IPSOS UPDATE

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

December 2021

Ipsos Knowledge Centre

GAME CHANGERS

Ipsos

IPSOS UPDATE DECEMBER 2021

Welcome to this month's edition.

Ipsos Update is our round-up of the latest research and thinking from Ipsos teams around the world.

After nearly two years of the pandemic, for the moment at least, Covid-19 is no longer the world's number one concern. Familiar anxieties about inequality and unemployment have returned to centre stage – but with huge variations by country. Latin America remains the most "angry" continent, with citizens frustrated at pressures on living standards and corruption. Europe and America are tentatively recovering, but with large numbers pessimistic about the future – a completely different picture to many Asian countries.

Meanwhile, the 2021 edition of our Ipsos Global Trends series shows that attitudes and values haven't changed as much as the media suggest, given the pressures of the pandemic. But it does show continued rising concern about climate change and a desire for business to step up on carbon reduction and social issues, while consumers themselves often aren't willing to make sacrifices without real leadership.

Following the COP26 summit, we've reviewed global public opinion on climate change in this edition, doing some "myth-busting" along the way. Take a look at our special feature and let us know what you think.

This time of year sees seasonal shopping reaching its peak in many countries, and our experts have been looking at the dynamics of today's retail environment and how to make the most of the opportunities.

Alongside each article you'll find links to help you explore the topic in more detail. Or you can get in touch directly with the Ipsos teams who carried out the research.

We do hope you find this edition useful. Please email **IKC@ipsos.com** with any comments or ideas, or if you'd like to subscribe to future editions.

Ben Page, Ipsos CEO

IN THIS EDITION

GLOBAL TRENDS 2021
Aftershocks and continuity

We examine how global values are shifting in this latest instalment of the wide-ranging Ipsos survey series. It reveals a world where public attitudes and values have changed less than might be expected.

MYTH-BUSTING THE CLIMATE OF OPINION
Global climate change perceptions and priorities

Ipsos was proud to be present at COP26 in Glasgow and use our data from around the world to bust three myths surrounding climate change. Here we outline some of the key points made.

CHANNEL PERFORMANCE MANAGEMENT
Three focus areas for driving growth

Our latest paper addresses the fundamental questions that arise when managing the performance of an organisation’s physical, contact centre, and digital channels. We point out where to act.

THE VALUE OF INSIGHTS
Moving to impact

The second paper in our ‘Future of Insights’ series presents new thinking about how research can truly inspire business growth. Here we demonstrate when and how to quantify the impact of insights.

INTERNATIONAL THREATS AND RESPONSES
Are we prepared to deal with the challenges of today?

In a series of 28-country surveys, we examine attitudes towards the threats of today, citizens’ assessments of how well their governments can respond to them, and their views of international institutions.

CLIMATE CHANGE FOCUS
Polling round-up post-COP26

Following COP26, we look at our recent research on climate change. These cover public opinion, climate-friendly behaviour change, and a podcast on the conference itself.

OPTIMISTING ECOMMERCE THROUGH UX
Five challenges user experience research can solve

The rapid acceleration of online shopping has also created friction within eCommerce. This paper identifies five common shopping barriers and sets out how UX research can help to overcome them.

SPOTLIGHT ON WOMEN
New understandings of gender

Placing the focus on women’s experiences, we examine Ipsos research for UN Women on violence against women. We also explore what female empowerment means across cultures.

GLOBAL TRENDS 2021

Aftershocks and continuity.

The Ipsos Global Trends Study 2021 is the latest instalment of the wide-ranging Ipsos survey series that seeks to understand how global values are shifting. This year's update polls the public in 25 countries around the world, ranging from developed countries such as the US, UK and Italy to emerging markets in Asia such as China and Thailand – as well as covering important new markets like Kenya and Nigeria for the first time.

The survey reveals a world where public attitudes and values have changed less than might be expected under the pressures of the pandemic. Indeed, the changes we do see in the data tend to be driven by long-running trends in public opinion that pre-date Covid-19.

Agreement on the urgency of dealing with climate change continues to rise but many other social attitudes hold steady.

Among the headline findings of this 25-country survey are:

- More people think it is more important that businesses fight climate change than pay the right amount of tax.
- Seven in 10 now say they tend to buy brands that reflect their personal values.
- The same proportion say that business leaders have a responsibility to speak out on social issues.
- Six in 10 believe that eventually all medical conditions will be curable.
- 83% agree that social media companies have too much power.

