

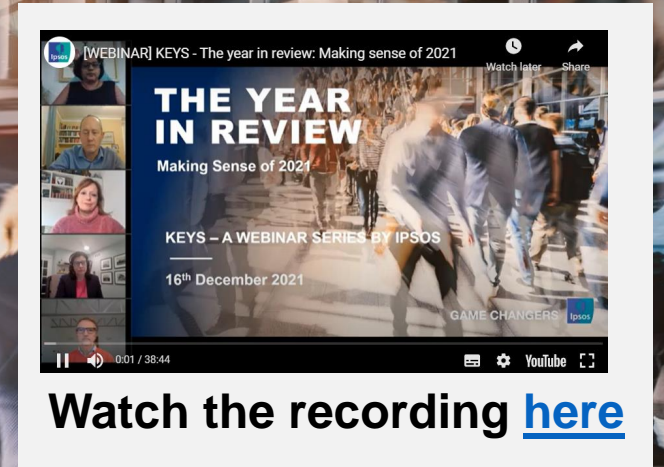
# THE YEAR IN REVIEW

Making Sense of 2021

KEYS – A WEBINAR SERIES BY IPSOS

---

16<sup>th</sup> December 2021



Watch the recording [here](#)

GAME CHANGERS



# AGENDA

## INTRODUCTION

Jennifer Hubber

Head of Ipsos Global Client Organisation

## LIFE IN COVID TIMES: Public Opinion in 2021

Simon Atkinson

Chief Knowledge Officer, Ipsos

## THE VACCINE STORY (So Far)

Rhoda Schmuecking

President, Syndicated Therapy Monitors, Healthcare, Ipsos

## PANDEMIC OR NO PANDEMIC, CULTURE MATTERS

Louis Rougier

Chief Research Officer, Qualitative, Ipsos

Radhecka Roy

Global Service Leader, Strategic Curation, Ipsos



Watch the recording [here](#)



# PART ONE: LIFE IN COVID TIMES

Public Opinion in 2021

KEYS – A WEBINAR SERIES BY IPSOS

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Simon Atkinson

GAME CHANGERS



# STARTING POINT: Looking back at 2020 (and before)





# LOOKING BACK AT THE YEAR JUST GONE

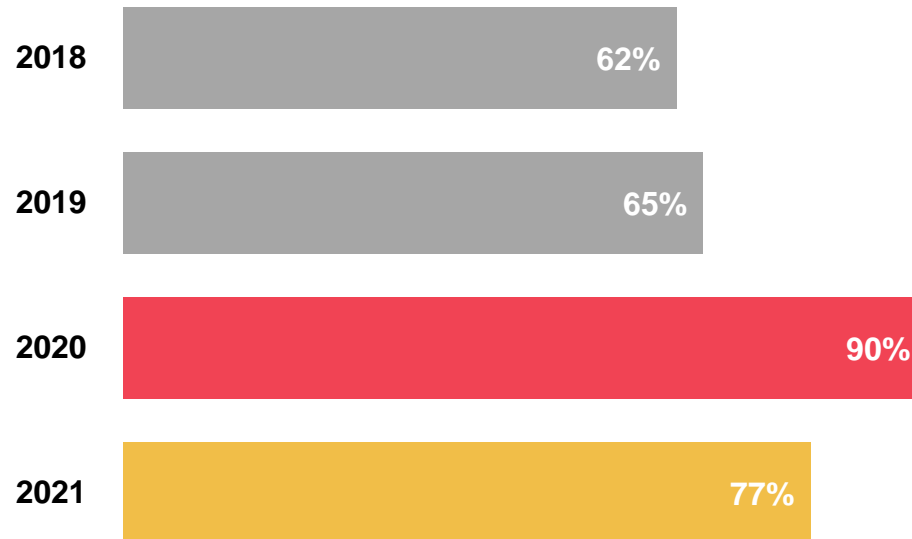
“The past 12 months has been...

**STARTING POINT:  
2021 Predictions  
Survey**



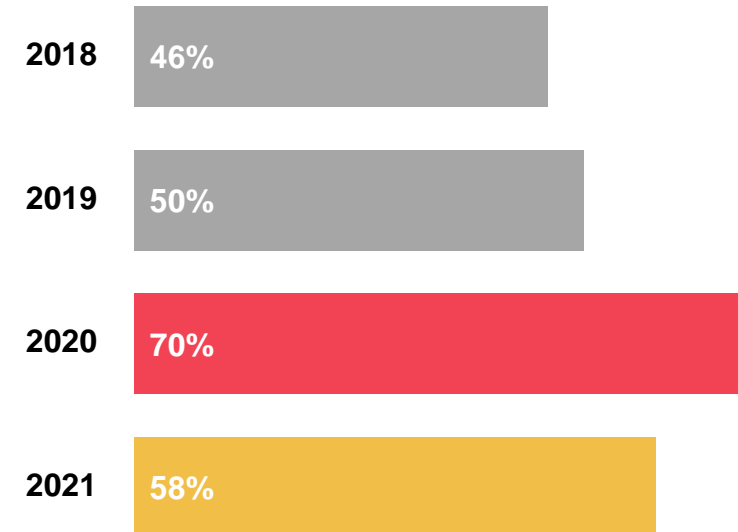
**... bad for my country”**

% agree



**... bad for me and my family”**

% agree



Source: Ipsos Predictions Surveys  
Base: c20,000 interviews in c30 markets

# THE CURRENT SITUATION...



*The following slides are based on Ipsos' ongoing 16-country "Essentials Survey". For further information, please contact the team at [Essentials@ipsos.com](mailto:Essentials@ipsos.com)*

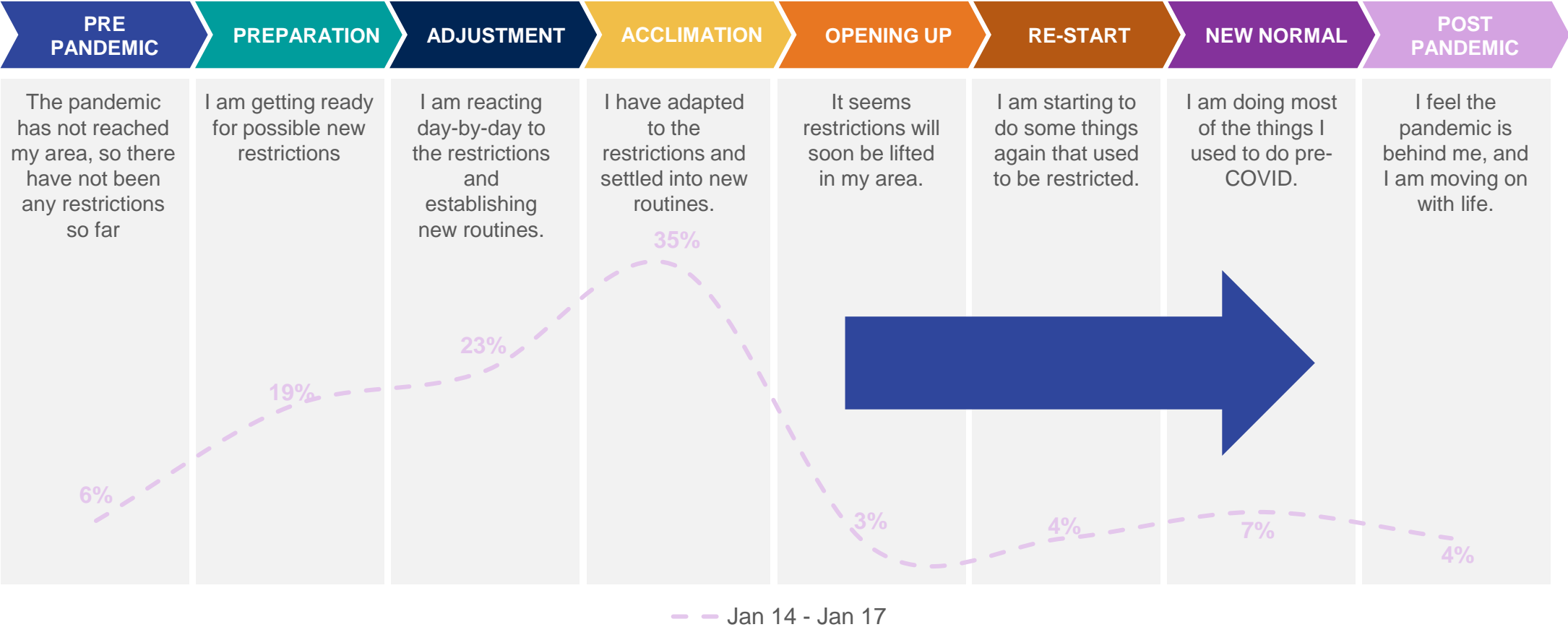
**GAME CHANGERS**





# “PHASES OF THE CRISIS”: JANUARY

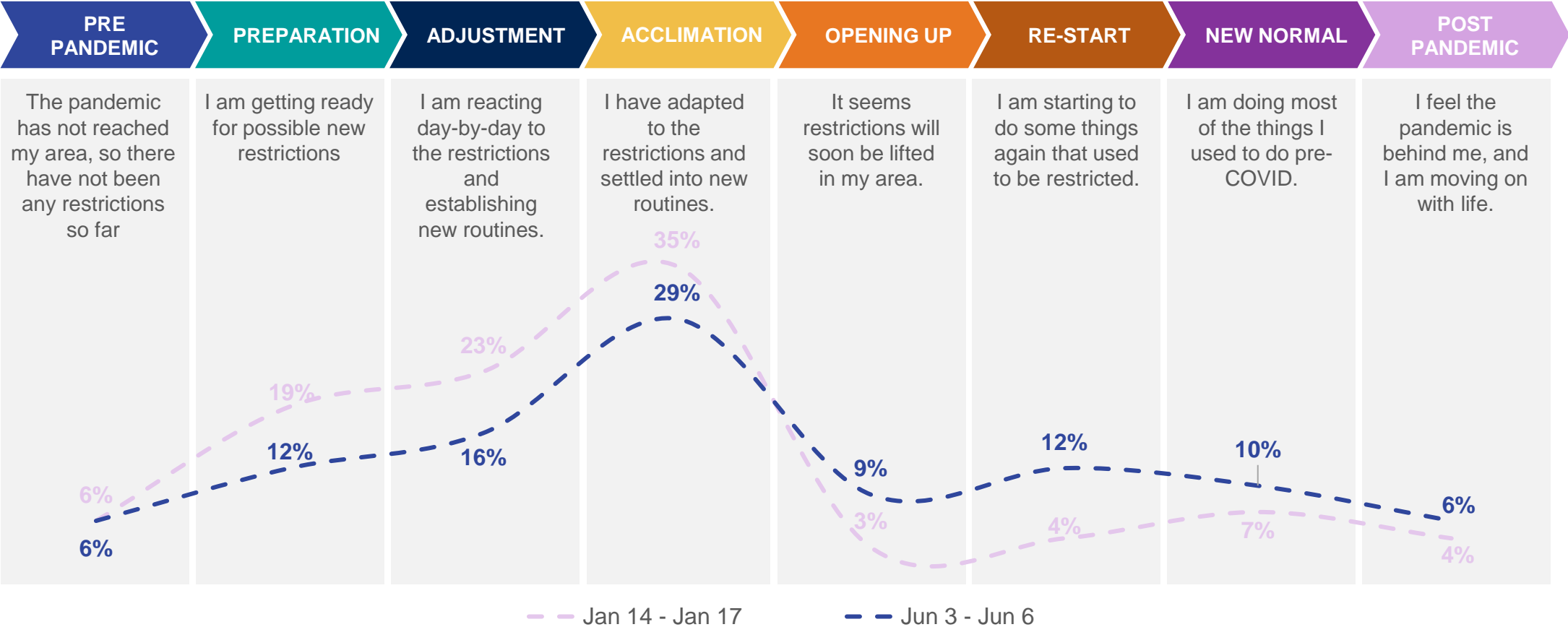
“Which one of the following phases do you feel best describes your current situation regarding the COVID-19 pandemic?”



Q. Which one of the following phases do you feel best describes your current situation regarding the COVID-19 pandemic?  
Base: Jan 14 - 17: 14523, Jun 3 - Jun 6: 14498, Dec 2 - 5: 11518

# “PHASES OF THE CRISIS”: JUNE

“Which one of the following phases do you feel best describes your current situation regarding the COVID-19 pandemic?”

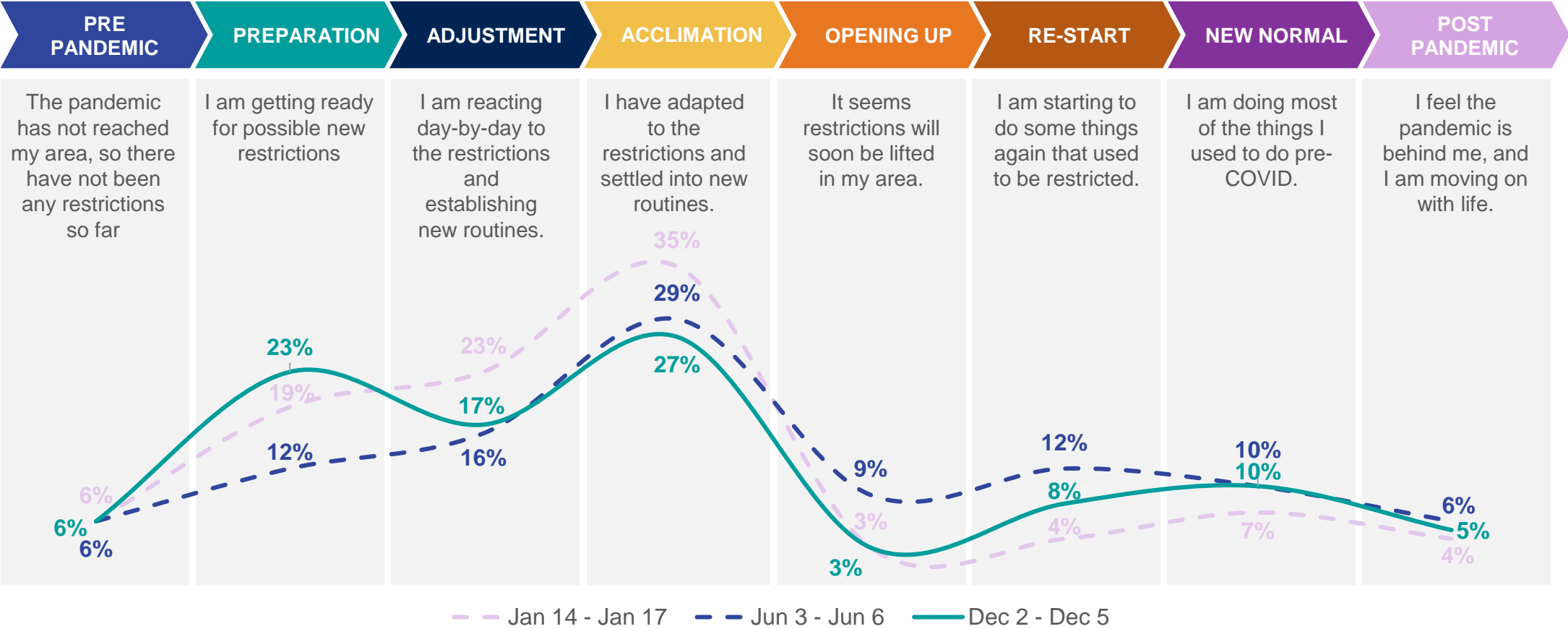


Q. Which one of the following phases do you feel best describes your current situation regarding the COVID-19 pandemic?  
Base: Jan 14 - 17: 14523, Jun 3 - Jun 6: 14498, Dec 2 - 5: 11518



