

IPSOS UPDATE

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

July 2020

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 with any comments or ideas, or if you would like to subscribe to future editions.

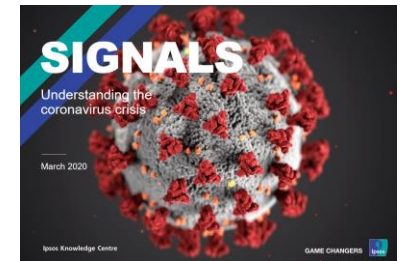
Thank you.

THE CORONAVIRUS CRISIS

To understand the dynamics of the coronavirus crisis, we produce a fortnightly compilation called Signals – bringing together our research and analysis on different aspects of the pandemic and its aftermath.

See editions 1-8:

1. [13 March](#)
2. [26 March](#)
3. [9 April](#)
4. [23 April](#)
5. [7 May](#)
6. [20 May](#)
7. [4 June](#)
8. [18 June](#)



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IN THIS EDITION

CORONAVIRUS ENTERS A NEW PHASE

A climate of uncertainty

Many are looking ahead to some post-pandemic normality, but the situation is far from stable. Our studies from this month cover economic reopening, myths around the virus, and the situation in South East Asia.

WORLD REFUGEE DAY 2020

Refugees welcome – in principle

Increasing support for the right to seek refuge from war or persecution sits alongside a reluctance from people in many countries to accept refugees at this particular time.

MIXED MODE RESEARCH

How to manage multiple survey methods

In this fluid environment, we expect to see Mixed Mode research becoming increasingly important. This introductory paper outlines how Mixed Mode design can be more participant-centric, future-proof, and efficient.

SOCIAL ATTITUDES IN BRITAIN

The latest on sexuality and race

Our new research finds a Britain more socially liberal and sexually diverse than you might think. We also take an in-depth look at how attitudes towards race have changed since the mid-2000s.

BLACK LIVES MATTER

Reactions in the US and around the world

Police brutality and systemic racism have come into public focus in the US and internationally as a result of George Floyd's death. We review Ipsos' opinion polling on the protests and race relations.

UNIVERSITIES & THE PUBLIC GOOD

Playing a key role in the world today

Our new research across 11 countries finds people agreeing universities are key to tackling global problems. But challenges remain for the sector – regarding the perceived value of university education, for example.

WHAT WORRIES THE WORLD?

Unemployment fears at a five year high

Analysis of our global *What Worries the World* survey findings shows that public concern is now shifting from coronavirus towards job security in many countries.

A DISRUPTED SUMMER

Rethinking our travel plans

With the travel industry disrupted, we look at how people in the US, Canada and Spain are looking to spend their vacations. Many are staying close to home, while September breaks are gaining in popularity.

CORONAVIRUS CRISIS ENTERS A NEW PHASE

A climate of uncertainty.

As the weeks turn into months, people, business and governments are tentatively looking to resume some kind of normality. But this takes place against a backdrop of high and even increasing infection rates in many parts of the world. The reinstatement of restrictions in a number of places underlines just how fluid the situation currently is.

At the start of June, [our 16-country tracking survey](#) found reticence towards the prospect of opening businesses, with a majority in nine of 16 countries saying this would put too many people at risk of contracting COVID-19. Brazilians were most likely to agree (71%).

Our tracker survey also found 52% of people saying that most of the jobs will not return in the wake of the easing of lockdown restrictions, with concern particularly evident in France, Spain, Japan, South Africa and South Korea. It identified [older people](#) as the most pessimistic about employment being restored.

As people come out of lockdown in South East Asia, our [new report](#) finds 80% of the region's population reporting loss of earnings, with widespread concern about restrictions being re-imposed.

Finally, our survey on [COVID myths](#) shows that, although we may think we are familiar enough with the virus by now, many of us lack a detailed understanding of how it spreads.

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BLACK LIVES MATTER

Attitudes towards the protests and racial equality.

The killing of George Floyd by police in Minneapolis sparked a wave of protests that have touched all states in America ([see Ipsos' Interactive Map](#)), with citizens taking to the streets to demand not only justice for Floyd, but an end to police brutality and racial inequalities. [Our survey](#) finds that Black Americans responded with sadness and anger, but were not surprised by the incident. Eight in 10 say that most white people do not understand the level of discrimination experienced by black people, but six in 10 think that Floyd's killing will increase concern about unfair treatment by police.

