THE YEAR AHEAD

WATCH the recording

KEYS – A WEBINAR SERIES BY IPSOS

27th January 2022

GAME CHANGERS

AGENDA

WATCH the recording

INTRODUCTION
Jennifer Hubber Head of Ipsos Global Client Organisation

THE END OF THE BEGINNING? 10 Lessons from Covid Times (so far)
Simon Atkinson Chief Knowledge Officer, Ipsos

FROM ADJUSTING TO LIVING
Oscar Yuan President, Ipsos Strategy3

RE-DEFINING AFFLUENCE
Nathalie Sodeike Director, Global Affluent Surveys, Ipsos

RUSSIA: IN THE FLOW OF CHANGE
Ekaterina Ryseva Country Manager, Ipsos in Russia

THE END OF THE BEGINNING?

Simon Atkinson

GAME CHANGERS

Ipsos

THE END OF THE BEGINNING?


WORLD ECONOMIC FORUM

Global Agenda | Davos Agenda 2022 | COVID-19

10 COVID-19 lessons that will change the post-pandemic future

COVID-19 lessons: What happens next? Image: Michael Marais/Unsplash

1 THE PANDEMIC REALLY UNDERLINES THE ADAPTIVITY OF HUMAN BEINGS

Q. Which one of the following phases do you feel best describes your current situation regarding the COVID-19 pandemic?
Base: Jan 6 - Jan 9: 10515

March 2020:
100 countries in lockdown

January 2022:
43% **are**
PREPARING or ADJUSTING to new restrictions

But life goes on…many economies have performed **better than expected**

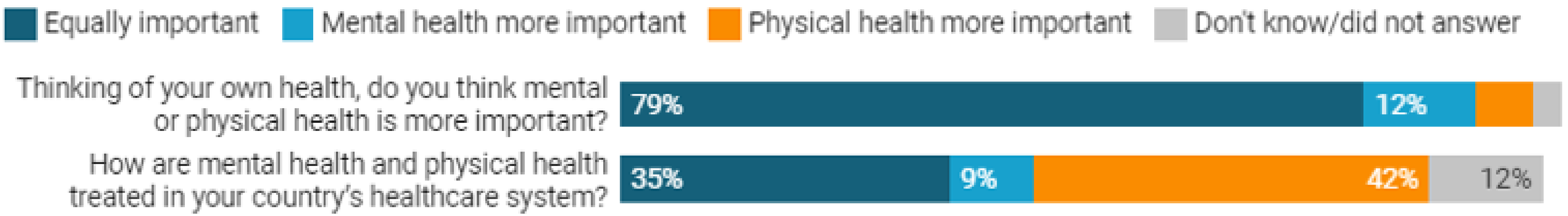
Be careful about hot takes: path to the **new normal** is likely to be incremental rather than dramatic

2 THE PANDEMIC HAS TAKEN ITS TOLL

Through one global public health crisis, **another is being revealed.** Levels of **reported anxiety** are as high as ever, with **women** and **young people** hit hardest**.**

79% of people around the world now say their **mental health** is **as important as their physical health**.

Perceived vs. experienced importance of health



21,513 online adults in 30 countries, August 20th – September 3rd 2021. The "Global Country Average" reflects the average result for all the countries where the survey was conducted.

3 CONSUMERS' DESIRES FELT EVEN HARDER TO PREDICT THAN USUAL

Three points in time…

20% say **inflation** a big issue: **double Jan 2021** score

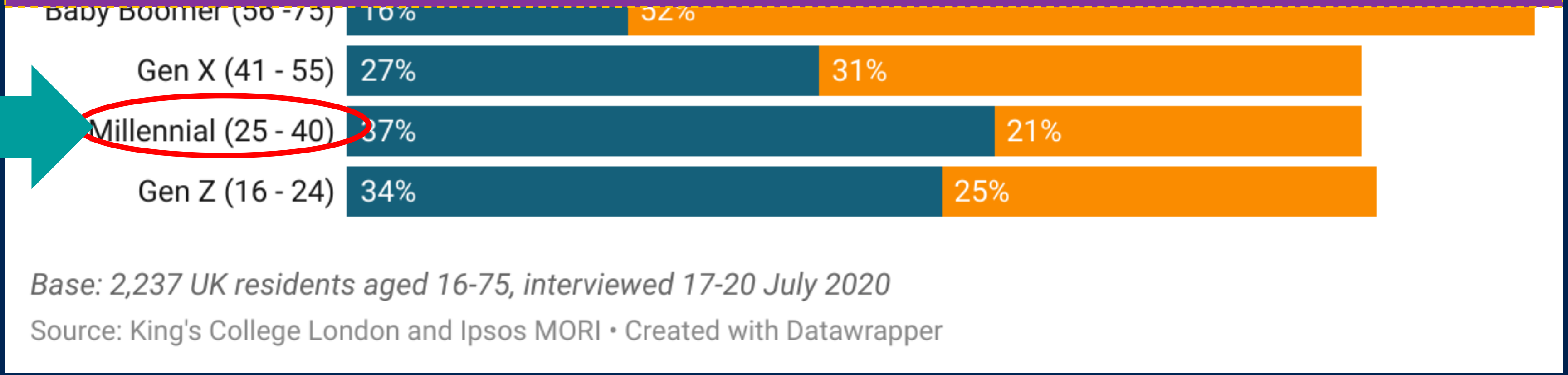
March 2020 | **June 2021** | **January 2022**

4 THE WHOLE EXPERIENCE HAS BEEN A GAP-WIDENER

The pandemic left us with all our old problems and **added some new ones**

THEMES TO WATCH

- **Childcare** gender gap
- Working **away from home** vs working from home
- **Lower income** vs higher income



37%

of millennials say their parents had better life chances

5 THE "EMPTY PLANET" SCENARIO IS APPEARING MORE LIKELY

No pandemic baby boom!

2.1

many countries now below

Birth Gauge @BirthGauge

India released national results of its NFHS-5 conducted in 2019-21: Fertility in India is now 2.0 kids per woman, down from 2.2 in 2015-16. Urban fertility dropped to 1.6 from 1.8, and rural fertility dropped to 2.1 from 2.4.

12:29 PM · Nov 24, 2021 · Twitter for iPhone

Ed Conway @EdConwaySky

According to the latest official population projections, the UK's total fertility rate is now 1.59 (long term average of children per woman).
Down from 1.78 in 2018. BIG drop taking it down from comfortably above the OECD avg to below it (tho OECD avg will prob also fall too). pic.twitter.com/jKQNDfUmfd

2022-01-12, 9:48 AM

The New York Times

China's Births Hit Historic Low, a Political Problem for Beijing

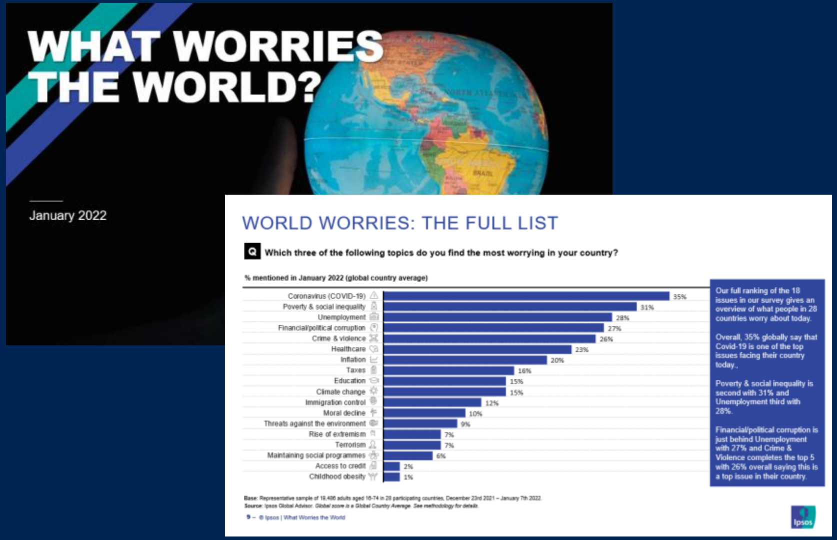
The demographic crisis, a challenge to the economy, also signals a limit to the reach of the government, which has struggled recently to grow the population.

6 BE CAREFUL ABOUT GENERALISING: COUNTRIES AND CULTURES MATTER

We see **huge disparities** in outlook by country, even between apparently similar close neighbours…

6 BE CAREFUL ABOUT GENERALISING: COUNTRIES AND CULTURES MATTER

7 the number of **different themes** occupying #1 spot as main concern facing my country in January's **What Worries the World** survey



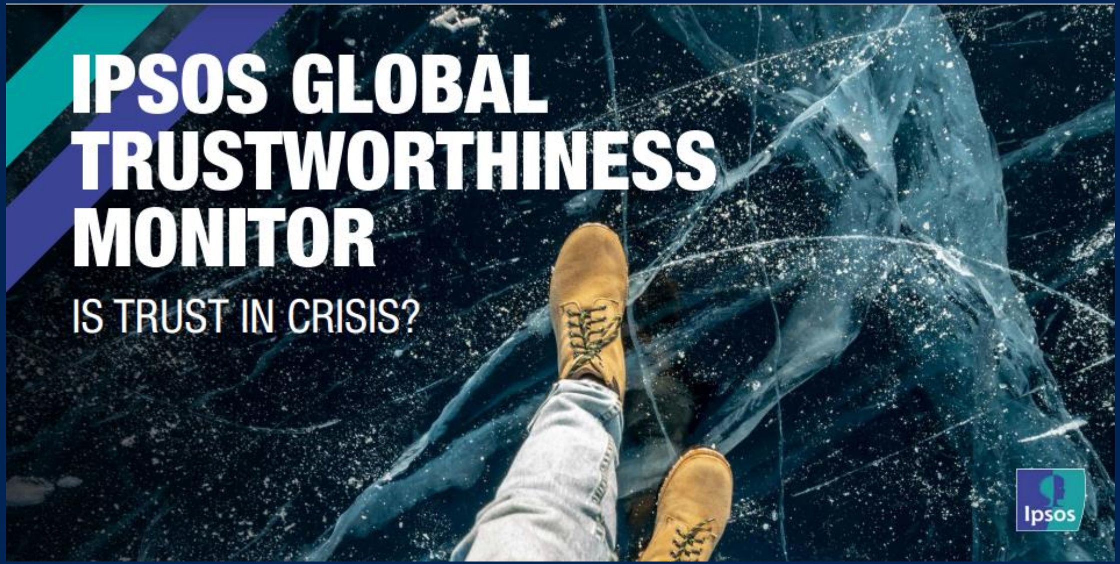
January results **for 28 countries** here

Top worry for each individual nation

Colombia	Corruption and finance
Malaysia	Corruption and finance
Peru	Corruption and finance
Australia	Covid-19
Belgium	Covid-19
Canada	Covid-19
France	Covid-19
Germany	Covid-19
Great Britain	Covid-19
Japan	Covid-19
Netherlands	Covid-19
Saudi Arabia	Covid-19
South Korea	Covid-19
the US	Covid-19
Chile	Crime and violence
Israel	Crime and violence
Mexico	Crime and violence
Sweden	Crime and violence
Hungary	Healthcare
Argentina	Inflation
Poland	Inflation
Turkey	Inflation
Brazil	Poverty and social inequality
Russia	Poverty and social inequality
India	Unemployment
South Africa	Unemployment
Spain	Unemployment
Italy	Unemployment
GCA	**Covid-19**

Look beyond the **Global Country Average**…. we need to factor in prevailing cultures, legal systems, decisions of governments…

