

# IPSOS UPDATE

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

April 2021

Ipsos Knowledge Centre

GAME CHANGERS



# WELCOME

Welcome to the April 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

## INTERNATIONAL WOMEN'S DAY

The priorities for gender equality today

Our annual study for International Women's Day explores global attitudes to gender equality and the issues facing women today. In the context of Covid-19, we identify a gap between recognition and action.

## THE RETAIL ROLLERCOASTER

How to stay on track

This paper presents our key observations on the retail landscape during the pandemic. Looking at what this all means in our omnichannel world, we set out ways for retailers to stay on track during the ups and downs to come.

## CONSUMER CONSCIOUSNESS

Designing successful data strategies

Companies often talk about being consumer-centric. However, "consumer consciousness" is a new concept whereby an organisation is attuned to consumer needs and is agile in its response to changes.

## PARENTING AND EARLY YEARS

Views on child development

The years between 0-5 set the foundations for a child's future health and happiness, but our survey shows this may not be widely appreciated. We look at the role of parents and society in bringing up the adults of tomorrow.

## INEQUALITIES AROUND THE WORLD

Which disparities matter the most?

We ask people across 28 countries which forms of inequality are most serious in the societies they live in. The results reveal the perceived importance of inequalities relating to wealth, race, education and more.

## TRADING UP

The positive momentum of premium brands

Premiumisation has become a classic move for many brands during prosperous economic conditions. But has the pandemic affected the positive momentum of premium brands? We explore the latest trends.

## WE DON'T NEED TO TALK ABOUT ADS

Why do only some ads become famous?

Advertising that gets talked about online can deliver unpaid reach – a bonus for marketers. In this paper, we identify the responses needed to get a reaction and the four key creative traits of ads that attract comments.

## SPOTLIGHT ON THE UK

The latest public opinion research

A new study by our UK team explores life during lockdown, including what people will miss from this time. We also take a look at polling on the top issues in the country today as well as perceptions of the Royal Family.

# INTERNATIONAL WOMEN'S DAY

Our annual study explores attitudes to gender equality against the backdrop of Covid-19.

Our 28-country survey finds that people around the world think the gender pay gap is real and important, but they are divided over whether it should be a top priority right now.

Women are more likely to say that closing the gap is a priority in their country today (41% vs. 31% of men). We also find that people in Chile, South Africa and France see this as a more urgent issue.

Across the 28 countries, around two-thirds (64%) say that Coronavirus has impacted both men and women equally. Those in Chile, Israel and Canada are most likely to say that the effects of the pandemic have been more negative for women.

Looking at whether gender equality will improve or worsen as a result of Covid-19, a majority (52%) across all countries believe it will continue to be the same as before the pandemic. One in five (19%) in Spain, Germany and Poland say that it will get worse.

When asked about what can be done to address issues facing women in the recovery from Covid-19, more flexible working practices emerges as the most important, with 44% of women and 37% of men selecting it. Support for women who face violence and abuse is next, followed by better healthcare services.

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# INEQUALITIES AROUND THE WORLD

Which forms of inequality matter most to people across 28 countries?

From a list that includes wealth, race, gender, health, education and more, income inequality is considered by most to be a serious equality issue in their country. On average, 60% select this, with larger proportions in Russia, South Korea and Hungary.

Our analysis finds there is no overall relationship between actual levels of inequality and how serious an issue is seen to be. For example, Belgium and the Netherlands rank highly on objective measures of income equality but these countries record higher levels of concern than others that perform much worse.

After income inequality, the top inequality issues selected by those in our survey are disparities between more or less deprived areas (42%) and in educational outcomes (33%).

There are generational differences when it comes to the relative importance of inequalities: those under 35 are more likely to say racial and gender inequalities are serious issues while older generations show greater concern for intergenerational inequality.

Meanwhile, two-thirds of South Africans and over half of Americans consider racial and ethnic inequalities to be among the most serious forms of inequality in their country – far above the global country average of 29%.

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# THE RETAIL ROLLERCOASTER

Riding the ups and downs of today's omnichannel shopper landscape.