Watch the presentation of findings from the 2021 Global Trends Survey from Ben Page, Ipsos CEO.

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INTERNATIONAL THREATS AND RESPONSES

Are we prepared to deal with the challenges of today?

As optimism grows that the world is turning a corner on the pandemic, global citizens' assessment of threats has shifted. This year's 28-country survey for the Halifax International Security Forum finds that people consider the prospect of being hacked a greater threat in the next 12 months than a major health epidemic outbreak (75% vs. 70%). A similar proportion (69%) see a major natural disaster to be a real threat.

Of these top three threats, it is in relation to hacking where people are least confident that their government is prepared to effectively respond, with India most and Belgium least confident.

Another Ipsos survey for the Halifax International Security Forum finds mixed reviews of whether current international organisations are doing a good job in dealing with these challenges.

Across the 28 countries surveyed, support for new international institutions and agreements is high. An average of 83% agree that the world needs new international institutions and agreements while 78% say they would have more respect for the institutions or agreements if democratic nations had more influence over them.

Meanwhile, China, the United States, and Russia are the three countries viewed as least likely to comply with any new international agreements and institutions.

There are signs though that the United States' reputation abroad is improving, after nearly one year of the Biden Administration. A global average of 62% say the US will have a positive impact on world affairs over the next 10 years, up 12 points on the 2020 score.

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AN AVERAGE OF 83% SAY THE WORLD NEEDS NEW INTERNATIONAL INSTITUTIONS AND AGREEMENTS THAT ARE LED BY DEMOCRATIC COUNTRIES. ”

MYTH-BUSTING THE GLOBAL CLIMATE OF OPINION

Environmental perceptions and priorities.

As part of Ipsos' mission to bring the voice of global citizens to the debate surrounding climate change and sustainability, we presented at COP26 in Glasgow to share our data from around the world and bust three myths surrounding climate change.

The first set out that Covid-19, and its associated personal hardships, has not dented climate concern. In fact, we know that 83% of global citizens agree that "we are heading for environmental disaster unless we change our habits quickly" (an increase from 2020), and 71% think the climate crisis is just as important as Covid-19 in the long-term.

The second 'myth vs. fact' is that younger people are more worried about climate change than older people. Our data shows this to be untrue: concern about climate change is high (70%+) across all generational cohorts. But what does set younger citizens apart is that they are angrier about climate change, and they also tend to be a little more fatalistic.

The final myth is that the citizen 'say-do gap' is the biggest challenge (i.e. people know what to do but aren't willing to pull their weight). In fact, people think they are doing enough already but those in power are not. Importantly, we find a 'believe-true gap' – that many overestimate low impact actions (such as recycling) and underestimate changes with a much higher carbon impact (such as not taking long-haul flights or having one less child).

In summary, Ipsos research and analysis shows that government and industry have been given a mandate to act. The media must provide solution-orientated framing to engage the public, while government and industry must lead and educate in tandem.

