping into regrets for a better understanding of decision-making.

As part of Ipsos' ongoing work to better understand consumer decision-making, we conducted applied research in partnership with the LaPsydé laboratory in Paris University to demonstrate how regret functions as a key driver in how we make decisions.

Measuring levels of regret – or anticipated regret – can tell us more about how people deal with conflicting preferences, how fixed someone is in their choices, and whether intentions are driven by more automatic (mindless) or considered (mindful) thinking.

This makes regret an important construct in market research, and something that can be applied to a range of scenarios. In this paper, we look in particular at changes in shopping behaviour, the impact of advertising on brand choice, and vaccine intent.

Our key learnings include:

- Regret is a powerful indicator of behaviour change.
- Regret measures how conflicted people feel when making a decision and shows whether interventions have an effect.
- Regretting past actions is a telling sign that someone will make a different choice in the future.

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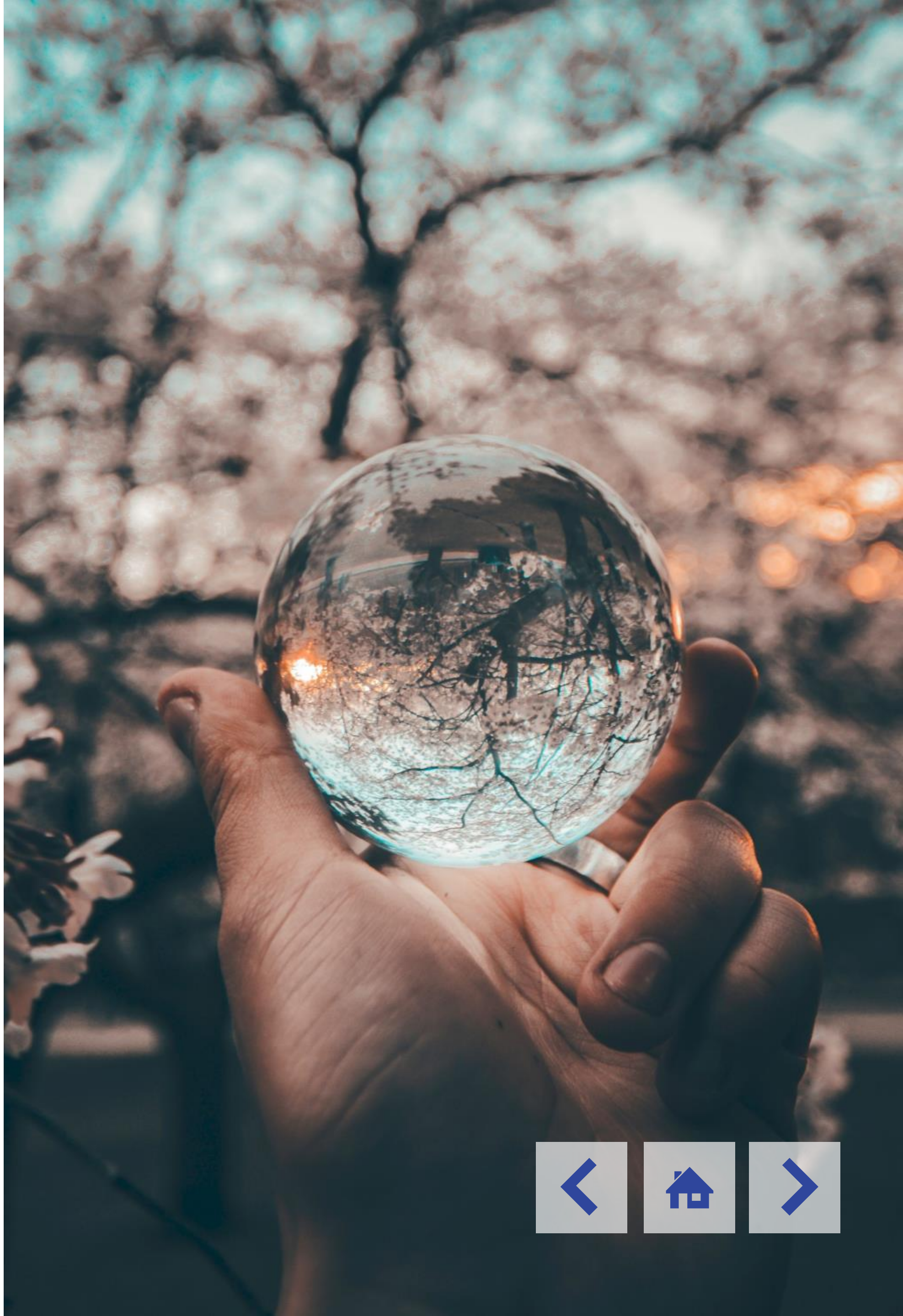

