

IPSOS UPDATE

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

May 2021

Ipsos Knowledge Centre

GAME CHANGERS



WELCOME

Welcome to the May 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

EARTH DAY 2021

Public views on climate change action

In what is supposed to be a “super year” for climate change policy, our global survey on attitudes to the environment finds the public lacking confidence that their governments have a plan to tackle climate change.

VACCINE PASSPORTS

Widespread support for Covid-19 passports

Our global study for the World Economic Forum finds three-quarters across 28 countries think vaccine passports should be required to travel. This falls to around half when it comes to visiting shops, offices and restaurants.

PRODUCT SUBSCRIPTIONS

Flirtation or commitment?

The business model of having regular products delivered to your door has seen a surge in popularity, but will this stick in the long-term – especially when in-person shopping is more accessible and safe?

SOUTH KOREA FLAIR

Resilience, perspectives and innovations

Our 2021 edition of *Flair* in South Korea, “Leading the Way”, presents an in-depth view of public opinion and consumer trends in a country that looks to have escaped some of the worst impacts of the Coronavirus pandemic.

WHAT WORRIES THE WORLD?

Our ranking of 28 countries’ top concerns

Coronavirus continues to preoccupy the global population: 45% on average say this is a concern for their country today, 10 points above the next issue (Unemployment). But there are many shifts at country level.

THE FUTURE OF VACATIONS

Preparing for the big travel reset

Many people are gearing up for leisure travel once again, but business travel faces a more uncertain future. In this report we present the latest trends, preferences and opportunities for the travel sector – including VR.

BIDEN’S FIRST 100 DAYS

Reflections on America under a new President

With America in a very different place today than in January 2021, we look back at how public opinion has shifted in the first 100 days of Biden's presidency and consider the key challenges ahead.

PODCASTS

In conversation with Ipsos experts

Two new Ipsos podcasts on brand strategy and data collection models join our family of podcasts, allowing listeners to tune directly into our latest research and thinking.

EARTH DAY 2021

A 30-market study on public attitudes to climate change – and what action needs to be taken.

Only 31% across all countries agree their government has a clear plan in place for how society will work together to tackle climate change. Two-thirds say that if their government (65%) and companies (68%) do not act now to tackle climate change, they will be failing their citizens, employees and/or consumers.

Opinions are however divided on whether tackling climate change should be a priority in the economic recovery from Covid-19. While 35% say climate change should be a priority in the economic recovery, 36% say it should not.

Individuals also feel the burden of responsibility as 72% agree that if they do not act themselves, they will be failing future generations. Exploring whether the public is likely to revert back to less sustainable lifestyles after the pandemic, our survey finds intentions to be environmentally-friendly; 39% will do more to avoid food waste, one-third (34%) expect to travel more on foot or by bike rather than by car, and a similar proportion (34%) say they will buy only what they really need, rather than shop for fun.