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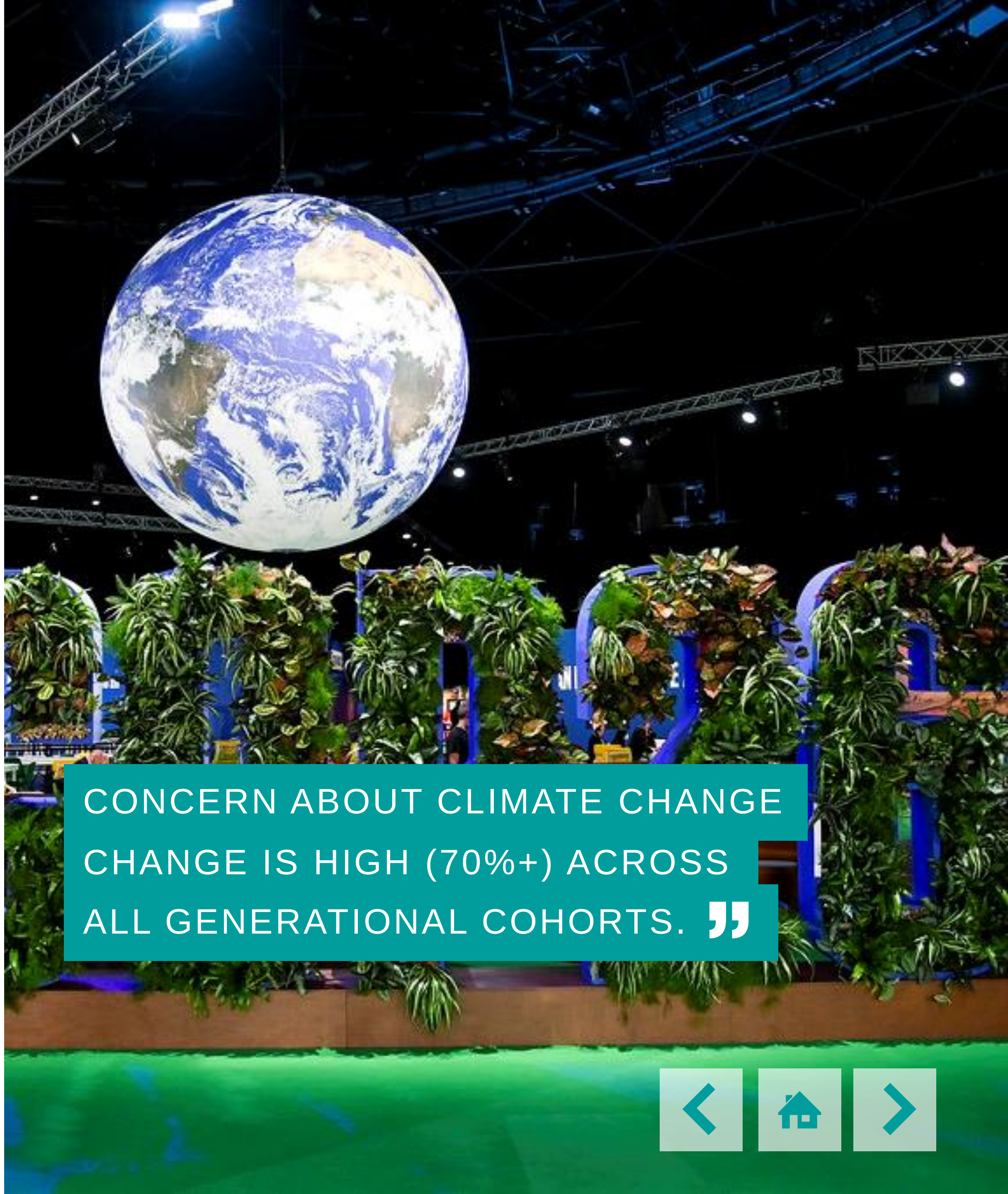

CLIMATE CHANGE FOCUS

A round-up of Ipsos polling and research on the COP26 conference and beyond.

COP26 POLLING

During the COP26 conference, our UK team polled the public to find out how closely they had been following it, measure support for climate goals, and assess levels of trust in the individuals attending to get the job done.

Following the extreme flooding in July, our Netherlands team investigated public opinion about climate change, looking at the importance of personal contribution, agricultural emissions and the role of government.

Our US team also looked at where climate sits on the public agenda, examining levels of concern, Americans' perceptions of extreme weather events, and exploring which actions they are taking most to tackle climate change.

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COP26 PODCAST SPECIAL

Our *Politics and Society* podcast, produced by Ipsos in the UK, released an episode on public engagement and the likelihood of action following on from the COP26 summit. Some of the topics covered include:

- Impressions of how COP26 has gone so far: what are the prospects for world leaders stepping up to the climate crisis?
- What do we know about how net zero policies are received by the public?
- How about the public making changes to their own behaviours? How willing are people to take action themselves?
- Post-COP26, what would be your advice to governments on how they can best engage citizens in making progress towards net zero?

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CONSUMER BEHAVIOUR

A 29-country Ipsos survey for the World Economic Forum shows fewer people reporting climate-friendly consumer actions than before the pandemic. On average, 56% say they have changed products and services they buy or use specifically out of concern about climate change, down from an average of 69% in January 2020.

This suggests that, as consumers across the world had to change their daily habits to protect themselves and others from Covid-19, they became less concerned about the environmental impact of their behaviour.

The top actions taken to counteract climate change are recycling or composting (46%), saving energy (43%), avoiding food waste (41%), and saving water (41%).

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CHANNEL PERFORMANCE

Three focus areas for driving growth.

