

IPSOS UPDATE

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

July 2021

WELCOME

Welcome to the July 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

WORLD REFUGEE DAY 2021

Principles at odds with practice

Our 28-country survey paints a mixed picture of public opinion on refugees. Although there is majority support for the right to seek refuge from war or persecution, many are reluctant to see their country accept more refugees.

DIVISIONS & CULTURE WARS

Exploring the causes of social conflict

Although “culture wars” may not be a concept that is familiar to everyone, our 28-country study finds many agreeing that tensions exist in society. The key source of division is seen to be that of rich vs. poor.

INDONESIA FLAIR 2021

Back to growth

The 2021 edition of *Indonesia Flair* presents an in-depth view of society as our local team reflect on what we have learned during the Covid-19 crisis. Topics covered include economic recovery and consumer expectations.

TIME TO DECIDE

Response time for innovation and brand growth

The time we take to make a choice can be telling. Response time has been used in market research for years. But our new paper shows how and why Ipsos integrates it into research tools and methodologies today.

LGBT+ PRIDE

Identities and attitudes around the world today

For LGBT+ Pride month 2021, we look at how people around the world describe their gender identity and sexual orientation. We also explore attitudes to issues relating to LGBT+ equality in 27 countries.

SUSTAINABLE DEVELOPMENT GOALS

Is enough being done?

In 2015, world leaders agreed to 17 Sustainable Development Goals (SDGs) to create a better world in 2030. Six years later, we asked people around the world what they think about progress and priorities.

DIGITAL DOCTOR

What a difference a year makes

The latest results from our 14-country Digital Doctor study show that healthcare professionals around the world have become significantly more knowledgeable and experienced in digital health during the pandemic.

GET REAL, GET CREATIVE

How to climb the creative effectiveness ladder

There are many paths to success in creative communications, but what often makes the difference is how campaigns are rooted in reality and can relate to people's lives. We show some examples of this winning strategy.

GLOBAL ATTITUDES TOWARDS REFUGEES

Principles are at odds with practice, according to our global study on attitudes towards refugees.

Our 28-country global survey for World Refugee Day 2021 paints a mixed picture of public opinion. Although there is majority support for the right to seek refuge from war or persecution (70% on average agree), many are reluctant to see their country accept more refugees or increase spending to support refugees (only 14% worldwide support each of these actions).

More people agree than disagree that their country should close their borders to refugees entirely (50% vs. 43%). Malaysia, Turkey and India are the nations where people are most likely to say they cannot accept refugees at this time. Poland, Japan, the US and Argentina show the lowest levels of support for closed borders.

We also find widespread scepticism around the genuine motivations of refugees. Globally, six in 10 think that people enter their country to seek economic benefits rather than refuge.

Opinion is split as to whether refugees are likely to successfully integrate (47% agree while 44% disagree). However, the proportion agreeing has increased in many countries since 2019. Saudi Arabia, India and Argentina are most confident in the ability of refugees to integrate into society.

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LGBT+ PRIDE

A wide-ranging report on identities and attitudes.

Our global survey for LGBT+ Pride month 2021 looks at how people around the world describe their gender identity and sexual orientation. It also explores issues relating to LGBT+ equality, exposure and visibility in 27 countries today.

The findings point to a generational gap. On average, those who identify as transgender, non-binary, non-conforming, gender-fluid, or other than male or female, make up 4% of Gen Z (born since 1997) compared to 1% among all adults. Younger adults are also significantly more likely to identify differently from heterosexual and to say they are equally attracted to both sexes.

Across all countries, an average of 51% support LGBT+ people being open about their sexual orientation or gender identity with everyone, while 16% oppose it. Support is highest in Spain (73%), Argentina (69%) and Chile (68%), and lowest in Russia (12%) and Malaysia (14%). Support for public displays of affection from LGBT couples is more muted (37% support and 27% oppose globally).