Black Lives Matter demonstrations have brought these issues into sharp focus for people in the US and around the world. Concern about [racial inequality in America](#) has surged from 7% saying it's a top political issue at the end of 2019 to 31% today. Our social monitoring study recorded five million social mentions of the protests and racial equality in the two weeks after Floyd's death, overtaking COVID-19. Indeed, our [global poll](#) finds a majority in nine of 16 countries agree that these events show there are bigger things to worry about than coronavirus. In 13 of these nations, a majority agree that racism and intolerance is present in their country.

In terms of public support for the protests, our [Reuters/Ipsos study](#) suggests that polarized public opinion in the US is connected to the levels of violence depicted by media outlets. Internationally, we find majority support for [peaceful protests](#) in 14 countries, with agreement highest in Canada (81%), Germany and India (80%), as well as the UK, South Africa and Mexico (79%).

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WORLD REFUGEE DAY

People are increasingly supportive of the right to seek safety abroad but are concerned about their own country's ability to accept more refugees.

Our poll finds 72% across 26 countries supporting the fundamental right of refugees to seek refuge from war and persecution – including in their own country. This marks an 11 point rise since 2019. The countries where people are most likely to agree are Sweden (81%), the Netherlands (80%) and Spain (79%). There have been notable increases on this measure in France, Belgium and Germany.

However, despite strong support for the principle of seeking refuge, half of respondents (49%) say that *their own country* cannot accept more refugees at this time. This has increased from 40% in 2019.

The coronavirus pandemic seems to have limited refugee acceptance. Almost half (49%) say that their country should be less open to accepting more refugees in these circumstances, compared with one in ten (10%) who say it should be more open.

Globally, 59% feel those wanting to come to their country aren't really refugees and instead have economic motivations.

People have become more positive about the ability of refugees to successfully integrate into their new society – 45% agree, up seven points from last year. The overall picture is still mixed though, with 44% disagreeing that refugees can successfully integrate.

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UNIVERSITIES AND THE PUBLIC GOOD

A study on the perceived value of university research and education in the world today.

Three-quarters (77%) of people across the 11 countries surveyed agree that universities have an important role to play in addressing the key challenges the world faces. Only 7% disagree.

The study, carried out in collaboration with the University of California, the Fulbright Commission and King's College London, finds 65% saying universities have a positive impact on their country. Majorities also point to a positive impact on family and friends (58%), local community (57%) and them personally (54%).

Of all nations polled, people in France are least likely to say universities have a positive impact across these measures, while people in China are most likely.

Meanwhile, 36% of people in the US agree that the benefits of going to university outweigh the expense of doing so – the lowest of any country surveyed.

Spain is the country most likely to say that a university degree does not lead to a higher salary (73%), followed by China (70%). Respondents are least likely to agree with this in Germany (41%), France (47%) and Canada (49%). These three countries are also most optimistic that universities equip students with the skills they need for a successful career.

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WHAT WORRIES THE WORLD?

As global concern about coronavirus declines, unemployment becomes a more prominent issue.

Our latest *What Worries the World* survey finds a further decline in the proportion of global respondents across 27 nations who think that coronavirus is a top concern for their country today. June's results find 47% saying they are worried about COVID-19, down from 55% in May and 63% in April.

While coronavirus is still the top worry globally, concern about unemployment has risen to 42% – the highest level seen in five years. In eight countries, unemployment has replaced COVID-19 as the number one worry since April, with France and Israel joining that group this month. The nations currently most concerned about unemployment are Italy (66%), Spain (65%) and South Africa (63%). Another [new multi-country survey](#) underlines these anxieties as it finds 52% do not expect jobs lost during coronavirus to return as soon as lockdown lifts.

