IPSOS UPDATE

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

October 2021

Ipsos Knowledge Centre

GAME CHANGERS

Ipsos

WELCOME

Welcome to the October 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** with any comments or ideas, or if you would like to subscribe to future editions.

Thank you.

IN THIS EDITION

A SENSE OF PRESENCE
The power of virtual and augmented reality

Virtual and Augmented Reality (VR/AR) are so much more than ‘shiny new toys’. In context of an increasingly digital world, we explore how using more immersive experiences can generate strong research insights.

TRUST IN RESEARCH
Fostering motivated and engaged participants

Securing respondent trust is a cornerstone of delivering reliable and trustworthy market research data. Our new white paper explores how to foster trust, advocacy and motivation among research participants.

WHAT WORRIES THE WORLD?
18 months of pandemic reporting

The latest in our 28-country survey marks 18 months of measuring global concern about Covid-19. During this time it has consistently been the issue people around the world are worrying about the most.

GLOBAL VIEWS ON ABORTION
From support to legal recognition

A significant majority across 27 countries believe abortion should be permitted. Support for the legal status of abortion has been growing in Latin America since 2014 while softening in Western Europe.

THE BRAND-EXPERIENCE GAP
Aligning an important intersection

How can brand promises and customers’ real-world experience be better aligned? Our new integrated measurement system focuses on this important intersection, enabling organisations to drive positive outcomes.

FUTURE RISKS 2021
Climate change returns to the top of the rankings

An in-depth study of the evolving perception of emerging risks finds climate change back at the top of the global risks ranking. It draws on the views of risk management professionals and public opinion around the world.

LATIN AMERICA’S ECONOMIC RECOVERY
The top issues facing the region

We gather the views of Latin American opinion leaders on the main challenges facing the region today, as well as their expectations for economic recovery in each of the 12 countries included.

GERMANY’S LEADERSHIP
The end of the Merkel era

As the 2021 German election approached, marking the end of Angela Merkel’s political career, we asked citizens of 25 countries for their views on how her leadership has impacted their country, Europe, and the world.

A SENSE OF PRESENCE

The power of virtual and augmented reality.

Virtual and augmented reality technology (VR/AR) is not simply the 'shiny new toy' some people view it as. It offers the next generation of digital interaction that will get us even closer to a 'sense of presence': the phenomenon of behaving and feeling as if we are in the virtual world created by computer displays.

The past two years have seen an acceleration in the use of digital services and daily time online has been growing significantly. There is a demand for more immersive experiences as we move into a more fully digital world.

Various case studies demonstrate the wealth of insights that VR/AR technology can bring. We explore these, and ask:

- How can we transport people into different environments and maintain a sense of presence while, at the same time, gaining a deeper understanding of their experience?
- Can we make consumers experience a new environment in order to test something they have never seen before?
- How can we enable our clients to experience life as their customers do to drive empathy in service and product design?

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THE BRAND-EXPERIENCE GAP

Aligning brand promise and customer experience.

Brand and experience are becoming increasingly intertwined and organisations must pay attention to this powerful intersection. An explicit understanding of how customer experience (CX) impacts brand equity and growth is needed to build strong brands.

This paper introduces Brand CX Forces, Ipsos' integrated measurement system that enables organisations to bridge any gap that may exist between what a brand promises to deliver and how people interact with the brand through CX.

The integration of brand and CX insights allows us to answer several important business questions, including:

- How to best align and manage brand and CX activities so that they resonate and drive positive outcomes?
- How to best allocate spend across acquisition and customer loyalty to maximise growth?
- How to build targeted acquisition and retention strategies?

Knowing precisely how to forge the strongest bonds with customers, whilst ensuring the delivery of prime customer experiences, will not only enable brands to better retain existing customers but also to better acquire new customers.

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TRUST IN RESEARCH

Fostering motivated and engaged participants.

Trust is critical to any business sector, but it has a special significance within market research. This centres around respondent trust in research organisations. People who offer up their personal opinions and data for market research purposes need to believe that it will be protected *and* used appropriately. They must also be engaged and motivated to participate.

We believe that securing respondent trust is a cornerstone of delivering reliable and trustworthy research insights. So, this paper explores how to foster trust, advocacy and motivation among research participants.

Reflecting on Ipsos' experiences, our focus includes:

- How a public presence provides a sense of familiarity and a base level of trust for potential participants.
- Continued commitment to participant data security across all modes of data collection.
- Reinforcing the sense that each participant's opinion is important and that they are part of something bigger.
- As the market research industry continues to evolve, building and sustaining panellists' interest by offering the opportunity to participate in a variety of research activities.