# “PHASES OF THE CRISIS”: DECEMBER

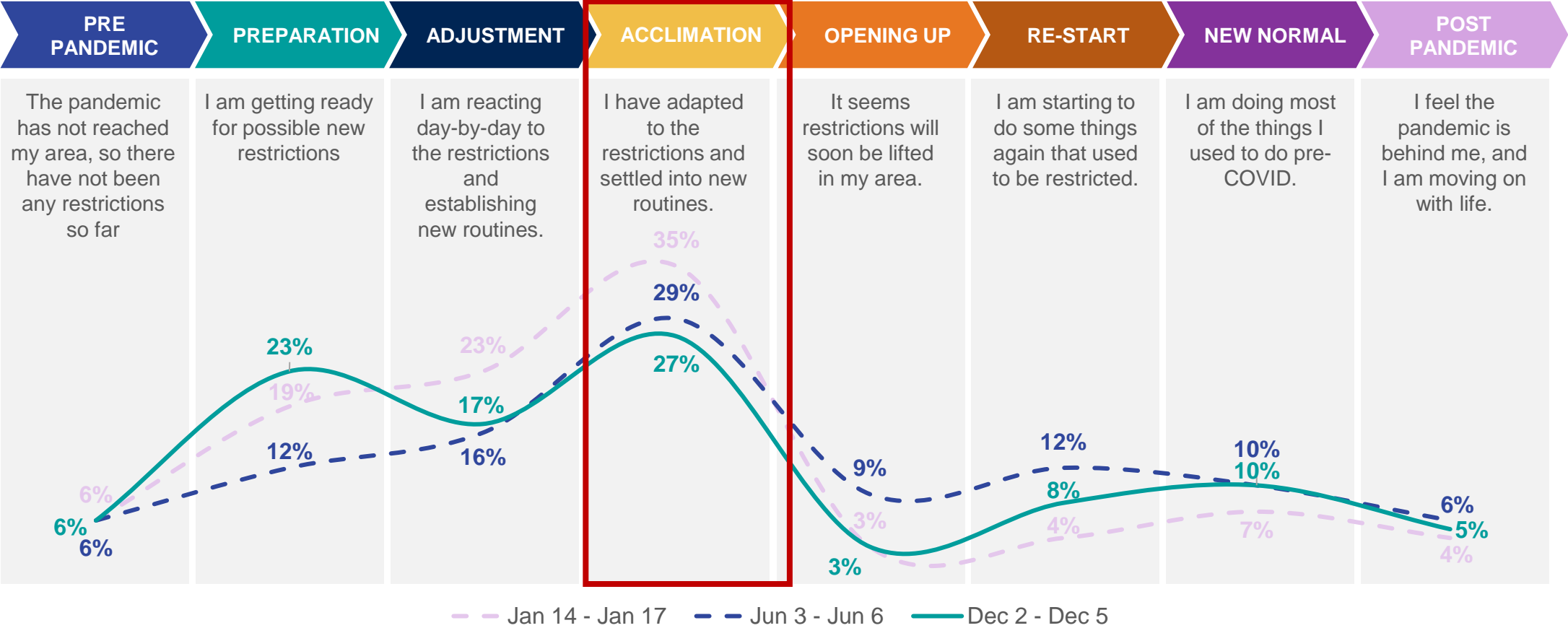
“Which one of the following phases do you feel best describes your current situation regarding the COVID-19 pandemic?”



Q. Which one of the following phases do you feel best describes your current situation regarding the COVID-19 pandemic?  
Base: Jan 14 - 17: 14523, Jun 3 - Jun 6: 14498, Dec 2 - 5: 11518

# “PHASES OF THE CRISIS”: DECEMBER

“Which one of the following phases do you feel best describes your current situation regarding the COVID-19 pandemic?”

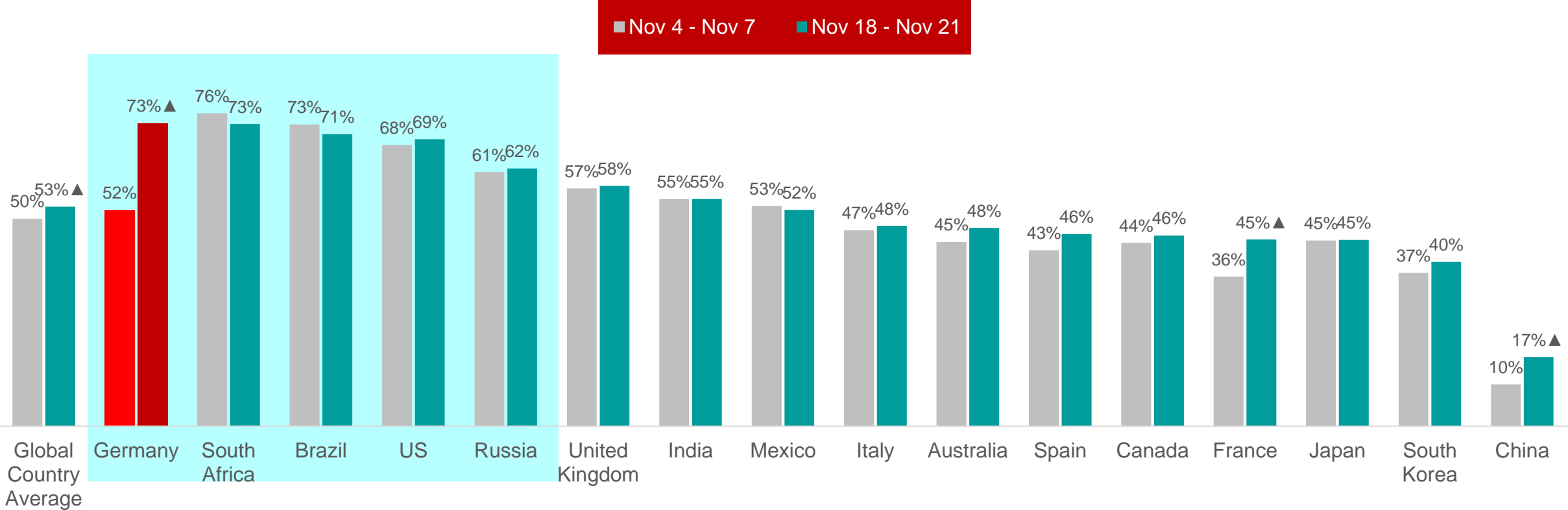


Q. Which one of the following phases do you feel best describes your current situation regarding the COVID-19 pandemic?  
Base: Jan 14 - 17: 14523, Jun 3 - Jun 6: 14498, Dec 2 - 5: 11518



# OUT OF CONTROL?

“I feel like things in my country are out of control right now”  
(Top-2 Box Agreement)



“The Global Country Average” reflects the average result for all the countries where the survey was conducted. It has not been adjusted to the population size of each country and is not intended to suggest a total result

Q: (T2B Summary) To what extent do you agree or disagree with each of the following? [I feel like things in my country are out of control right now]

Base: Global Country Average:11509, AU:501, BR:500, CA:1002, CN:501, FR:1001, DE:999, IN:1000, IT:501, JP:1001, MX:501, RU:500, ZA:500, SK:500, ES:501, UK:1001, US:1000

▼ or ▲ indicate change vs. previous wave (statistically significant @ 95% C.I.)



# BUT LIFE CONTINUES



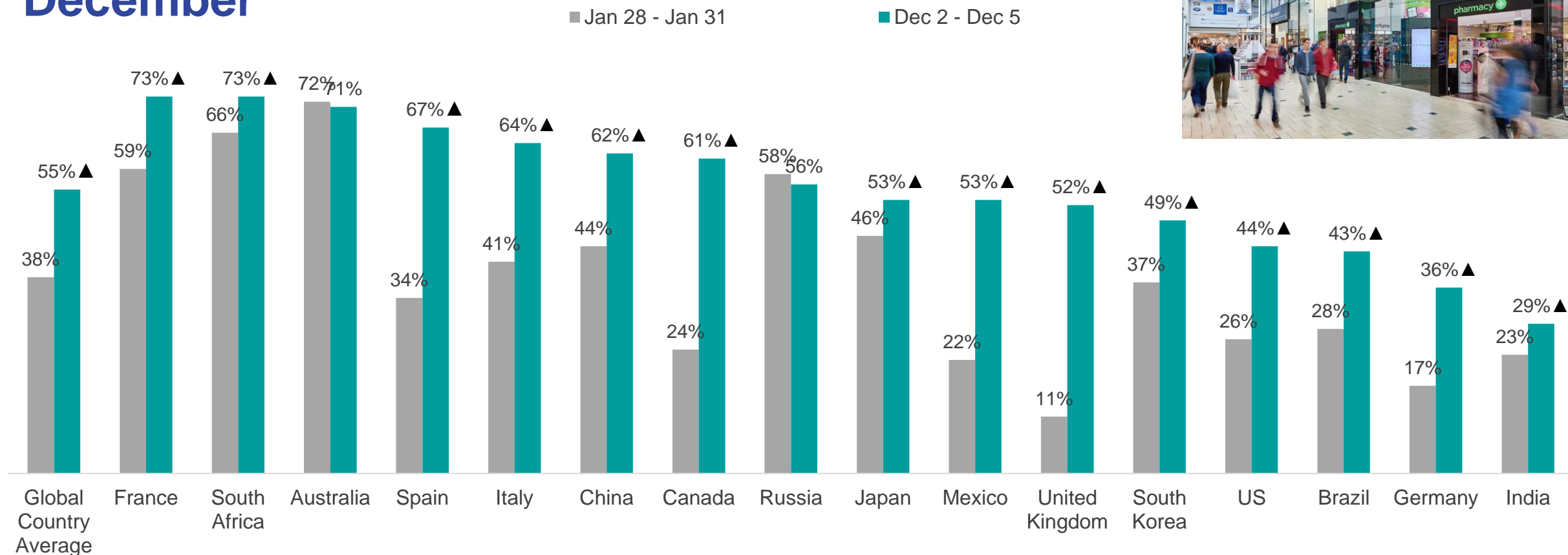
*The following slides are based on Ipsos' 16-country "Essentials Survey"*  
*For further information, please contact the team at [Essentials@ipsos.com](mailto:Essentials@ipsos.com)*



# SHOPPING PARTICIPATION

Already Shopping at an Indoor Shopping Mall  
by Country

December



“The Global Country Average” reflects the average result for all the countries where the survey was conducted. It has not been adjusted to the population size of each country and is not intended to suggest a total result

Q: For the following, when are you planning to do each of these activities again?

Base: Global Country Average:11518, AU:500, BR:500, CA:1002, CN:500, FR:1002, DE:999, IN:1001, IT:500, JP:1003, MX:502, RU:502, ZA:500, SK:501, ES:502, UK:1002, US:1002

▼ or ▲ indicate change vs. previous wave (statistically significant @ 95% C.I.)

**MANY OF US  
ARE SPENDING  
MORE TIME AT  
HOME**

**GAME CHANGERS**



# SHIFT IN TIME SPENT COMPARED TO A YEAR AGO

NET spending more time (+/-)



## Shopping online

29%

Watching TV, movies and/or videos

27%

Spending time on social media

24%

Cooking meals from scratch

24%

Watching/reading news

21%

## Cleaning

24%

Socializing with family/friends virtually

7%

Being intimate/having sex/romance

3%

Spending time with friends/family in-person

-11%

Celebrating holidays/milestones in-person with friends,  
family

-15%

Shopping in-store

-7%

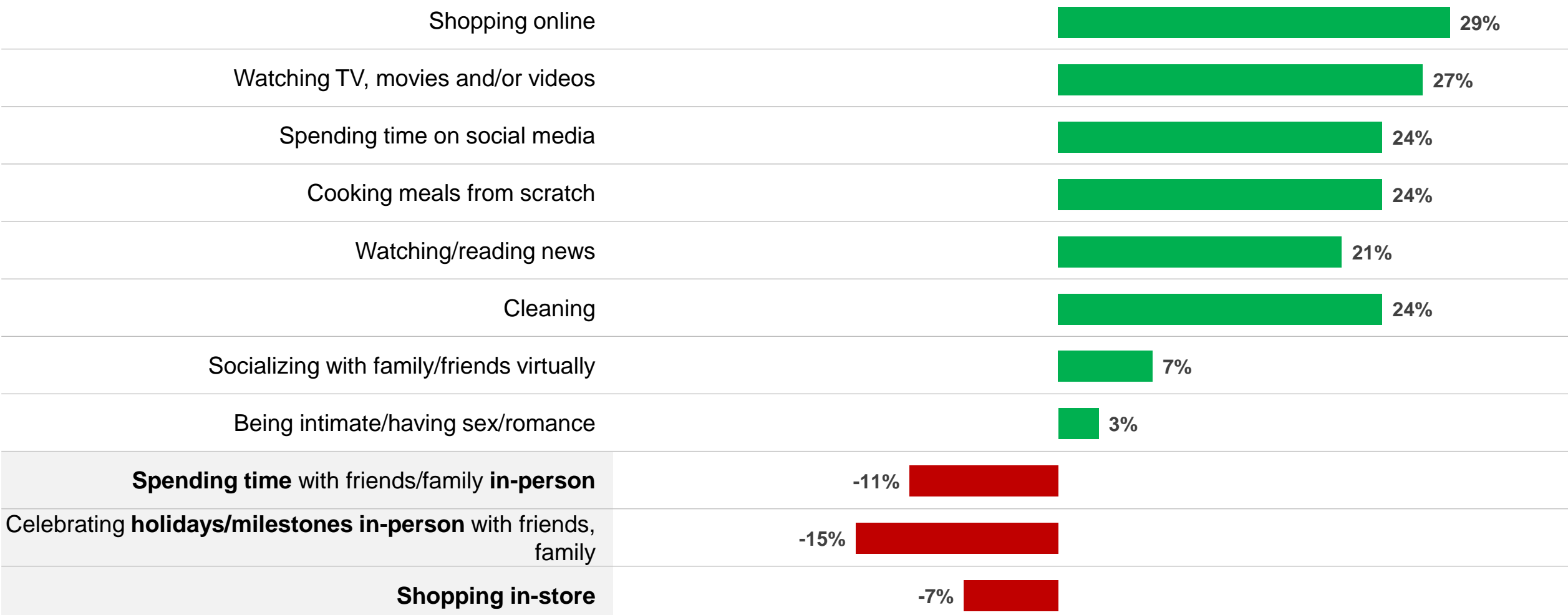
Q: Compared to a year ago, are you spending more, less or the same amount of time doing the following activities?