In today’s increasingly omnichannel and digital world which offers new services and distribution channels, brands must be confident that their channel strategies are implemented consistently.

This paper is aimed at those charged with managing the performance of their organisation’s channels – physical, contact centre, and digital. Featuring several sector-based case studies, it will help them to understand the fundamental questions that need to be answered, and where to act.

Our three essential considerations for measuring and managing channel performance are:

- **The size of the prize**: Understanding which channels offer the greatest growth potential and how competitors stack up.
- **The measure of brand delivery**: If brand messaging does not always carry through to the customer’s experience, a ‘promise-delivery gap’ is created, causing unhappy customers.
- **The activities that drive sales**: Implement tools that tell you where and how customer engagement happens. This will help you to decide staffing levels, training, store layout and more.

By focusing on these three areas, your organisation can maximise benefits from the channels it operates in, ultimately improving the experiences of your customers and your business results.

Moreover, using these tools together, rather than in isolation, allows an organisation to make the most of the data at hand.

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BRANDS MUST BE CONFIDENT THAT THEIR CHANNEL STRATEGIES ARE IMPLEMENTED CONSISTENTLY. ”

OPTIMISTING ECOMMERCE THROUGH UX

Five challenges user experience research can solve.

Many people around the world are now shopping more online. With this increase in usage, friction has also risen. Poorly designed sites and non-standard website interaction functionality can lead to confusion and frustration for users.

By focusing on the people who are most likely to use digital products or services, User Experience (UX) research can help organisations to understand consumers' existing "mental model" and design successful experiences. User experience research can also identify usability issues with functionality or content by testing prototypes, live sites, and apps with users.

More than 600 UX research sessions with major eCommerce retailers and brands worldwide helps us to identify five common online shopping barriers and explore how UX research can help.

These barriers are:

1. Shoppers can struggle to find what they are looking for.
2. They have trouble deciding if a product is right for them.
3. Comparing products and prices is important.
4. Shoppers want clearly costed delivery and pick-up options.
5. Returning items bought online is a worry and hassle.

Addressing these barriers requires a deep understanding of how consumers shop for your products, what leads them to feel confident about purchasing decisions, which attributes are important to them and, ultimately, what their expectations are so online retailers can meet (or exceed) them.

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GLOBALLY, 43% OF SHOPPERS SAY THEY ARE SHOPPING MORE ONLINE, WITH THE LARGEST INCREASES HAPPENING IN NORTH AMERICA AND LATAM. "

THE VALUE OF INSIGHTS

Moving to impact.

The insight world is undergoing a profound transformation, which sees most of our clients having to revisit their research efforts, implement new team structures, and establish new priorities and ways of working.

But budgets are not endlessly expandable, and insight teams face increased demand from users to deliver on value. For example, we see competition between data acquisition and management budgets, and those attached to surveys and research insights.

The insights community is at an exciting turning point. On one hand, this presents a risk of being subservient to technology and becoming a commodity, On the other, it offers an opportunity to give a renewed enthusiasm for insights, wherever they come from – data or survey – and present them as an essential source for driving innovations and improving services.

This paper is the second in our “Future of Insights” series, based on rich discussions with clients about how research is changing and how to elevate its impact. Building on Transforming the Insight Function, this new paper sets out to share ideas on how to demonstrate the impact insights have on business to our business partners.

The paper is organised into two parts. Firstly, we look at when and how we can quantify the impact insights have on the business (the “Return on Research Investment”). This includes ensuring that resources go to the right places and are driving the right business outcomes.

Secondly, we explore what to do when absolute quantification may not be simple. The key point here is about augmenting the power of consumer understanding, and ensuring it is being used to drive value and impact for the organisation.

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BEING ABLE TO QUANTIFY THE VALUE OF DATA-DRIVEN INSIGHTS CAN ENSURE THAT INVESTMENT IS DRIVING THE RIGHT OUTCOMES. ”

SPOTLIGHT ON WOMEN

From violence against women to female empowerment.

Ipsos conducted research for a UN report on violence against women (VAW) in 13 countries to find out how the pandemic has impacted women's safety at home and in public spaces.

Our survey data shows one in two women (45%) reporting that either they or a woman they know has experienced a form of violence during the Covid-19 pandemic.

Seven in 10 say that verbal or physical abuse by a partner has become more common and 56% feel less safe at home since the pandemic began.