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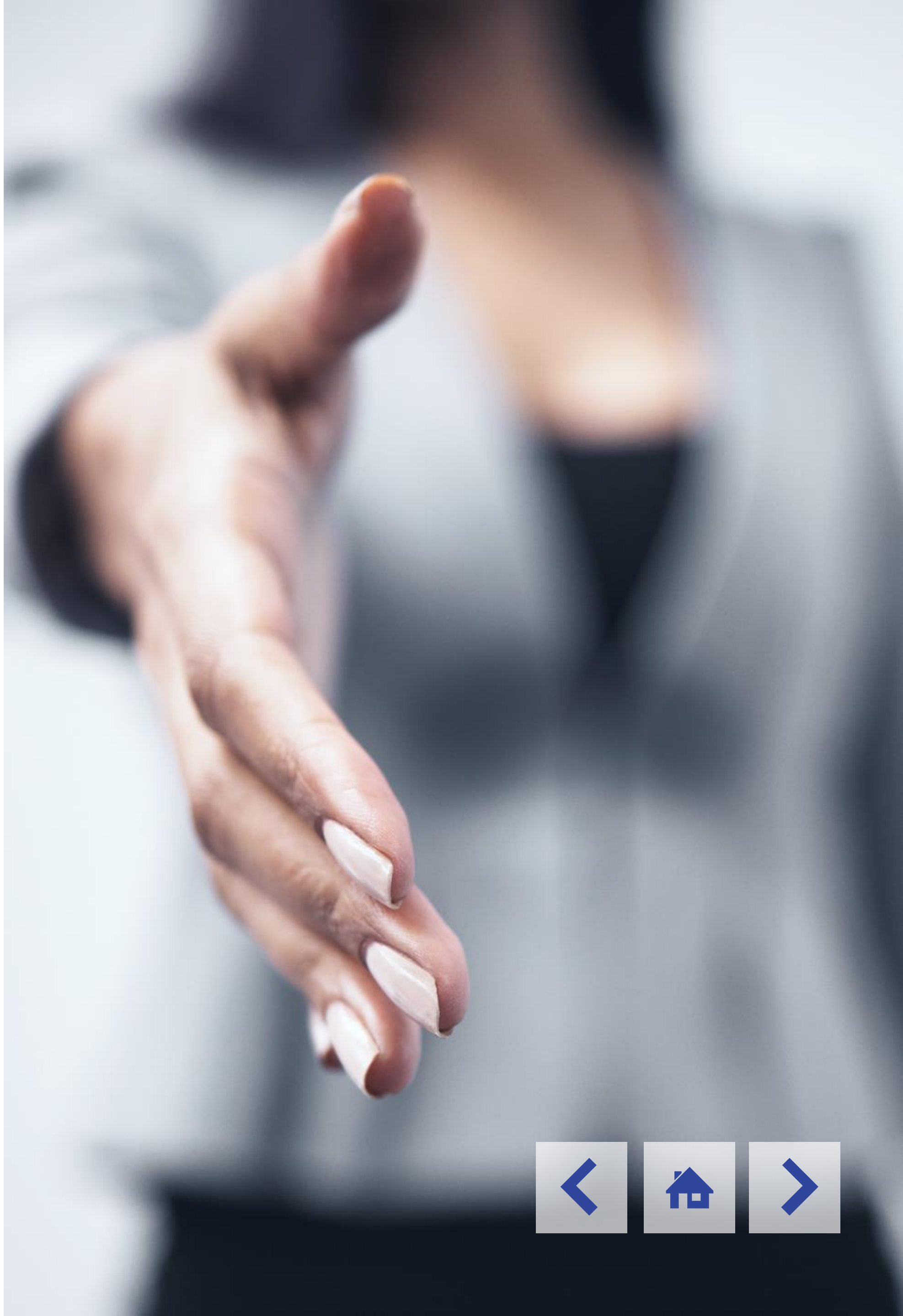

FUTURE RISKS 2021

Climate change and cyber security top the list of emerging risks, despite the ongoing health crisis.

The AXA Future Risks report, produced in partnership with Ipsos and Eurasia Group, explores the evolving perception of emerging risks, drawing on the views of risk management professionals and public opinion around the world.

Last year saw Covid-19 bump all other risks down the rankings, but climate change is back at the top in 2021. The perceived risk posed by climate change is highest in Europe, where experts and the public once again place this risk at the top of the list. Only 19% of experts believe governments are prepared to face this risk.

