

THE ESG IMPERATIVE



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KEYS – A WEBINAR SERIES BY IPSOS

8th June 2023

Watch the recording



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AGENDA



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01

The Dynamics of Public Opinion

Simon Atkinson

Chief Knowledge
Officer, Ipsos

02

Everything Everywhere All at Once

Lauren Demar

Chief Sustainability
Officer & Global Head
of ESG, Ipsos

03

ESG through a Cultural Lens

Radhecka Roy

Global Leader,
Strategic Curation,
Ipsos

04

More Equal than Others?

**Manuel Garcia-
Garcia**

Global Leader,
Neuroscience, Ipsos

THE DYNAMICS OF PUBLIC OPINION

Simon Atkinson

REASONS TO BE CHEERFUL?

Global consumer confidence rises to highest point in sixteen months

All four sub-indices show significant gains as sentiment rises across much of Europe.

17 May 2023 Consumer Confidence Index / Society / Economy / Consumers



DOWNLOAD

Download the results [here](#)

REASONS TO BE CAUTIOUS



REASONS TO BE CAUTIOUS



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[Inflation](#) [THE BIG PICTURE](#) [LOCAL VIEWS](#) [HOW YOU CAN ACT](#)

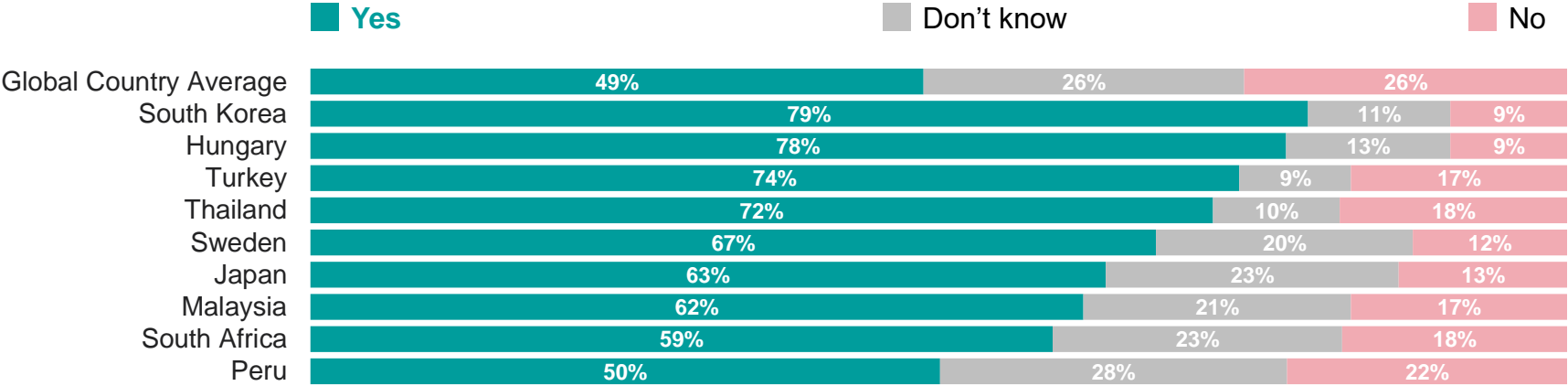
[Ipsos](#) > [Inflation](#) > [Global Inflation Monitor](#) > [Half of the public across 29 countries think their country is in recession](#)

Half of the public across 29 countries think their country is in recession

A latest wave of the Ipsos Global Inflation Monitor finds in 26 of 29 countries more people think their country is in recession than think it is not. Almost two-thirds expect inflation will continue to rise over the next year, while one-third expect their disposable income to fall.