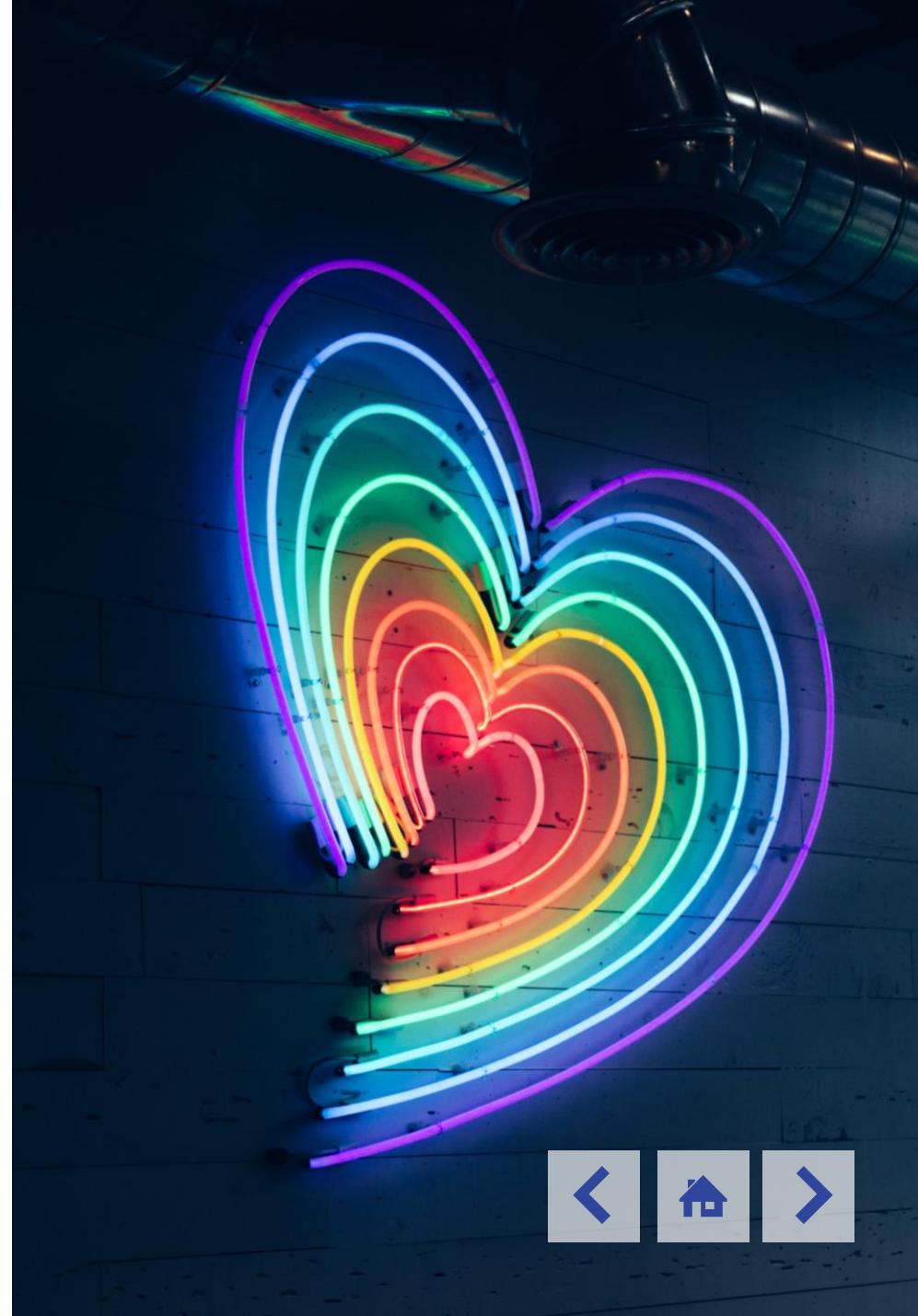
On average across all 27 countries, 54% support the right of LGBT people to marry legally and 16% support some other form of legal recognition. One in three (36%) worldwide say their views on this issue has changed in the past five years.

The survey also looks at views on same-sex parenting, anti-discrimination laws, corporate activism on LGBT+ equality and more.

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DIVISIONS AND CULTURE WARS

Exploring the causes of social conflict.

Just over a third (35%) of people on average across 28 countries believe their society is divided by “culture wars”, according to a new Ipsos Global Advisor poll carried out in partnership with the Policy Institute at King’s College London. However, there are large variations by country, and many do not have a strong view.

People in South Africa, India and the US are in greatest agreement that culture wars divide their country. More than 50% in each nation say this is the case. But, globally, a large proportion express uncertainty (32% on average), suggesting “culture wars” is not a concept that everyone is familiar with.