The study reveals strong concern about cyber security, which ranks second globally and becomes the main focus in the US.

Pandemics and infectious diseases falls to third position, although pandemic concern is still high among the public as people face the daily effects. Those in Asia and Africa are especially concerned.

We also find a heightened sense of vulnerability to future risks: 80% of the public feel more vulnerable now than five years ago, up from 73% in 2020. And 83% of experts agree this is the case.

In general, the report reveals a low level of confidence in the ability of governments to address these risks alone. More than 55% of respondents consider a collective and global approach to be the most appropriate way to propose effective solutions.

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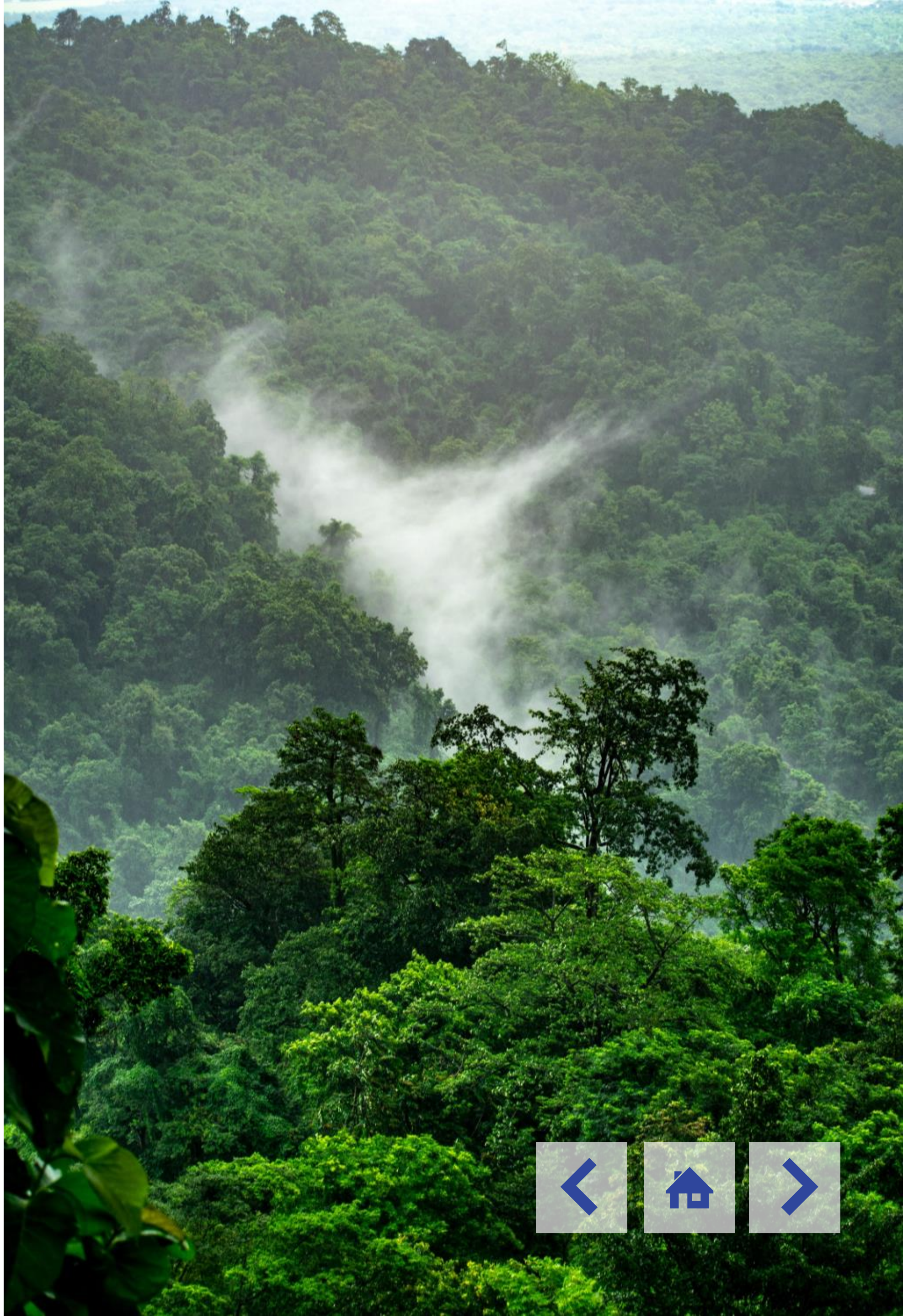

WHAT WORRIES THE WORLD?

