

IPSOS UPDATE

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

November 2021

Ipsos Knowledge Centre

GAME CHANGERS



WELCOME

Welcome to the November 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

GLOBAL HEALTH SERVICE MONITOR

The top health concerns and challenges today

The latest wave of our global health study explores public perceptions of their country's healthcare services. Coronavirus remains the dominant health problem while concern about mental health increases.

INFRASTRUCTURE INDEX 2021

Environmental considerations are the public priority

We look into how people across 28 countries rate their local infrastructure and what their priorities are for future investment. This year's release also carries a strong environmental message.

TRANSFORMING THE INSIGHTS FUNCTION

Insights as the engine of change

Insights enable us to truly understand people and consumers, but a focus on decision-making is often lacking. This paper shares how the process of generating insights can be transformed for real competitive advantage.

CONVERGENT COMMERCE

A more complex shopper landscape

Retail channels have proliferated in recent years while digital and physical environments are blending. We explore the emerging world of convergent commerce, where a binary offline vs. online divide no longer applies.

TRUSTWORTHINESS

Doctors emerge as the most trusted profession

Ipsos' Global Trustworthiness Index gathers public opinion from across 28 countries on the most and least trusted professions. This year's study sees doctors become the world's most trusted profession for the first time.

WHAT WORRIES THE WORLD?

Coronavirus no longer the top global concern

After 18 consecutive months of our tracker finding Coronavirus to be the number one issue worrying people across 28 countries, it falls to third place – behind poverty/social inequality and unemployment.

EMPATHY AWAKENED

The power of an empathetic organisation

Developing a strong sense of empathy helps organisations to rediscover consumers as people and meet their deeper needs. We introduce a four-step framework for developing an empathetic approach for business.

TETRA PAK INDEX 2021

The rise of responsible consumption

This year's report, "The Rewired Consumer" finds that the fragility experienced during the pandemic has created a shift from passive concern to active caretaking for ourselves, our communities, and our environment.

GLOBAL VIEWS ON HEALTH

The top concerns and challenges in 2021.

Our annual [Global Health Service Monitor](#) finds that, for a second year, Coronavirus is considered the most important health problem facing people today. Some 70% say this is a key health challenge facing their country, while half as many say the same about cancer (34%). In third place is mental health (31%, up 5 points vs. 2020).

Our 30-country survey for [World Mental Health Day](#) explores this topic in greater detail. One key finding is that a majority worldwide (79%) say their mental health and physical health are equally important, but they do not see this reflected in their country's healthcare services.

Despite a uniquely challenging couple of years for healthcare, public perceptions of treatment are generally holding up well: 53% rate their country's healthcare services positively, and 51% trust they will receive the best treatment.

That said, a majority worldwide (56%) say that their country's healthcare system is overstretched. Access to treatment/waiting times is seen to be the main challenge for healthcare services (41%), followed by lack of staff (39%). Cost of accessing treatment, selected by 31% overall, is also a big concern in some countries.

Singapore is happiest with their quality of healthcare (79% rate it as good), followed by Switzerland and Australia (78% in both).

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TRUSTWORTHY PROFESSIONS

Doctors given a boost in standing in our 2021 report.