SPOTLIGHT ON CANADA

Travel

As Canadians dare to imagine what post-lockdown life may look like, it is clear that this vision does not include international travel until at least 2022. Only 3% say they would be comfortable going abroad right now and just 18% say they would be happy to do so before the end of this year.

The government's recently tightened travel rules (including pre-testing, testing upon arrival, and mandatory hotel quarantine at the traveller’s cost) form part of the backdrop to this unease. However, a large majority (83%) of Canadians say they support these rules.

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Mental Health

Canadians are feeling more anxious, stressed, and lonely as a result of Covid-19. We find this to be more pronounced in certain regions, among younger people, and for those with kids at home.

The second wave of lockdowns over winter is taking a heavier toll: 44% of Canadians say it is impacting their mental health more than the first time back in spring.

The data suggests several possible causes for declining mental health, physical distancing being one. A majority (54%) say this has left them feeling lonely or isolated.

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Vaccines

Recent polling finds that seven in ten (71%) Canadians are angry that Canada is falling behind other countries in its vaccination efforts. However, a majority (57%) agree the delays are out of the government’s control.

The public are sceptical that Canada will achieve its goal of vaccinating three million people by the end of March and most of the population by the end of September. Just 43% say they are confident this will happen.

Two-thirds (66%) say they would not have a Covid-19 vaccine without hesitation, but concerns remain for some.

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MOBILITY FOCUS

Electric Vehicles

The electric vehicle (EV) industry had an exceptional year worldwide in 2020. Tesla became the most valuable automotive brand and its owner, Elon Musk, became the richest man in the world. Meanwhile, Norway saw electric vehicles account for over half (54%) of market share.

A new report on EVs in Thailand, where there is still room for growth, finds that this trend may be replicated as 48% of Thais expect to buy an electric car in the next five years. It outlines some of the challenges in this shift towards electric vehicles.

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Mobility Trends

Our team in Mexico recently presented a webinar on mobility trends which saw our automotive experts provide a local and global view of factors shaping the landscape. The trends highlighted include safety redefined, collective mobility and micro-mobility – which refers to the development of local solutions.

With the world's top cites running at around 40% of their normal mobility levels, we focus on how the pandemic is impacting mobility, looking at data on how many people are working from home and travelling outside their local areas.

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Ipsos Mobility Research

The future of mobility is constantly evolving, with new technologies wielding huge potential to further shift the way we travel. This rapidly changing mobility landscape also impacts consumer behaviours. Looking to the future, Ipsos is constantly exploring developments in this area.

On this web page, you will find the range of Ipsos' latest mobility research in the form of white papers, polls, reports and webinars. For example, read about the push towards electric vehicles in the US today and the role of automotive quality in customer's purchase decisions.

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COVID-19: ONE YEAR ON

THREATS AND EXPECTATIONS

As the world marks one year of living with Covid-19, an analysis of Ipsos tracking data from eight countries (Australia, Canada, France, Germany, Japan, Russia, the UK, and the US) shows how perceptions of the virus have changed during this time.

The UK is the country where most citizens say Covid-19 poses a threat to their nation today (76%), closely followed by Japan (72%) and France (72%). These levels of concern mark a huge increase from a year ago. We see the biggest changes in the UK (+57 percentage points), France (+50), Canada (+44), and Germany (+43).