People have been saying for years that retail is going through unprecedented times of change, but recently this has escalated from a ride on the teacups to a full-scale rollercoaster.

Shoppers and retailers alike have been dealing with new dynamics throughout the pandemic. Shopping is one of the everyday activities that has been turned upside down by Covid-19 with non-essential retail among the most disrupted sectors.

We explore the ways in which an altered environment has “rewired” shoppers by changing the emotional experience of shopping.

In one sense, the scale of change has been huge, but in another, the shifts that we are seeing are an acceleration of trends that were already set in motion such as the demand for omnichannel design.

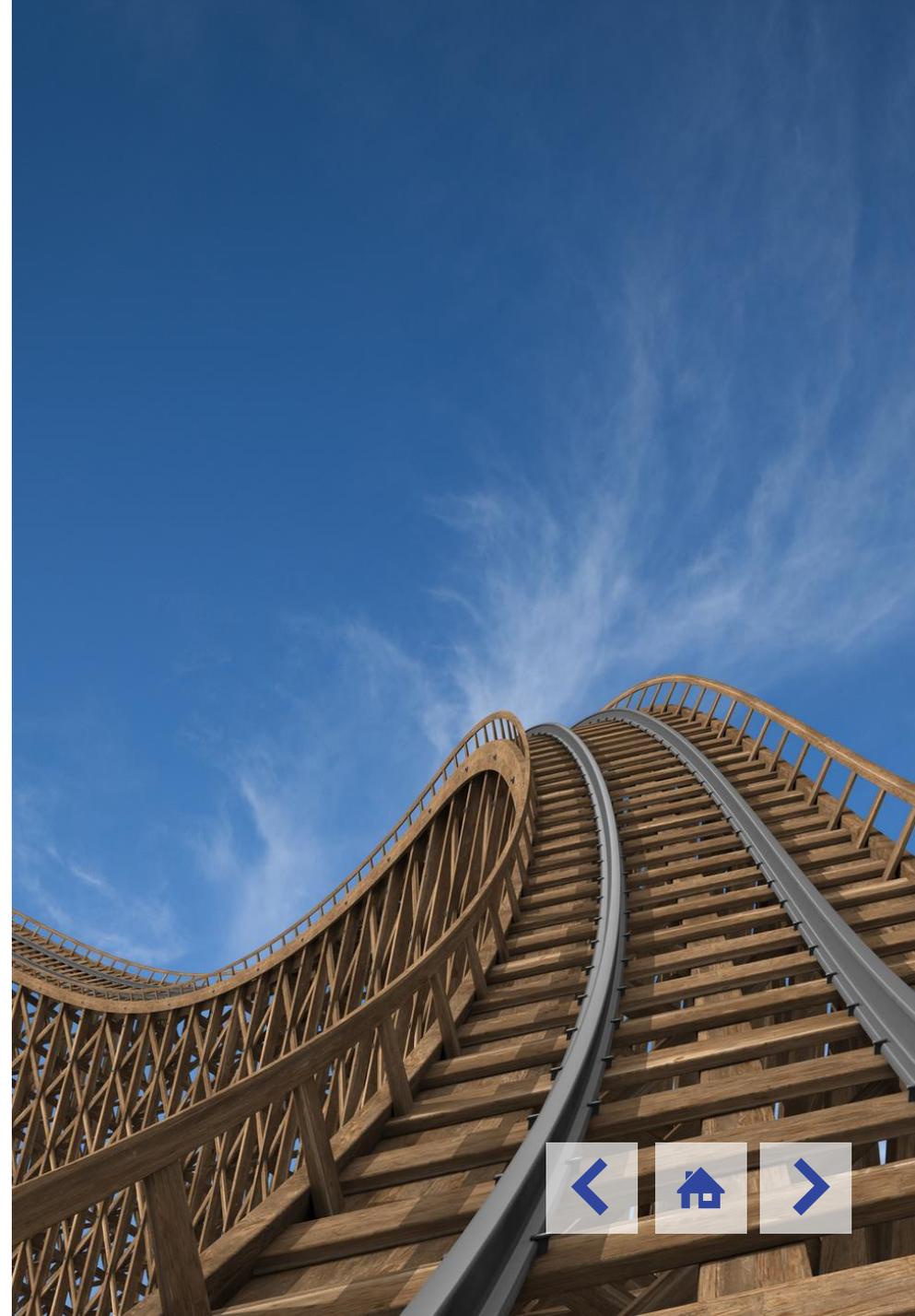
This paper presents some of our key observations in this turbulent time for retail and sets out ways for retailers, and the products that stock their shelves and websites, to stay on track during the ups and downs to come.