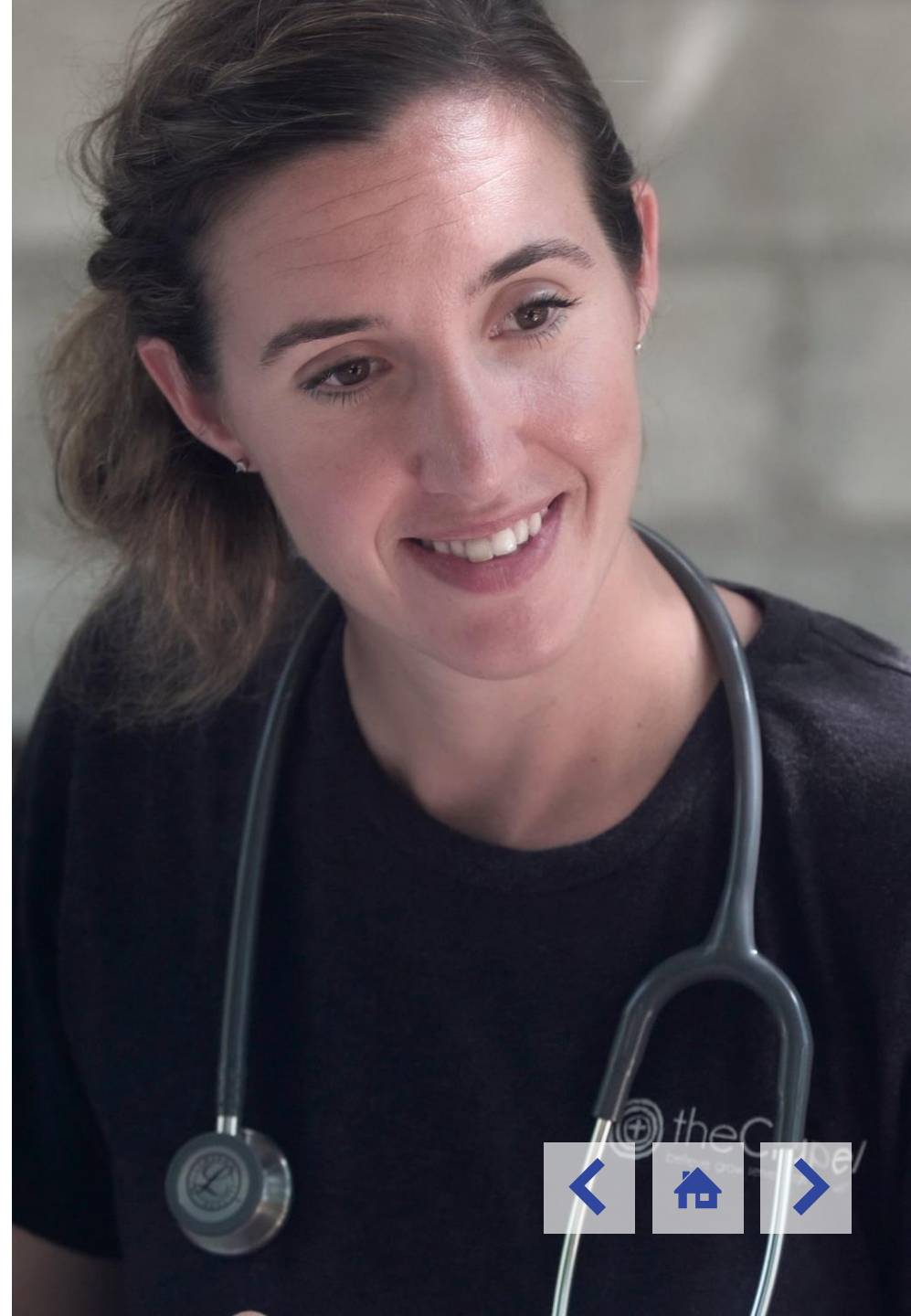
The Ipsos' [Global Trustworthiness Index](#) measures the level of trust afforded to many types of professionals and has been running since 2018, providing comparisons between the pre-pandemic world and where we are today.

While many professions' positions have barely shifted over the last few years, one notable impact during the pandemic has been a boost to the standing of doctors, moving them above scientists who were the top profession in previous waves. This year's study finds that 64% globally rate doctors as trustworthy, followed by scientists at 61%, and teachers on 55%.

At the bottom of the trust table are politicians, with only 10% believing they are trustworthy. Just 14% say the same about government ministers, and 15% about advertising executives.

Great Britain leads the world in trusting doctors with 72% rating them as trustworthy, a proportion which has increased by 5 points since 2018 (67%). Doctors are similarly highly trusted by Dutch people (71%) and Canadians (70%).

The biggest changes in trust in doctors are seen in Hungary and Chile, where the proportion saying doctors are trustworthy has risen by 19 percentage points in each nation between 2019 and 2021.

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INFRASTRUCTURE INDEX 2021

The environment is the most important factor in future infrastructure planning.

A study carried out in 28 countries by Ipsos, in collaboration with the Global Infrastructure Investor Association (GIIA), finds that, while the global public recognise that improvements to infrastructure have economic benefits, they prioritise environmental considerations.

