

IPSOS UPDATE

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

June 2021

Ipsos Knowledge Centre

GAME CHANGERS



WELCOME

Welcome to the June 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

EMPTIER PLANET

The shock of the global population decline

A great defining moment of the 21st century will occur in three decades or so when the global population starts to decline. We consider what these shifting population dynamics mean for society and business.

THE PATIENT VOICE

Using social data to enhance empathy

Empathy between patients and doctors is key to positive health outcomes, but this relationship is increasingly strained in the changing healthcare environment. We explore how social analytics can help.

GEORGE FLOYD: ONE YEAR ON

What has changed?

May 25th marked the one-year anniversary of the killing of George Floyd and the subsequent Black Lives Matters protests across the world. Our studies in the US and UK reflect on what this has meant for racial justice.

THE FUTURE OF ENTERTAINMENT

Media is pervasive – and we're not going back

Our screen time has increased over the past year. Will our dependence continue? The latest in our US team's *What the Future* series considers our viewing habits, content marketing, opportunities for virtual and more.

AN AFRICAN PERSPECTIVE

The ongoing impacts of Covid-19

The initial slow spread of Covid-19 through Africa helped some countries to start preparing for the inevitable, but – a year into the pandemic – many Africans report a devastating effect on their lives and livelihoods.

SETTING THE RIGHT TARGETS

KPIs for customer experience performance

Key performance indicators are a powerful tool for driving business success. But the KPIs you choose need to be right – linking to desired outcomes and reflecting customer needs.

SPOTLIGHT ON ITALY

A country at a crossroads

The 2021 edition of *Italy Flair* highlights some of the key dynamics shaping society and consumer trends in Italy today while our Italian team's ongoing monitor of the Coronavirus crisis shows an increasingly positive outlook.

WHAT WORRIES THE WORLD?

Coronavirus concern is shifting

Our 28-country survey finds Covid-19 is still worrying people around the world, but concern is down in many places. Meanwhile, countries with successful vaccination programmes show highest economic optimism.

EMPTIER PLANET

Are we ready for the shock of the global population decline?

Population change isn't necessarily a good thing or bad thing, but it is a big thing, and the implications for the future of the world are profound.

A defining moment of the 21st century will occur in three decades or so when the global population starts to decline. Many people are surprised to hear this. But the truth is that the earth's population is not growing out of control. Instead, we are heading for a population bust.

This trend is not only taking place in a handful of countries – it is happening everywhere. The forces driving this decline are already in place and we are feeling the effects in many aspects of our lives.

Our new *Ipsos Views* paper looks at the latest demographic projections, the factors driving population decline, and considers the implications for society and business. Among the key points:

- Urbanization, fertility and ageing are the key interacting forces driving population decline.
- In the future, ageing and immigration will drive population growth more than the birth rate.
- The geographic centre of the world's population will move from Asia to Africa.

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COVID-19: AN AFRICAN PERSPECTIVE

The ongoing impacts of the pandemic on health, social and economic conditions, and daily life.

The initial slow spread of Covid-19 through Africa helped some countries to start preparing for the inevitable, but – a little more than a year into the pandemic – many Africans report a devastating effect on their lives and livelihoods.

The International Monetary Fund (IMF) estimates Africa will need a total of US \$285 billion over the next four years to overcome the effects of the Covid-19 pandemic.

Ipsos has been conducting research for the Partnership for Evidence-Based Response to Covid-19 (PERC) on the impact of Covid-19 on the continent. Here are some of the latest findings:

- 77% on average across the 19 African countries surveyed report some loss of income due to the pandemic.
- Four in ten say that Covid-19 had made it more difficult for them, or someone in their household, to obtain medication.
- Reported mask use is high overall, but on the low side in the two most populous African countries: Nigeria and Ethiopia.
- Two-thirds (67%) are interested in taking a vaccine when it becomes available. Attitudes vary considerably by country.

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THE PATIENT VOICE

Using social data to bridge the empathy gap in healthcare.