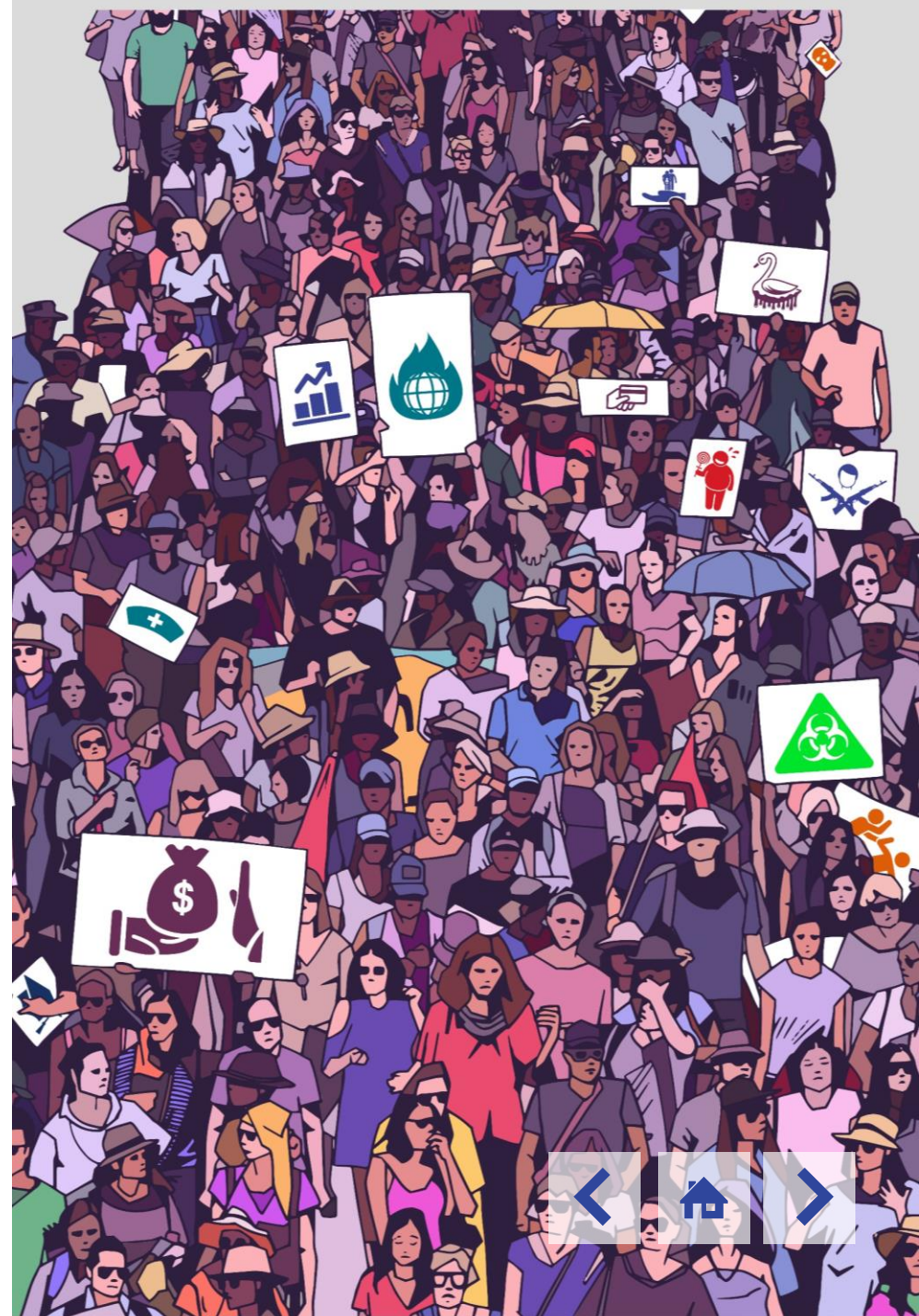
Poverty & social inequality was the top issue at the beginning of the year, with 34% globally concerned in January 2020. But, overtaken by coronavirus and employment, it is now in third place with 31%.

Meanwhile, 58% of all respondents, and a majority in 21 of the 27 countries surveyed, are pessimistic about where things are heading in their country today. Three-quarters in Belgium (77%), Hungary (75%) and Chile (also 75%) say their nation is on the wrong track.

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MIXED MODE RESEARCH

How to reach the right people in the right way to get the data you need.

Mixed Mode is the use of two or more different data collection modes to run a survey in a given country. These may include CATI (computer-assisted telephone interviewing), CAPI (computer-assisted personal interviewing), online and postal.

By reaching participants through multiple survey modes, it is possible to achieve better population coverage and response rates – and be more efficient in terms of time and money invested.

A Mixed Mode design can also help to future-proof surveys by integrating newer data collection modes into traditional research approaches. The survey design can be made to match individuals' preferences and experiences to make it truly participant-centric.