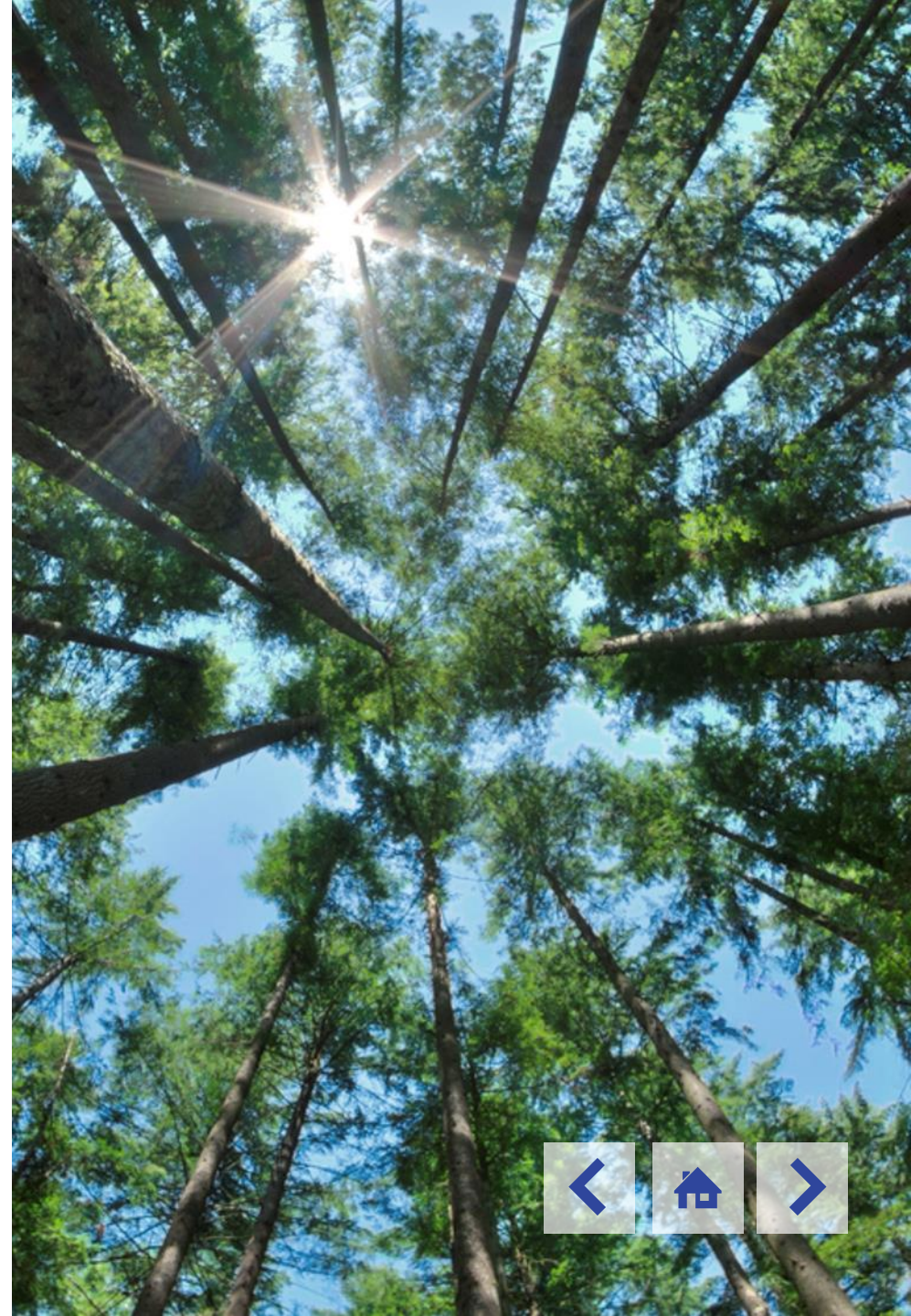
Seven in ten (69%) on average say that they know what they need to do to limit their environmental impact. However, our new [Perils of Perception study](#) suggests this might not be the case.

The [Earth Day special](#) of our UK politics and society podcast discusses some of the topics raised by this research.

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WHAT WORRIES THE WORLD?

Levels of concern about Coronavirus remain steady worldwide, but the underlying picture is unstable.

Covid-19 remains the top global concern in our 28-country survey survey. This continues the trend seen since we began tracking it alongside 17 other long-running issues in April 2020.

One year later, 45% say Covid-19 is one of the top issues facing their country today. Compared to last month, we see large increases in concern about Covid-19 in Chile (+23 points), Argentina (+13) and Turkey (+11). Meanwhile, concern has fallen most in Israel (-31 points), Great Britain (-8) and Italy (-7).

Unemployment is the second greatest issue at global level, but at 35% is the lowest recorded in 12 months, following a period of elevated concern during the pandemic. Poverty & social inequality (31%), Financial/political corruption (30%) and Crime & violence (25%) complete the top five.

Two-thirds (65%), according to our global country average, say that things in their country are heading in the wrong direction, while 35% say they are on the right track. Peru is most pessimistic on this measure with 89% opting for “wrong track”, followed by its Latin American neighbours Colombia (84%) and Chile (82%)

Meanwhile, our [Global Consumer Confidence Index](#) for April 2021 shows economic confidence to be at a new pandemic-era high.

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VACCINE PASSPORTS

Widespread support for Covid-19 passports worldwide – especially among older adults.