Base: Rebased to exclude does not apply. Source: Ipsos Essentials December 2021



# SHIFT IN TIME SPENT COMPARED TO A YEAR AGO

NET spending more time (+/-)

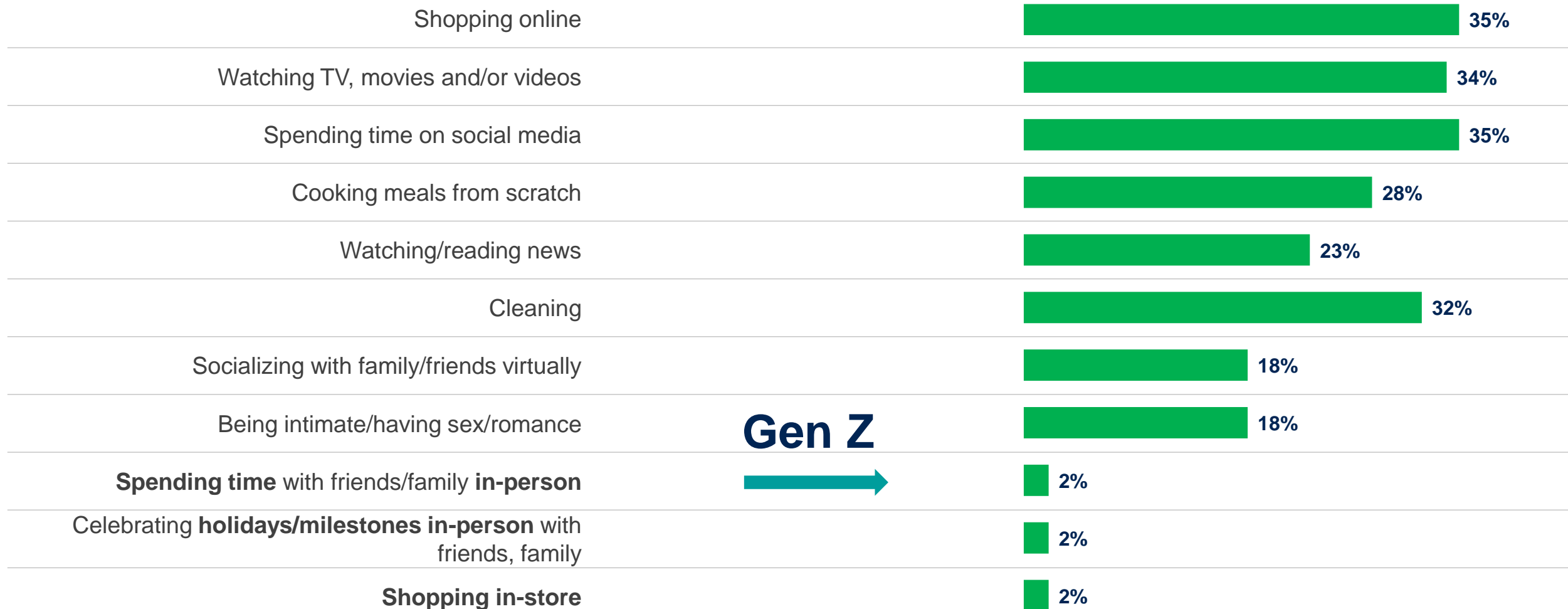


Q: Compared to a year ago, are you spending more, less or the same amount of time doing the following activities?

Base: Rebased to exclude does not apply. Source: Ipsos Essentials December 2021

# SHIFT IN TIME SPENT COMPARED TO A YEAR AGO

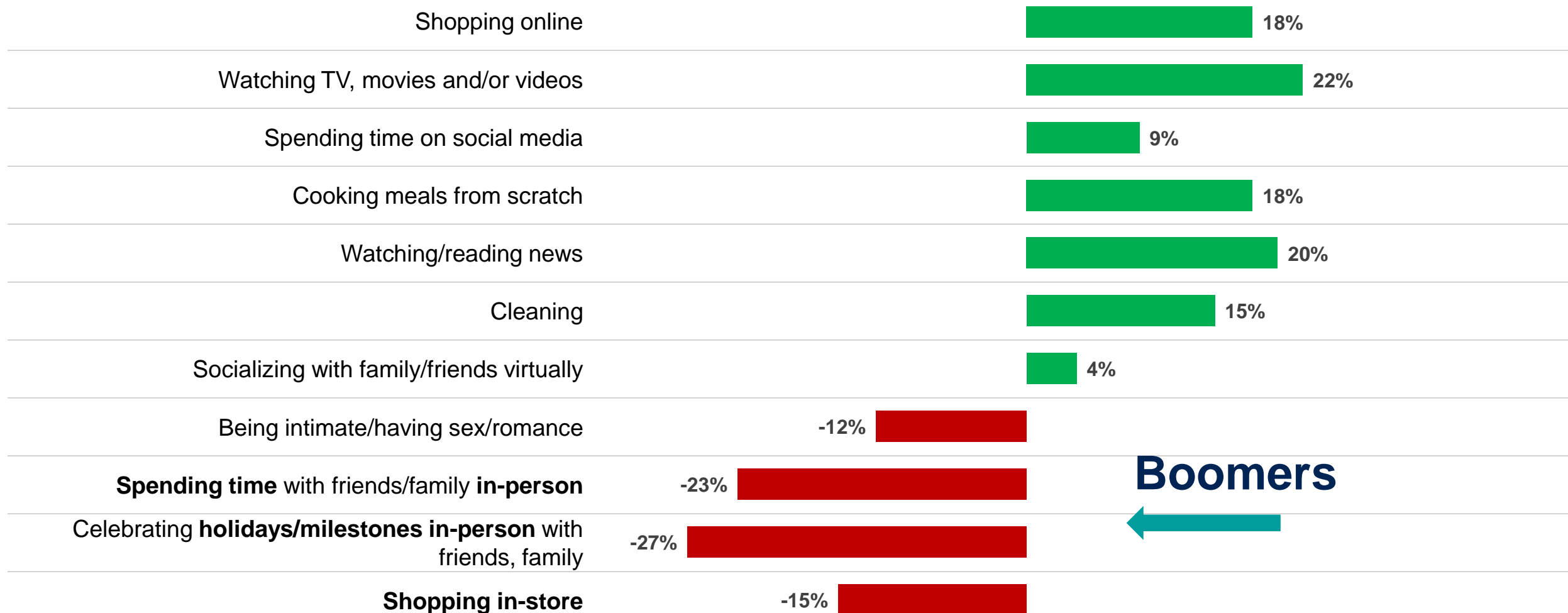
Gen Z NET spending more time (+/-)



Q: Compared to a year ago, are you spending more, less or the same amount of time doing the following activities?  
Base: Rebased to exclude does not apply. Source: Ipsos Essentials December 2021

# SHIFT IN TIME SPENT COMPARED TO A YEAR AGO

Boomers NET spending more time (+/-)



Q: Compared to a year ago, are you spending more, less or the same amount of time doing the following activities?

Base: Rebased to exclude does not apply. Source: Ipsos Essentials December 2021



# THE BIG ISSUES DIDN'T GO AWAY

## WHAT WORRIES THE WORLD?

November 2021



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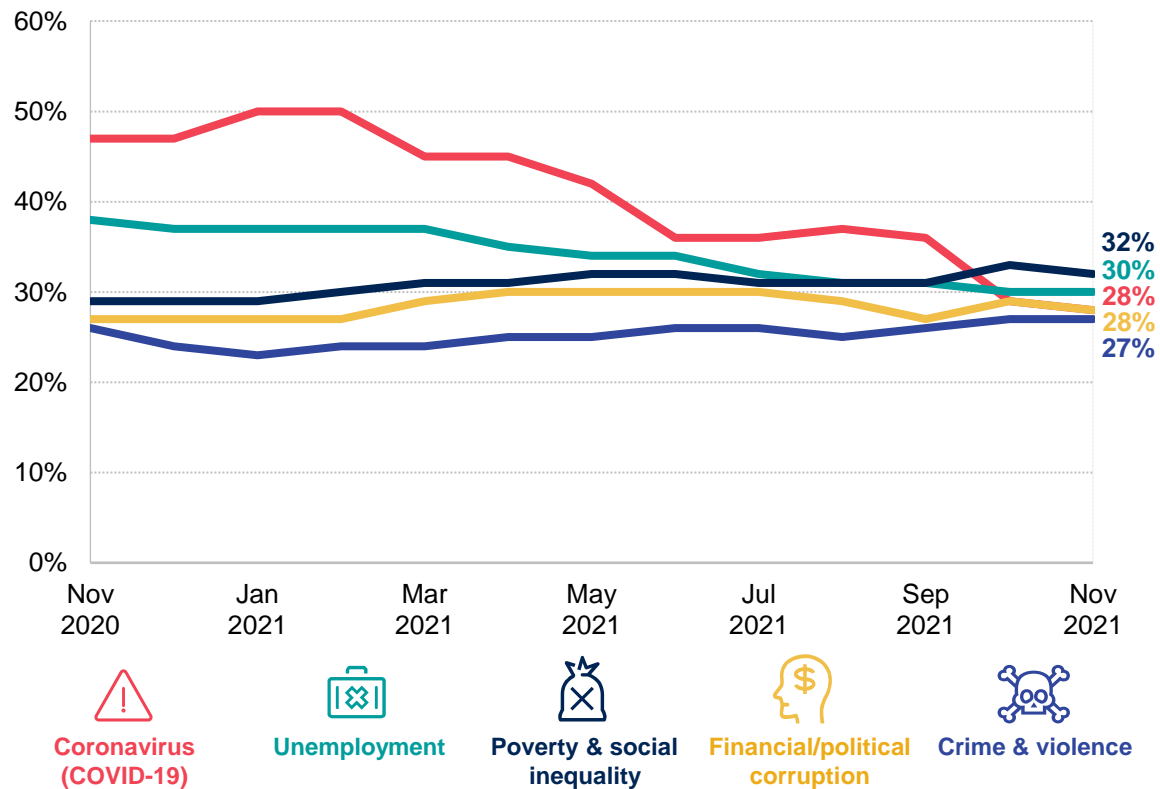
GAME CHANGERS



# WHAT WORRIES THE WORLD? 12-MONTH TREND

Q

Which three of the following topics do you find the most worrying in your country?



**Base:** Representative sample of c.20,000 adults aged 16-74 in 28 participating countries, November 2020 – November 2021

**Source:** Ipsos Global Advisor. Global score is a Global Country Average. See methodology for details.

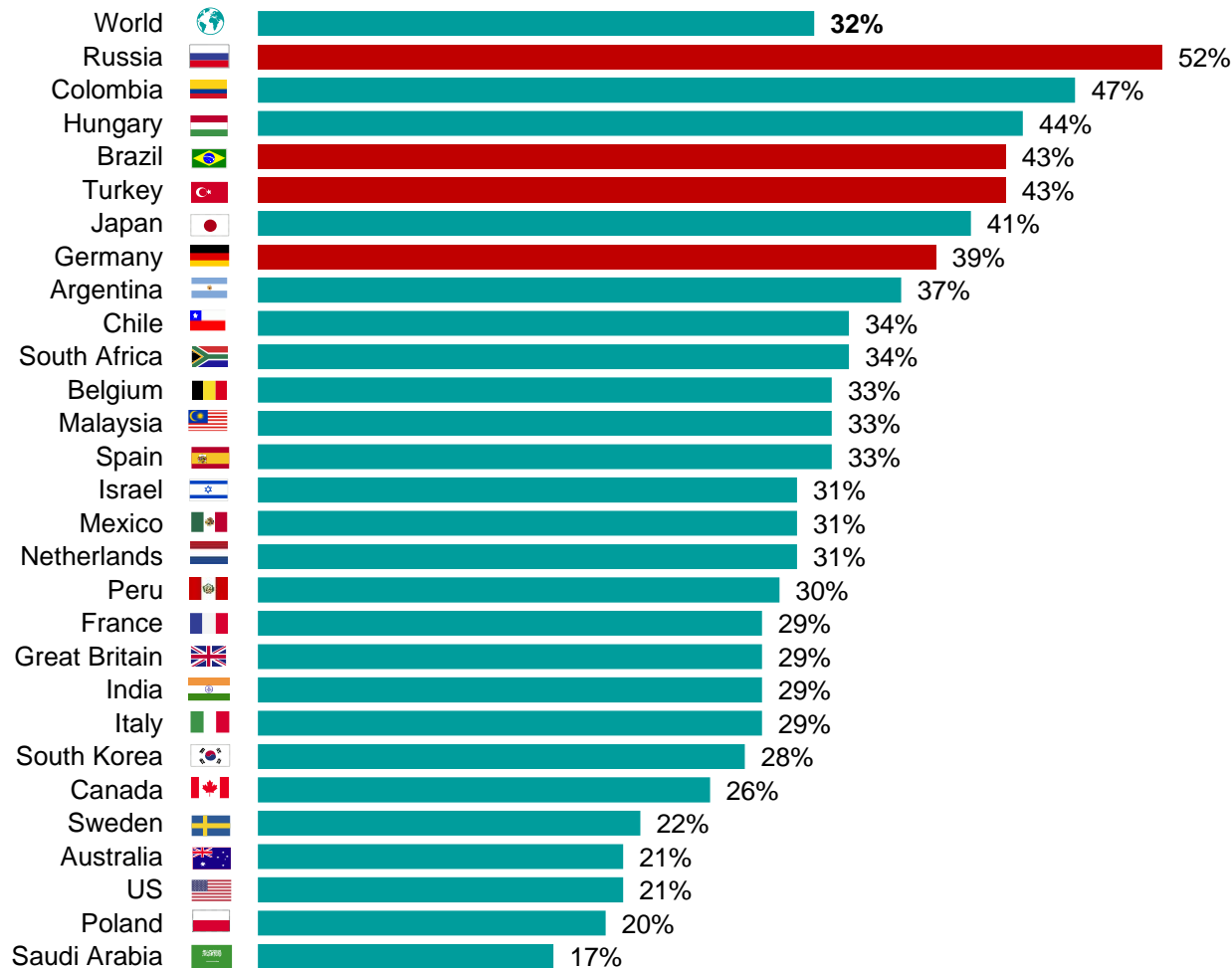


## Coronavirus no longer the world's top worry as it is overtaken by economic concerns

The long reign of Coronavirus as our survey's top global concern comes to an end in October 2021. It falls to third place in our issues ranking – behind poverty & social inequality and unemployment.