A new report on [the future of buying](#) looks at the latest trends in purchasing behaviour and reveals that, while Americans miss in-person shopping, a majority will continue buying things online.

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# TRADING UP

Has the pandemic affected the positive momentum of premium brands?

Premiumisation has been a successful strategy for brands in recent years, while economic conditions have been prosperous. But does this still apply today? Using Ipsos' brand value database, we look back over the past five years, and the disruptions of 2020 in particular, to see whether the positive momentum of premium brands has been impacted by the pandemic.

Our analysis reports good news for premium brands, but the story is not the same everywhere. There is greater potential for premium brands and products in certain categories and markets.

With these differences in mind, we look at some of the foundations of generating brand desire and explain some of the factors that encourage people to "trade up" in the products they buy.

Key points from our exploration of premium brands include:

- Functional superiority and emotional value are important for maintaining a premium position.
- Premium does well where there are opportunities for technical innovation, high levels of customer engagement, and when a brand or product can project aspirational values.
- Premium products are often perceived as higher quality and therefore less risky, an appealing quality in uncertain times.

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# CONSUMER CONSCIOUSNESS

Designing data strategies for a volatile world.

Companies often talk about being consumer-centric. But “consumer consciousness” is a more holistic concept. This means being aware of and attuned to consumer needs, allowing them to respond to changes and market disruptions in an agile manner.

Ipsos’ understanding of how to create a consumer conscious organisation is based on recent developments in neuroscience, data science and analytics. In this new paper, we discuss the building blocks of a consumer conscious business strategy, including the critical factors for getting it right.

Success here begins with sourcing and integrating consumer data, then applying analytical capabilities to create fresh insights. Finally, these must be tested through a learning loop of feedback.