Research shows that empathy and compassion in the patient-doctor relationship has multiple positive health outcomes. However, this relationship is increasingly strained in the changing healthcare environment, with the rise of virtual care and as patients take more control over their health.

We found that people share their health-related questions and experiences on social media platforms due to uncertainty, services being unavailable, and to find validation and belonging.

Social media research helps to understand the emotional aspect of the patient experience and can guide us towards bridging the empathy gap in healthcare. For example, we discover that the dominant emotions within our dataset are worry, confusion, fear and sadness. These arose from occasions where the patient felt misunderstood, unheard, or not taken seriously.

More and more, people are turning to the internet to share experiences and find answers to their health questions. Online platforms can provide an authentic and immediate data source to help us understand patient journeys, customer profiles, unmet needs and market landscapes. In turn, healthcare businesses can use these insights to create the best products, tools and services to support patients.

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THE KEY TO YOUR CX SUCCESS

Finding the right customer experience KPI for your business.

Key Performance Indicators (KPIs) are central to customer experience measurement and management, serving to drive customer-focused action and improved business performance. As a powerful tool for change, organisations need to ensure that their KPIs are right for them.

Choosing a KPI is not just about selecting an easy-to-answer metric. It needs to be connected to an organisation's bottom line or reflect desired business outcomes. The rationale behind the metric should be clear and transparent from boardroom to frontline staff.

In this paper, we explore how organisations can determine the right CX KPIs to drive their business performance. We specifically focus on:

- The key ingredients of a good KPI.
- How organisations can validate their CX KPIs.
- Linking KPIs and real-life business outcomes i.e. delivering a '[Return on CX Investment](#)' (ROCXI).
- How to drive action through the right diagnostics.

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GEORGE FLOYD: ONE YEAR ON

What has changed in the past year?

May 25th marked the one-year anniversary of the killing of George Floyd and the subsequent Black Lives Matters protests across the world. We look at how public opinion has shifted on in a [new study](#) that compares how Black and White Americans perceive the circumstances around George Floyd's death, support for protests and trust in institutions, revealing some major differences.

[Our recent polling](#) finds Americans believe there is still some way to go to resolve tensions around racial justice. Just one in three (35%) agree that the protests following the death of George Floyd had a positive impact on society. And only 13% think that police treatment of Black Americans improved over the last year.

In the UK, our study on [British attitudes to race and inequality](#) finds opinion is split as to whether racism is discussed too much (28%) or too little (30%) in society today. There are clear differences by age, ethnicity, and political support. However, a majority (54%) say more needs to be done to tackle racism.

Further [qualitative research](#) on this topic among people from ethnic minorities in Britain finds that the Black Lives Matter movement has inspired optimism that change on racial justice is possible, but some express concerns about what the movement can achieve – and whether it has lost momentum.

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SPOTLIGHT ON ITALY

New in-depth analysis from our experts and the latest in public opinion.

The 2021 edition of *Italy Flair* explores a country at a crossroads. Our English summary of the full report ([available in Italian](#)) highlights some of the key dynamics shaping Italian society and explores the latest consumer trends in this important market.

There are two political avenues open to Italians: conservative and protectionist, or open and environmentally-conscious. Which is more likely to prevail depends on how public optimism develops. Meanwhile, Italy's consumers are questioning the role of companies in society and searching for quality and authenticity.

Our Italian team's ongoing public opinion monitor during the Coronavirus crisis shows an increasingly positive outlook:

- A quarter of Italians think they are still in the midst of a full emergency, but 42% believe that the worst has passed.
- 57% of Italians say they are more concerned about the health risk of Covid-19, while 25% are most concerned about losing their job, income or savings.
- 45% of Italians express a positive opinion of their country's vaccination programme (+ 25 points vs. two months ago).

Read the [latest findings](#) or listen to the [podcast](#) (both in Italian).

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THE FUTURE OF ENTERTAINMENT

Media has become pervasive, and it looks like we're not going back.