# 1 | POVERTY & SOCIAL INEQUALITY

(%) worried in November 2021 in each country



*Which 3 of the following topics do you find most worrying in your country?*

**(List of 18 topics)**

**Red fill denotes #1 issue in that country**

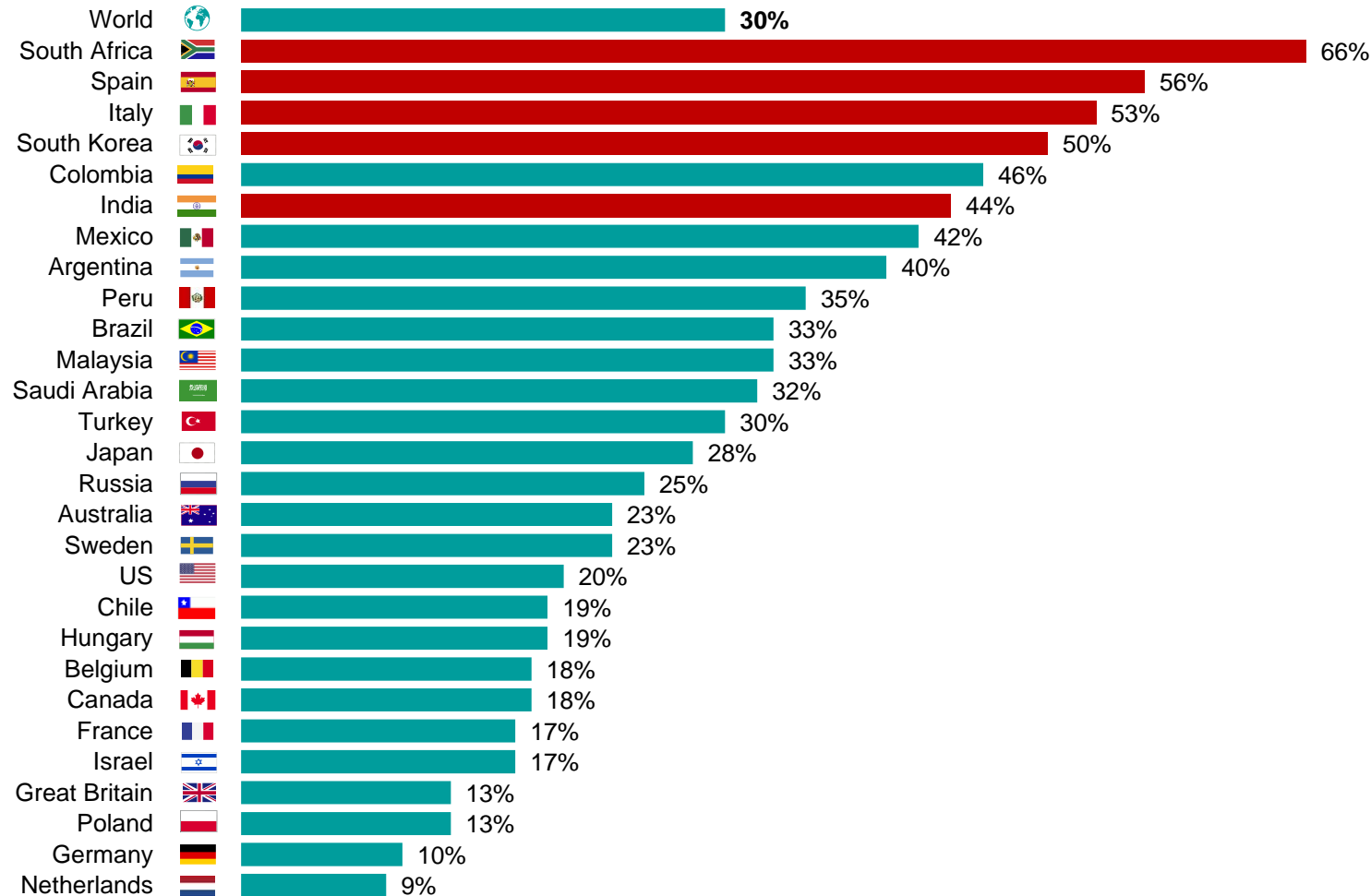
**Base:** Representative sample of 19,021 adults aged 16-74 in 28 participating countries, October 22nd 2021 - November 5th 2021.

**Source:** Ipsos Global Advisor. *Global score is a Global Country Average. See methodology for details.*



## 2 | UNEMPLOYMENT AND JOBS

(%) worried in November 2021 in each country



*Which 3 of the following topics do you find most worrying in your country?*

**(List of 18 topics)**

**Red fill denotes #1 issue in that country**

**Base:** Representative sample of 19,021 adults aged 16-74 in 28 participating countries, October 22nd 2021 - November 5th 2021.

**Source:** Ipsos Global Advisor. *Global score is a Global Country Average. See methodology for details.*

# THE BIG ISSUES DIDN'T GO AWAY

## ENVIRONMENT EMERGENCY?

KEYS – A WEBINAR SERIES BY IPSOS

21<sup>st</sup> October 2021

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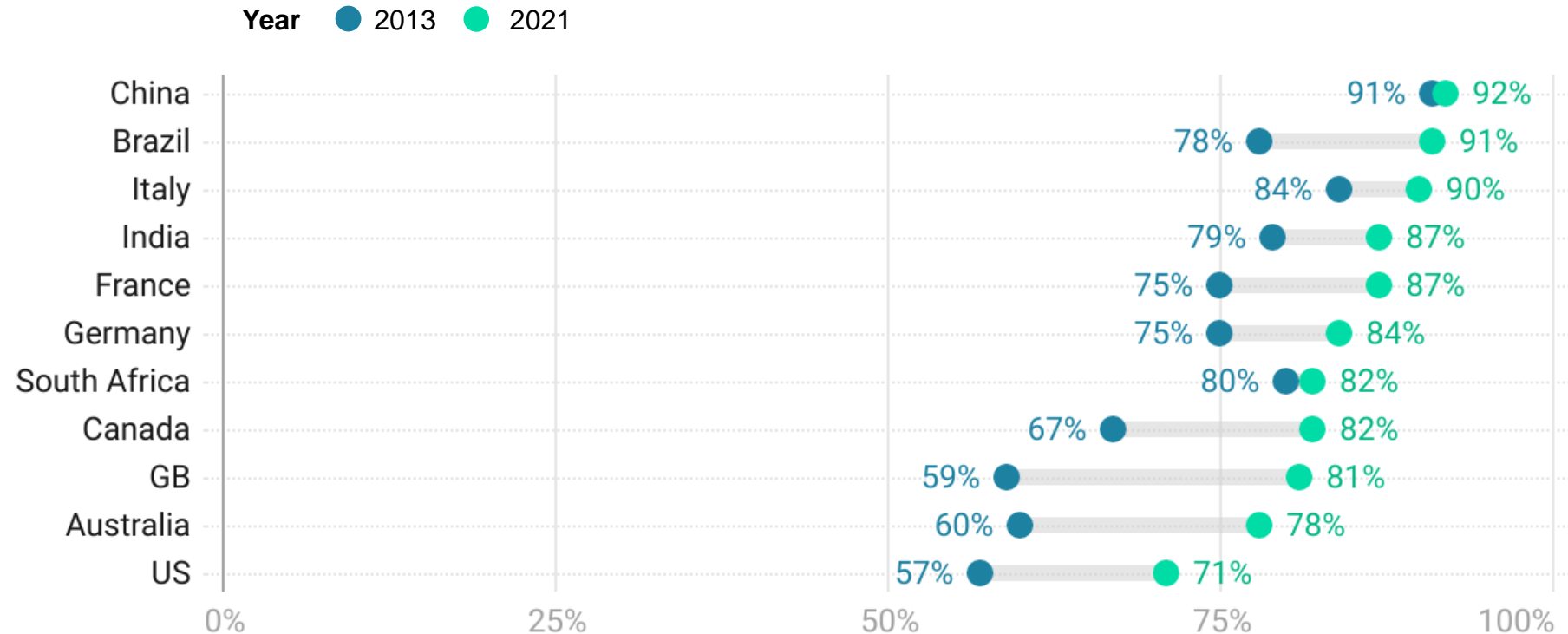


# Our direction of travel



We are heading for **environmental disaster** unless we change our habits quickly

% agree



Ipsos Global Trends Survey  
Base: c.1,000 adults aged 16-75  
(18-75 in US) in each market for each wave



# Our opportunity for change?

75%

agree that the pandemic has shown that it is possible for people to **transform their behaviour very rapidly.**

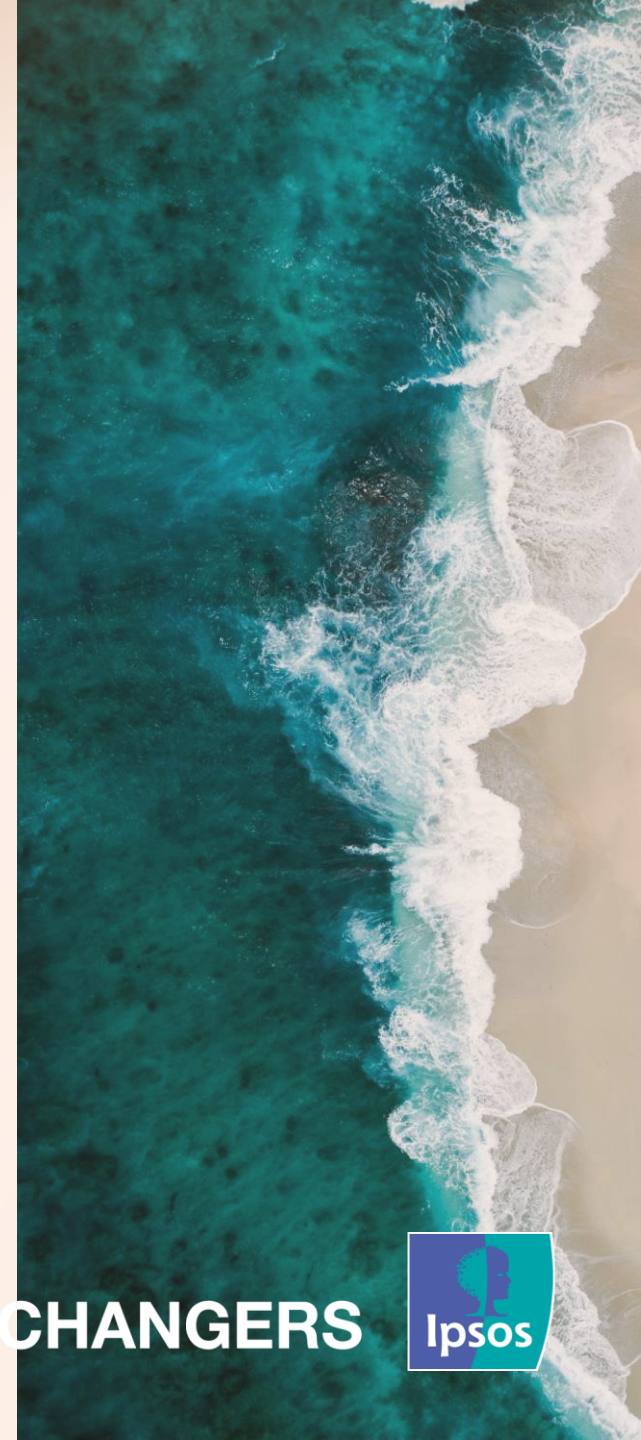
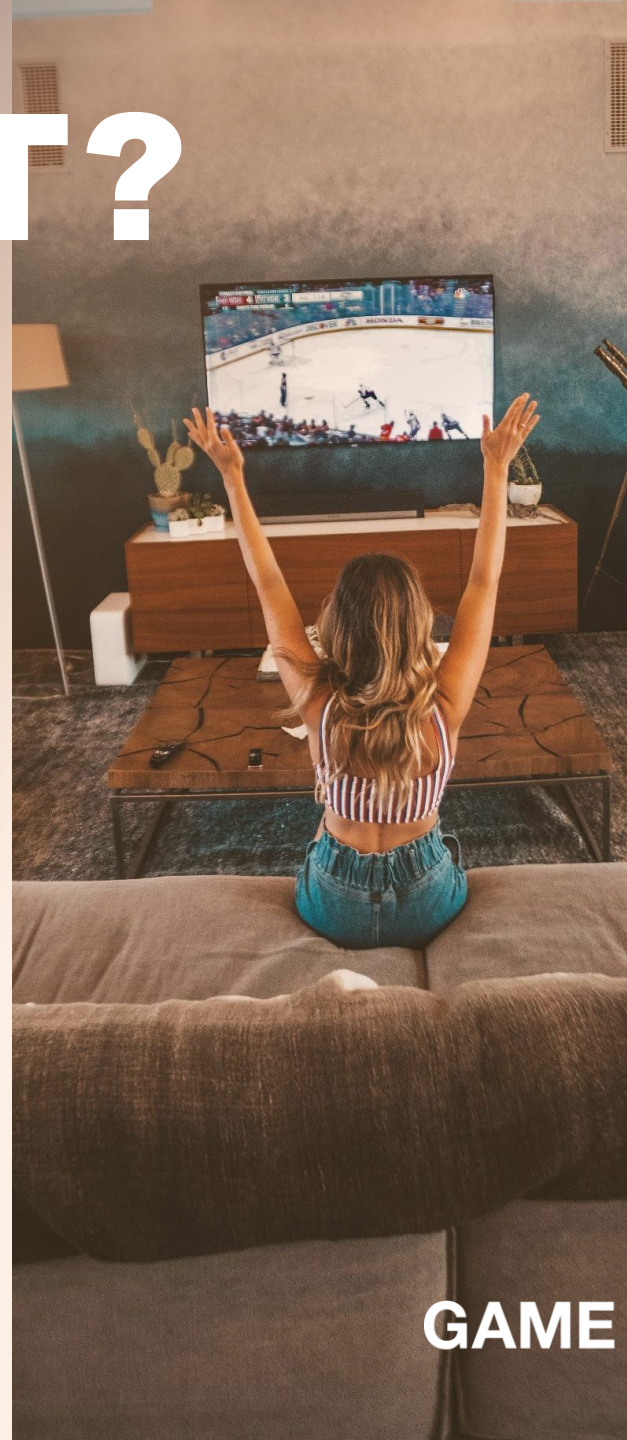
71%

of people agree the **pandemic recovery is a unique moment** to build societies more resilient to future shocks.