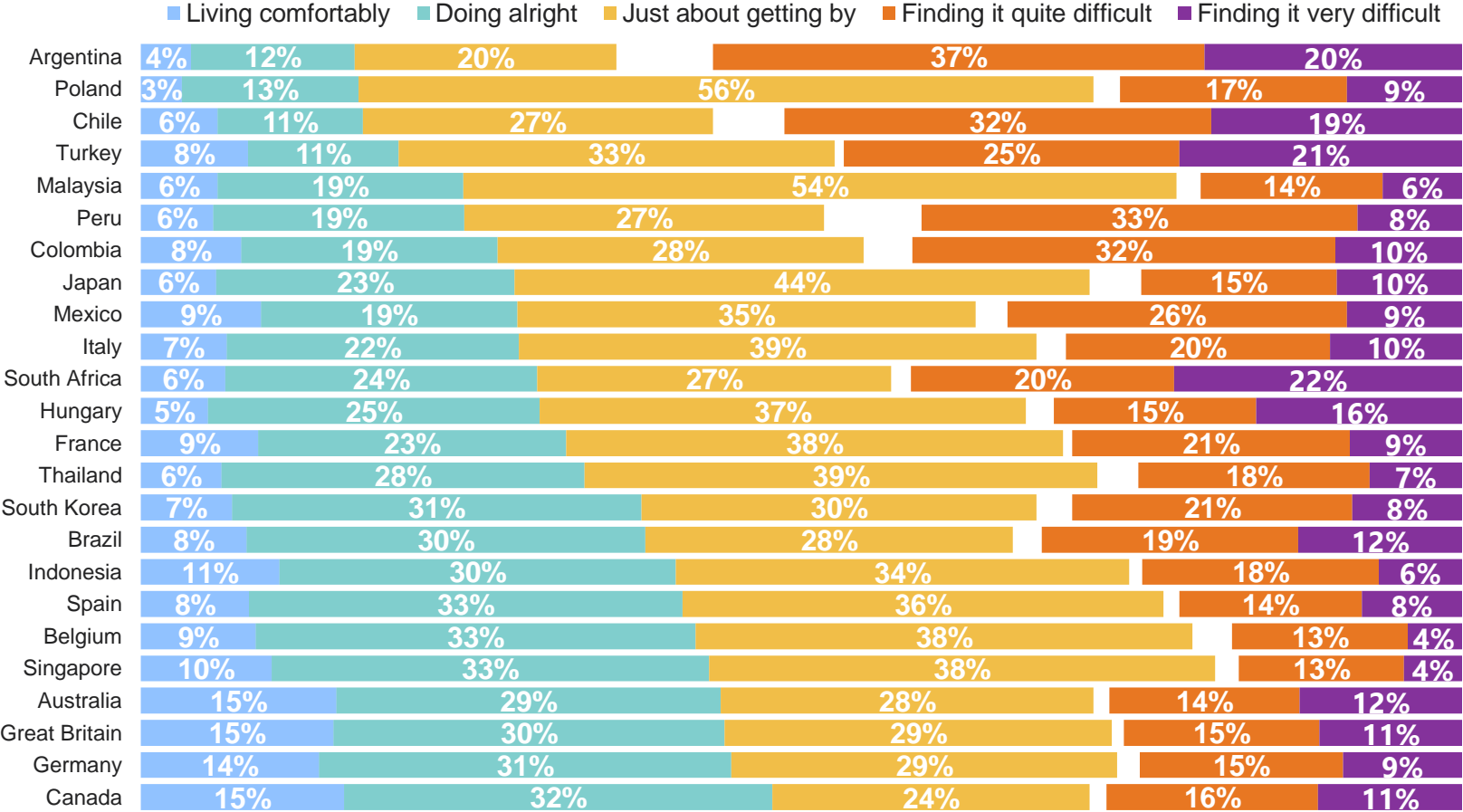
[23 May 2023](#) [Global Advisor](#) / [Inflation](#) / [Cost of living](#) / [Economy](#) / [Consumers](#)

As far as you are aware, is the economy in your country currently in a recession?