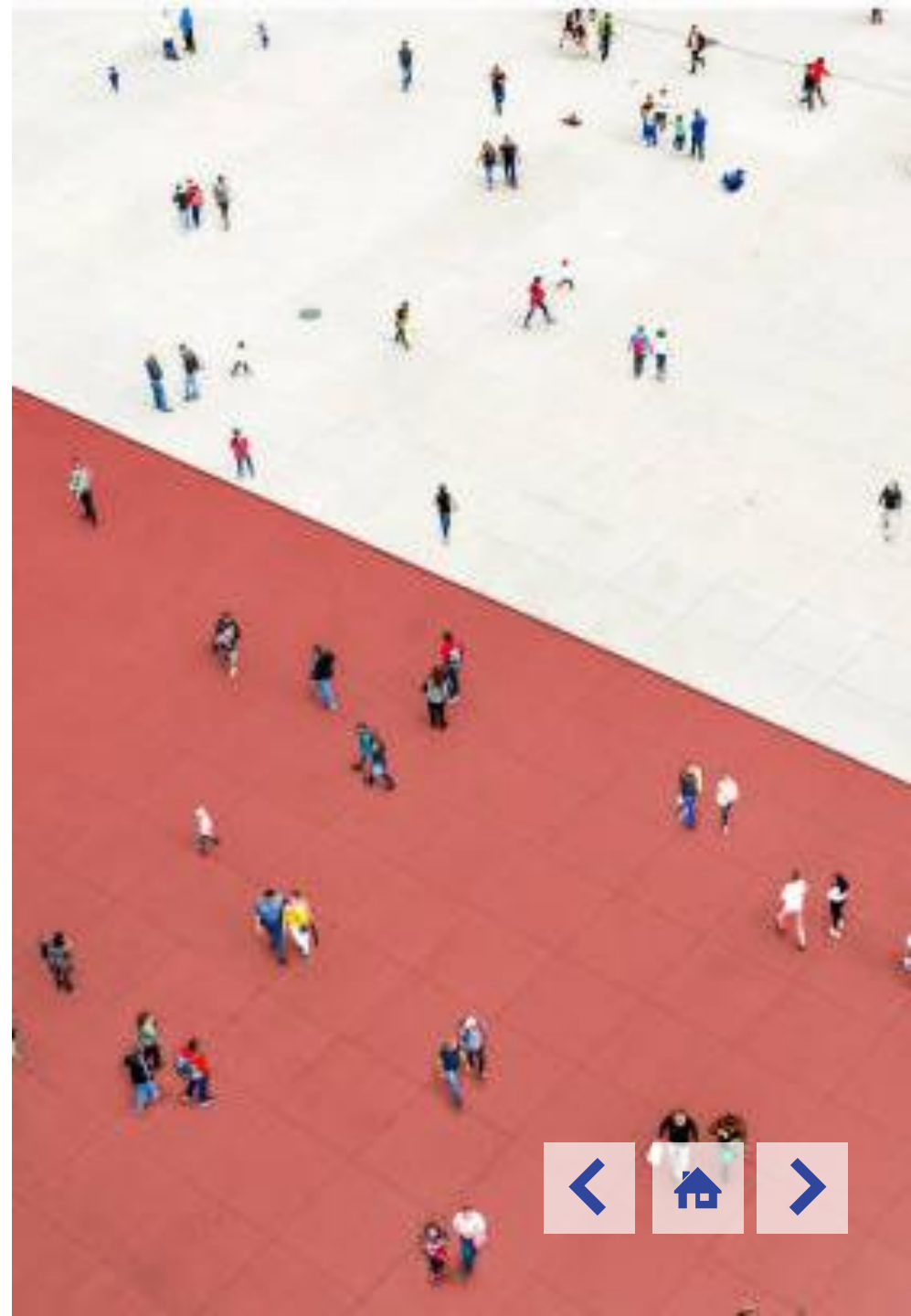
Looking more closely at the source of divisions that exist in society, the tension between rich and poor is identified as a key factor by 74%. This is followed by politics (69%), social class (67%), immigration (65%), and the values that people hold (66%).

The survey also asks people their views on political correctness. On balance, people in most countries tend to think that we need to “change the way people talk” as opposed to thinking that “some people are just too easily offended” (60% vs. 31%, global country average). Those in Great Britain, Australia and the US are most likely to support the view that people take offence too readily, with Sweden, Canada and the Netherlands not far behind.

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SUSTAINABLE DEVELOPMENT GOALS

Does the world think enough is being done to achieve the goals set by the UN?