A new 28-country Ipsos survey for the World Economic Forum (conducted between 26th March and 9th April) finds that, on average, 78% of people think that Covid-19 vaccine passports – a record to prove an individual has been vaccinated against Covid-19, or has recently tested negative for the virus – should be required for travellers entering their country. Support for this is highest in Malaysia (92%) and Peru (90%), two of the countries most concerned about Covid-19, according to our *What Worries the World* survey.

Thinking also about large-scale public venues, two-thirds (67%) on average also agree these “passports” should be required at entry. However, fewer people (55% on average) think they should be required for shops, restaurants, and offices.

Confidence that these measures would make travel and large events safe is high, with 73% globally agreeing. Expectations that they will be implemented are more muted; 66% across all countries expect to see them in use by the end of this year.

Meanwhile, six in 10 people across 30 countries expect they will return to something like their [pre-Covid lives](#) within the next 12 months, although this varies greatly between countries. The timescale for the return to normal closely correlates with when people think the virus will be contained.

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WHAT THE FUTURE: VACATION

In a post-COVID world, what does the future of travel look like?

Americans are eager to escape their pandemic cocoons. Yet leisure travel today depends heavily on the business travel infrastructure, which has an outsized economic impact. With 53% of US business travellers agreeing they will travel less for business after the pandemic, what happens to the industry if business travel really does shrink in the long term?

Featuring interviews with key travel experts, our latest *What the Future* issue explores the changing dynamics of business travel, including the points economy, different types of accommodations, and the present and future of virtual tourism.

With 66% of Americans saying they would use an app or device to virtually explore a new city or cultural site, we look at how virtual reality technology can be harnessed in the travel industry, both as a replacement for “being there” and also as a tool for destination marketers.

The report looks at what travel- and hospitality-focused companies can do to attract and retain customers as we head for the big “travel reset”. Listening carefully to their preferences, desires, and safety concerns are most important, as is offering flexibility.

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PRODUCT SUBSCRIPTIONS

Is increased consumer interest just flirtation or is there true commitment to the purchase model?

Product subscriptions have become increasingly popular in recent months, due in part due to widespread in-store shopping restrictions and health & safety concerns during Covid-19. People have been signing up in greater numbers to receive regular deliveries of items such as personal care products, groceries and household goods. For example, replenishment subscriptions (restocking essentials) have increased by 56% compared to before the pandemic while box subscriptions (which offer curated selections of new products) are up by 62%.

In this new paper, we explore what this method of shopping offers consumers, and reflect on how subscription models can further develop to ensure people stick with them in the long-term.

Our research has found the main reasons people sign up are the convenience of home delivery (44%), that it is a safer way to shop (32%), free shipping (28%) and knowing exactly when it will arrive (22%).

But shopping is not just about acquisition. Excitement, social connections, satisfaction, and even a sense of achievement also come into play. These are things that subscription models will need to tap into for lasting success.

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BIDEN'S FIRST 100 DAYS

Reflections on America under a new President.

At the start of President Joe Biden's term, the US was grappling with a deadly third wave of the Coronavirus pandemic, the aftershocks of a bitterly contested election, and an unprecedented assault on the Capitol building.

100 days later and the situation is very different, with Covid-19 cases declining and significant progress on vaccinations. At the same time, Americans have become more optimistic, with many now looking forward to resuming aspects of their pre-Covid lives.

In this report, our US team looks back on Ipsos' polling and analysis during the first 100 days of Biden's presidency.

While we find Americans divided on which issues the government should prioritise, Biden entered office with a strong mandate to tackle the Coronavirus crisis and a majority (62%) approve of how he has handled it (84% of Democrats and 39% of Republicans).

Beyond his first 100 days, the top challenges Biden will face include: the vaccine wall, economic recovery, trust in federal government and bipartisan consensus on the issues of the day.

Read more about [how the past 100 days transformed America](#) in this round-up of stories from our US political polling team.

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SOUTH KOREA 2021

Resilience, perspectives and innovations.

Our 2021 edition of *Flair* in South Korea, “Leading the Way”, presents an in-depth view of public opinion and consumer trends in a country that looks to have escaped some of the worst impacts of the Coronavirus pandemic. There is a hopeful outlook as the Bank of Korea expects to see an annual growth in 2021 that would place South Korea it in the world’s top ten economies.