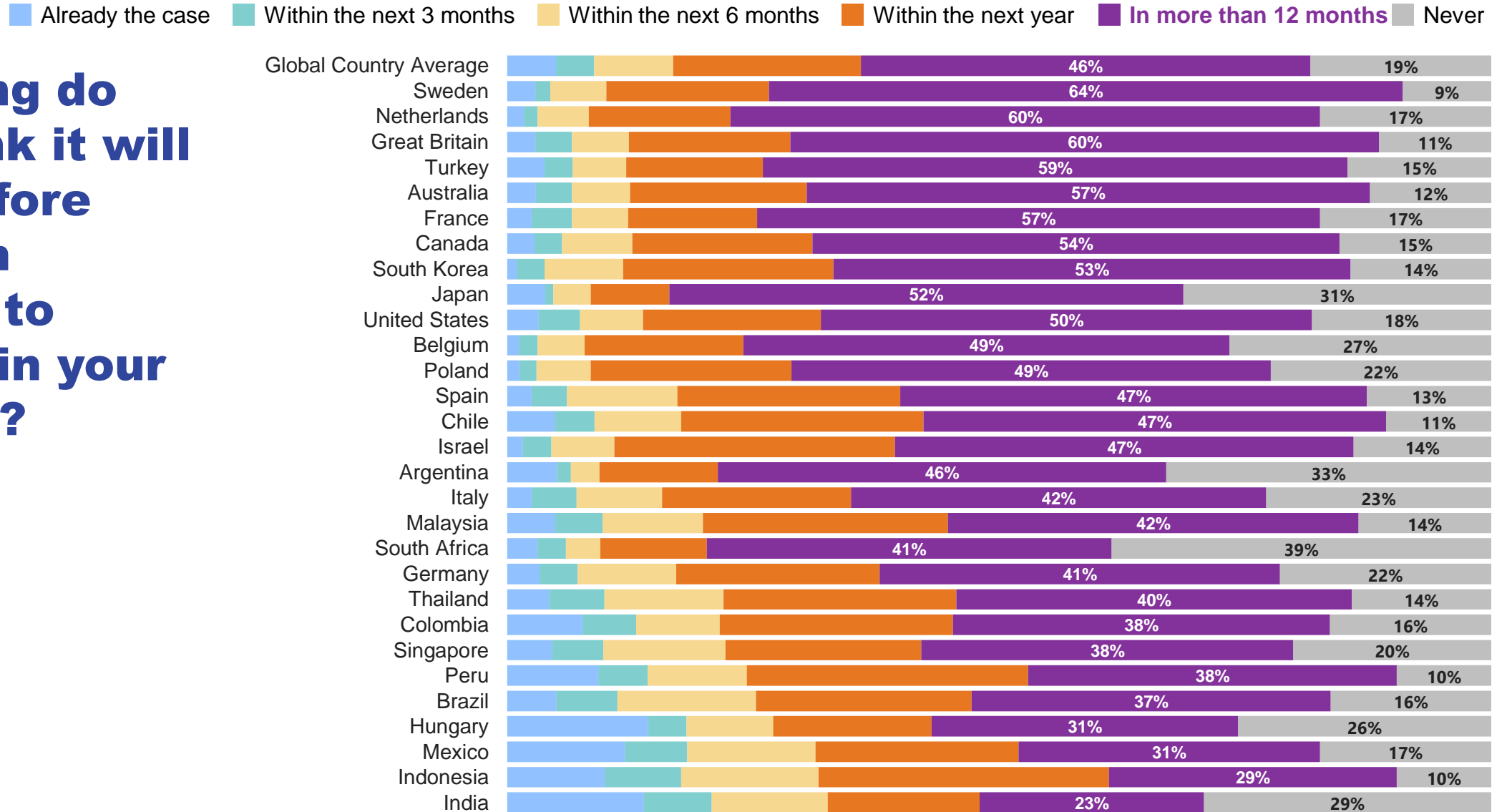
Base: 23,039 online adults under age 75 across 29 countries, interviewed March 24-April 7, 2023
The "Global Country Average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result.
The samples in Brazil, Chile, Colombia, India, Indonesia, Malaysia, Mexico, Peru, Singapore, South Africa, Thailand and Turkey are more urban, more educated, and/or more affluent than the general population.