When making decisions about improving infrastructure, almost twice as many people want to see environmental impacts prioritised than those who want to put the economy first (51% vs. 26%). The environment is also ranked as the most important of seven factors when planning for the future; an average of 26% of people rank it first, ahead of quality of infrastructure (23%).

We find that more are satisfied than dissatisfied with their country's current infrastructure (39% vs. 27%), but many (30%) are neutral. Satisfaction levels range widely, from 77% in China to 18% in Italy.

A majority in most countries, and 58% on average, agree that more needs to be done to meet their infrastructure needs. People see many priority areas for investment, from water supply to solar energy, flood defences, new homes, footpaths and road networks.

Overall, there is a preference for maintaining and repairing existing infrastructure rather than spending on new projects (55% vs. 20%).

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WHAT WORRIES THE WORLD?

Covid-19 is no longer the top global concern, slipping to third on the world's worry list.

After 18 consecutive months of our *What Worries the World* tracker showing Coronavirus to be the number one issue worrying people across 28 countries, it falls to (joint) third in October 2021.

A 7-point decrease in the proportion saying Covid-19 is a main concern for their country today (from 36% to 29%) means that the levels of concern we recorded for both Poverty & social inequality (33%) and Unemployment (30%) are higher this month. Covid-19 is now level with Financial/political corruption at 29%.

All but three of the 28 countries surveyed register declines in levels of concern about Coronavirus since September – most significantly Japan (-22 points), Mexico (-16), Germany (-14), Peru (-12) and Brazil (also -12).

Covid-19 remains the number one concern in just four countries (Australia, Great Britain, Malaysia, and the US), down from 12 last month and a high of 24 in April 2020.

Despite falling concern about the virus, the global public are no more optimistic about where things are heading: 64% think that their country is moving in the wrong direction, little changed since last month. We find more pessimistic countries in Latin America: Colombia (90%), Peru (83%), Argentina (82%) and Brazil (80%).

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TRANSFORMING INSIGHTS

How insights can be the engine of change.

Is your insight function a real source of competitive advantage? This is a challenge that has been posed to businesses for at least a decade now, but the gap between delivery and expectations has only grown in recent years.

Insight has historically missed a laser focus on the decisions that organisations should make. We believe the pandemic has provided an important opportunity for the insight function to transform as it has brought to the fore an enhanced need to understand people's fast-evolving desires, emotions and aspirations

It is important for insight leaders to take a strong and strategic lead in this new context, addressing the challenges ahead and giving clear guidance.

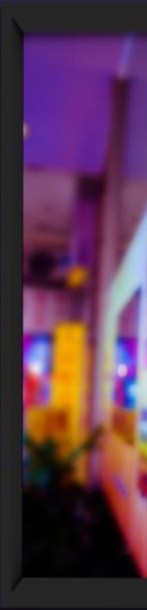
Insight allows companies to deeply understand humans and, in this way, shines a light on ways to develop better products and services, ultimately leading to better business results.

Shaped by Ipsos' Global Client Organisation, and based on what we have learned from talking and working with hundreds of clients across many industries, this paper sets out the most instrumental actions needed to support the transformation of the insight function.

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EMPATHY AWAKENED

Building an empathetic organisation starts with rediscovering consumers as people.

Researchers need to develop a strong sense of empathy to look into and understand the real-life experiences, deeper motivations and emotions of individuals. Through empathy, businesses can rediscover the people they serve; who they are and who they are becoming, what drives them, what frustrates them, and how best to delight them.

Applying an empathetic lens takes you out of your world and into another. It transforms insights from detached observations that produce predictable results to something that allows you to see and experience the tensions underneath. This will enable you to meet both the emotional and functional needs of people.

Ipsos surveys show that consumers want to see businesses operating with empathy and show an understanding of consumers as people. We find that younger generations in particular are more likely to purchase something from a company that demonstrates empathy.

In this paper, we outline the importance and the benefits of creating a culture of empathy and introduce a four-step framework for developing an empathetic approach for business. This moves from building “empathy muscle” to connecting with people, creating a human-centric plan of action, and finally developing a broader empathy ecosystem.