7 PUBLIC TRUST NEEDS TO BE EARNED



Doctors become the world's most trusted profession

% saying **trustworthy**

64% **DOCTORS**

61% SCIENTISTS

15% ADVERTISING EXECUTIVES

14% GOVERNMENT MINISTERS

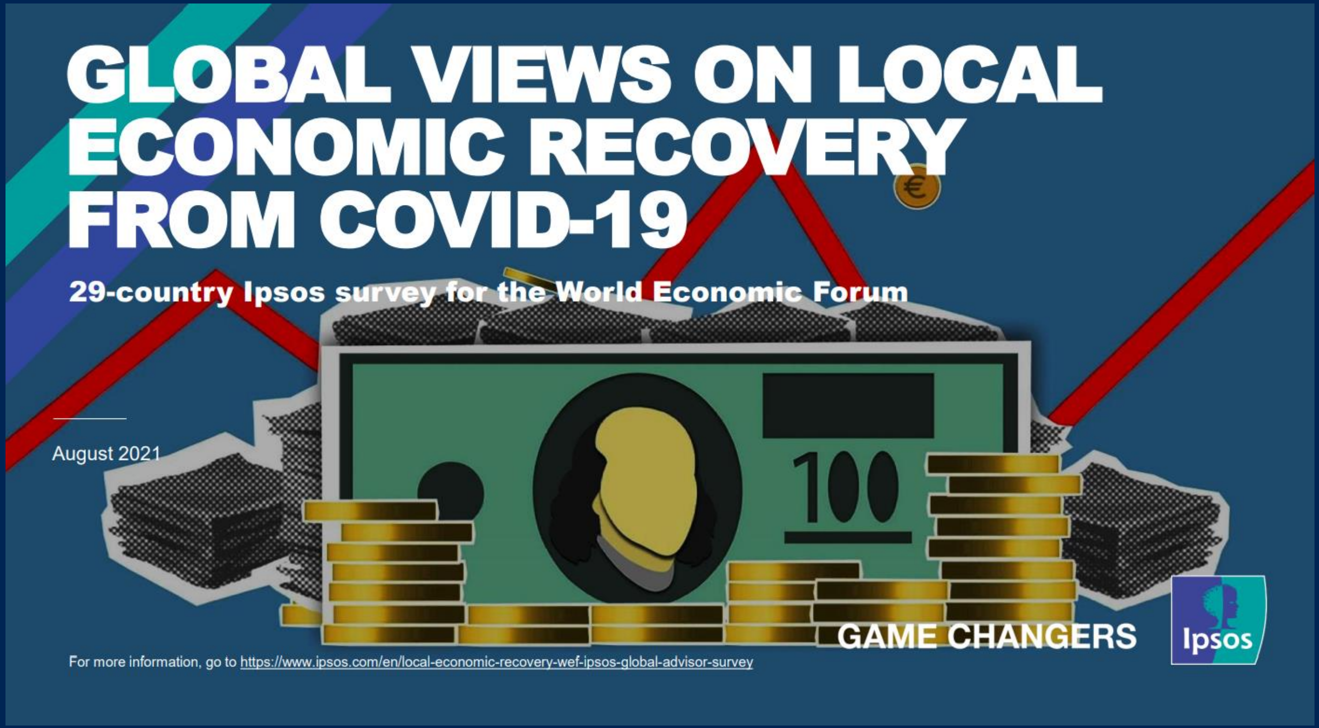
"BEHAVING RESPONSIBLY": the key driver of trust in public and private institutions in a world where **people feel more able to challenge authority** than they used to

Pharmaceutical and **banking companies** and **governments** are improving their scores when it comes to being **trustworthy**

8 EXPECTATIONS OF THE STATE ARE BEING ALTERED

53% trust **their government** most to take primary responsibility for ensuring economy recovers

Large companies *and* ***businesses*** *come second.* ***Individuals*** *come third…*



Source: Ipsos/World Economic Forum

9 LONG-STANDING CONCEPTS OF FEAR AND RISK ARE BEING RE-DEFINED

80% say “I think there will be **another wave of COVID-19 infections** in my country”

For more than **2 in 3** people in US, Russia, Brazil and Germany: **“I feel things in my country are out of control right now”**

Since the lockdown I save more because of **fear of the unknown** … I watch what I buy, I try to stay prudent and I don’t buy the things I don’t need. It avoids wasting food

– Musa, Nigeria

I definitely added more food items to the list like ginger and grapfruits and oranges because I know citrus foods are good for your **immune system**. I want to get my immune system as absolutely as strong as it can be due to Covid-19

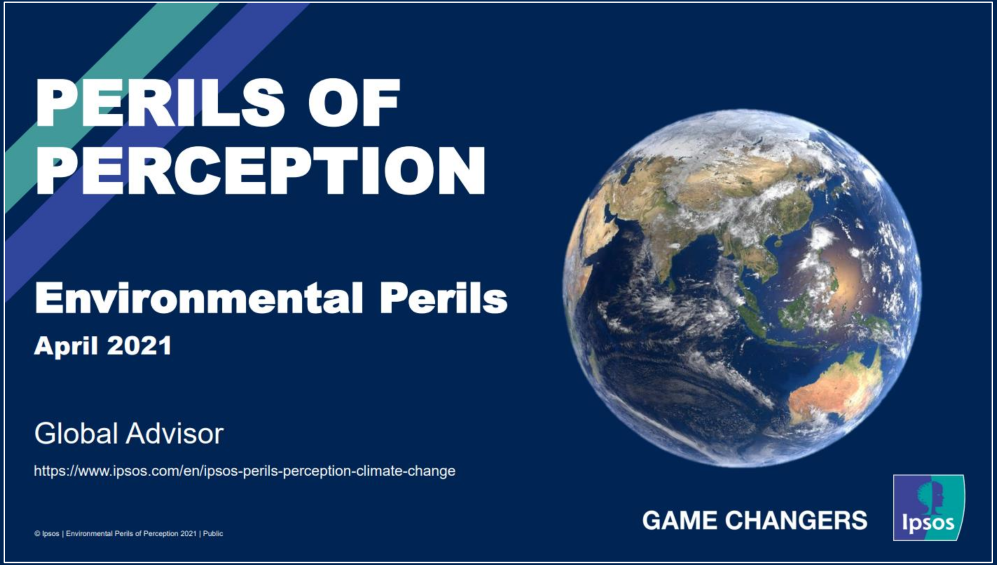
– Michael, USA

Source: Tetra Pak Index 2021

10 THE PATH TO A SUSTAINABLE FUTURE WILL NEED LEADERSHIP

69% say “I understand **what action I need to take** to play my part in tackling climate change”

BUT DO WE REALLY?



THE END OF THE BEGINNING?

10 Things We Learned (So Far)

1 The Pandemic really underlines the **Adaptivity** of Human Beings

2 **Mental health is** now on an equal footing to physical health

3 **Consumers' desires** felt **even harder to predict** than normal

4 The Whole Experience has been **a Gap-Widener**

5 The **Empty (and Grey) Planet scenario** is appearing more likely

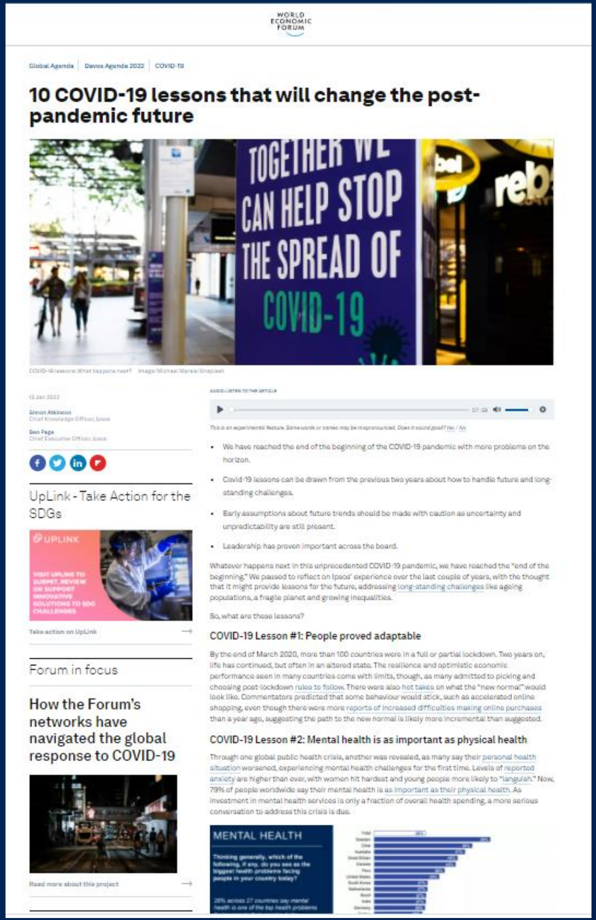
6 Be careful about generalising: **Countries, Cultures** and **Communities Matter**

7 **Public trust** is less ubiquitous and has become **Conditional.** It needs to be earned

8 **Expectations of the State** have been radically altered

9 Long-standing concepts of **fear** and **risk** are being **redefined**

10 The path to **a Sustainable Future** will bring unexpected surprises


WORLD ECONOMIC FORUM

Global Agenda | Davos Agenda 2022 | COVID-19

10 COVID-19 lessons that will change the post-pandemic future

Simon Atkinson

Ben Page

UpLink - Take Action for the SDGs

Take action on UpLink

Forum in focus

How the Forum's networks have navigated the global response to COVID-19

Read more about this project

- We have reached the end of the beginning of the COVID-19 pandemic with more problems on the horizon.
- Covid-19 lessons can be drawn from the previous two years about how to handle future and long-standing challenges.
- Early assumptions about future trends should be made with caution as uncertainty and unpredictability are still present.
- Leadership has proven important across the board.

Whatever happens next in this unprecedented COVID-19 pandemic, we have reached the "end of the beginning." We paused to reflect on Ipsos' experience over the last couple of years, with the thought that it might provide lessons for the future, addressing long-standing challenges like ageing populations, a fragile planet and growing inequalities.

So, what are these lessons?

COVID-19 Lesson #1: People proved adaptable

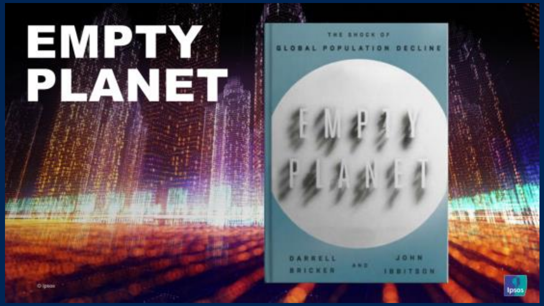
By the end of March 2020, more than 100 countries were in a full or partial lockdown. Two years on, life has continued, but often in an altered state. The resilience and optimistic economic performance seen in many countries come with limits, though, as many admitted to picking and choosing post-lockdown rules to follow. There were also hot takes on what the "new normal" would look like. Commentators predicted that some behaviour would stick, such as accelerated online shopping, even though there were more reports of increased difficulties making online purchases than a year ago, suggesting the path to the new normal is likely more incremental than suggested.

COVID-19 Lesson #2: Mental health is as important as physical health

Through one global public health crisis, another was revealed, as many say their personal health situation worsened, experiencing mental health challenges for the first time. Levels of reported anxiety are higher than ever, with women hit hardest and young people more likely to "languish." Now, 79% of people worldwide say their mental health is as important as their physical health. As investment in mental health services is only a fraction of overall health spending, a more serious conversation to address this crisis is due.

Davos Agenda article

THE END OF THE BEGINNING: RESOURCES

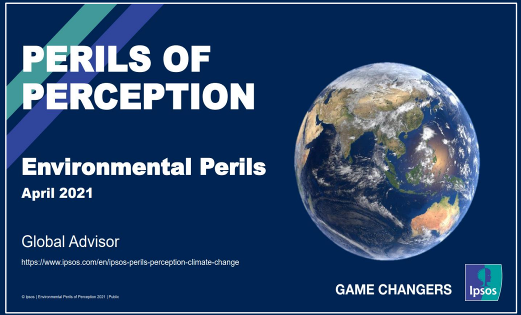


GLOBAL TRENDS STUDY
NEW **podcast** with Ipsos CEO Ben Page

SHAPING THE FUTURE
Potential senarios for 2025 and beyond

EMPTY PLANET
Preparing for the shock of population decline

WHAT WORRIES THE WORLD
What are the main issues facing your country?



IPSOS UPDATE
Monthly round-up of latest research in EN, ES & FR.

GLOBAL TRUST MONITOR
18 professions ,9 sectors
29 countries

PERILS OF PERCEPTION
What can individuals do to tackle climate change?