# WHAT NEXT?



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# WHAT NEXT? FOUR REPORTS TO SET THE SCENE



## The Return of Inflation?

30-country study asking people whether they have noticed prices rising in recent weeks



## The Evolving Workplace

People across 33 countries set out their expectations for a safe working environment



## In Search of Better Times

Perspectives from 33 nations on which specific events might signal the end of the pandemic



## The Year Ahead

Ipsos' annual predictions survey puts people on the spot and asks for their views on what is likely (and unlikely) to happen in 2022

# INFLATION: CONSUMER PERCEPTIONS IN 30 COUNTRIES

*% saying prices higher in recent weeks*

**Transport/fuel** **70%**

**Food & drink** **70%**

**Utilities** **66%**

For more information: [www.ipsos.com/en/inflation-consumer-perceptions-30-countries-december-2021](https://www.ipsos.com/en/inflation-consumer-perceptions-30-countries-december-2021)

© Ipsos

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# COVID AND THE WORKPLACE

*People in our workplace should...*

**...be vaccinated against Covid-19**

**78% agree**

**...wear a mask in communal areas**

**81% agree**

GAME CHANGERS



# COVID-19: WILL THE PANDEMIC EVER END AND HOW WILL WE KNOW?

A 33-country Ipsos survey

---

December 2021

GAME CHANGERS



# NO CONSENSUS ON WHAT WOULD SIGNAL THE END OF THE COVID-19 PANDEMIC



Q. Which of the following do you think would be the **best indicator that the COVID-19 pandemic is ending** and that major restrictions can be lifted in [COUNTRY]?

	When at least 75 percent of the population in ... has been <b>vaccinated</b>	When <b>transmission</b> of the coronavirus in ... has completely stopped	When <b>hospitals</b> across the country have had normal operations, with no staff or equipment shortages, for at least one month	When there are fewer than 10 new cases for every million people in ... each day	When there are fewer than 2 COVID deaths for every million people in ... each week	Other	The pandemic has already come to an end	Don't know
33-country average:	20%	19%	17%	12%	7%	3%	8%	14%
Higher than average by 8 points or more in:	Peru Turkey Switzerland Colombia Romania Argentina India	China Italy	Sweden Netherlands Singapore	Singapore			Saudi Arabia China Hungary Malaysia	France Canada United States Germany Great Britain

Base: 22,023 online adults aged 18--74 across 33 countries

\* Online samples in Brazil, Chile, mainland China, Colombia, India, Israel, Malaysia, Mexico, Peru, Romania, Russia, Saudi Arabia, Singapore, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population

The "Global Country Average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result.



# WHERE NEXT?

## 2022 Predictions Survey

**77%** optimistic “2022 will be a better year for me than 2021 was”

**61%** “global economy will be stronger in 2022”

**56%** it’s “likely more than 8 in 10 people worldwide” will receive at least 1 dose of vaccine



# LIFE IN COVID TIMES

Public Opinion in 2021

*Latest releases at [ipsos.com](https://www.ipsos.com)*

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Simon Atkinson

GAME CHANGERS





# PART TWO: VACCINES – THE STORY SO FAR

KEYS – A WEBINAR SERIES BY IPSOS

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Rhoda Schmuecking

GAME CHANGERS





# COVID-19 VACCINES: THE STORY SO FAR...

**KEYS Webinar – 16 December 2021**

Rhoda Schmuecking

President, Global Therapy Monitors, Syndicated Healthcare

Head of Virology & Vaccines Centre of Expertise

COVID-19 is still  
impacting all countries,  
all industries and all  
walks of life...



9<sup>th</sup> December  
2020



**68M**

confirmed cases of  
COVID-19 globally

9<sup>th</sup> December  
2021



**267M**

confirmed cases of  
COVID-19 globally

Source: World Healthcare Organization Coronavirus Disease Dashboard – updated 9 December 2021  
(<https://covid19.who.int/table>)

# Recent news has caused renewed anguish



**Staggering Omicron case numbers expected – health expert**

15 Dec 2021, BBC News



**Variant spreading at unprecedented rate and vaccines may be waning, WHO warns**

15 Dec 2021, The Independent



**A J&J booster works well for people who had Pfizer-BioNTech doses originally, a study finds**

5 Dec 2021, New York Times



**A surge of deadly COVID cases in Europe is met by popular fury over lockdowns”**

27 Nov 2021, The Economist



**Traces of Omicron variant detected in Cape Town’s wastewater**

10 Dec 2021, News 24 South Africa



**Israeli study finds Pfizer COVID-19 booster protects against Omicron**

12 Dec 2021, Reuters



**Asia-Pacific wants to live with COVID. Omicron is threatening those reopening plans**

6 Dec 2021, CNN



**Tokyo reports 29 new coronavirus cases; nationwide tally 175**

15 Dec 2021, Japan Today



**“Moderna or Novavax after AstraZeneca Jab Confers High Covid Immunity, Study Finds**

6 Dec 2021, The Guardian



# Many questions remain unanswered



How soon will we know that existing vaccines are effective against Omicron?

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What other new variants will emerge?

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Will we need to take an annual COVID-19 booster shot?

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How can we overcome the crisis in trust that is vaccine hesitancy?

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When will this pandemic be behind us?

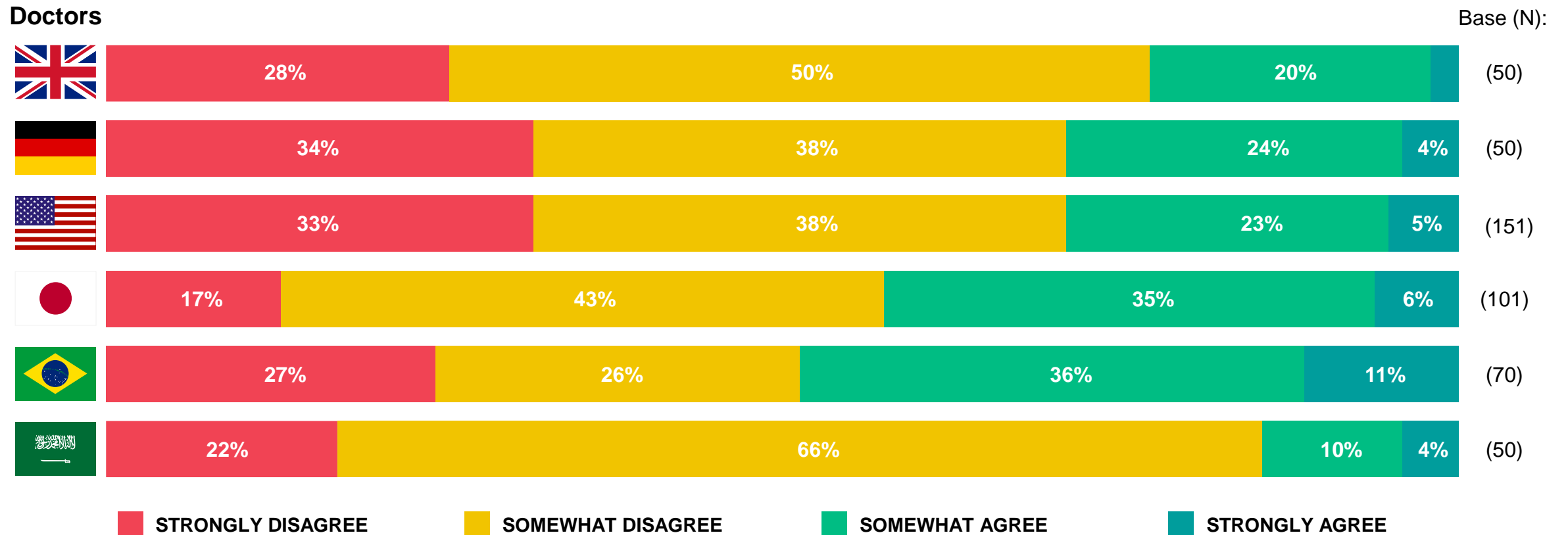
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And many more...

# Do doctors believe this pandemic will be resolved one year from now?

Most doctors surveyed do not believe this pandemic will be resolved one year from now; doctors in Brazil and Japan were the most optimistic...



BASE: All respondents; don't know' responses excluded.

Source: Ipsos Syndicated Vaccine Impact Study. Data collected online from doctors across 20 markets worldwide in Nov 2021, Q: *How much do you agree / disagree that the pandemic will be resolved 1-year from now?*

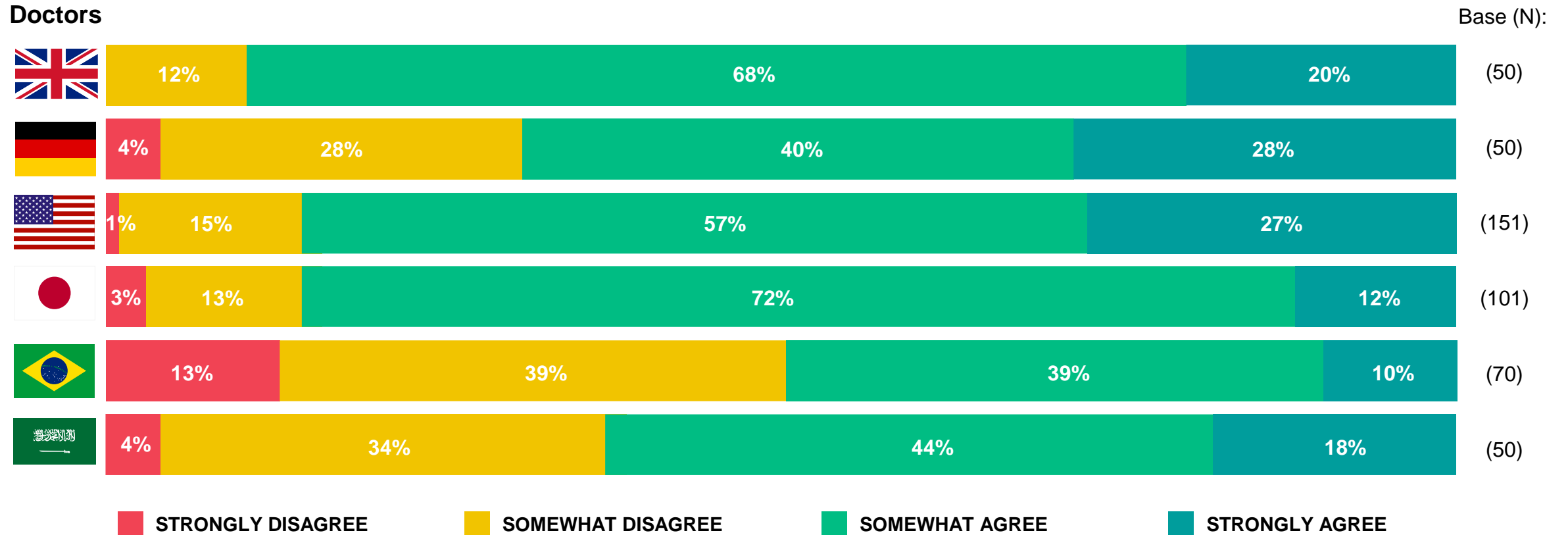
Over 50% of Doctors surveyed do **not** think this pandemic will be resolved one year from now





# Are doctors concerned about the emergence of a new variant, and its impact on our ability to gain control of the pandemic?

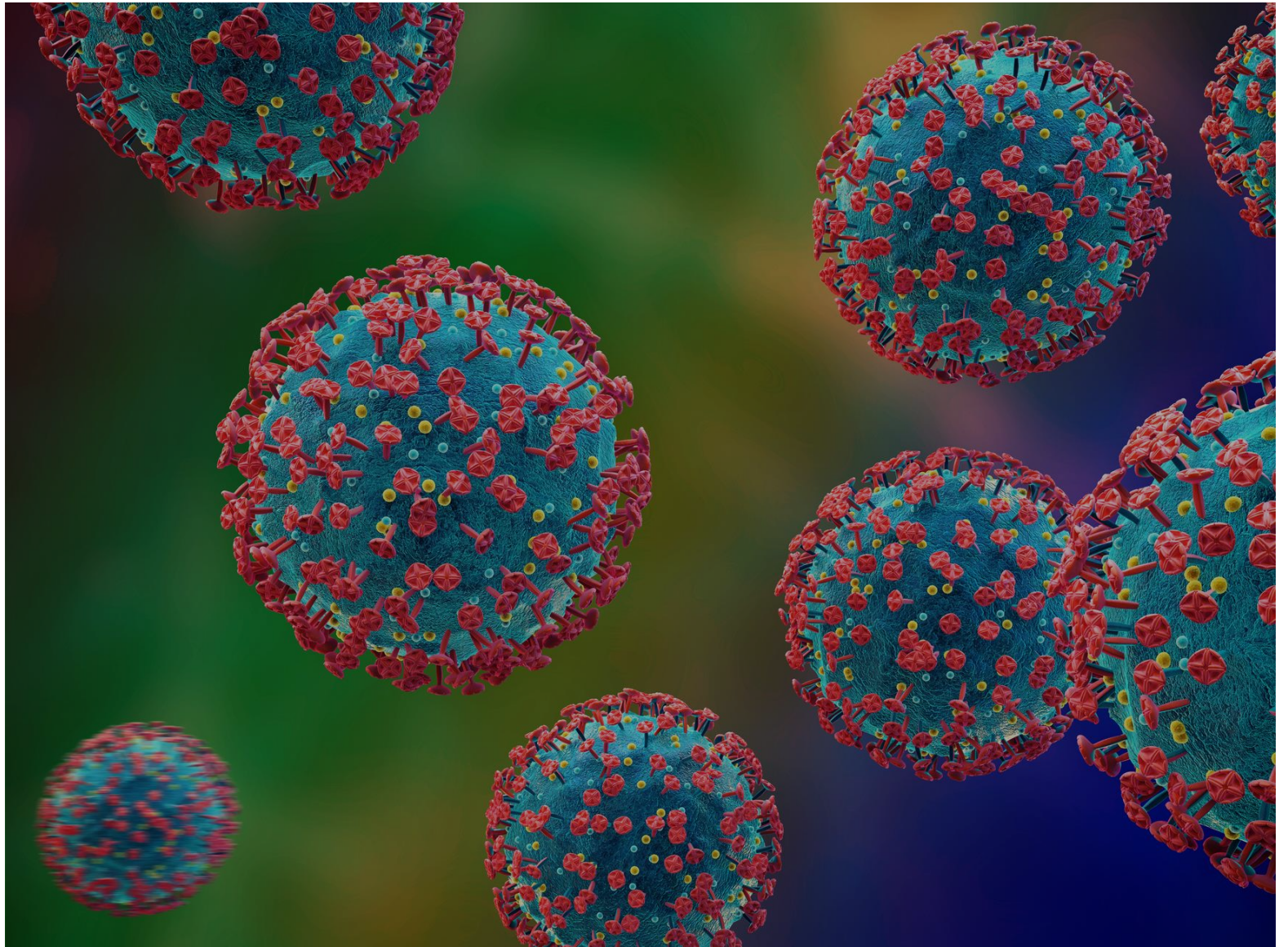
Most doctors surveyed were concerned about a new strain; those in Brazil were less concerned.