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CONVERGENT COMMERCE

Navigating the fragmented world of emerging channels and shoppable touchpoints.

The number of available retail channels and touchpoints for consumer engagement have exploded in the last decade. A feature of this evolution is that digital and physical environments are merging. For example, shoppers may scan QR codes to find out product information while physically present in a store.

Meanwhile, touchpoints that were previously used for consumer awareness are now becoming shoppable purchase channels. 'Buy now' buttons in social media, for instance, enable see-and-buy, one-click purchases.

This means that 'channel thinking', in the sense of online versus offline, has become redundant. The omnichannel concept of a seamless customer experiences across touchpoints still applies, but this must be seen within the context of simultaneously converged and fragmented channels, environments and touchpoints.

Converging channels offer the benefits of speed and convenience on one hand and discovery on the other.

This paper explores the emerging channels where convergent commerce is evident, considers their impacts on shopper journeys and use of touchpoints, and reflects on the implications for brands.

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TETRA PAK INDEX 2021

The rise of responsible consumption.

The [2021 Tetra Pak Index](#), conducted in partnership with Ipsos, offers a deep exploration of consumer attitudes and behaviour relating to food, health, and the environment.

This year's study, "The Rewired Consumer" finds that the personal, economic and environmental fragility experienced during the pandemic has created a shift from passive concern to more active caretaking – for ourselves and the world around us.

One in two (49%) globally now recognise that their everyday actions have an impact on the environment. This awareness means that many of us are adapting our home behaviours. More than half (55%) are planning meals more carefully to avoid waste and 59% are avoiding products which have a lot of packaging. Over one-third (35%) are more frequently choosing brands based on their sustainability credentials.

As part of this effort to make the right purchases, consumers are thinking about their own health too. Over six in 10 say they are paying more attention to the quality of what they eat and drink.

Based on Ipsos consumer research and local perspectives, this report examines emerging and sticky trends as consumers seek a more resilient and sustainable future.

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SHORTCUTS

NATION BRAND INDEX

Germany retains its top position in the 2021 Anholt-Ipsos Nation Brands Index (NBI) for the fifth year in a row. This study measures how countries are perceived by others across a range of metrics to give an overall ranking.

Completing the top three this year are Canada and Japan. There have been a few changes in the top 10 since 2020, including some gains and losses. Italy jumps from sixth to fourth and the United States advances from tenth to eighth. However, the United Kingdom (ranked second last year), drops to fifth. Meanwhile, France, Sweden, and Australia all drop one spot.

The study shows that Germany's reputational strengths are in exports, immigration & investment, governance, and culture. Canada's position rests in part on positive perceptions of governance and people.

The study finds that levels of desire to visit other countries has increased over time with 2021 marking its highest point.

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WOMEN IN THE G20

Ipsos research for the Women's Forum in 19 G20 countries explores how the already widespread gender inequalities are being affected by the current economic, social and sanitary crisis, and how to support an inclusive recovery.

Two-thirds of people around the world think that women have fewer opportunities in a range of business areas, but 80% say that having more women in these positions would benefit everyone.

There is widespread agreement (84%) that closing the gender gap and designing an inclusive recovery is a priority. This includes support for more coercive approaches.

One in three think that gender equality between men and women will never be achieved in their country. And one in two say the same about achieving gender equality worldwide. In spite of this, the report outlines why now is a moment to shift the paradigm of gender equality for the benefit of all.

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IPSOS KEYS WEBINARS

Ahead of this year's UN Climate Change summit, the latest edition of our KEYS webinar series focuses on the Environment Emergency.

Our presenters look at the climate of public opinion, interrogate the changing contours of the ESG agenda, and share perspectives on new green routines from different parts of the world. The presentation and a link to the webinar recording is [available here](#).

Our next edition on 18th November will focus on Convergent Commerce.

As the seasonal shopping season reaches its peak in many parts of the world, we explore how retail channels and consumer engagement touchpoints are proliferating at the same time that digital and physical environment are converging.

Available in two sessions to accommodate time zones, [sign up here](#) to join us.

All KEYS webinar recordings and presentations are also [available 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.

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