Ipsos

Thriving in an Unpredictable World

A Look to the Year Ahead through the Lens of Scenario Planning

Oscar Yuan
President
Ipsos Strategy3

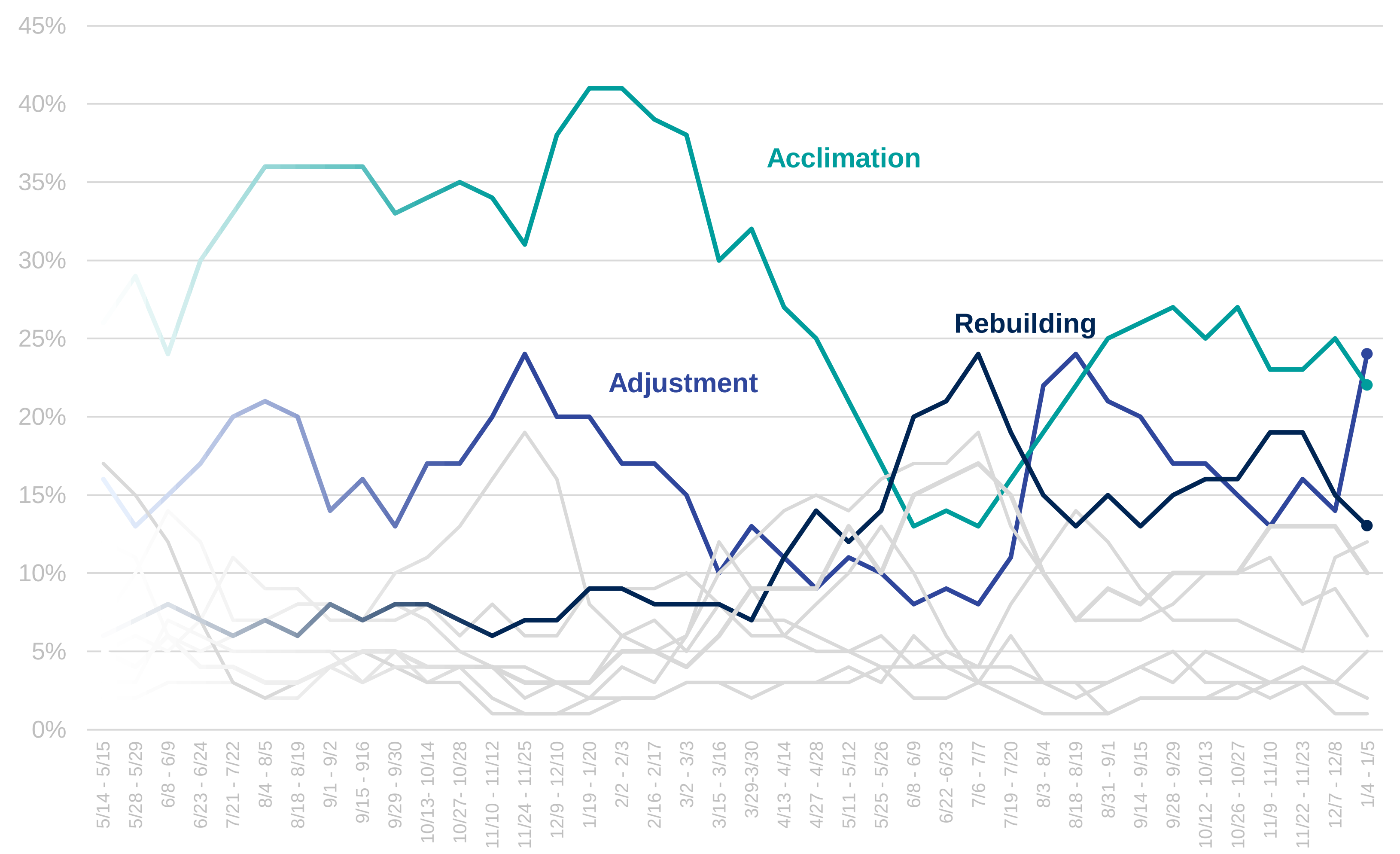
KEYS WEBINAR
27 JANUARY 2022

Ipsos

Our COVID tracking project

	Uncertainty	Preparation	Adjustment	Acclimation	Enduring	Anticipation	Exploration	Recalibration	Rebuilding	Settling In
April	6%	13%	23%	11%	13%	7%	7%	9%	7%	3%
May	2%	6%	15%	25%	14%	16%	4%	9%	7%	5%
June	3%	6%	16%	27%	6%	10%	7%	13%	8%	5%
July	3%	11%	20%	33%	6%	3%	5%	7%	6%	4%
August	2%	9%	21%	36%	8%	3%	5%	8%	7%	3%
September	4%	8%	14%	35%	7%	4%	4%	8%	8%	5%
October	4%	12%	17%	35%	7%	3%	4%	7%	8%	5%
November	3%	18%	22%	33%	7%	1%	2%	4%	7%	4%
December	3%	16%	20%	38%	6%	1%	1%	3%	7%	3%
January	2%	8%	20%	41%	9%	2%	1%	3%	9%	3%
February	2%	7%	17%	40%	9%	4%	2%	6%	9%	5%
March	3%	7%	13%	33%	8%	9%	3%	9%	8%	6%
April	3%	7%	10%	26%	6%	7%	3%	15%	13%	9%
May*	3%	5%	11%	21%	5%	10%	4%	14%	12%	13%

Interesting, but not predictive



24%
Adjustment

Same ranking as last wave
▲10% since December 7-8

22%
Acclimation

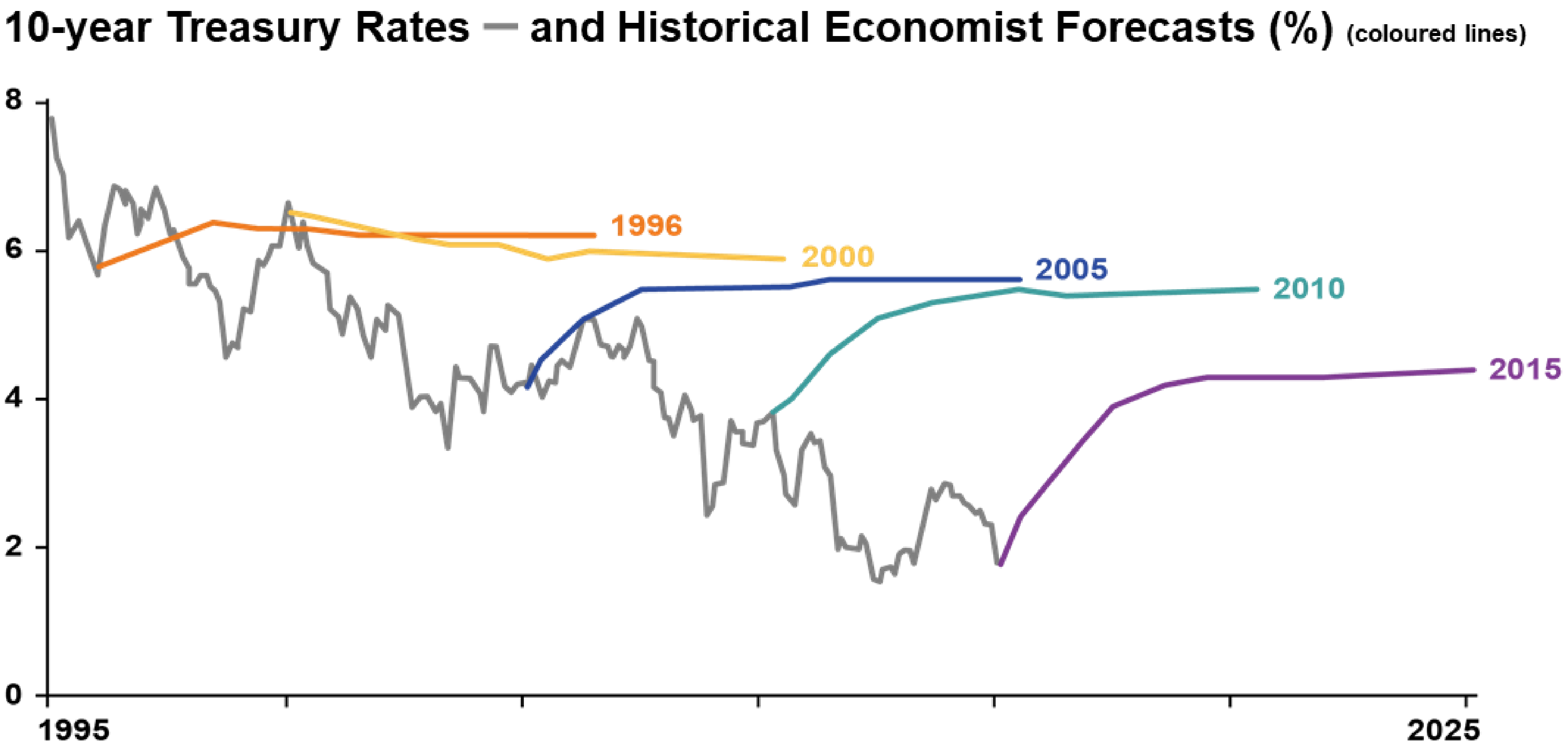
Same ranking as last wave
▼3% since December 7-8

13%
Rebuilding

Same ranking as last wave
▼2% since December 7-8

January 4-5, 2022

In fact, most predictions are wrong



Note: Forecasts are those reported by Blue Chip Economic Indicators released in March of the given calendar year, the median of over 50 private-sector economists. **Source:** Blue Chip Economic Indicators, Aspen Publishers.

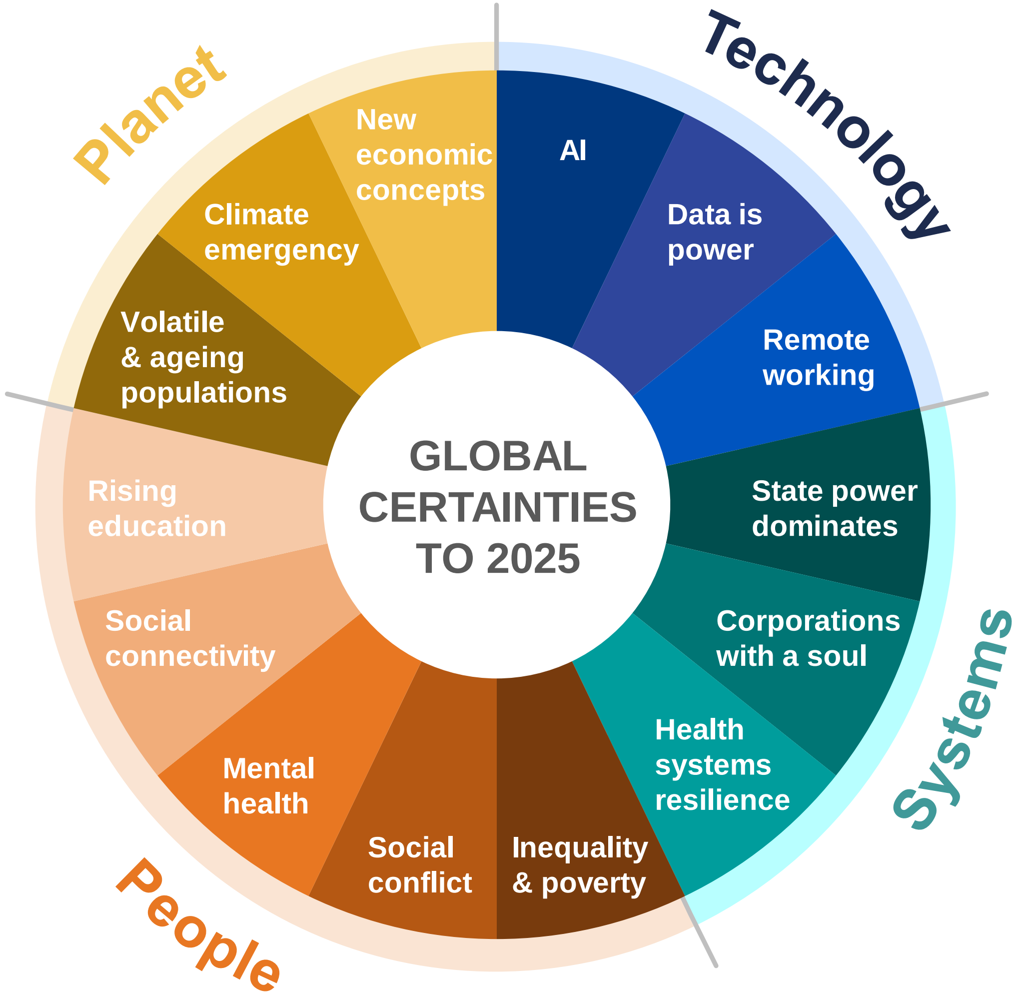
Ipsos Strategy3

Making predictions will only set you up to be wrong

Craft data-driven stories of what COULD happen

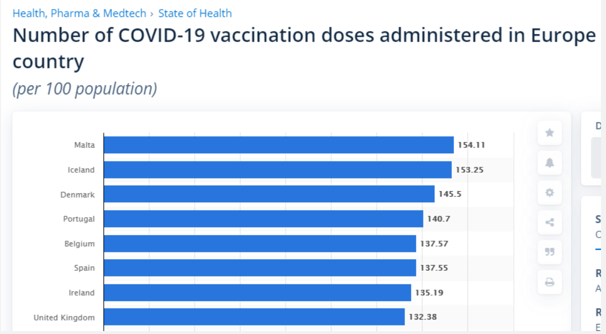
There are some things we know...

Future Certainties: our Known Knowns

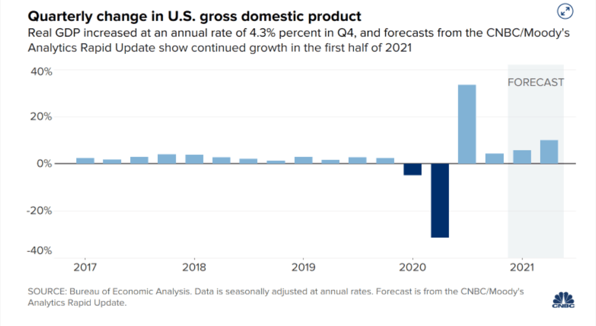


There are many things we don’t know...