How well would you say you are managing financially these days? Would you say you are...?



Base: 23,039 online adults under age 75 across 29 countries, interviewed March 24-April 7, 2023
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.
The samples in Brazil, Chile, Colombia, India, Indonesia, Malaysia, Mexico, Peru, Singapore, South Africa, Thailand and Turkey are more urban, more educated, and/or more affluent than the general population.

How long do you think it will take before inflation returns to normal in your country?



Base: 23,039 online adults under age 75 across 29 countries, interviewed March 24-April 7, 2023

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. The samples in Brazil, Chile, Colombia, India, Indonesia, Malaysia, Mexico, Peru, Singapore, South Africa, Thailand and Turkey are more urban, more educated, and/or more affluent than the general population.

STAYING CLOSE TO CONSUMERS

IPSOS UPDATE JUNE 2023

What's going on? Our round-up of research and thinking from Ipsos teams around the world

At last, some good news! In the volatile 2020s we are pleased to report that Global Consumer Confidence has reached its highest level for 16 months. Even in Europe, where the gloomy mood has dominated, we are now seeing some more positive scores, with Poland, France, Britain and the Netherlands all showing improved outlooks. Our monthly look at 29 major countries shows that concern about inflation has plateaued. Could this be the start of a new normal? Well, half think their country is currently in recession (it isn't – but it shows the downbeat mood of consumers). For the 14th successive month, the cost of living is the top concern in our What Worries the World survey, with most not expecting to see inflation return to "normal levels" for at least a year. Sceptical? Consumers' expectations have generally been more accurate than central bankers' in our tracking since 2020.

With people everywhere concerned about the economy, and united on the challenges of climate change (but not its solution), we look at how rising focus on ESG in business is positive for most employees. The imperative to protect the environment – and build a more inclusive society – is a theme of our new Ipsos Flair report on Italy. Our team takes inspiration from the country's love of football, as they describe the dynamic of an Italy that is playing catenaccio, in which defence is a prelude to attack, redesigning policies, industries and brands in the face of competing crises. Like the

Brazilians, the Italians find a way of making do.... Watch out for new reports on Chile, France, Indonesia and Brazil in the coming months.

If you can't fix the present, you can seek salvation elsewhere – our latest global study looks at the role of religion around the world. It reminds us of the big differences in the role of religion globally. Brazil, South Africa, Turkey and India are the most likely to believe in (a) God, with Japan, South Korea and many of the European countries far more secular. These massive differences in belief are accompanied by a common amount of tolerance: 76% say they are completely comfortable being around people who have different religious beliefs. Perhaps there is more that unites us than divides us after all.

Looking at all the signals I see daily, it does feel like we are in a transitional period – as Antonio Gramsci put it: "the old order is dying, and the new order is not yet ready to be born – throwing up all sorts of pathologies". We will keep measuring those every month. Links to more information are provided throughout the text. Let us know at info@ipsos.com if you want more on any topic.