More also see Covid-19 as a threat to them personally than they did a year ago. Concern about personal safety today is highest in Japan (43%), where it has also grown the most (+27 points). It is lowest in Australia (15%, the same level as one year ago).

Expectations for the end of the pandemic are not optimistic. Most do not think the virus will be contained before the second half of 2021.

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LONELINESS & COMMUNITY

A 28-country survey from Ipsos shows how the Covid-19 pandemic has affected mental wellbeing, community support and loneliness.

On average, one-third of people (32%) across all countries say that their local community has become more supportive over the last six months. The countries with the highest levels of agreement are China and India (both 55%), Saudi Arabia (51%), Peru (44%), Chile (43%), Malaysia (43%), Mexico (40%), the UK (39%), Singapore (39%) and Argentina (38%).

However, by 40% to 22%, people are inclined to say that Covid-19 will have a negative impact on their mental wellbeing rather than a positive one. Particularly doubtful are those in Britain (where just 13% select 'positive'), alongside people in Hungary (12%), Canada (11%), France (11%) and Japan (8%).

On average, two in five (41%) across all countries report becoming lonelier over the last 6 months. This is higher in Turkey (54%), Brazil (52%), Belgium (51%), Canada (50%) and Britain (49%).

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VACCINES WEBINAR

Widespread administration of a Covid-19 vaccine will be central to the successful re-opening of the economy and society. But as the race to vaccinate gathers speed, many questions remain.

In this webinar, Ipsos experts present the latest insights into vaccines with the evolving attitudes and perceptions of consumers, healthcare providers and pharmacists. Key points include:

- While vaccine demand is currently outweighing supply, there are still hesitant segments of the population.
- Physicians will play a critical role as they are the most trusted source.
- Vaccines and treatments are moving us in the right direction, but new strains are causing concern.
- The experience of Covid-19 will further medical innovation for years to come.

See our web page for the latest in Ipsos' vaccines research.

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SHORTCUTS

SUPER BOWL ADVERTISING

The Super Bowl ad break is the marketing industry's Colosseum. The battle to engage, entertain and even survive unscathed is fierce. Appealing though it may be to single out one champion, more sophisticated and rigorous research shows that there are actually multiple winners.

Ipsos leveraged its depth and breadth to analyse the ads through both traditional and cutting-edge methods – from surveys to social listening to AI. This combination of approaches provides a more robust and nuanced picture of Super Bowl success.

From our analysis, we chose to award nine different titles, including best tearjerker, best for brand recall, most inclusive, best use of celebrities, and best newcomer.

Despite sitting out the Super Bowl for the first time in 37 years to support Covid-19 relief, Budweiser still earned the second most brand mentions on social.

The top performers are highlighted in our infographic.

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GCC TECH TRACKER

Ipsos' annual technology tracker in the Gulf countries (Saudi Arabia, UAE, Kuwait, Oman, Bahrain and Qatar) presents the latest trends in internet, content, and technology consumption. Some regional results include:

Internet:

- 36% are familiar with 5G and 17% are connected to a 5G network.
- 51% have used eCommerce in 2020.

Social platforms:

- 89% are Facebook users, 51% are Instagram users and 33% use TikTok.
- 33% rely on social media as their main source of news information.

Tech ownership:

- 26% have a smartwatch.
- 14% own at least one drone.
- 12% own a VR headset.

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WHAT WORRIES THE WORLD?

Ipsos' monthly *What Worries the World* survey, which tracks levels of public concern on a range of social and political issues in 27 countries, shows that Coronavirus is still top of mind when it comes to what people are worrying about in their country.

Level with last month, the global country average for concern about Covid-19 is currently at 50%. This rises to 77% in Malaysia and over two-thirds in Great Britain (68%), Spain (67%) and Japan (66%).

Unemployment, Poverty/social inequality, Financial/political corruption and Healthcare make up the top five global concerns this month.

Meanwhile, 64% on average across all countries say that things in their country are heading in the wrong direction. This sentiment is strongest in Peru (87%), South Africa (82%) and Poland (80%). There have been sharp increases in Belgium and Spain on this measure (+10 percentage points in each vs. last month).

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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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