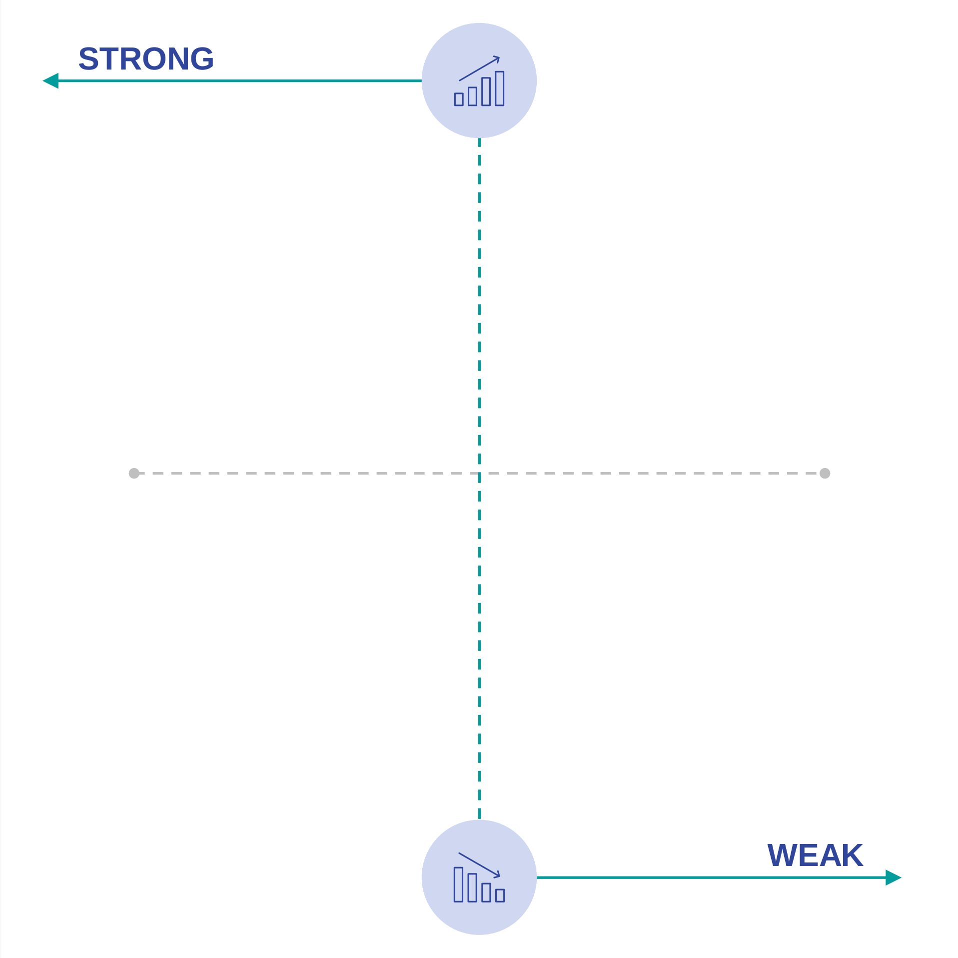
The economy is one realm in which we are often uncertain



Majority of Eurozone has administered 120+ vaccinations per 100 people



GDP Growth expected to top 6.5% US & 4.6% in EU in 2021



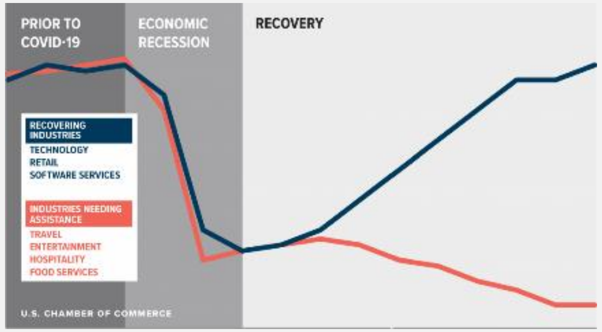
U.S. inflation soars in April to 13-year high, CPI shows, and reveals fresh stress on the economy

Last Updated: May 12, 2021 at 9:58 a.m. ET
First Published: May 12, 2021 at 8:47 a.m. ET

By Jeffry Bartash

Surging inflation adds new stress to U.S. economy

Potential for high-inflation/high deficits



K Shaped Recovery is leaving many behind

IpsosStrategy3

Demography, politics and values are also evolving

House prices rising by ~6% in multiple markets

COVID-19 sets back gender equality – especially mothers and minorities

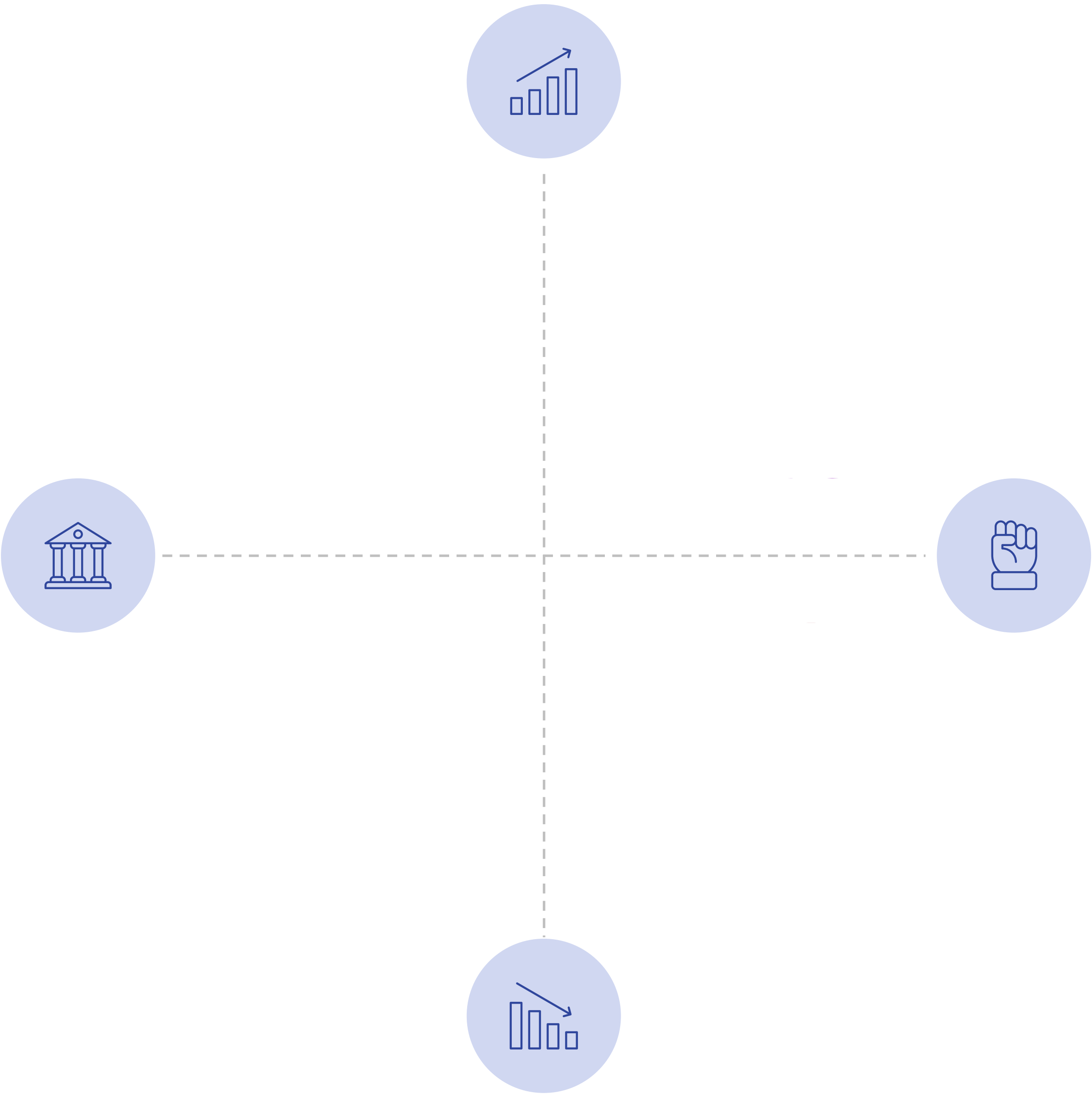
TRADITIONAL/ NOSTALGIC

PROGRESSIVE

Emergence of a new economy

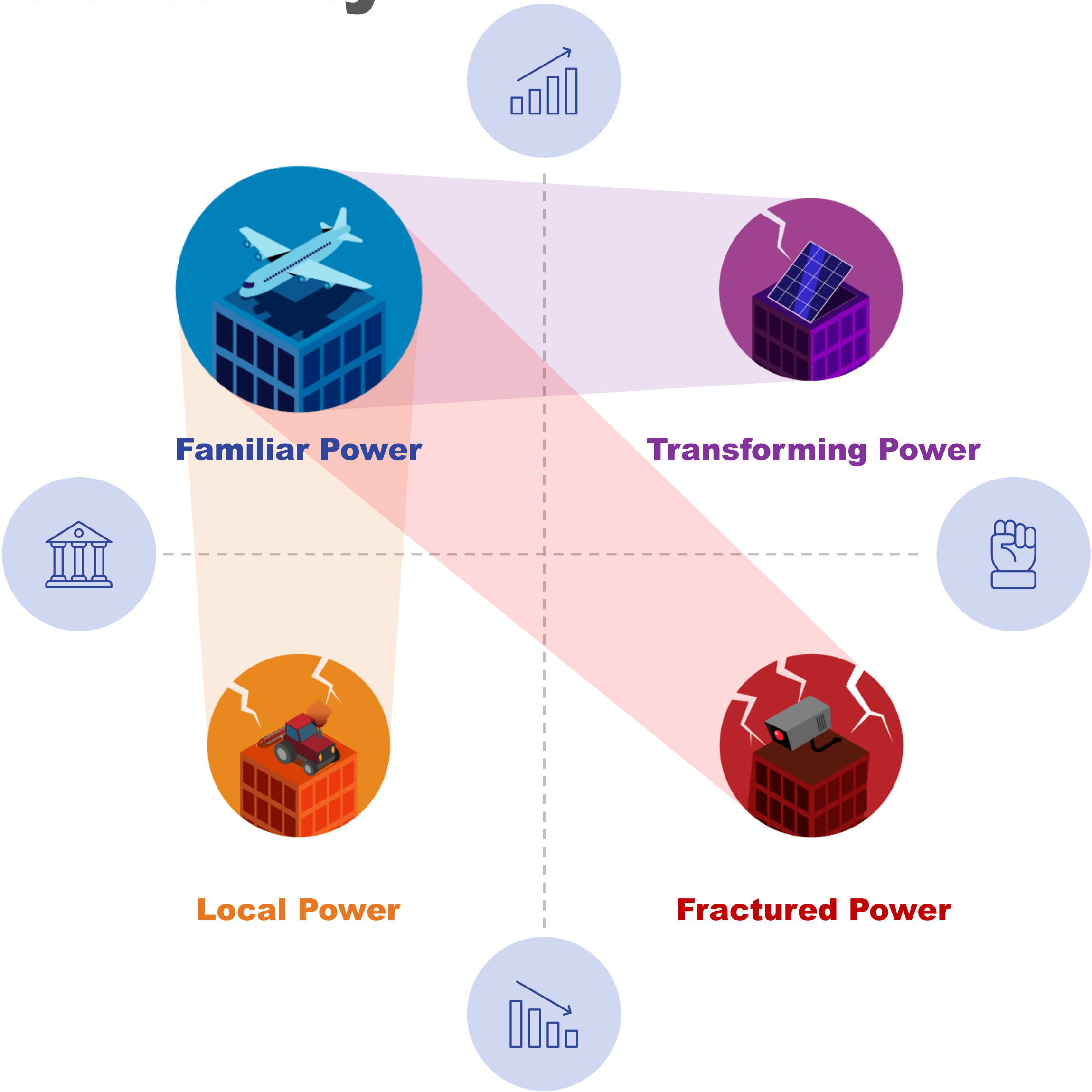
Protests for social justice #BLM, #MeToo