Some of the key points from the report include:

- **Positivity towards the Covid-19 response:** The public are happy with how the government have handled the crisis, however, concerns about infection remain prevalent.
- **Society is ageing fast:** In 2020, the number of births outnumbered the number of deaths. The cost of having children is one reason for the low birth rate.
- **Facing up to gender equality:** 38% of women and 71% of men think that giving women equal rights has gone far enough in South Korea. The country is currently ranked 108th out of 153 nations in terms of gender equality.
- **The rise of the “home economy”:** as people have spent more time at home, consumption of products related to indoor activities skyrocketed in 2020, and was seen across different sectors.

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PODCASTS

Brand Strategy



Getting It Right is a new Ipsos podcast on all things brand strategy. Hosts Douwe Rademaker and Chris Murphy encourage us to think differently about brand management.

[Episode 1:](#) Seth Traum on implementing dynamic brand strategies.

[Episode 2:](#) Daan Versteeg introduces us to a data-driven consumer-centricity framework.

[LISTEN HERE](#)

Operational Angle



The Operational Angle is a new Ipsos podcast that explores the breadth and depth of Ipsos' data collection capabilities.

In the [first episode](#), our host Leah McTiernan talks to Ipsos colleagues Adele Bearfield, Andrew Cleary, Andrew Green and Nik Reynolds about their experiences of carrying out social, audience measurement and product testing research through a Mixed Mode design.

[LISTEN HERE](#)

Insight Out



Insight Out is a podcast by Ipsos UU (our qualitative research team) exploring emerging trends, budding innovations and creative ways to get closer to real people in real life.

The [latest episode](#) features a conversation with Luciana Obniski about why it is important to listen to all voices – especially those in the margins. Often the "small" voice can initiate the biggest change.

[LISTEN HERE](#)

Customer Perspective



Customer Perspective is a podcast aimed at everyone that aims to help their organisation deliver on its brand promise to customers. Recent episodes of the third season include:

- Customer experience in the hospitality industry.
- A discussion with EQ about experience management.
- Tips on taking mystery shopping to the next level.

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SHORTCUTS

SPORT FOCUS

An Ipsos survey in 5 European countries (France, Germany, Italy, Spain and the UK) finds widespread opposition to the proposed European Super League. Conducted on 20th April, the poll shows a majority of people (irrespective of their interest in football) disapprove of many aspects of the Super League, including its funding, how participating clubs are selected and the continued participation of the founding clubs regardless of their performance.

Another study looks into how media portrayal of sports athletes is affected by their gender. It finds male athletes more likely to have their sporting performance discussed while coverage of women athletes includes more of a focus on their personal lives.

Our analysis of Google searches show people are interested in finding out similar things about male and female players (apart from net worth – searched for more with men), yet the results are unbalanced in terms of gender.

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SCOTLAND

The outcome of the Scottish Parliament election on 6th May look set to be critical for the future of Scotland and of the UK

As part of Ipsos' coverage of the election, Emily Gray and Rachel Ormston discuss the current state of play and the possible paths after election day in this [21st April webinar](#).

We find that half of the UK public (51%) say the UK Government should allow another Scottish independence referendum if the SNP win a majority. A similar proportion (53%) expect the UK will not exist in its current form in a decade, with those in Scotland and Northern Ireland particularly likely to say this. Six in ten (59%) believe the UK will be weaker if Scotland leaves.

In partnership with Holyrood Magazine, Ipsos is following a small group of people who are yet to decide who to vote for on the 6th May. They are keeping a video diary to help us better understand their experiences thoughts as polling day approaches. Watch [Part 1](#) and [Part 2](#) of the Election Diaries.

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DYNAMIC PLANET

Are we prepared for the demographic, environmental and technological changes ahead? In this webinar, Ipsos experts from around the world explore some of the big trends shaping the planet:

Environment: Our review of public attitudes towards climate change explores misperceptions, allocation of responsibility and what individuals themselves are prepared to do.

Population: We consider the prospect of the planet's population starting to fall, and reflect on what that may mean for society, economies and governments.

Mobility: Looking beyond our current state of "immobility" prompted by the pandemic, our new mobility trends analysis sets out the underlying changes that are taking place.

We then go on to consider the implications of each of these in **Latin America**, considering how these dynamics will impact the diverse countries of the region.

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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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