Ben Page, Ipsos CEO



2 – © Ipsos | Ipsos Update – June 2023



“Consumers’ expectations have generally been more accurate than central bankers’ in our tracking since 2020”

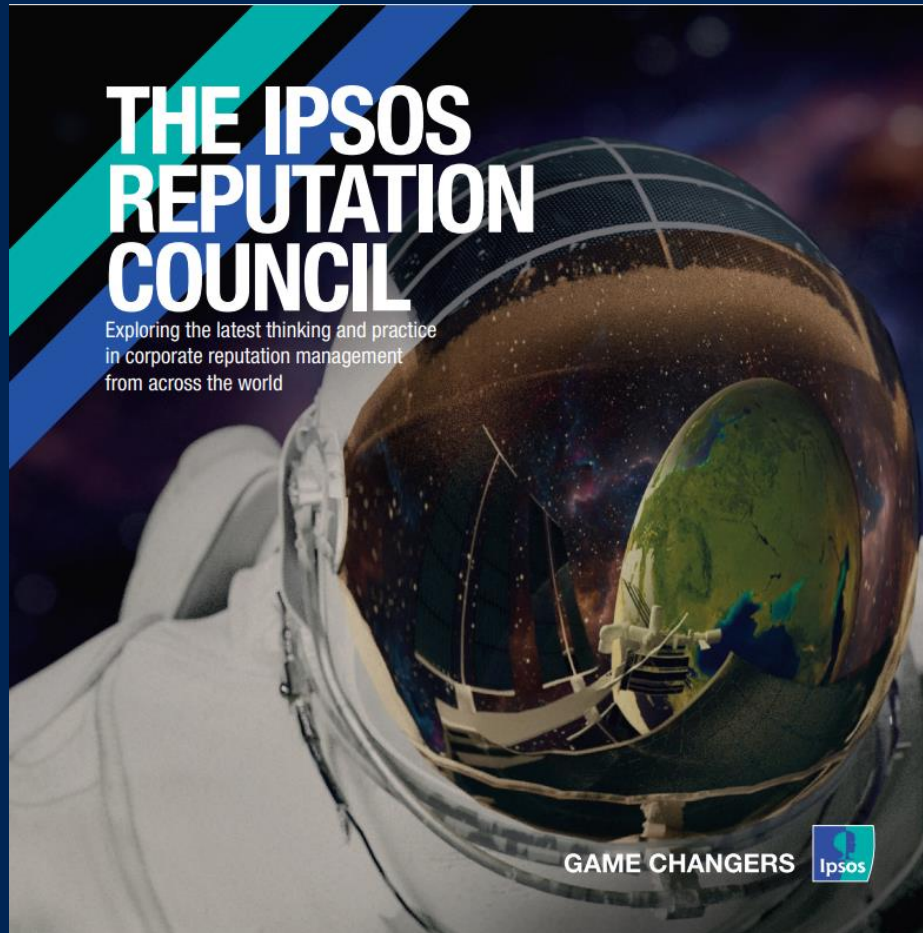
Explore the June edition [here](#)



OUR FOCUS FOR TODAY



THE VIEW FROM BUSINESS HQs



Exploring the latest thinking and practice in **corporate reputation management** from across the world. Latest report [here](#)

Has ESG fundamentally changed the way our business operates?

29% Disagree

55% Agree



16% Unsure

Base: 100 Council members

Does poor ESG performance now have material consequences?