Four plausible future directions for the world



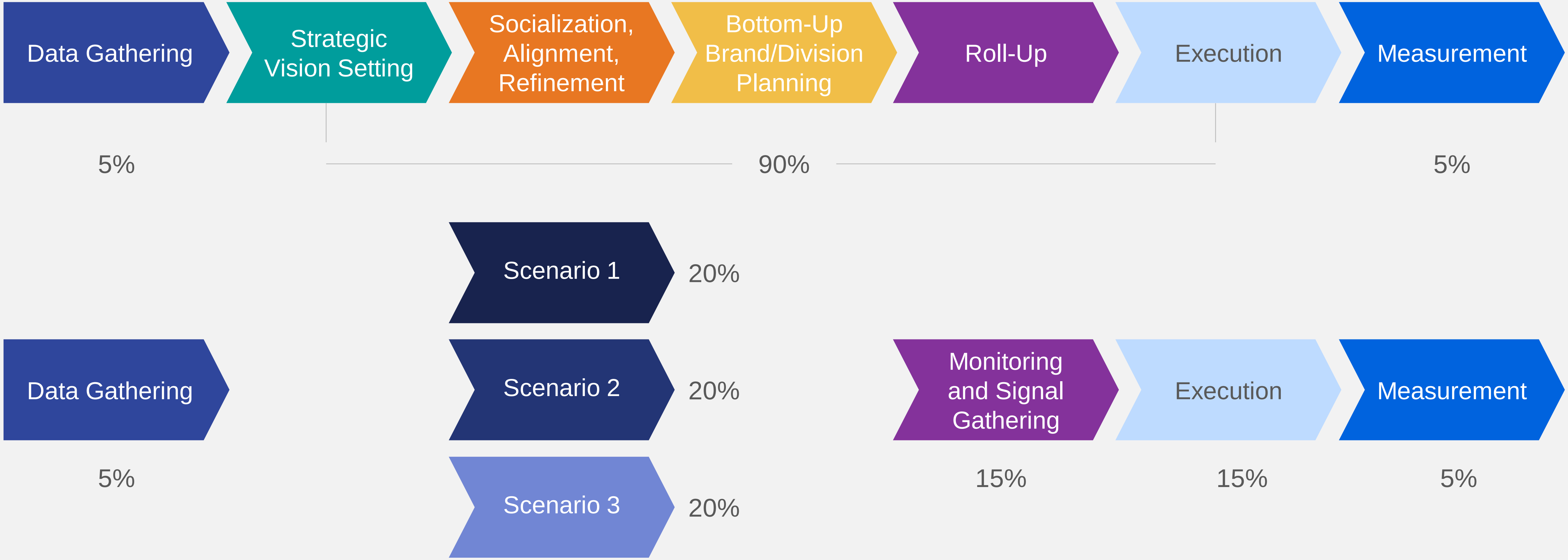
How do we use these scenarios?

Scenarios serve as a foundation to a structured approach to uncertainty

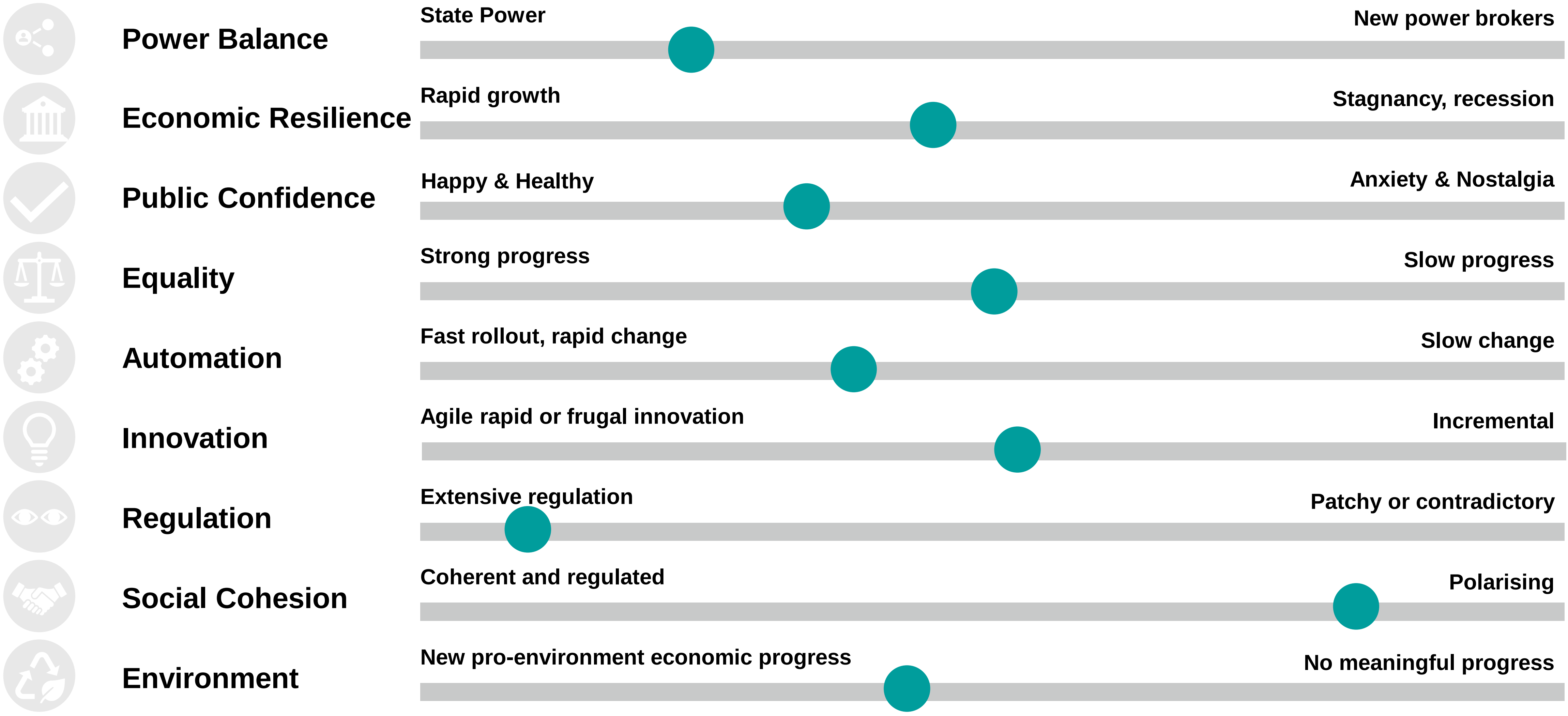


IpsosStrategy3

This approach should shape how organizations plan



Lighter planning, more on monitoring critical dimensions

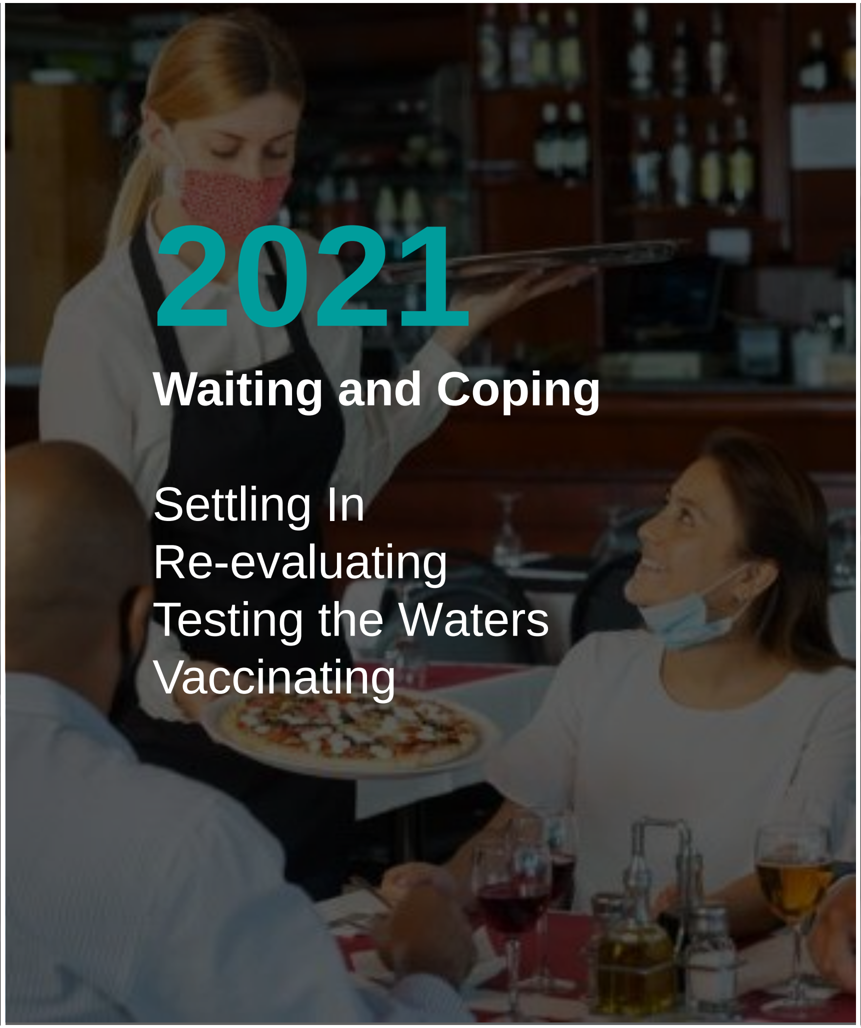


Going into 2022, there are some Known Knowns

2020

Novelty and Adjusting

Stockpiling
Cooking
Zoom and Netflix
Planning



2021

Waiting and Coping

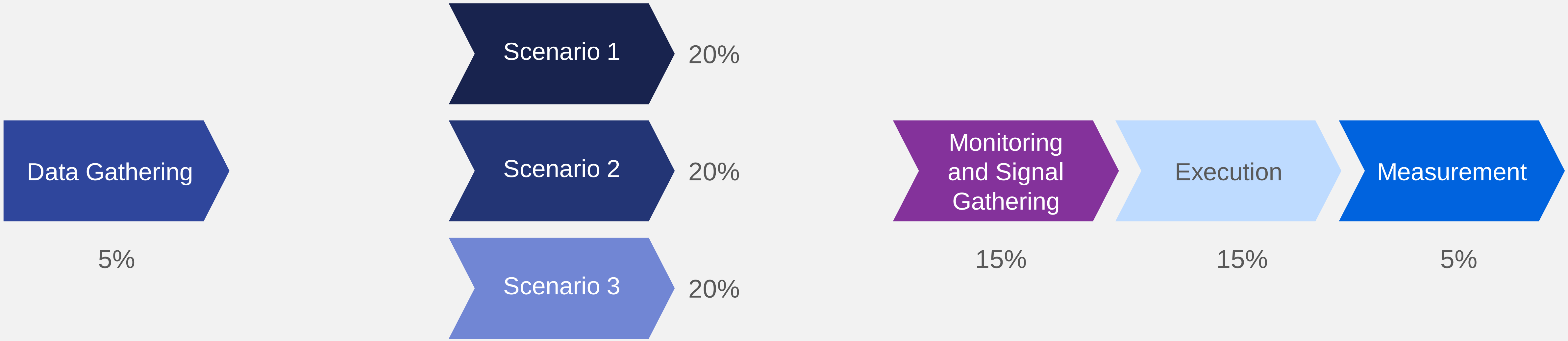
Settling In
Re-evaluating
Testing the Waters
Vaccinating

2022

Accepting and Retooling

Global Supply Chain
Pricing and Inflation
Rethinking the Labor Market
Refocusing on Sustainability

How do we use what we know to be able to tackle the year ahead?



It’s not about being right;
It’s about being **prepared**

Thank You.