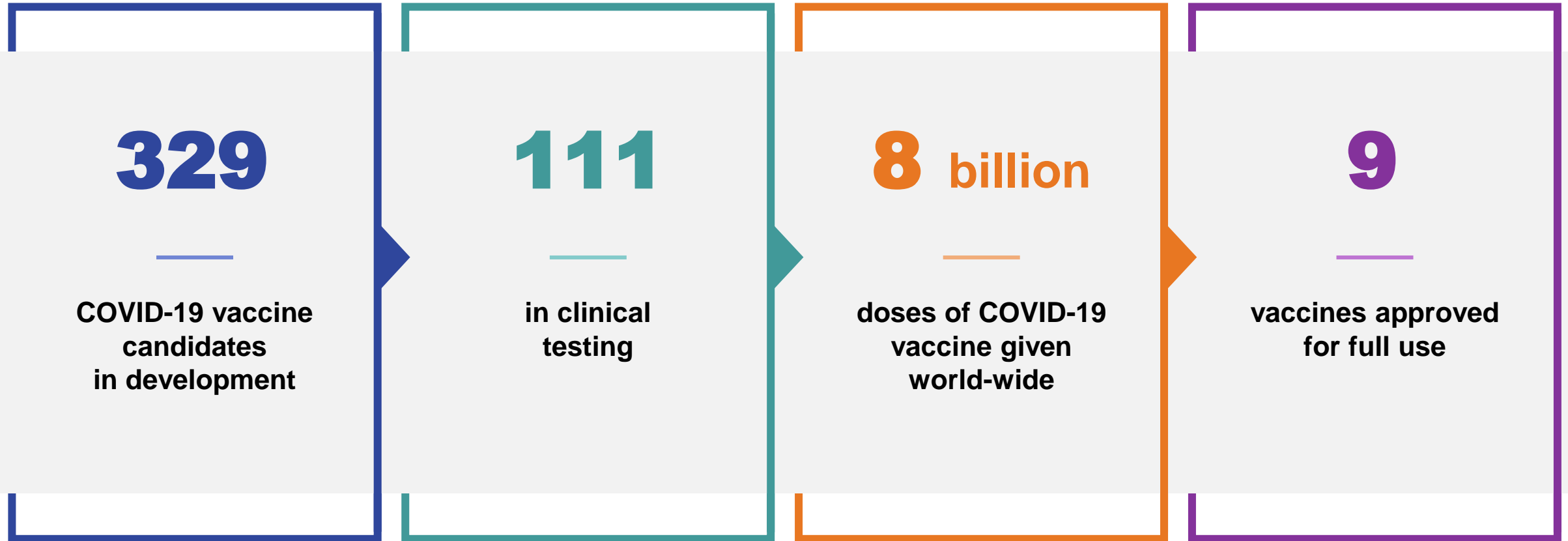
BASE: All respondents; don't know' responses excluded.

Source: Ipsos Syndicated Vaccine Impact Study. Data collected online from doctors across 20 markets worldwide in Nov 2021, Q: *How much do you agree / disagree that 'the emergence of new variants (or strains) will inhibit our ability to gain control of the pandemic?*

The majority of doctors were concerned that the emergence of a new variant / strain **will** inhibit our ability to gain control of this pandemic



# Effective COVID-19 vaccines have been brought to market at record speed

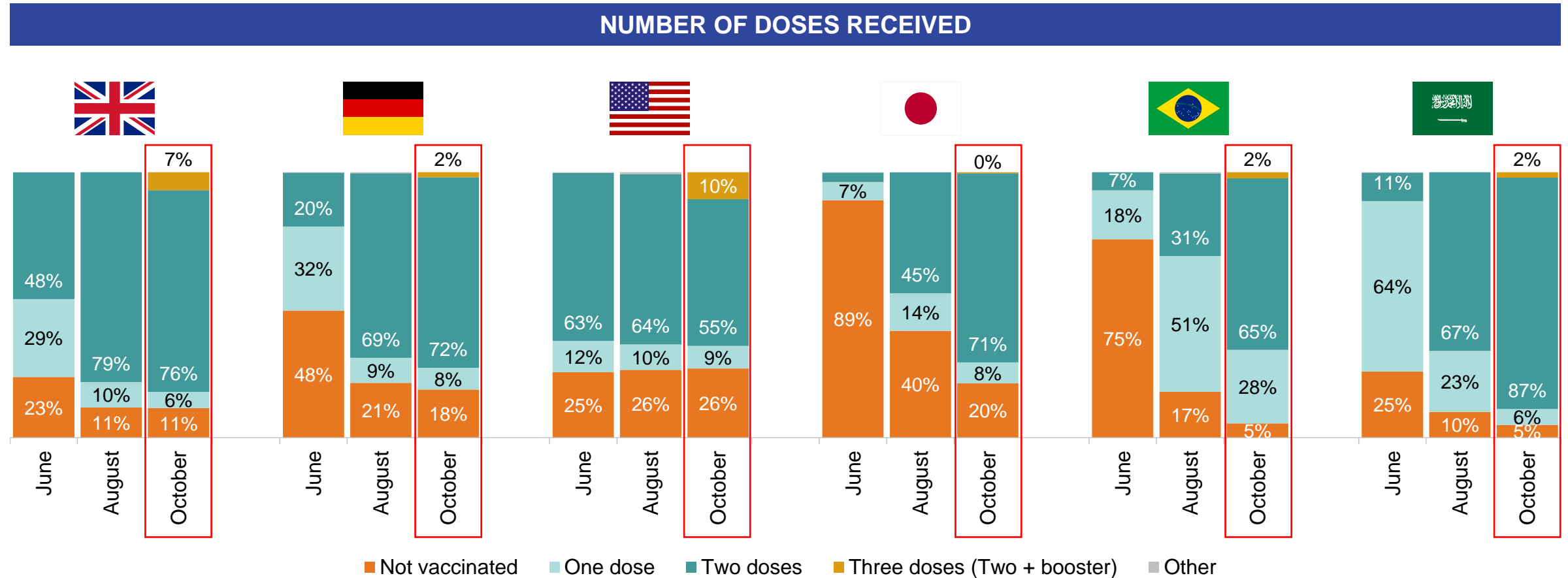


Sources: London School of Hygiene & Tropical Medicine COVID-19 Vaccine Tracker – accessed 9<sup>th</sup> December 2021 ([https://vac-lshtm.shinyapps.io/ncov\\_vaccine\\_landscape/](https://vac-lshtm.shinyapps.io/ncov_vaccine_landscape/))  
<https://www.nytimes.com/interactive/2020/science/coronavirus-vaccine-tracker.html>



# In the majority of markets surveyed, over 80% of consumers are vaccinated with at least one dose


Over a quarter of US consumers remain unvaccinated.



BASE: All consumers

Source: Ipsos Syndicated Vaccine Impact Study. Data collected online from consumers in June, August & October 2021 (sample sizes per wave: c.1500 in UK; c.1500 in Germany, c.2000 in US & c.1000 in Japan, Brazil & KSA)

Q: How many doses have you received? One dose / Two doses / Three doses

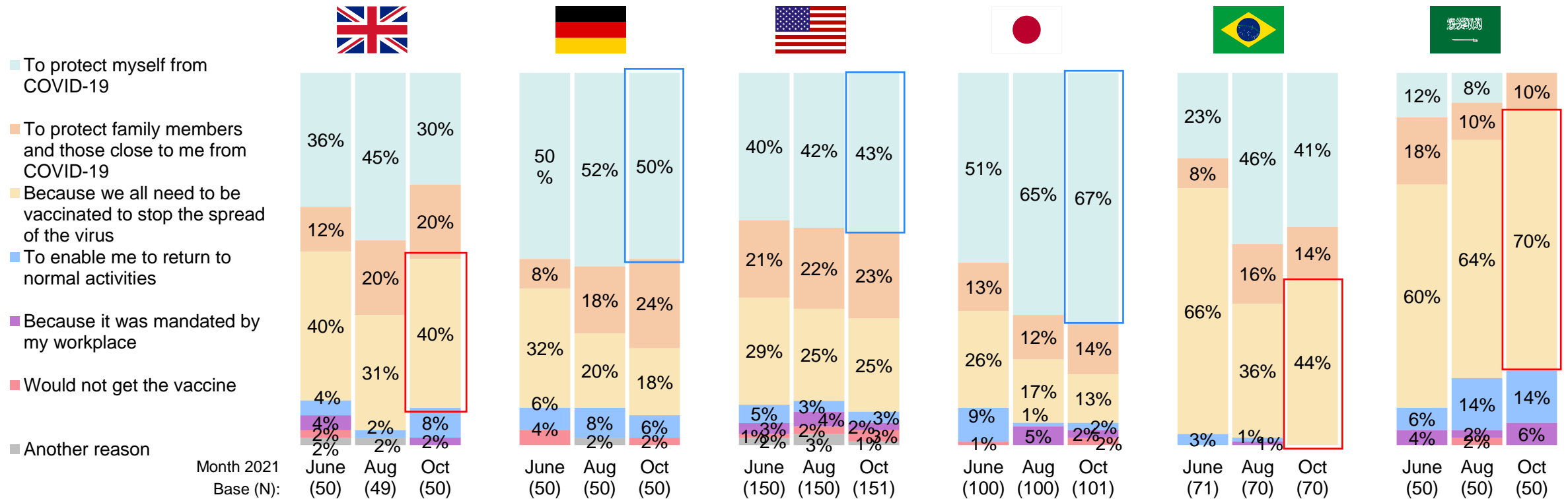


**Emotions around  
getting vaccinated  
versus not getting  
vaccinated run deep.**

# Why are doctors getting the vaccine?

In KSA, UK & Brazil, the top reason given was 'To stop the spread of the virus'. In Japan, Germany & US, the top reason was 'To protect myself'.

## MAIN REASON FOR GETTING COVID-19 VACCINE – DOCTORS



BASE: All respondents; don't know' responses excluded.

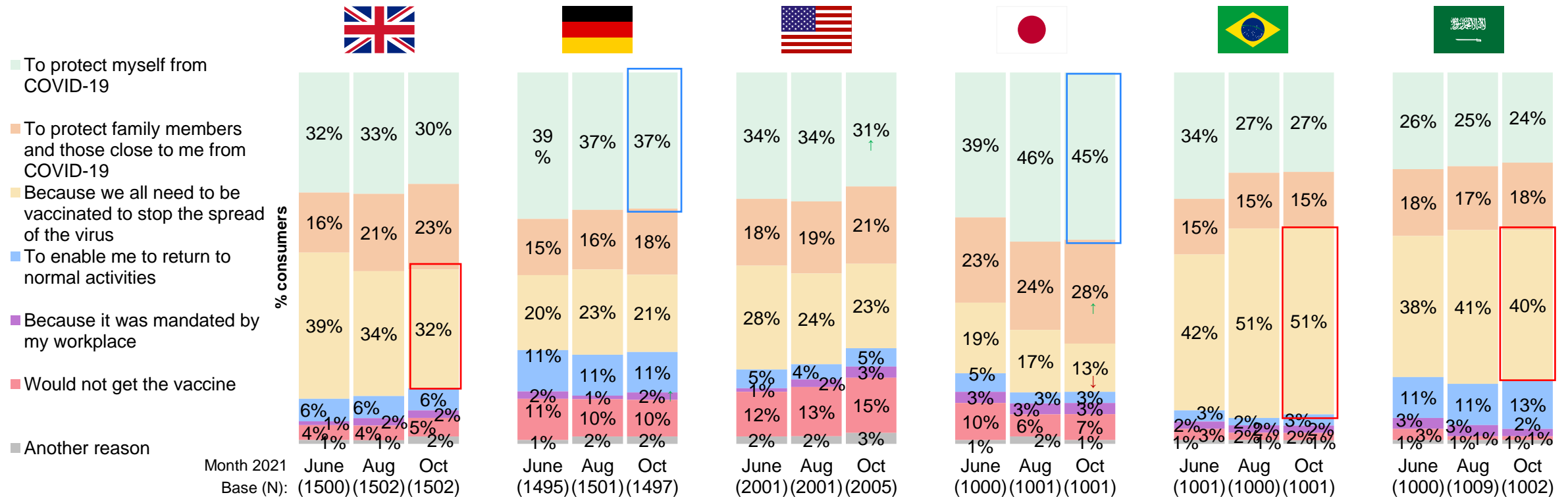
Source: Ipsos Syndicated Vaccine Impact Study. Data collected online from doctors across 20 markets worldwide in Nov 2021, Q: Which of the following is the most important reason why you would get a vaccine for COVID-19?