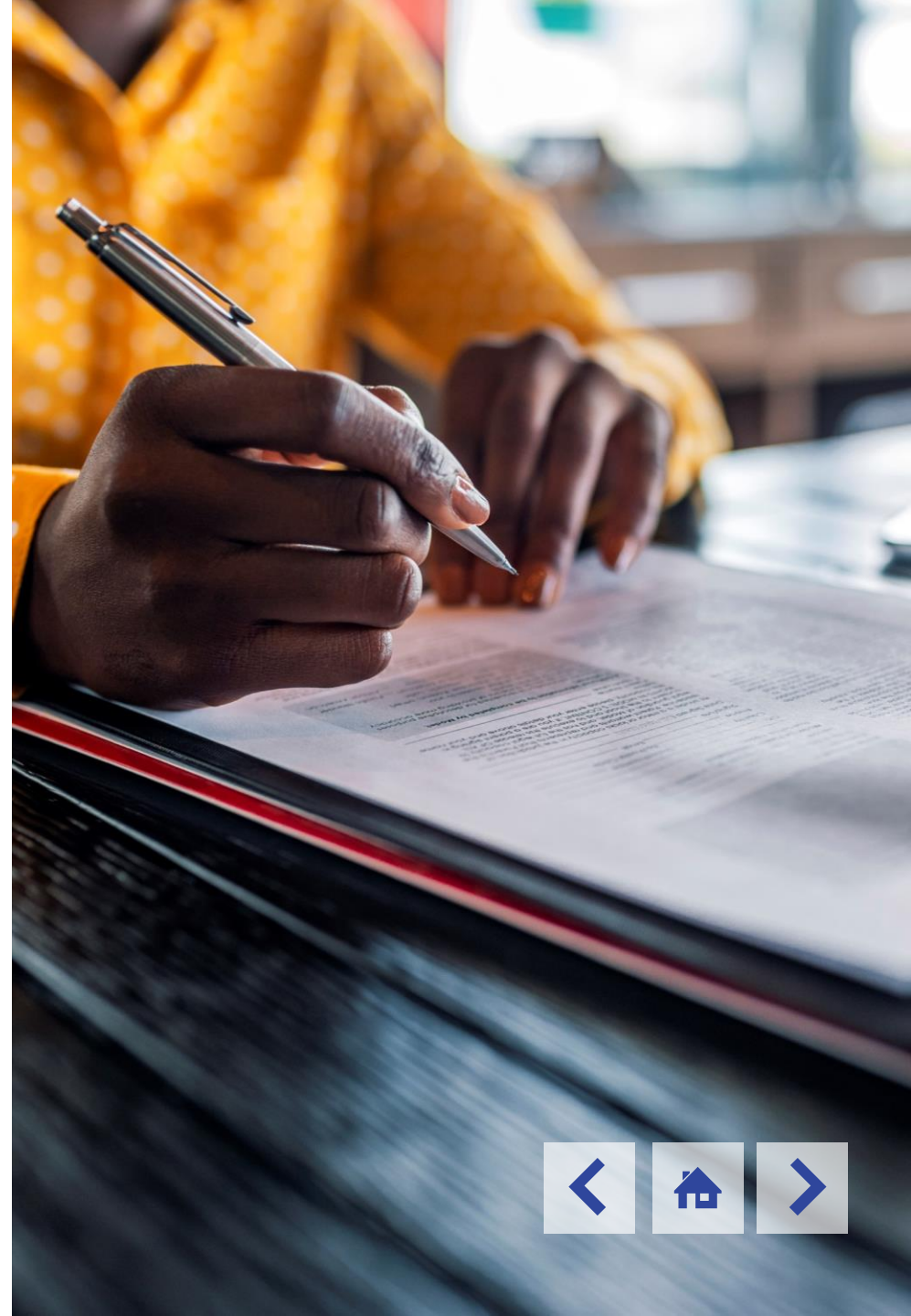
This paper serves as an introduction to Mixed Mode research, collating key learnings from Ipsos' experience to show how it works and what the benefits are, as well as the challenges - such as controlling mode effects.

We expect Mixed Mode research to become increasingly important as markets emerge from the COVID-19 pandemic, and Ipsos is currently building its 'contactless' Mixed Mode capability – the findings of which will be presented in the next instalment of our research methods papers.

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SOCIAL ATTITUDES IN BRITAIN

New studies present the public view on LGBT+ rights and race equality in Britain today.

Looking at sexual orientation in Britain today, almost nine in 10 (86%) identify as heterosexual, while three-quarters (74%) say they are exclusively attracted to the opposite sex. One in 10 (11%) say they are only or mostly attracted to the same sex and 4% are equally attracted to both sexes.