Oscar Yuan
oscar.yuan@ipsos.com

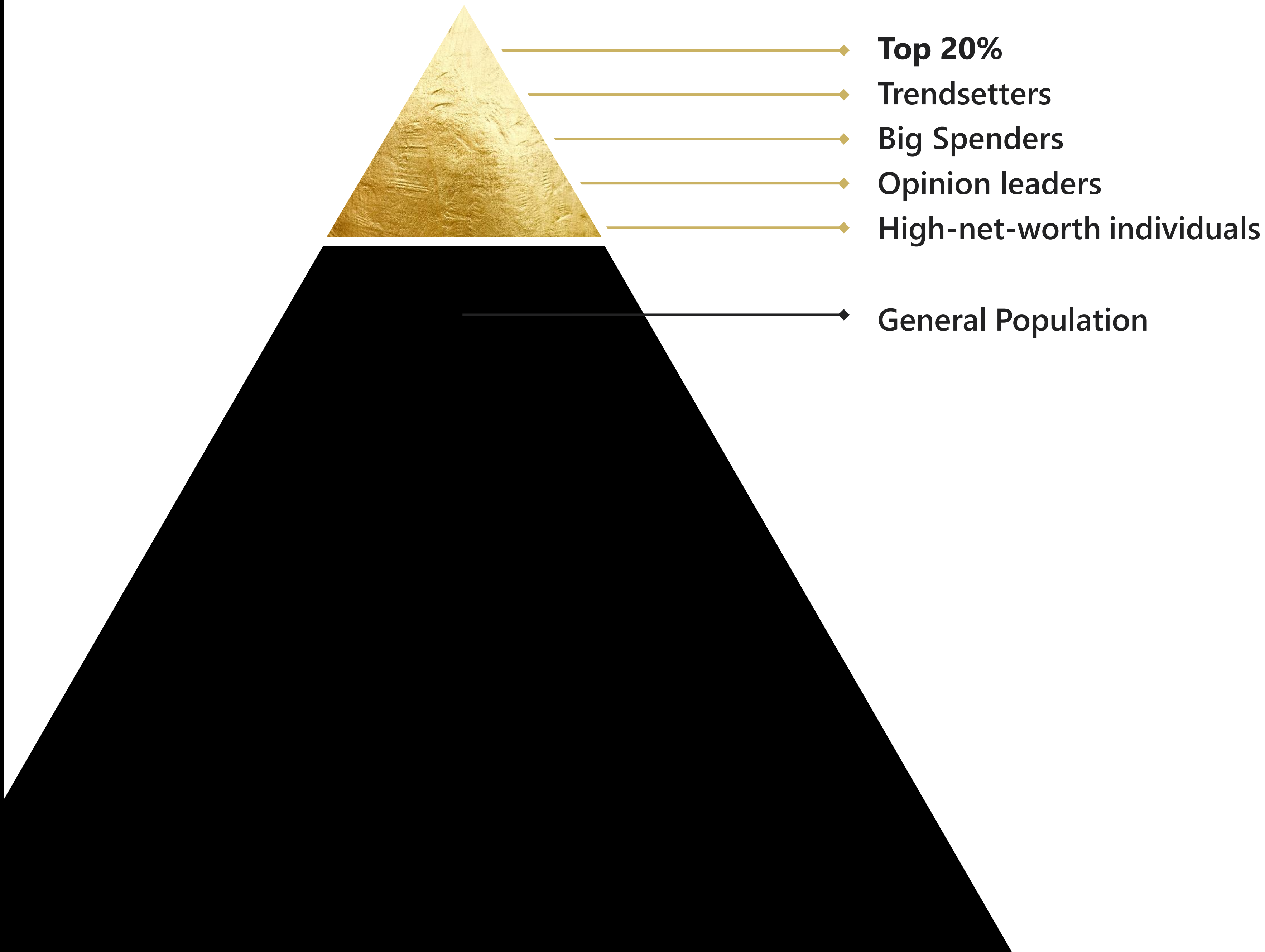
Understanding the Affluent

Nathalie Sodeike

Affluent

Ipsos

Who are the Affluent?



Who are the Affluent? Spotlight on Europe

age
47 years

University degree or higher
58%

Personal income
€58,000

Gender
60% | 40%

Own a wearable device
49%

Speaks one or more foreign languages
66%

4 Things to know about the affluent

#1 The affluents are hungry for information

Staying up-to-date

“I am interested in news and current affairs”

Affluent 67%

General population 55%

“I often discuss news about other countries”

Business decision makers 65%

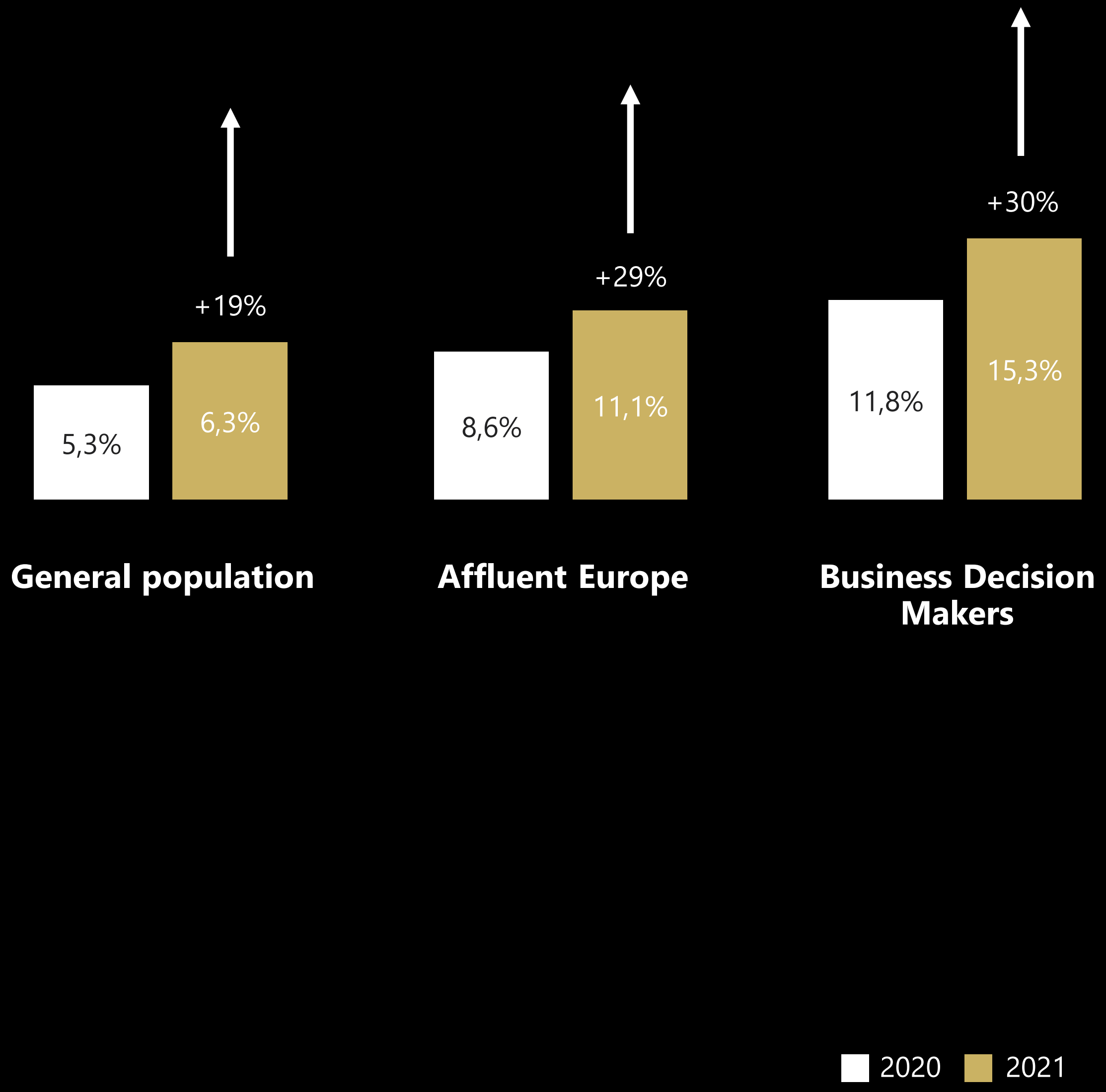
General population 43%

“Gaining knowledge and becoming better informed is a priority to me”

Affluent 75%

Source: Ipsos Affluent Survey + Benchmark; Europe 2021. % “any agree"

Podcasts as a new source of information



★★★★★

Populair podcast topics among the affluents

News & current affairs
16%

Business / economics
12%

Sports
11%

#2: The Affluent are in love with Modern technology

Modern technology as a new source of information: wearables

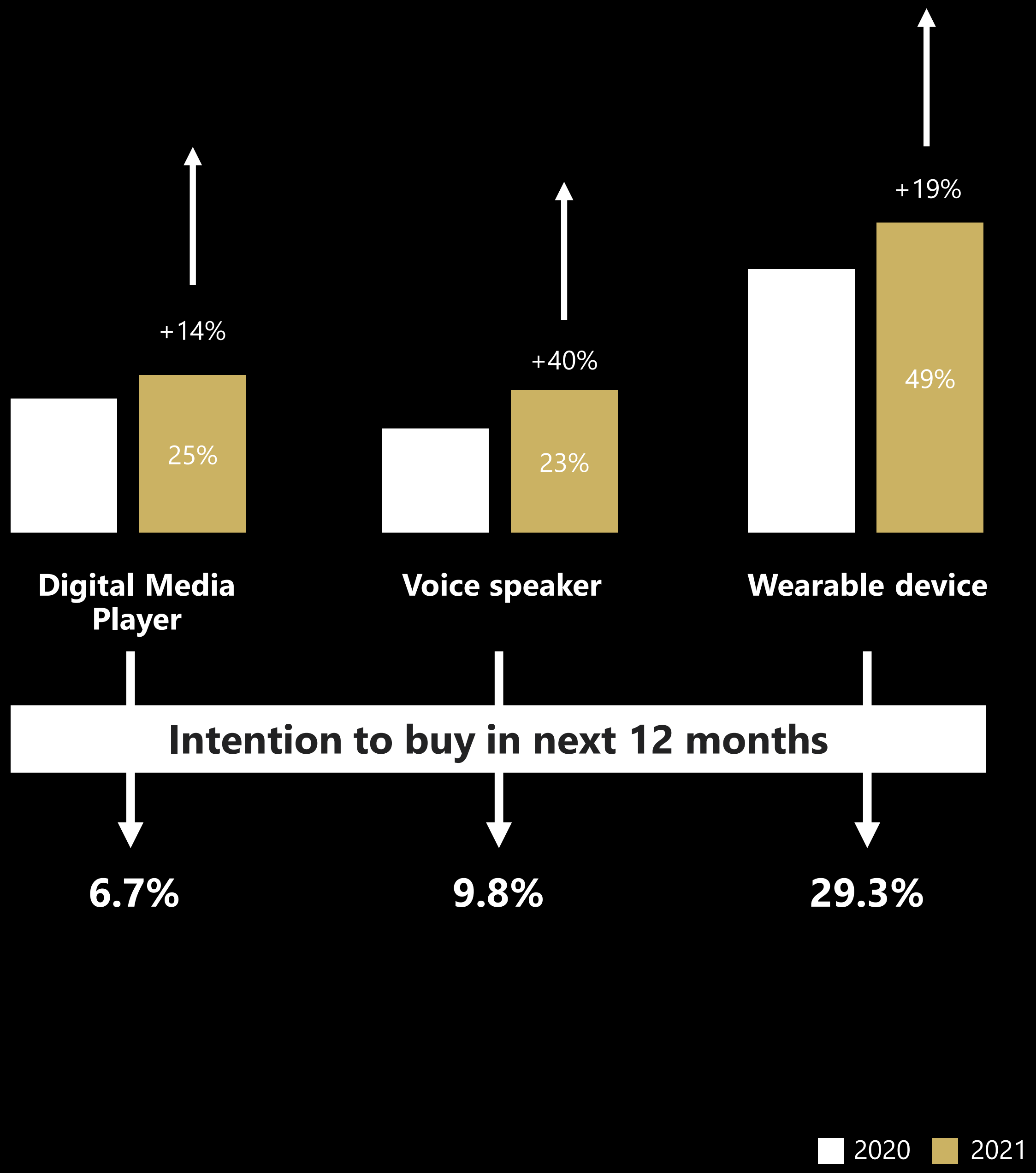
56%
Of **US Affluents own** a wearable device *(smartwatch or fitness tracker)*

38%
Of **APAC Affluents own** a wearable device *(smartwatch or fitness tracker)*

49%
Of **European Affluents own** a wearable device *(smartwatch or fitness tracker)*