# Why are consumers getting the vaccine?

Top reasons include 'To stop the spread of the COVID-19 virus' (KSA, Brazil, UK)' & To protect myself' (particularly Japan & Germany)

## MAIN REASON FOR GETTING COVID-19 VACCINE – CONSUMERS



BASE: All consumers

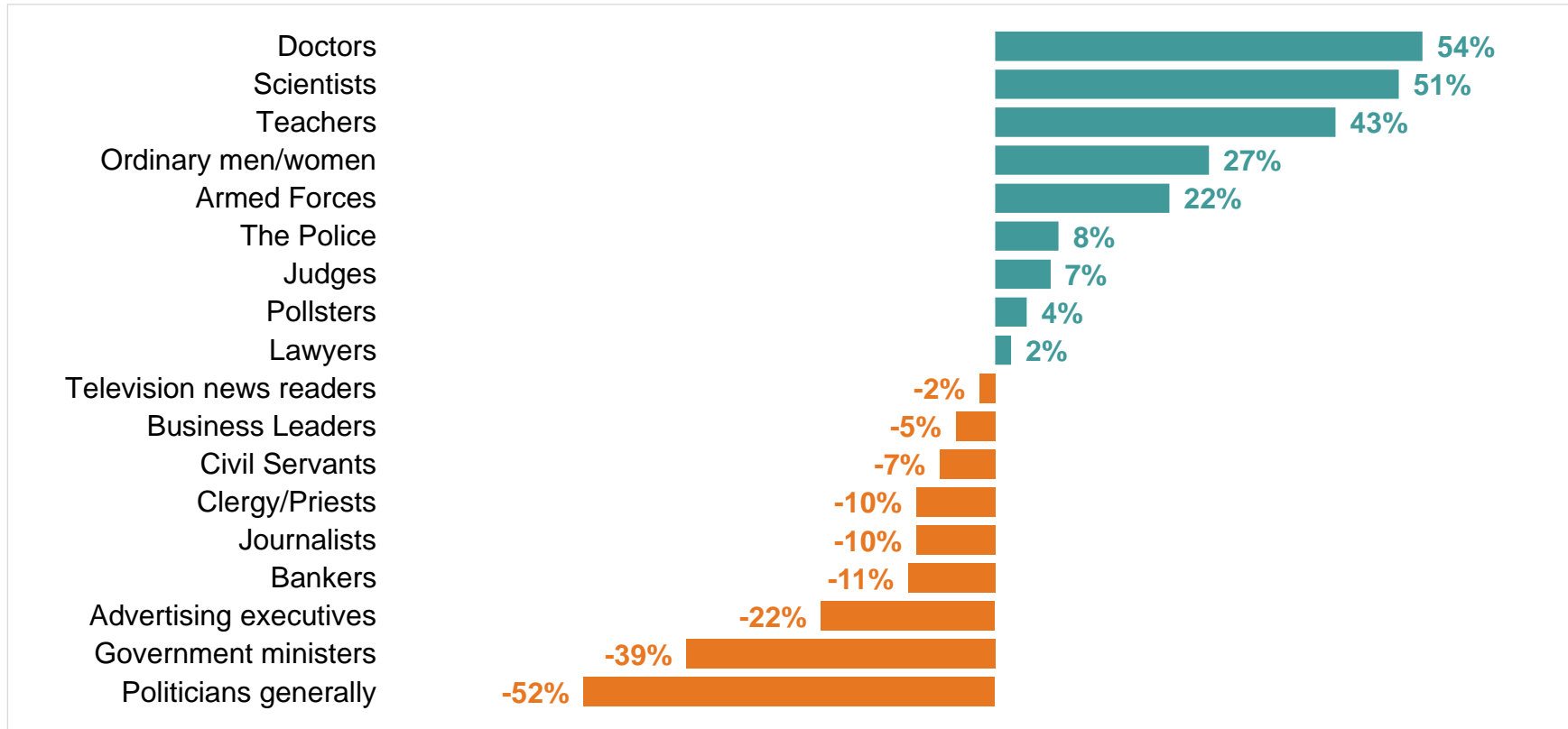
Source: Ipsos Syndicated Vaccine Impact Study. Data collected online from consumers in June, August & October 2021, Q: Which of the following is the most important reason why you are likely to get a vaccine for COVID-19?

# There is a clear divide in ideology between those that have chosen to be vaccinated and those that have not



# Trust remains an issue...

## GLOBAL TRUSTWORTHINESS RANKING 2021 NET TRUST



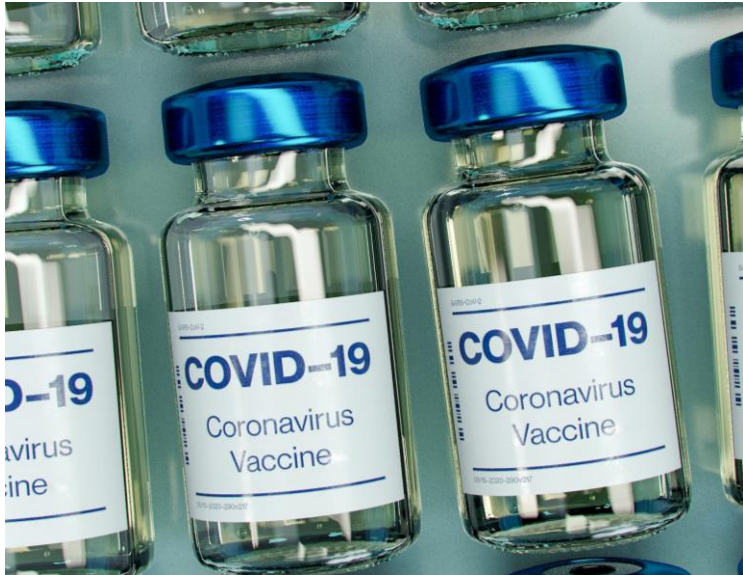
- For the first time, doctors were rated as more trustworthy than all other professionals.
- On a positive note, we still trust those responsible for COVID-19 vaccine development & recommendation
- BUT we still distrust those telling us when and how to get vaccinated...

Ipsos Global Trustworthiness Index 2021 – 19,570 participants across 28 countries, interviewed online from 23 April – 7 May 2021

Q: Please look at this list of different types of people. In general, do you think each is trustworthy or untrustworthy in your country? Please use a scale of 1 to 5, where 1 is very trustworthy and 5 is very untrustworthy



# But we have reasons to be positive



If needed, vaccine manufacturers can produce a new vaccine adjusted to any variant within 6 weeks and ship initial batches within 100 days.



Promising COVID-19 antivirals will be shortly available.



We learn more about the virus and how to conquer it every day and apply these learnings to other diseases.

# PART THREE: PANDEMIC OR NO PANDEMIC, CULTURE MATTERS

KEYS – A WEBINAR SERIES BY IPSOS

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Louis Rougier  
Radhecka Roy

GAME CHANGERS





# HELP BRANDS TRAVEL ACROSS CULTURES



LOUIS  
ROUGIER

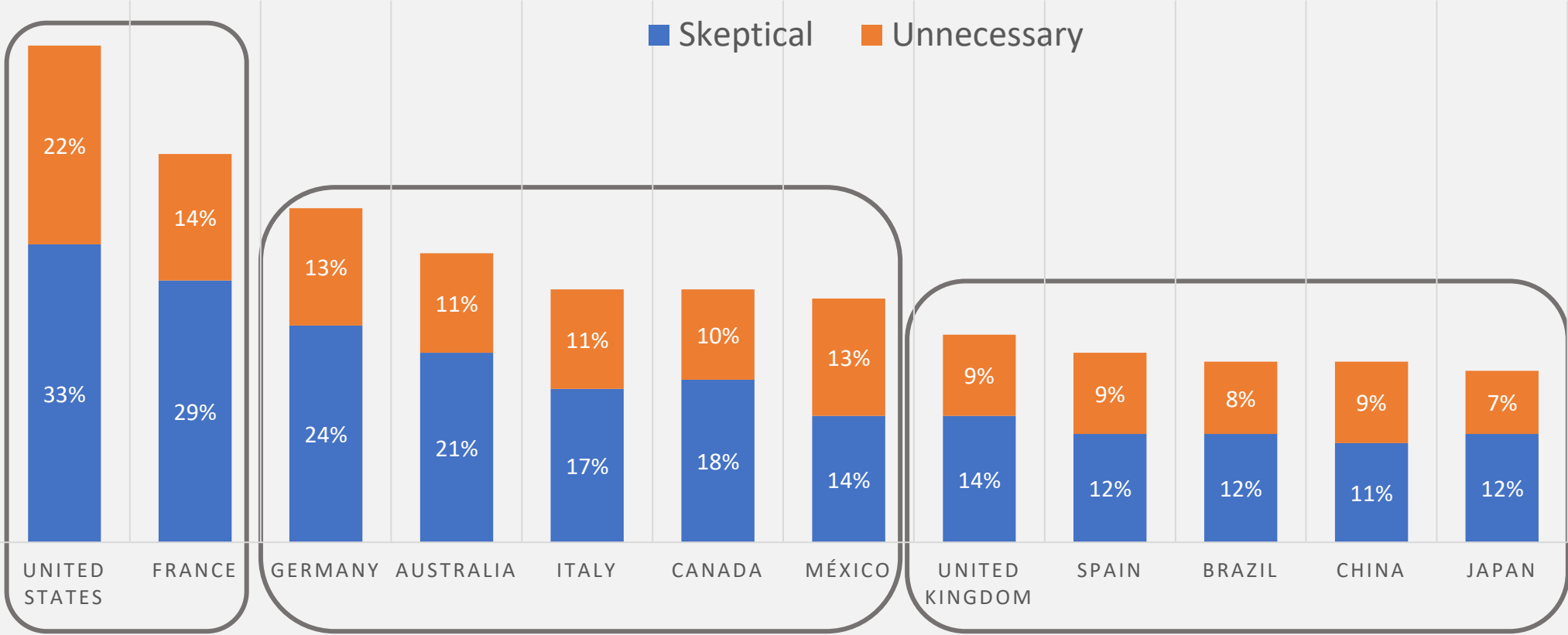
RADHECKA  
ROY





# CULTURAL MAPS DON'T MATCH GEOGRAPHIC MAPS

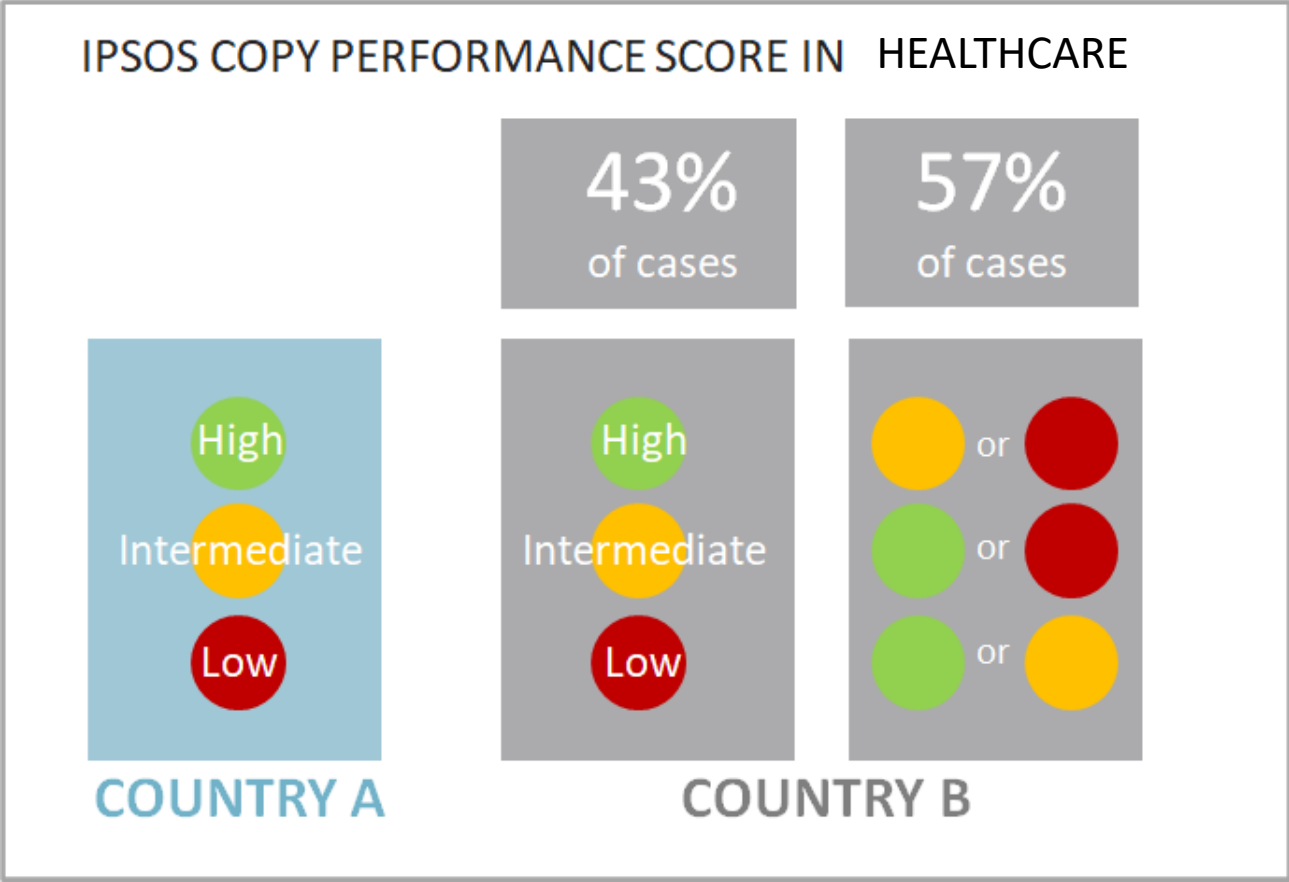
EMOTIONAL ASSESSMENT OF GETTING COVID-19 VACCINE  
(SOURCE : IPSOS, 4 WAVES FEB-AUG 2021, NON VAX POPULATION)



# THE COMMUNICATION TRANSFERABILITY CHALLENGE



# KEY CHALLENGE : LESS THAN 1 OF 2 AD COPIES GET SIMILAR PERFORMANCE BETWEEN TWO COUNTRIES



Source : Ipsos Creative Excellence





“CULTURE IS WHAT REMAINS  
WHEN YOU HAVE FORGOTTEN  
EVERYTHING”

Values

Beliefs

Traditions

Rituals

Habits

Symbols

Codes



# EXPERT EYE

25 countries

10 themes



WHAT WOULD  
ILLUSTRATE ...  
MASCULINITY?