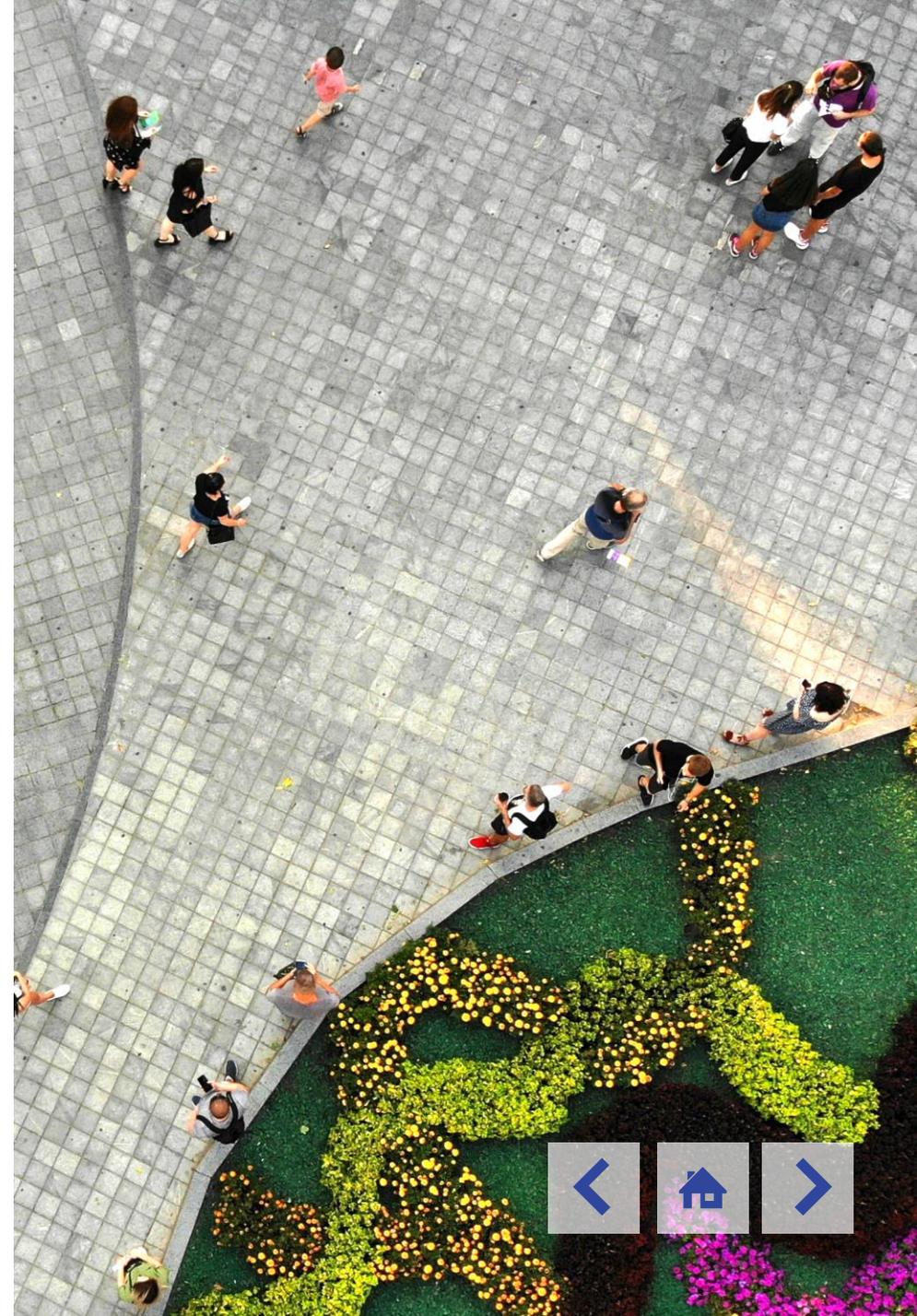
Key points from the paper include:

- It is increasingly important for companies to develop strong links between insight generation, digital analysts, computer scientists, and marketers.
- Manual, qualitative curation will always be a key skill. But in today’s world, new insights can also be generated through the application of digital analytics and data science techniques.

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# WE DON'T NEED TO TALK ABOUT ADS

Why only some advertising gets talked about on social media and becomes famous.

Evidence suggests that advertising that gets talked about has the potential to deliver unpaid or earned reach, and therefore more efficiency for marketers.

In this paper, we highlight the types of responses effective creative needs to evoke to be talked about online. Using data from our social intelligence platform, [Synthesio](#), we examine the relationship between the volume of mentions for a diverse range of online video ads, as well as the creative responses they achieved in our creative evaluation solution, [Creative|Spark](#).

Showcasing examples from recent campaigns, we identify four key creative traits of ads that attract comments online:

- **Cultural impact:** reflecting the world around us beyond the brand itself.
- **Creative bravery:** surprise people by delivering unique and divergent creative.
- **Positive feelings:** make people feel good about the experience.
- **Controversy:** don't be afraid if some people hate your ad.

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# EARLY YEARS & PARENTING

The importance of the early years in a child's development is undervalued around the world.

Science tells us that the early years of a child's life sets the foundations for their health and happiness as they grow into an adult. However, an average of only one in five (18%) across 28 countries believe the stage from pregnancy to five years' old are most important for a child's development. More are likely to say that all stages of life are equally important (35%). The countries where greater numbers believe the early years to be most important are Peru (28%), Germany (26%) and France (24%).

We see differences between countries in ideas about the role of parents vs. society in raising children. Four in 10 believe it is mostly the responsibility of parents to give children the best chance of health and happiness. This is matched by 41% who say parents and society are equally responsible. But more place the responsibility on parents in Poland (58%), the United States (55%) and Australia (54%). Just 13% on average say this is the joint responsibility of everyone in society, but this rises to one-quarter in China and in India (26% and 24% respectively).