Our screen time has increased over the past year. One-third of Americans say that they have been streaming more content and using social media more throughout the pandemic. Will our dependence continue to grow?

When it comes to entertainment, 90% of Americans intend to stick with their content streaming subscriptions once pandemic restrictions are fully lifted. And while many are keen to get back to in-person events this summer (especially younger generations) there are still many opportunities for virtual.

The latest edition of our US team's *What the Future* publication considers the future of media and entertainment. It includes data on viewing habits and preferences as well as articles on a number of topics, including:

- Representation on TV and how to drive more viewers to mainstream content.
- Social commerce: how to turn scrollers into shoppers.
- The next frontier for virtual spaces, from entertainment to commerce and even research.

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WHAT WORRIES THE WORLD?

Coronavirus concern is still widespread, but much reduced from this time last year.

The May 2021 results of our 28-country survey find that Covid-19 is still worrying people around the world more than other issues: 42% on average count it among the top concerns facing their country today. This is down three points since April and 29 points lower than it was in May last year.

In many countries, concern about Coronavirus has dropped by more than 10 percentage points since last month, but it is up 21 points in India, to 66%. The country is now in third place in terms of Coronavirus concern, behind Malaysia and Japan.

Completing our list of the top five worries worldwide are Unemployment/jobs (34%), Poverty & social inequality (32%), Financial/political corruption (30%) and Crime & violence (25%).

Meanwhile, two-thirds (65%) across all countries say that things in their country are on the wrong track, as opposed to moving in the right direction. The countries most pessimistic on this measure are Colombia (where 91% say this), Peru (83%) and Argentina (81%).

Another increase in [global consumer confidence](#) sees the countries with the strongest vaccination programmes showing greatest economic optimism. The Expectations Index is now back to pre-pandemic levels.

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SHORTCUTS

RESEARCH IN THE REAL WORLD

Ipsos has been focused on informing clients how the Coronavirus crisis is playing out in the lives of citizens across the globe.

Our social research is informing public sector policies and solutions as governments and organisations grapple with the ebb and flow of the pandemic and its variants.

In a global webinar on “Lessons from the Pandemic”, our panel of experts presented real-world examples of how their research has delivered tangible impacts for governments, organisations and citizens across the world at critical points in time throughout the last year.

[The recording is available to watch here.](#)

Find out about how Ipsos has adapted research methods, developed and delivered new innovations, and helped our clients to understand how to answer the most important communications and policy questions being raised by the pandemic.

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DRIVING SAFETY

Our study on responsible driving in 11 European countries looks into what is happening in the minds of those behind the wheel, monitoring risky behaviours in order to inform better prevention campaigns.

Findings include:

- 75% of European drivers admit they do not always follow the traffic code. Among these, speeding is the number one offence.
- 77% of those who take liberties with the traffic code also do the same with public health guidelines. Overall, 70% say they do not always follow the Covid-19 rules.
- 45% follow health guidelines out of concern for others, while 33% follow the traffic code for the same reason.

This research, conducted for the Vinci Autoroutes Foundation, finds people are more likely to break a rule if they do not understand or agree with the reason for it.

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COVID-19 VACCINES

An Ipsos survey of nearly 10,000 unvaccinated adults in 15 countries presents the latest in public attitudes to vaccinations.

It finds that majorities in all but two countries intend to get the Covid-19 vaccine as soon as it becomes available to them.

The proportion of the public saying they will get vaccinated is currently highest in Brazil (93%), Mexico (88%), Spain (83%) and China (81%), but low in Russia (41%). It is middling in France (58%), South Africa (62%) and Australia (66%).

Since February, vaccination intent has declined most in the United States (-19), Australia (-12), the United Kingdom (-10), South Korea (-8), and Italy (-6).

Looking at a demographic breakdown of our survey data, it appears that vaccine hesitancy is more prevalent among those with lower incomes or lower levels of education, younger generations, and females.

[Find more on Ipsos' vaccines research here.](#)

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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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