In 2015, world leaders agreed to 17 Sustainable Development Goals (SDGs) to create a better world in 2030. Six years later, we asked people across 28 countries what they think about progress and priorities for sustainable development.

The goals that the public consider most important today are “Zero hunger”, “No poverty” and “Good health and wellbeing”. Eradicating hunger is ranked #1 in 20 of the 28 countries while poverty is a bigger focus in Belgium, Russia, Saudi Arabia and South Africa. Health and wellbeing is seen to be most important in Belgium (alongside poverty), France, Japan and the Netherlands.

More than half of the public (53%) across 28 countries say their government isn't doing enough to achieve the UN Sustainable Development Goals (SDGs). And a majority in 20 countries think their government is skirting its responsibility in this area. People in Hungary, (71%), Colombia (69%), South Africa (69%), and Brazil (67%) are most likely to agree with this.

Looking to the responsibility of business leaders, four in 10 (42%, global country average) say that business is not doing enough to work towards the SDGs. This includes a majority in Chile (56%) Canada (55%), Turkey (55%), Great Britain (54%), Italy (52%) Hungary (52%), and Colombia (51%).

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INDONESIA FLAIR 2021

This year's edition focuses on getting back to growth.

The 2021 edition of *Indonesia Flair* presents an in-depth view of society as our local team reflect on what we have learned during the Covid-19 crisis.

We begin with the economic picture. Indonesia's economy rebounded in the second half of 2020 and growth is expected to accelerate in 2021 and 2022. In line with this positive projection, we find Indonesians are the most optimistic about economic recovery when compared to their Southeast Asian neighbours.

However, as Indonesia is the leading producer of nickel and palm oil, we point out that environmentally responsible economic growth will be an important focus for the nation. Indonesia is currently stepping up agreements with manufacturers of electric batteries.

Turning to consumer trends, we discover a greater focus on health, note that consumers are more discerning, with greater expectations of brands and products, and explore how the digital economy has opened up to larger segments of the population.

There is also a huge drive to restart and boost the tourism sector in Indonesia, with a preferential loan package (worth \$US 670 million) to Bali in particular.

See the [10 key points](#) summary report of Indonesia Flair 2021.

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DIGITAL DOCTOR

What a difference a year makes.

The latest survey results from Ipsos' [Digital Doctor study](#) in 14 countries show that healthcare professionals around the world have become significantly more knowledgeable and experienced in digital health during the pandemic.

This growing familiarity with digital health technologies over the past year is shown below (*figures represent % of physicians who "know a lot" about this in the context of health in 2021 vs. 2020*).

- Telehealth (71% vs. 64%)
- Remote patient monitoring (53% vs. 45%)
- Digital medicine (42% vs. 34%)
- Chatbots (23% vs. 19%)

Although the pandemic did not create the need for digital health, it certainly accelerated the uptake. In this paper, we explore whether a shift to remote patient management has impacted doctors' perceptions of health care technologies and consider whether these ways of working will continue in the future.

Ipsos' forward-looking view is that healthcare will establish a blended approach of online and offline solutions as best suits the situation. It is also clear that some digital health challenges, such as a healthcare professional's ability to provide holistic care and convey empathy, will need to be addressed.

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TIME TO DECIDE

Response time for innovation and brand growth.

The time it takes for us to make a choice can be telling. In consumer research, response time reveals whether decisions are made in a more automatic or considered way. It can be used to measure the strength of brand associations, as well as whether external factors (e.g. advertising) can affect the choice outcome.

Based on the latest scientific understandings of decision-making and validated by real-world applications, Ipsos incorporates response time measurement into research methods and tools designed for product development, marketing, and growing stronger brands. For example:

- **Duel** screens marketing elements such as claims, names and visuals through a “tournament” design, asking respondents which they prefer in quick succession. Response time reveals which are appealing at a more automatic level.
- **InnoTest** predicts how well a new product will do on the shelf. Faster response times indicate greater conviction in the choice and often highlight the winning option.
- In **Multi-Choice Reaction Time**, response time helps to see how brand assets (colours, logos) are encoded in memory, and how strong, intuitive and unique brand associations are.

[Listen to the podcast](#) as the authors of *Time to Decide* discuss response time in market research.

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GET REAL, GET CREATIVE!

Using real understanding to climb the creative effectiveness ladder.

Multiple examples of creative communications campaigns show that there are many different paths to success. But we find that what often makes the difference is how much they are rooted in reality and how they resonate with consumers' own lives. Being 'Real' is a winning strategy. But what does this mean, exactly?