9% Disagree

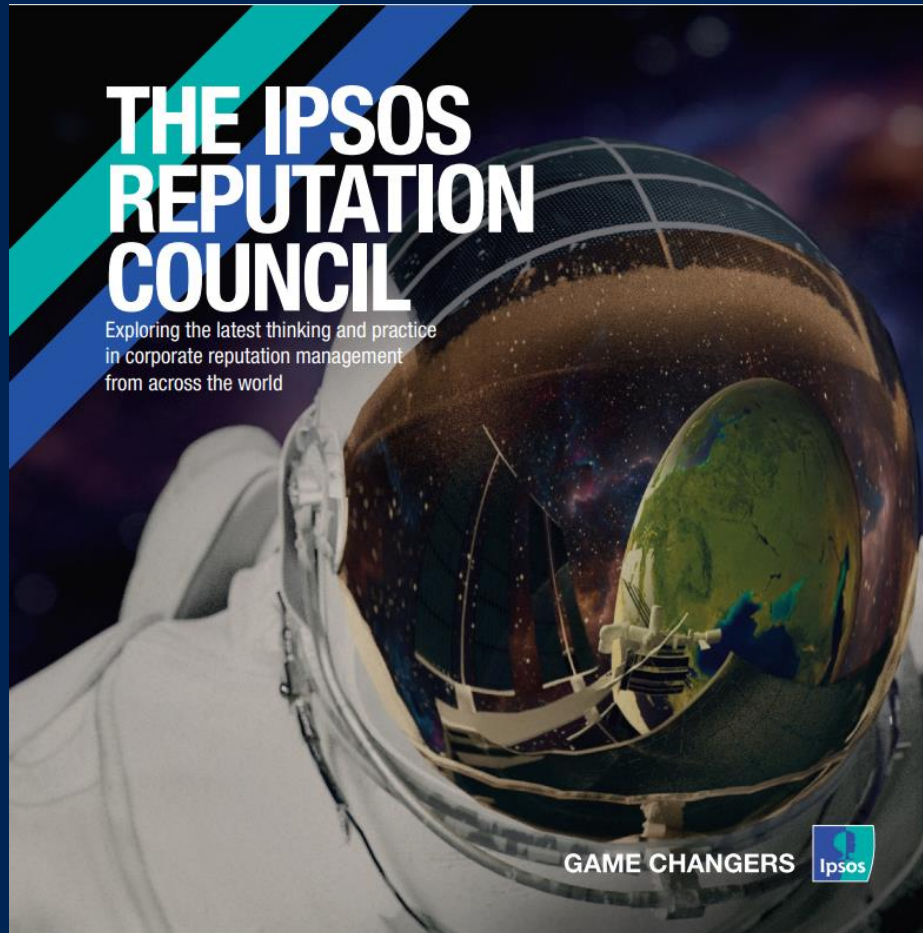
81% Agree



9% Unsure

Base: 99 Council members

THE VIEW FROM BUSINESS HQs



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COMING SOON

The ESG Council



EVERYTHING EVERYWHERE ALL AT ONCE

Lauren Demar

8 June 2023



ESG IS ABOUT...



EVERYTHING.

How a business affects the environment

How a business treats its employees, customers & communities

How a business is run



EVERYWHERE.

Global

All sectors



ALL AT ONCE.

Value creation for all stakeholders

ESG CHALLENGES ARE SOME OF THE **LARGEST** THE WORLD FACES TODAY

unicef  for every child

Worldwide, nearly 1 in 4 girls between the ages of 15 and 19 are neither employed nor in education or training — compared to 1 in 10 boys.

Le Monde

Canicule en France: les fortes chaleurs perdurent dans le quart Sud-Est, après plus de soixante records absolus de température mardi



Racial justice in the workplace: In-depth look at diversity's struggle to crack corporate boardrooms

The Economist

Pakistan has been hit by its worst floods in recent memory

UN WOMEN 

Explainer: How gender inequality and climate change are interconnected

BBC NEWS

India heatwave: High temperatures killing more Indians now, Lancet study finds

 THE WORLD BANK

Nearly 2.4 Billion Women Globally Don't Have Same Economic Rights as Men

The Guardian

Wildfires in US west fueling extreme weather in other states, study finds

IDB 

Study reveals high gender inequality in companies in Latin America and the Caribbean

Bloomberg

Climate Disasters in Latin America Threaten Global Food Security

africa news. 