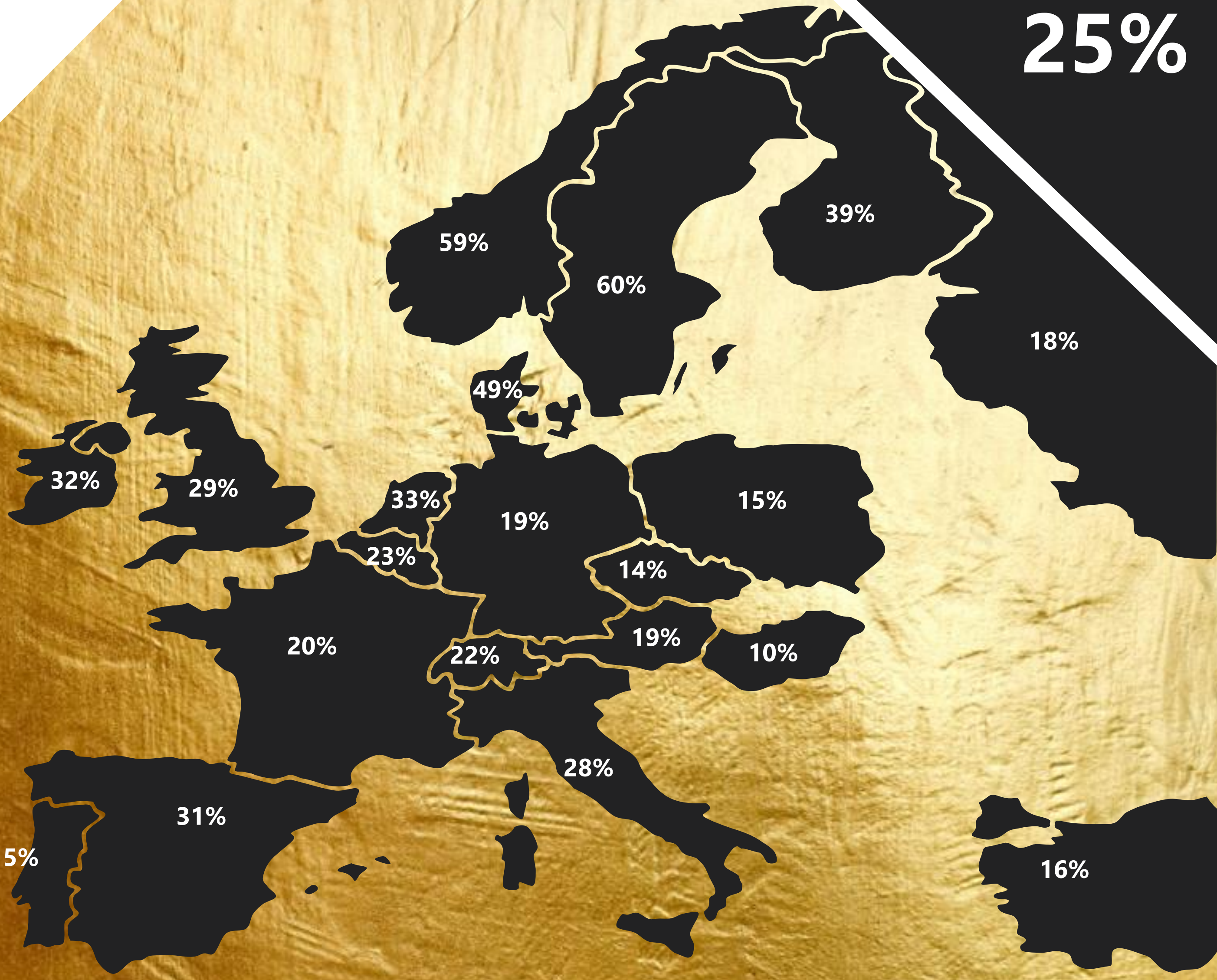
30%
Of **European Affluents intend to buy** a wearable device in the next 12 months

Using modern technology to consume media

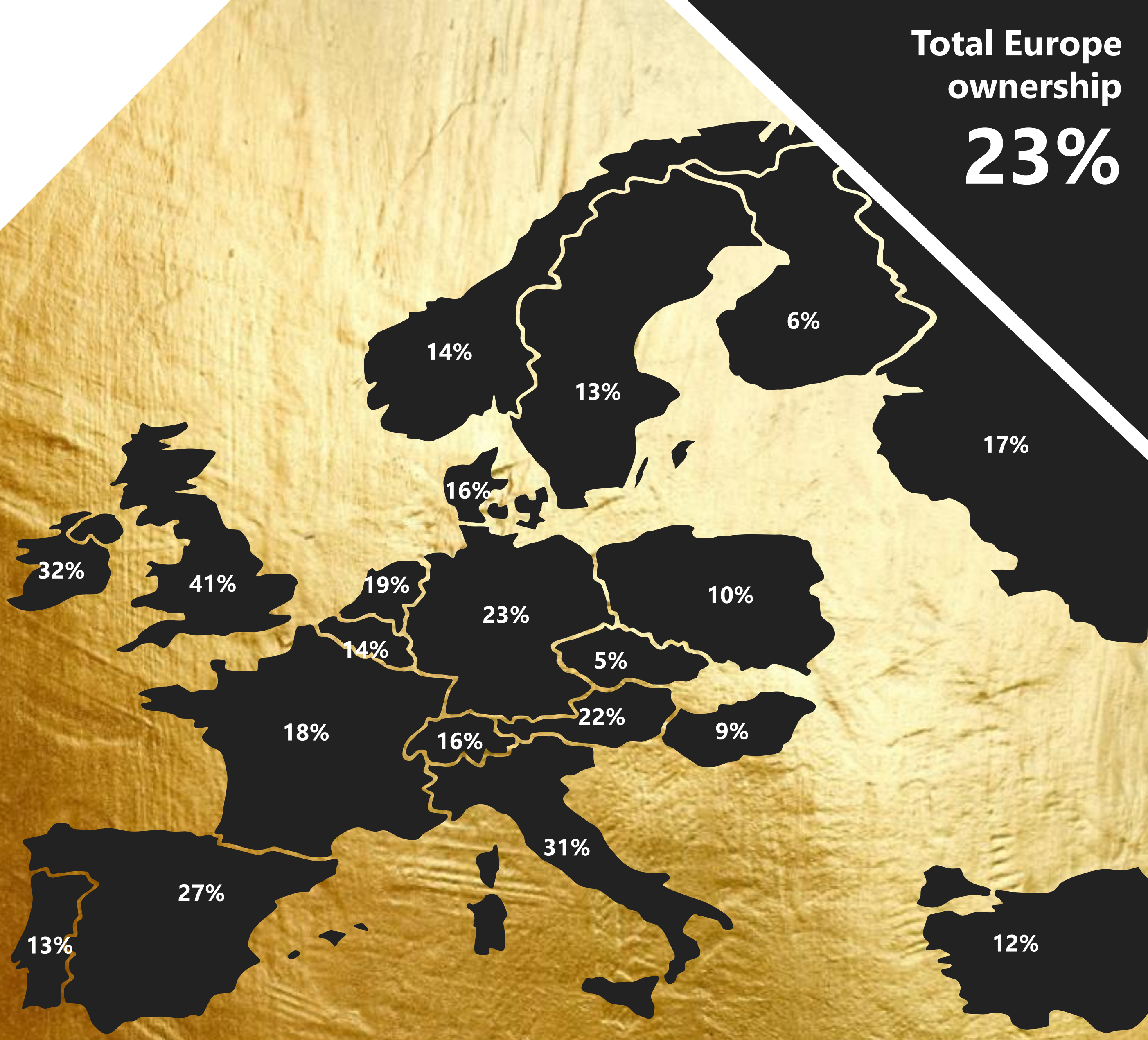


Scandinavia adopting digital media players fast

Total Europe ownership
25%

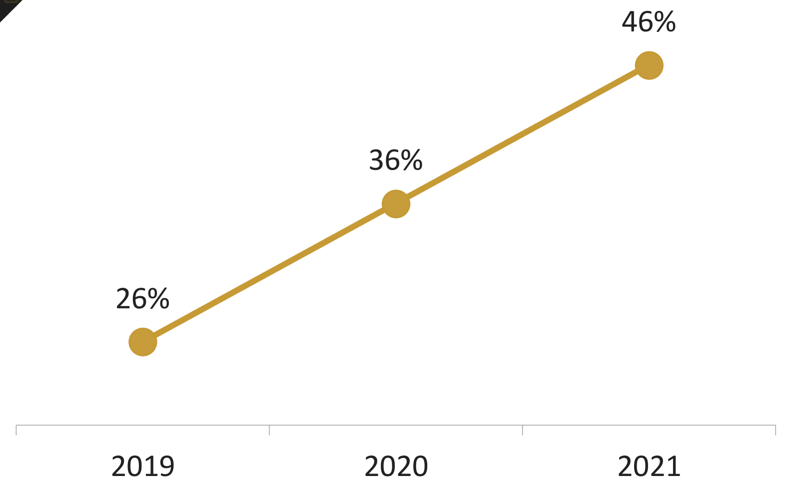


UK leading the way with voice speakers



SVOD continues to grow in popularity

Video-On-Demand watched yesterday
(e.g., Netflix, Disney+)

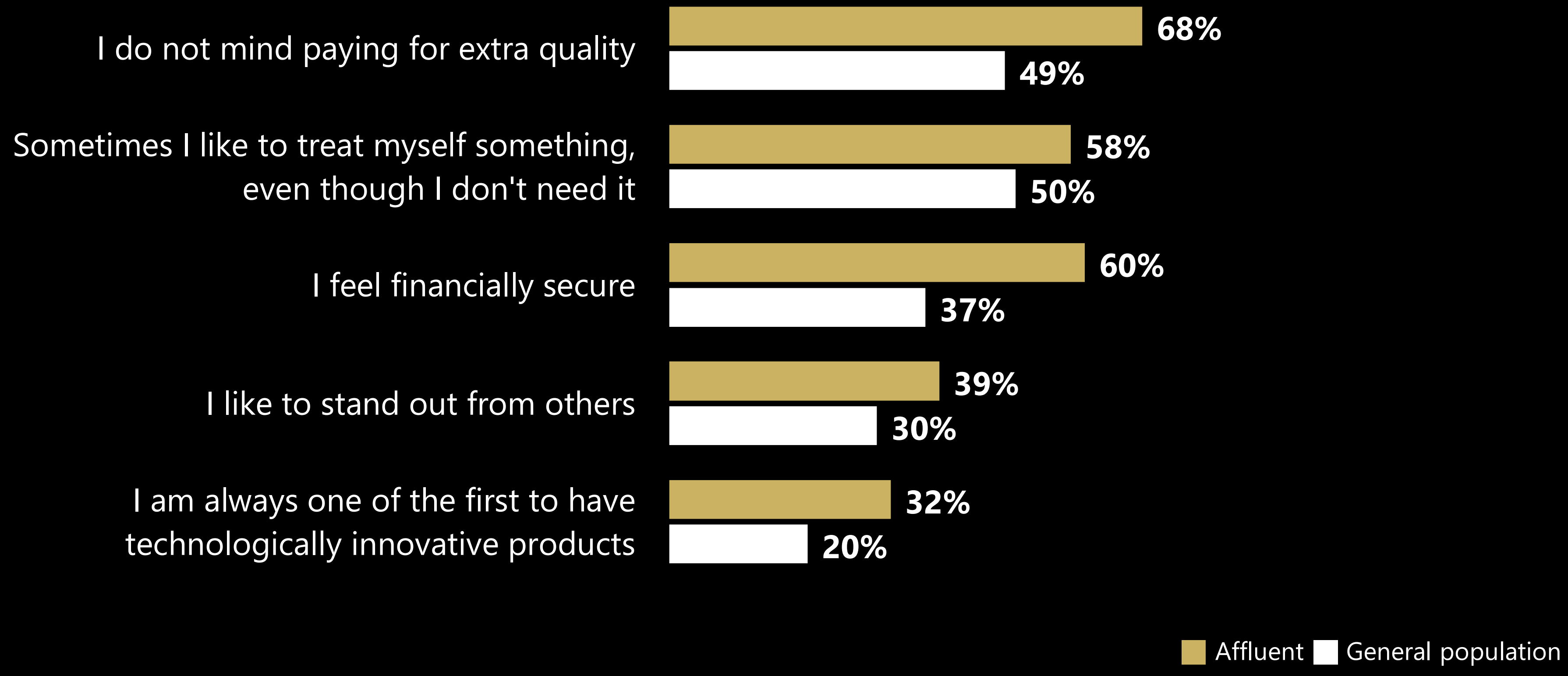


46% Of Affluent has consumed SVOD services yesterday

Source: Ipsos Affluent Survey; Europe 2021. "Media activities done yesterday + past 30 days"

#3: The affluent are ready to spend

The Affluents have a confident attitude towards spending



Spending on luxury products has increased

Designer clothing	△	+6%
Shoes	△	+5%
Jewellery	△	+3%
Luxury watches	△	+22%
Fragrance	△	+3%
Cosmetics	▽	-1%

▽△ % change compared to 2020

 | Source: Ipsos Affluent Survey; Europe 2020 & 2021. "Mean: € Expenditure in past 12 months"

#4: The Affluent are concerned about the environment

	Affluent Europe	Affluent US	Affluent APAC
I do everything I can to help the environment	**69%**	60%	N/A
I would be willing to pay more for products that are environmentally friendly	**55%**	54%	46%
A company's commitment to corporate and social responsibility is important to me when I buy products or services	52%	**55%**	N/A
Disagree: The economy is more important than the environment	**48%**	39%	37%

Source: IAS; USA 2021, IAS; APAC 2021, IAS; Europe 2021. % "any agree" , % "any disagree"