After 18 months of tracking, Covid-19 remains the number one global concern.

The latest in our 28-country *What Worries the World* survey marks 18 months of measuring global concern about Covid-19. During this time it has consistently held the top spot as the issue people around the world are worrying about the most.

In September 2021, the top five issues, according to our global country average, are: Coronavirus (36%), Unemployment/Jobs (31%), Poverty and social inequality (also 31%), Financial/Political corruption (27%) and Crime & violence (26%).

Malaysia is the country with the highest proportion concerned about Coronavirus (74%), followed by Japan (71%), which sees a 9-point increase this month. Elsewhere, we have recorded significant month-on-month decreases in Covid-19 concern in Spain (-10), Argentina (-9), and Russia (-9).

Meanwhile, 65% across all countries say that things in their country are heading in the wrong direction. This rises to 89% in Colombia – the country consistently least positive about the future direction.

In this review article, we explore in more detail how Covid-19 has changed the landscape of our issues tracker throughout the pandemic, drawing on the perspectives of our experts in countries including Australia, Malaysia, South Korea and the US.

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ECONOMIC RECOVERY IN LATIN AMERICA

Expert views on the key challenges ahead.

As is the case around the world, economic recovery from the impact of Covid-19 is an important issue facing Latin America today. Our report gathers the views of Latin American opinion leaders (those who express their views in the media and public sphere) on the economic recovery of countries in the region.

In most cases, economic recovery is expected to last between two and three years. Chile and Uruguay are seen to have the best prospects with 65% expecting Chile to recover within 12 months and 61% saying the same for Uruguay. The outlook for Argentina, Cuba and Venezuela, however, is more pessimistic.

When asked which are the biggest challenges for Latin America in the next 18 months, job creation comes first, followed by economic recovery. The fight against the Covid-19 pandemic and vaccinating the population come next.

Other issues mentioned by almost half of our opinion leaders are the reduction of poverty (55%), the reduction of inequality (51%), and the fight against corruption (47%). To a lesser extent, opinion leaders are concerned about citizen insecurity (43%) and improving education (35%).

Read more about Ipsos' economic indicators and global consumer confidence in our September 2021 release.

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GLOBAL VIEWS ON ABORTION

Support for the legal status of abortion is growing in Latin America while softening in Western Europe.

Our 27-country survey finds that, on average, seven in 10 adults worldwide say abortion should be permitted. This comprises 46% who think it should be allowed ‘whenever a woman decides she wants one’ and 24% ‘in certain circumstances’. Only one in six (17%) say abortion should *not* be permitted: 5% ‘under no circumstances’ and 12% unless ‘a woman’s life is in danger’.

Since 2014, public support for the legal status of abortion has generally remained steady with the levels recorded today. However, views continue to vary widely across countries. This year’s survey highlights significant gains in levels of support for legalising abortion in some countries, balanced by a softening in others.

The most notable increases since 2014 are seen in South Korea (+20 points to 79%), Argentina (+15 to 79%), Brazil (+11 to 64%), Russia (+9 to 68%), Chile (+8 to 73%), and Mexico (+8 to 59%). Conversely, pro-abortion sentiment has declined in Turkey (-15 to 56%), South Africa (-12 to 62%), France (-9 to 81%), Spain (-8 to 80%), Belgium (-6 to 79%), and Great Britain (-5 to 80%).

On average across all countries, women are more likely than men to say that abortion should be permitted whenever a woman wants one (50% vs. 43%). The gender gap is highest in Turkey, Russia, Argentina, Canada, South Korea and Poland.

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SPOTLIGHT ON GERMANY

The end of the Merkel era.

As the 2021 German election approached, marking the end of Angela Merkel’s 16 years as Chancellor, we asked citizens of 25 countries about their views of Merkel's impact on their own country, Europe, and the world.

A majority in 17 of the 25 countries surveyed express a favourable opinion of Angela Merkel. The global country average shows 58% favourable (vs. 67% in her native Germany).

There is also a widespread perception that Germany has been a trustworthy partner for their country under Angela Merkel and that her policies have had a positive impact on their country.

On average, across the 11 European countries surveyed, more than half of respondents (53%) agree that Germany has been a trustworthy partner for their country on European issues under Angela Merkel, with only a quarter (25%) disagreeing. European countries are more divided on whether the future of Europe depends on strong German leadership, with 40% agreeing and 33% disagreeing (excluding Germany).