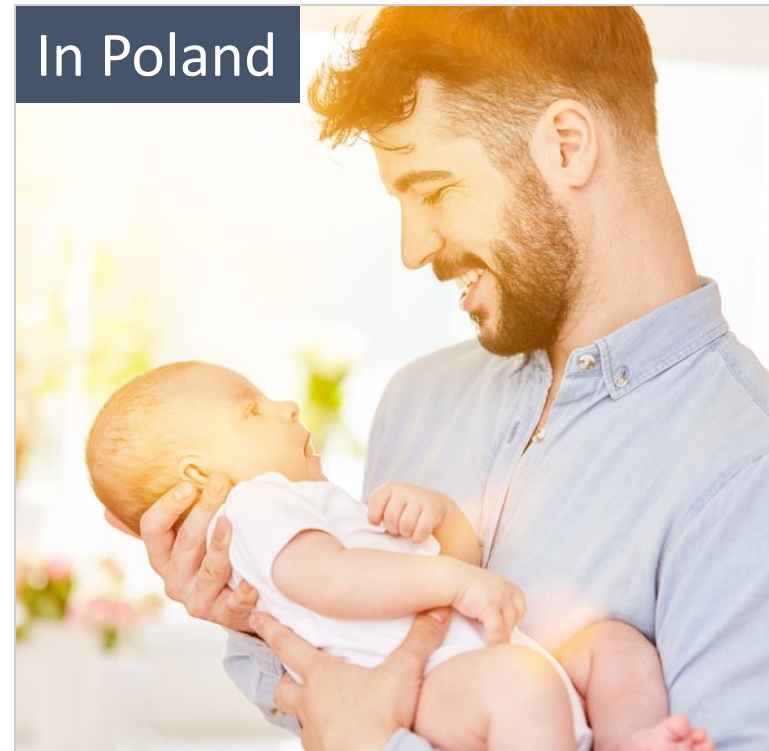
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In Spain



In Canada



In Poland



In Singapore



WHAT WOULD  
ILLUSTRATE ...  
TOGETHERNESS?

---





WHAT WOULD  
ILLUSTRATE ...  
FINANCIAL  
SUCESS?

---



In Italy



In China



In Nigeria



In Denmark

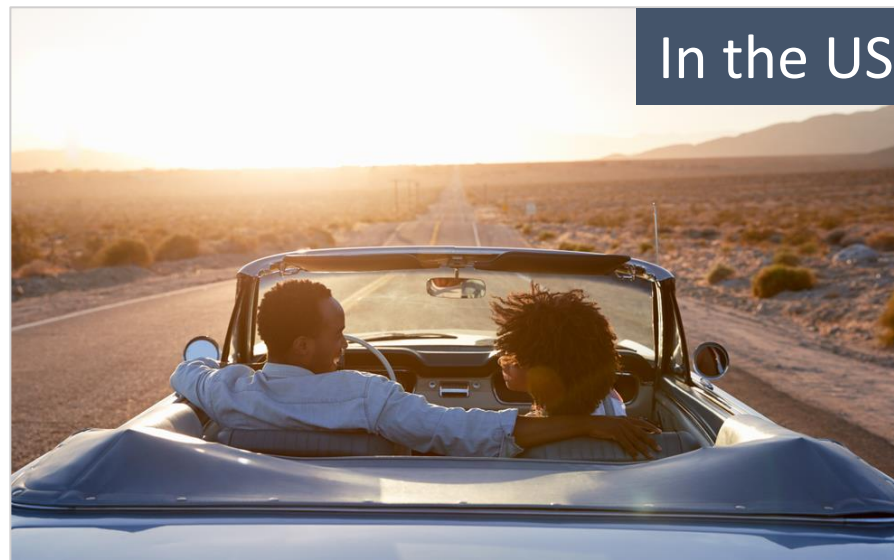


WHAT WOULD  
ILLUSTRATE ...  
ESCAPE?

---



In Australia



In the US



In the UK



In Brazil



WHAT WOULD  
ILLUSTRATE ...  
COMFORT?

---



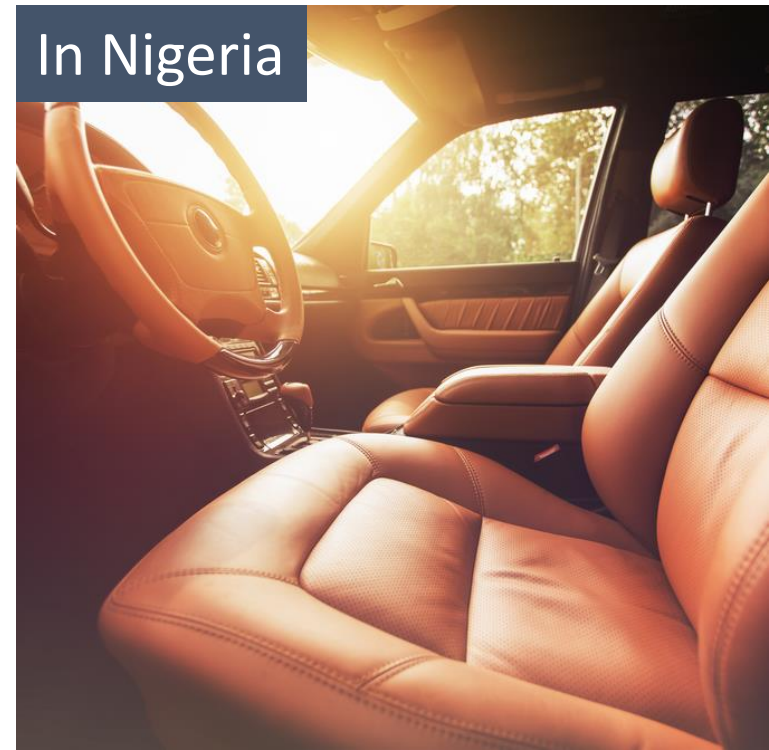
In Japan



In Singapore



In Poland



In Nigeria



WHAT WOULD  
ILLUSTRATE ...  
FREE THINKING?

---



In Brazil



In Canada



In Denmark



In Switzerland



# CONSUMER EYE

Learning a new  
language?





Diversity



Personal  
enrichment

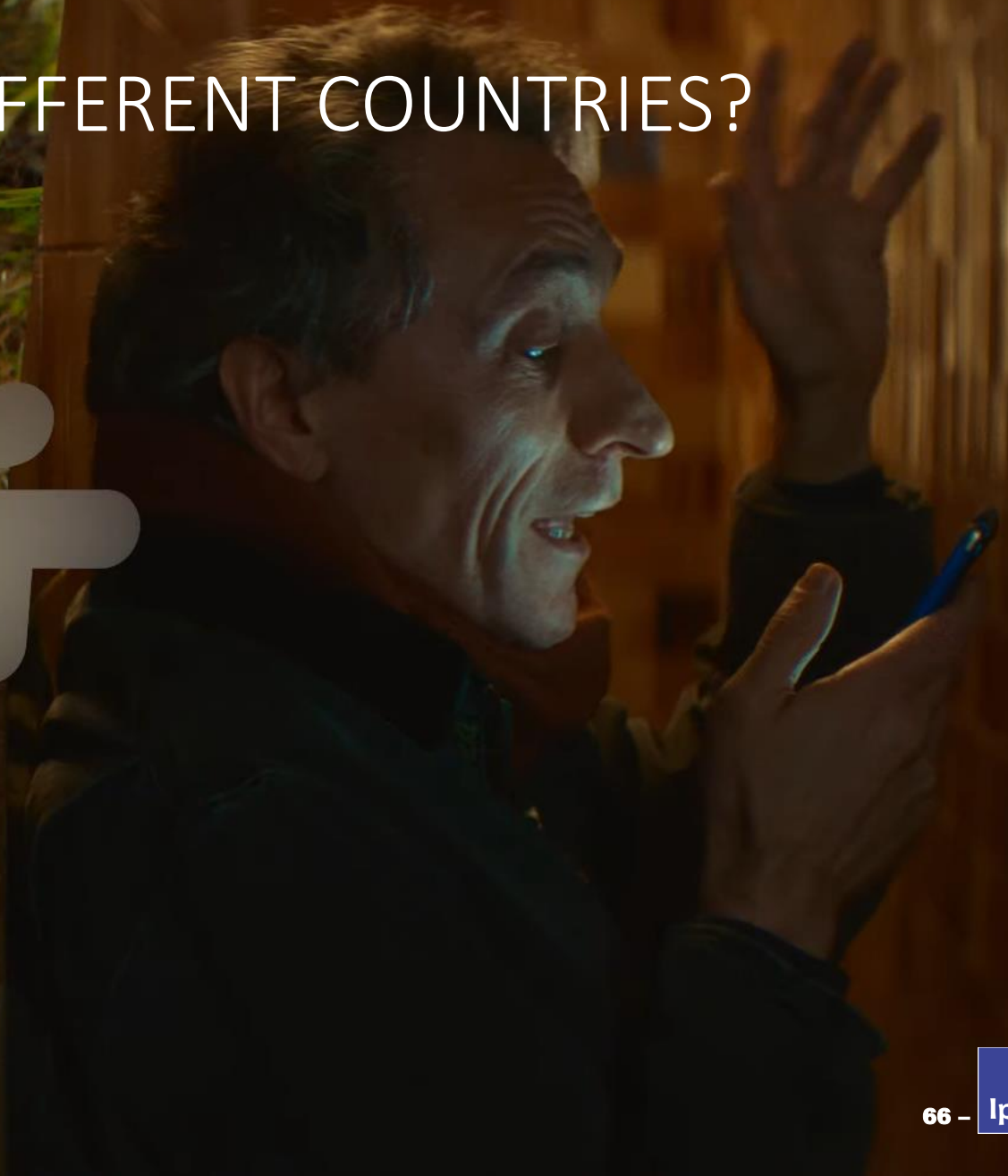


Self  
assurance



Professional  
boost

# HOW TO MAKE A MESSAGE CULTURALLY RELEVANT IN DIFFERENT COUNTRIES?





# HELPING BRANDS AND CREATIVITY TRAVEL

## 3 culture tips







**Nike's Nothing Beats a Londoner campaign**

# #1 Culture ENDURES through ages

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Leverage Empirical models to trace  
**HISTORICAL ROOTS**





# #2

# Culture is DYNAMIC

Build in **MODERN-DAY** influences, shifts and trends

# #3

Culture is the  
**KEY**  
to successful  
global brands



Make culture work for your brands with **FUNCTIONAL LENS**



# BUILDING THE CULTURAL TRANSFERABILITY FOR BRANDS

## Four Pillars Of the Framework



### CULTURE

#### values + beliefs

- Contextuality
- Aspiration
- Locus of Control
- Relationships



### MARKET

#### category dynamics + competitive environment

- Category Evolution
- Benefits
- Digitalization
- Channel



### BRAND

#### brand territory + image

- Brand History
- Brand Equity
- Brand Share
- Brand Spend



### AD CONTEXT

#### content effectiveness drivers

- Functional, Emotional
- Clarity, Credibility, Relevance and Distinctiveness
- Tonality

# APPLYING CULTURE TO BRAND ENGAGEMENT

## Culture Scan

Find cultural clusters – similarities and differences

What to tweak, localize

## Advertising Transferability

Add on advertising context, tonality, execution for meta learnings

Local market do's & don'ts for execution



# SUCCESS DRIVERS FOR CULTURAL TRANSFERABILITY



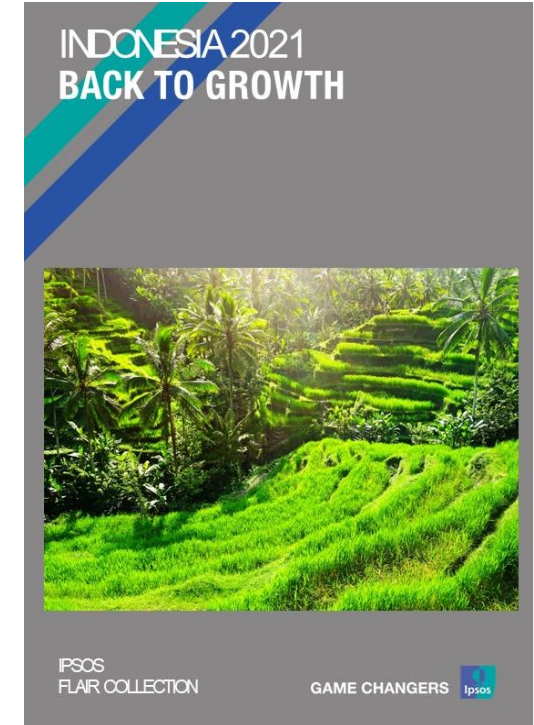
1. Two-way exchange



2. Real-time social intelligence




3. Market-category meta learnings, databases



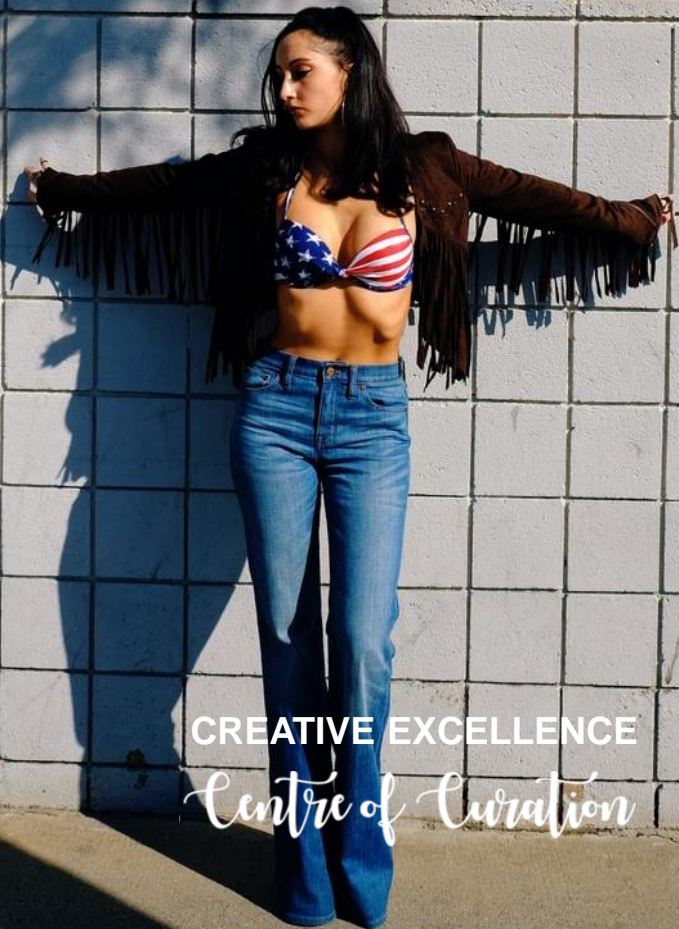
4. Local market assets





**WEBINAR  
ON JANUARY  
25, 2022**

**MEET US  
NEXT YEAR  
TO KNOW MORE**



CREATIVE EXCELLENCE  
*Centre of Curation*