In the context of creative communications, we have uncovered four different dimensions of Real. These are:

- **Context:** Understanding the broader context in which people live; the social and economic trends influencing them.
- **Insight:** Exploring experiences, aspirations and tensions.
- **Purpose:** Uncovering the role that the brand can play in people's lives.
- **Distinctiveness:** Revealing a real point of difference. This can be the springboard to telling a unique and creative story.

Our new paper tells four stories of brands that have used these elements to inspire creativity and create campaigns that are effective in the long-run.

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LATIN AMERICA



BRAZIL

As part of the Canning House *LatAm Outlook* events, Marcos Calliari, CEO of Ipsos in Brazil presented the social outlook in the country today.

- 87% say the economic situation is 'bad' but 67% expect it to improve soon.
- Covid-19 and Healthcare are key issues and the public is keen to get vaccinated.
- People are also very aware of social inequalities and would prioritise social progress over economic growth in the recovery from Covid-19.

[SEE THE PRESENTATION](#)



COLOMBIA

At the LatAm Outlook Colombia event, Mauricio Sepúlveda, Country Manager of Ipsos in Colombia shared a picture of the social context. He draws on global data and stability indicators to explore some of the issues underlying the unrest seen in the country today.

- Social issues such as employment, inequality and concern about corruption dominate, and are even bigger concerns than worries about the virus.
- Set against a global picture Colombia is among the most likely to say that things in the country are on the wrong track.

[SEE THE PRESENTATION](#)



CHILE

The latest chapter of the Ipsos and Espacio Público survey in Chile explores the public view on democracy, education and health. Alejandra Ojeda, Director of Public Affairs, commented: "More and more Chileans feel it is important to give their opinion on issues of interest to the country and to their lives".

- 83% would not vote for a candidate involved in a corruption case.
- 80% think that schools have primary responsibility for children's learning.
- 63% are concerned about being able to pay for a health emergency.

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SHORTCUTS

ITALY: AN INTERNATIONAL VIEW

A new international study from Ipsos in Italy explores perceptions of the country abroad, taking in perspectives from 19 countries. Findings include:

- Italy is ranked 3rd when we look at the countries people are most familiar with (after the US and UK).
- It ranks highly on 'Quality of life', 'Positive attitude' and 'Creativity'.
- Tourism is a popular talking point in relation to Italy, with landscapes, restaurants and museums the top attractions.
- Italian food and beverages have great appeal with 63% strongly agreeing the cuisine is 'exceptional'.
- Social analytics show a negative view of politics and the economy in Italy.

[Discover more in *Flair Italy 2021*.](#)

For more on countries' reputations, see the new Ipsos/Anholt [Nation Brands Index](#).

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BREXIT: FIVE YEARS ON

Five years after Britain voted to leave the European Union, [a new report](#) from Ipsos in the UK looks at how Britain continues to be divided into distinct groups each with different views about how Brexit is going and on their underlying values.

These groups range from 'Liberal Remainers' to 'Traditionalist Leavers' and include various middle groups with weaker Brexit identities and less polarised views towards both sides.

[New polling](#) by Ipsos in the UK, in partnership with *UK in a Changing Europe*, finds that four in 10 (44%) Britons believe that there are still many important issues to finalise with the EU. This shifts from 60% of 'remain' voters and 30% of 'leave' voters.

The majority of Britons (56%) say Brexit has made no difference to their daily lives. Again, there is a difference in perceptions according to how people voted. 51% of Remainers say Brexit has impacted their lives negatively, compared to 10% of Leavers.

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WHAT WORRIES THE WORLD

The June wave of our 28-country issues tracker shows concern about Coronavirus is at the lowest level seen since it was first included as an issue in our survey in April 2020. Our headline findings include:

- Across 28 countries, 36% say that Covid-19 is one of the top issues facing their country (-6 points vs. last month and -14 since the start of the year).
- Covid concern has eased particularly in Turkey, Canada, Netherlands, Italy and Hungary. But the trend is moving in the opposite direction in Brazil.
- Malaysia, Japan and India are currently most concerned about the pandemic.
- After Coronavirus, the top global issues are Unemployment (34%) and Poverty/Social Inequality (32%).
- 63% worldwide say that things in their country are on the wrong track. This represents a gloomier outlook than the 58% recorded at this time last year.

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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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