We also find strong support for female leadership, with twice as many agreeing than disagreeing (54% vs. 28%) that the world would be more peaceful and successful if we had more female political leaders.

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FUTURE OF SPORTS

In a series of articles originally published in the latest edition of our research magazine *What the Future*, Ipsos' US team explores possibilities for future engagement with sports.

FANTASY & BETTING

Fantasy sports have been around for a long time, but as sports betting grows in the US, there are new opportunities for fans to engage with their favourite sports, their friends, and their wallets.

Fantasy sports services are already an $8 billion industry in the US. And this is despite sports betting being illegal in many states – something that is shifting.

Betting-based leagues offer real-time winning and our data shows it is becoming increasingly popular.

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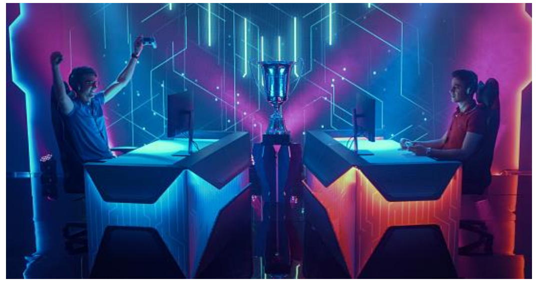

ENDORSING ESPORTS

Celebrity endorsements continue to be a go-to strategy for brands, despite mixed results. New meta-analysis by Ipsos on the best ways to use celebrities in advertising finds that sports stars add more value than those famous in the world of entertainment.

With a new crop of esports leagues and their related stars to tap into, we look at how our learnings translate to esports, uncovering some tips for increasing the impact of celebrity endorsements in this environment.

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WOMEN'S SPORTS

Ipsos data shows that a plurality (46%) of Americans agree there needs to be more media coverage of women's sports. This is even higher among sports fans, at 60%.

Less than 5% of total television sports coverage focuses on women's sports. Twice as many say they are "not a fan" of women's sports than men's sports.

Does the lack of access to women's sports explain dwindling interest? We explore this "chicken or egg" dilemma.

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SHORTCUTS

DEATH OF THE CITY?

A study of London and Paris by Ipsos in the UK, Kings College London, and the University of Paris suggests that predictions of the "death of the city" due to the Covid-19 crisis may be wide of the mark. Londoners' and Parisians' satisfaction with their local area remains undented, and numbers looking to move out of the city is unchanged since 2019. Majorities also think that their cities will bounce back from the pandemic, albeit slowly.

There are notable differences between the two cities on important issues. For example, Londoners are more likely than Parisians to think that people from different backgrounds get on well in their city and are far more positive about immigration to their capital.

London is seen as a better place to work and do business than Paris. But London is also seen as a worse place to live for poorer people, older people and families, as well as for affordability of housing. The UK capital also fares worse on reports of harassment towards women.

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VACCINE BOOSTERS

A new 13-country Ipsos survey conducted with the World Economic Forum explores attitudes towards the need for Covid-19 booster shots among fully-vaccinated adults to maintain protection against the virus.

Most citizens surveyed – and especially those in Mexico, Brazil and the UK – expect vaccine booster shots will be required at least annually.

Large majorities of vaccinated adults say they would get a booster shot if it were available to them. Intent is highest in Brazil (96%), Mexico (93%), and China (90%) while it is lowest in Russia (62%) and Italy (66%). Those aged 55-74 are also notably more willing to get a vaccine booster.

In 9 of the 13 countries, majorities recognise the need for booster shots, even if Covid-19 rates are low and life is back to normal in their country.

There is widespread agreement that, before making booster shots available, first doses should be given to those who want them.

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THE GENERATION MYTH

In an article in *Research Live*, Ben Page, CEO of Ipsos in the UK, considers the "generation myth". This refers to how differences between generations are exaggerated in the media and what research can do to hone its approach to understanding younger people.

Marketing is overrun with stereotypes. One of the most enduring is that post-1980 millennials are a generation that will completely disrupt business. Now, Generation Z, born post-1995, are touted as the next big change. But, most of what passes as startling new insights is likely to be misleading or wrong.

The real task for researchers is to separate three effects that explain changes to behaviour. First are simple 'lifecycle effects' that all generations go through. Secondly, 'period effects', e.g. living through war, affect all generations. Finally, 'cohort effects' show that a new generation is different from others at the same age, and is staying different. In doing this, we will be able to predict the future in a much more meaningful way.

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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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