In another [global survey on parenting](#), we find four in five parents feel judged for the behaviour of their children. On top of this, they aren't just imagining it – a similarly high proportion of non-parents admit to judging parents.

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# SPOTLIGHT ON THE UK

## A Year of Life in Lockdown



Two-thirds (65%) of Britons are likely to say that they have had a bad year, but it hasn't been all bad for everyone. A significant minority (19%) say the year has been better than they expected – rising to 29% of under-35s. Looking ahead, over half (54%) of the British public say they'll miss at least some aspects of lockdown, such as family time and quieter roads. Our study on what life has been like during lockdown in the UK explores its impact on relationships, finances, careers and future prospects.

See this [infographic](#) for a snapshot of public opinion over the year.

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## The Monarchy



The Duke and Duchess of Sussex's interview with Oprah Winfrey about their time as active members of the royal family raised questions about whether public opinions of the monarchy would change. Two Ipsos surveys conducted before and after the conversation show the monarchy's popularity remains stable. Only one in five (19%) believe abolishing the monarchy would be good for the country's future, similar to before the interview (17%). However one-quarter (26%) say they see the British monarchy as an institution less favourably as a result of the interview.

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## Issues Index



The UK [Issues Index](#) for March records the first significant drop in concern about Covid-19 since June 2020. Currently, 45% say this is one of the biggest worries facing the country, down from 72% last month.

Concern about Brexit continues to fall. The 60% citing this in December has fallen to 26%. See [another poll for views on whether/how Brexit has affected daily lives](#).

In other issues, economic concern holds steady while this month sees increases in those worried about the NHS, poverty/inequality, education and housing.

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# SHORTCUTS

## ONLINE MEDIA LITERACY

Around the world, demand for training in online media literacy – helping people to distinguish between true and false information – is going unmet.

An Ipsos survey for Google explores public attitudes towards misinformation, the difficulties people experience online and actions to solve them.

The 17-country study finds nearly one-third of Europeans, Americans and Australians saying they find it difficult to tell the difference between online news and current affairs information that is true or false.

A majority of those surveyed are interested in learning about tools that will help them distinguish between true and false information in the future. Fewer than one in ten in Europe and less than a third in all countries say they have received such training to date.

Of all countries surveyed, we see greatest demand for online media literacy training in Nigeria, India, Brazil and Romania.

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## FLAIR SAUDI ARABIA

Ipsos' first edition of *Flair in Saudi Arabia* presents an in-depth view of society. Our local team analyses current trends in the Kingdom today with expert perspectives on themes such as the economy, demographics, social media, food and infrastructure.

Some key points from the report include:

- **A powerful economy in the region:** The population represents 5.7% of the MENA total but GDP accounts for 21%.
- **Saudi Arabia is a young country:** 40% of the population is under 25.
- **Women's participation in the workforce is increasing:** The female to male labour force participation rate was reported at 28% in 2020.
- **Obesity is a public health concern:** The vast majority believe they are in good health but six in 10 are overweight or obese.

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## WHAT WORRIES THE WORLD?

Our 27-country survey finds that nearly one in two (45%) say that Covid-19 is one of the top issues facing their country in March 2021, one year after the global pandemic was declared. This remains the top global worry, although this latest figure is down 5 points from the previous month and the lowest recorded since October 2020.

Malaysia, Great Britain, Japan and the Netherlands are currently most concerned about Covid-19.

Unemployment ranks second overall, (mentioned by an average of 37% across the countries covered). It is followed by Poverty & social inequality (31%) and Financial/political corruption (29%).

Over six in 10 (62%) across all countries say that things in their country are off on the “wrong track”, while 38% say they are heading in the “right direction”. With over eight in 10 believing their country is on the wrong track, the public in Peru, South Africa and Poland are currently most pessimistic.

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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](mailto:IKC@ipsos.com) with any comments, including ideas for future content.

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