In terms of who has been most affected, we see more younger women, women with children, and women in rural areas reporting direct or indirect experience of violence during the pandemic.

Keeping the focus on women's experiences, this month we also delve deeper into gender and what it means to be a woman through a cultural lens. Being Woman is a study that curates Ipsos data and external sources in order to present a cultural perspective of femininity and empowerment in China, France and USA.

We find that modern-day femininity is a product of social culture. And being a woman means very different things in different cultures:

- In the US, strong trends of polarisation and intersectionality enable women to express their identities freely.
- In France, openness co-exists with hierarchy so that being woman is expressive but is also still about desirability.
- Meanwhile, in China, the quest for success produces competitiveness, in which being woman can often mean an inherent disadvantage.

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45% REPORTED THAT THEY, OR SOMEONE THEY KNEW, HAS EXPERIENCED SOME FORM OF VAW SINCE COVID-19. ”

SHORTCUTS

CHRISTMAS SHOPPING

With one month to go, we used survey and social insights across the United States, Europe and Australia to investigate people's excitement and preparation for Christmas.

On average, four in 10 have already or are almost finished with their holiday shopping. We see a correlation between preparation and stress; the US, Australia and the UK are the most advanced in their shopping but also the most concerned about delays and shortages.

We also see an increase in holiday buzz from 2020, with 45% more online conversations about Christmas shopping on social sites, forums, and blogs recorded over the same four-week period.

The lines between online and offline shopping continue to blur. While many are returning to stores for the first time this holiday season, online shopping is still a popular option. Around 20% of shoppers expect to do more in-store shopping this year.

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CORPORATE REPUTATION

Each year, Ipsos conducts interviews with over 150 leading communications and reputation executives globally to understand the trends, issues and concerns facing today's reputation practitioners.

In this on-demand webinar, Ipsos Corporate Reputation experts Trent Ross and Jason McGrath share the findings from the latest edition of the Ipsos Reputation Council, covering topics including:

- The impacts of Covid-19 on corporate reputation and the business of communications.
- Diversity and Inclusion, and the role it plays in business broadly and in reputation specifically.
- The pressures that companies face when it comes to ESG and sustainability.
- Internal communications and the role of employee communications in managing reputation and business success.
- Supply chains and their impact on sustainability and company reputation.

WATCH RECORDING

PODCASTS

The *Ipsos Views* podcast series features interviews with authors of our latest Ipsos white papers.

In 'Empathy Awakened', we speak to April Jeffries who explains why researchers need to develop a strong sense of empathy to look underneath into real-life experience and deeper motivations and emotions.

In 'Optimising the eCommerce Experience', Yana Beranek and Suki Beg discuss why user experience is vital for online retailers, and show how UX research can help to overcome some of the obstacles to success.

Elsewhere, Alison Chaltas joins *Customer Perspective* to discuss today's ever-evolving shopper journey, with channels & touchpoints mushrooming, and as physical and digital environments increasingly converge.

Continuing the focus on eCommerce, Jannet Wang joins Douwe and Chris for episode 5 of *'Getting It Right'* to discuss eCommerce in China, including the emergence of social commerce and livestreaming.

LISTEN

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POLL DIGEST

Some of this month's findings from Ipsos polling around the world.

ITALY: People are behind on their Christmas shopping – as of 24th November, 55% of Italians hadn't started yet.

FRANCE: Three years on, 40% of French people still feel close to the Yellow Vests movement.

US: The nation's international image has improved during the Biden Administration: 62% expect it to have a positive influence.

NEW ZEALAND and **CANADA** are seen to have shown the strongest leadership during the pandemic.

CANADA: 75% of Canadians think that men are less likely than women to share their mental health concerns.

GERMANY: Only one in two think that their company has a clear position on how it will design the future of work.

LATIN AMERICA: Only 16% of Latin Americans have a high standard of financial inclusion, according to our 7-country survey.

UK: Pollution and climate change records its highest ever score in our Issues Index and becomes the top issue in Britain today.

SOUTH KOREA: 81% expect there to be another wave of Covid-19 in their country – above the global average of 71%.

UK: 6 in 10 Britons think it's acceptable to be in bed before midnight on New Years Eve.

SOUTH AFRICA: Snacking is on the rise with spending up by almost half (+43%) vs. 2020.

Visit Ipsos.com and our local country sites for the latest polling research.

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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