Thank you

Affluent IPSOS

More details on the Affluent Survey here

Ipsos

RUSSIA: IN THE FLOW OF CHANGE

Ekaterina Ryseva

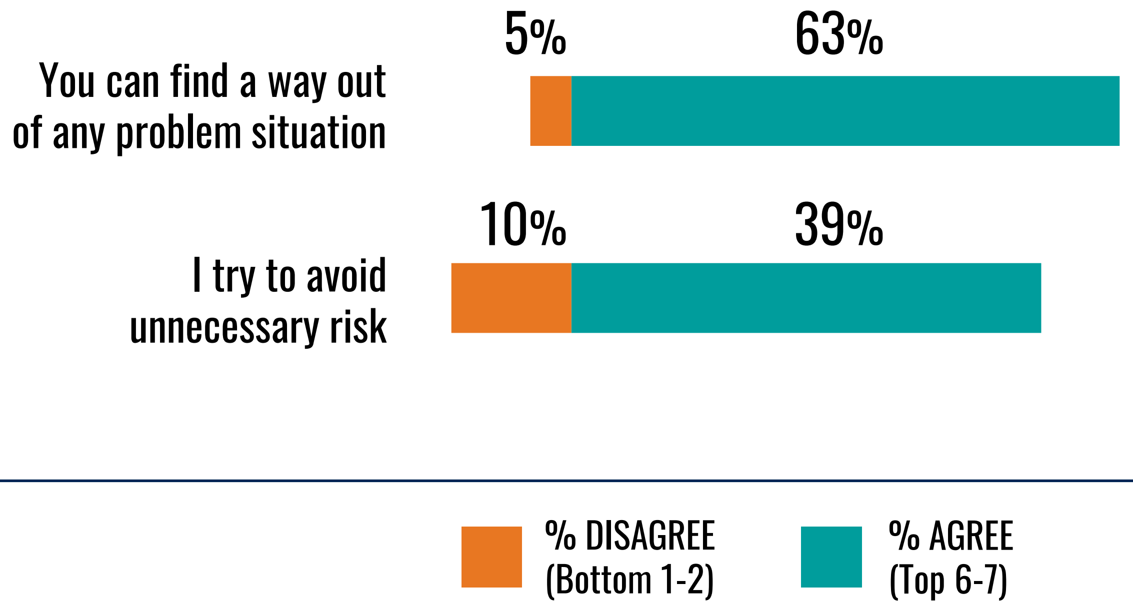
Country Manager
Ipsos in Russia

SOCIOCULTURAL PROFILE

12 attributes

- Collectivism
- Savvy
- Risk avoidance
- Passivity
- Joyless culture
- Fatalism
- Great idea
- Traditionalism
- Living against the rules
- Straightforwardness
- Heterogeneity
- Living beyond one's means

RUSSIANS WILL FIND A WAY OUT OF ANY SITUATION

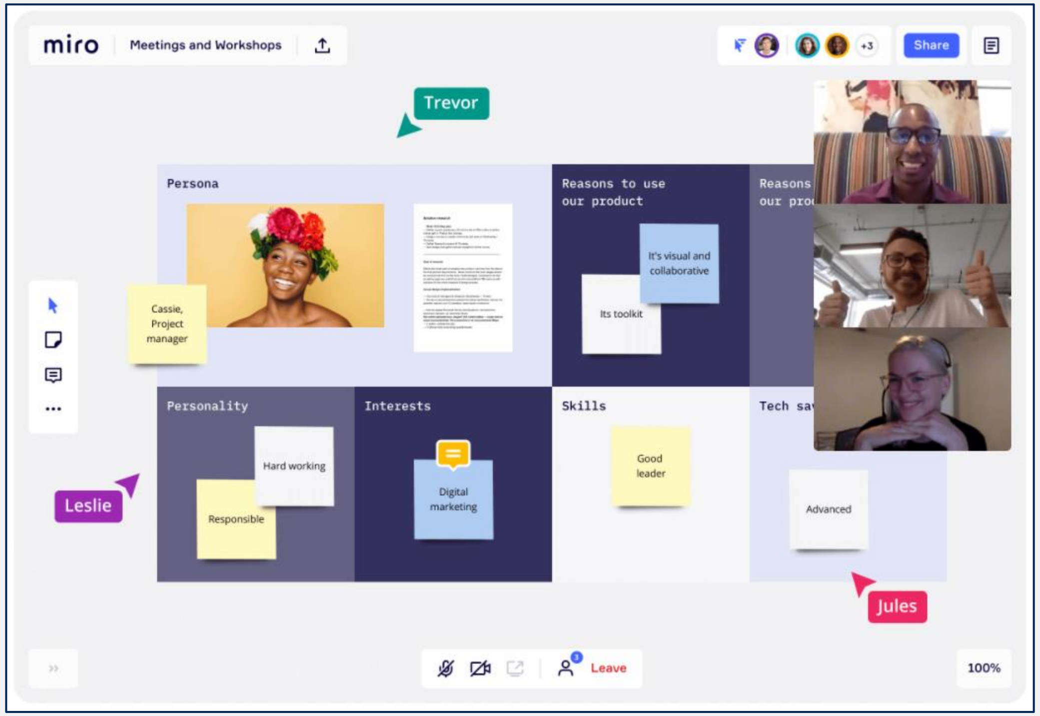


Source: Sociocultural Profile of Russia.
Russians, 18-64. Online survey, Ipsos i-Say panel.
Data collection: November 12-16, 2021 N=1,987

miro

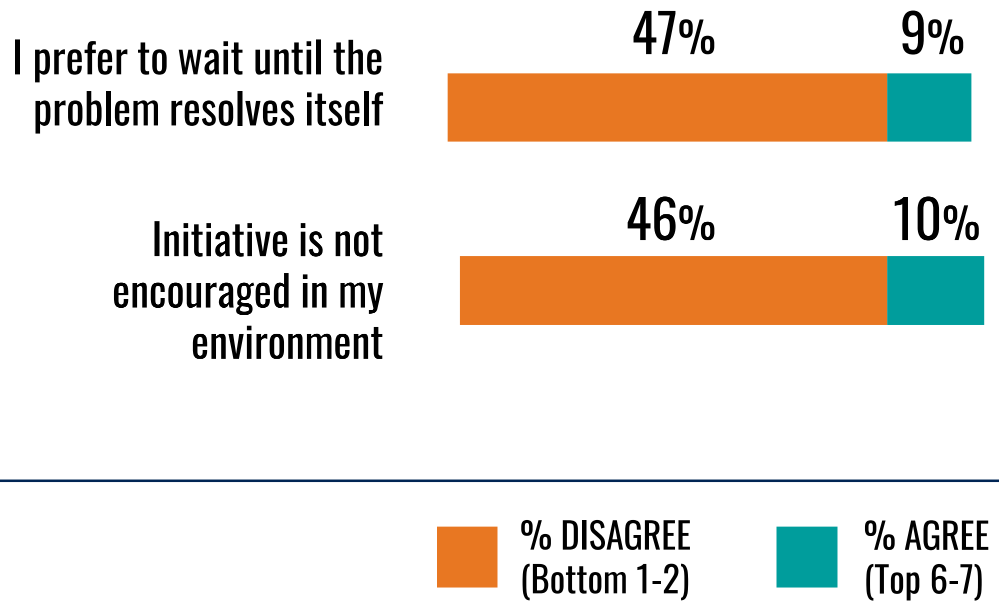
Miro is a startup, created by a Russian team from Perm.

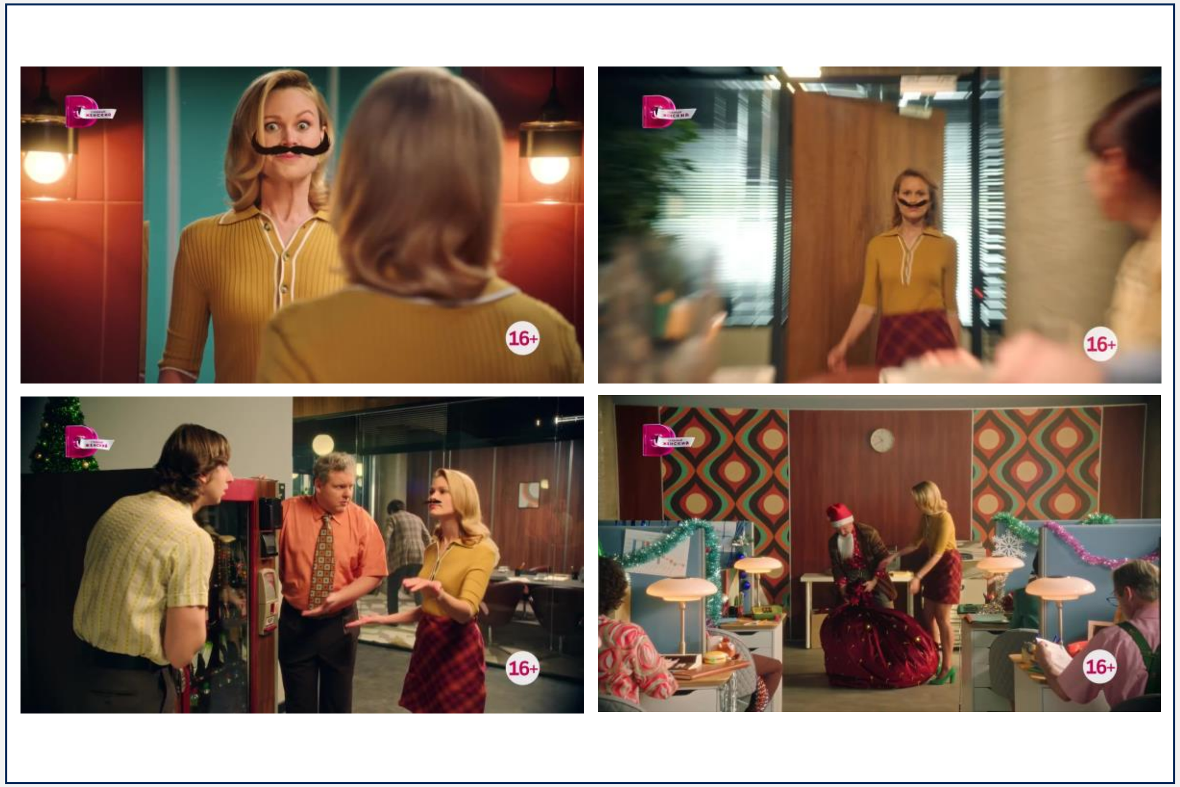
In 2021 MIRO was included in Enterprise Tech 30.



Ipsos

RUSSIANS ARE NOT PASSIVE

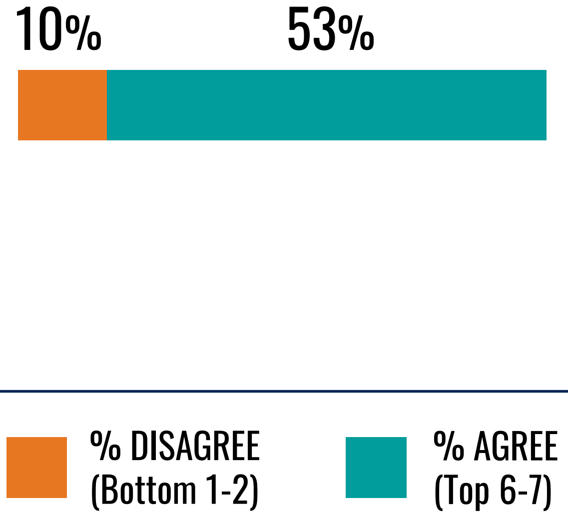




Source: Sociocultural Profile of Russia.
Russians, 18-64. Online survey, Ipsos i-Say panel.
Data collection: November 12-16, 2021 N=1,987

PROUD OF RUSSIA

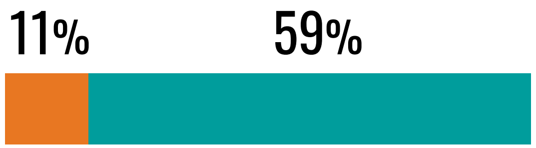
It is important for me to see the achievements and successes of Russia



Source: Sociocultural Profile of Russia.
Russians, 18-64. Online survey, Ipsos i-Say panel.
Data collection: November 12-16, 2021 N=1,987

COMMITTED TO TRADITIONS

I support traditional values



% DISAGREE (Bottom 1-2)

% AGREE (Top 6-7)

Mayonnaise under the brand Ryaba - the hero of Russian folk tales

A box of chocolates with a design representing paintings by famous Russian artists

Dairy products under Prostokvashino brand. Prostokvashino cartoon was shot in Soviet times, new episodes were released in 2018

Source: Sociocultural Profile of Russia.
Russians, 18-64. Online survey, Ipsos i-Say panel.
Data collection: November 12-16, 2021 N=1,987

SOCIO-CULTURAL PROFILE

Savvy, the ability to find non-standard solutions, is a characteristic of people in Russia

A non-passive position: make independent decisions and act

They are committed to traditional values

KNOWING THE CULTURAL PROFILE OF CONSUMERS, YOU CAN …

1. Localize global scenarios
2. Build effective strategy
3. Deliver relevant communication
4. Support healthy corporate culture

FLAIR RUSSIA 2022
What else?

FLAIR RUSSIA 2022

IN THE FLOW OF CHANGE

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