The majority of Britons (60%) believe that people from LGBT+ communities face at least a fair amount of discrimination in their country (16% say they face a great deal). But people are split when it comes to the progression of LGBT+ rights: one quarter (25%) believe they have gone as far as they should, and one in five (18%) think they have gone too far. A further quarter (27%) say that LGBT+ rights have not gone far enough, rising to nearly half among Gen Z (47%) compared to 14% of Baby Boomers, 27% of Gen X and 38% of Millennials. The survey also finds Gen Z to be more sexually diverse and familiar with different types of sexuality.

Meanwhile, another study shows Britons becoming open-minded in their attitudes towards race in recent years. Only 3% think that to be truly British you have to be white (down from 10% in 2006). However, seven in 10 think tensions still exist between people of different races and nationalities, and there are concerns about inequalities in public services, the police and politics. A new article looks at [financial inequalities](#) for minority ethnic groups in Britain.

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A DISRUPTED SUMMER

Travel in 2020 will be limited and local with authentic, traditional holidays.

Consumers' travel aspirations are dialled back this year amid restrictions and uncertainty related to coronavirus. While the [travel and hospitality sector](#) starts moving again, we expect strong demand for local travel and holiday-makers planning for 2021.

[Social conversations](#) indicate that originally scheduled plans are now changing and people are cautiously excited for the weeks and months ahead. Health and wellness is a popular topic, with people getting in shape for summer – even if they will be staying home.

[Our US study](#) finds that only one third of Americans have summer vacation plans and many are turning to creative and unconventional ways of enjoying the summer months. There is a focus on enhancing outdoor spaces around the home, where many will spend time cooking and eating food, gardening and spending time with friends and family.

[In Canada](#), four in 10 plan to take a road trip this summer, primarily for day trips (68%), visiting family (53%), and camping (39%).

Our [study in Spain](#) finds seven in 10 plan to go on holiday this year, but the vast majority will stay in the country. Spaniards are also pushing back their plans with September replacing July as the most popular month for vacations. For 20% who will not travel, it is mainly due to coronavirus, followed by economic reasons.

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SHORTCUTS

WORLD ENVIRONMENT DAY

For World Environment Day on 5th June, Ipsos finds that the vast majority of people across 16 countries (over 80% in most cases) feel a strong responsibility to ensure their generation does not destroy the planet for future generations.

The study also finds majority support for a green recovery with 75% overall expecting their government to make environmental protection a priority as their country rebuilds after coronavirus. However, another 27-country survey for the [World Economic Forum](#) shows that opinion is more divided when it comes to the details. While 38% agree that financial aid and incentives to revive the economy should be limited to businesses that have reduced their carbon footprint and impact on the environment, 36% do not think this should be a prerequisite and a further 26% remain unsure.

More than four in five respondents globally say issues such as pollution, degradation of nature, deforestation, overfishing and climate change pose a serious threat to our health and well-being today. Those in developing countries are leading a call for change.

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LISTEN IN – IPSOS PODCASTS

Here is a round-up of some of the podcasts produced by Ipsos teams on different themes, from cultural understanding to customer experience and society and politics.

The latest *Insight Out* podcast from Ipsos UU, [Showing Up for Black America](#), reflects on the murder of George Floyd in police custody. April Jeffries and Emma Grand discuss the Black and African community within the context of American culture.

Over the month of June, [Customer Perspective](#), a podcast series from Ipsos' Customer Experience, Mystery Shopping and Channel Performance teams has included discussions with colleagues from the UK, Canada, and Hong Kong, the latest from APAC, and a focus on how behavioural science can influence service design and customer behaviours.

Meanwhile, the UK Public Affairs team has launched a new [politics and society podcast](#). Kieran Pedley and guests take a data-driven look at the world of UK politics and beyond, starting with an appraisal of Kier Starmer, the new Labour Party leader of the Opposition.

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THE INSIDE TRACK: US ELECTION

The US is now facing three crises: the pandemic, economic recession, and massive protests against police brutality.

June's edition of *The Inside Track: Election 2020* from Ipsos' Public Affairs team covers the latest public opinion data on these events and how they are affecting the political landscape.

Americans are socialising more, but daily new cases of coronavirus hit a record high, meaning some states are pausing reopening plans or returning to lockdown.

The "defund the police" movement is not widely favoured (only 34% support it), but there is strong support for police reform measures, creating the political challenge of treading the middle ground.

President Trump's approval rating remains steady but Joe Biden now has a double-digit lead on the President in the polls – though much could change before November.

The defining issue of the election may not be coronavirus or the economy; voters say they are looking for a candidate who can restore faith in American government.

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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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