World Bank: South Africa is the most unequal country in the world

CITIZENS ARE CONCERNED

80% agree

“We are headed for environmental disaster unless we change our habits quickly”

Source: 2023 Ipsos Global Trends Report

#2 global concern

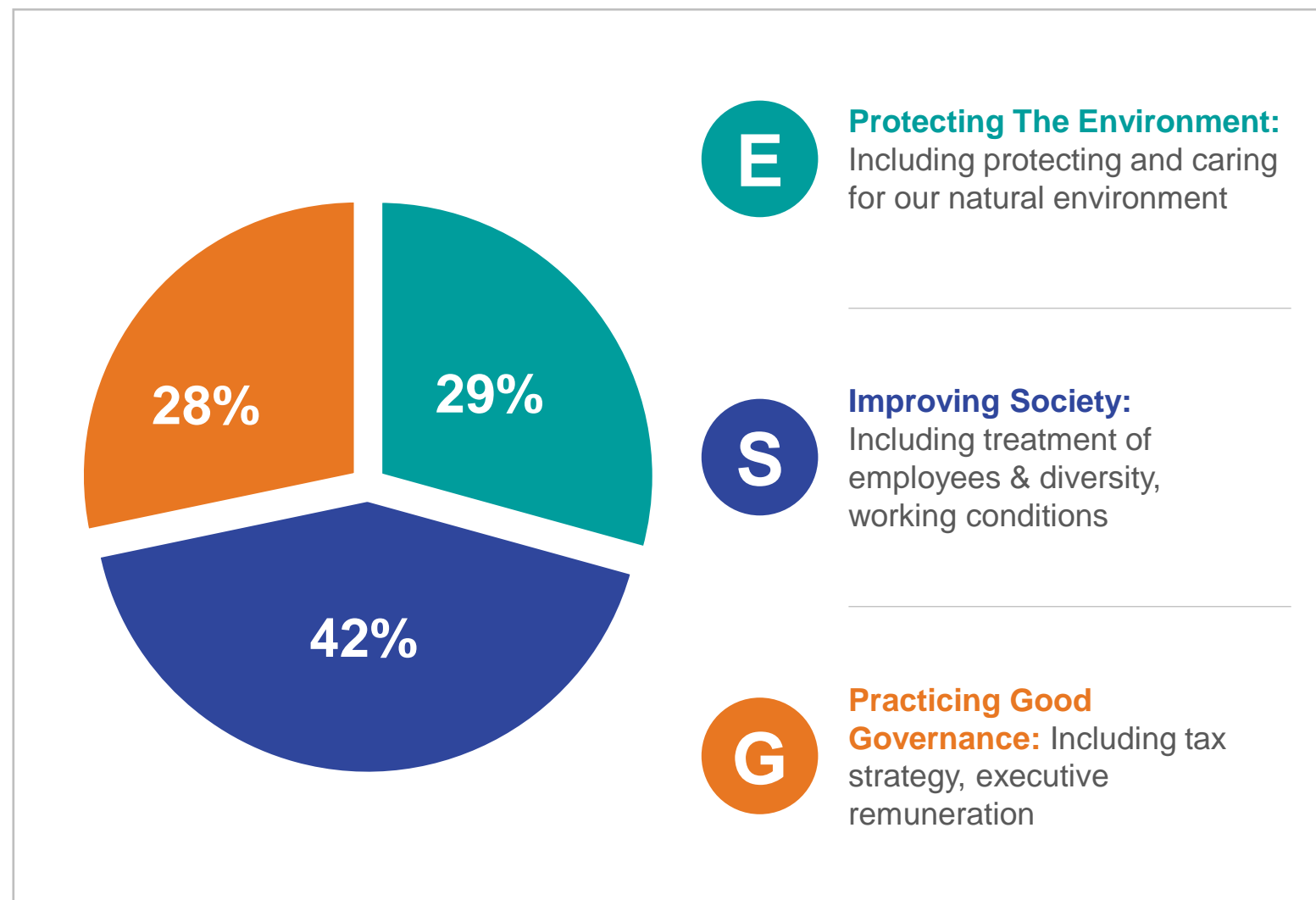
Poverty and social inequality

Source: Ipsos What Worries the World Survey April 2023



IMPROVING SOCIETY IS THE TOP PRIORITY FOR BUSINESS AMONG CITIZENS GLOBALLY

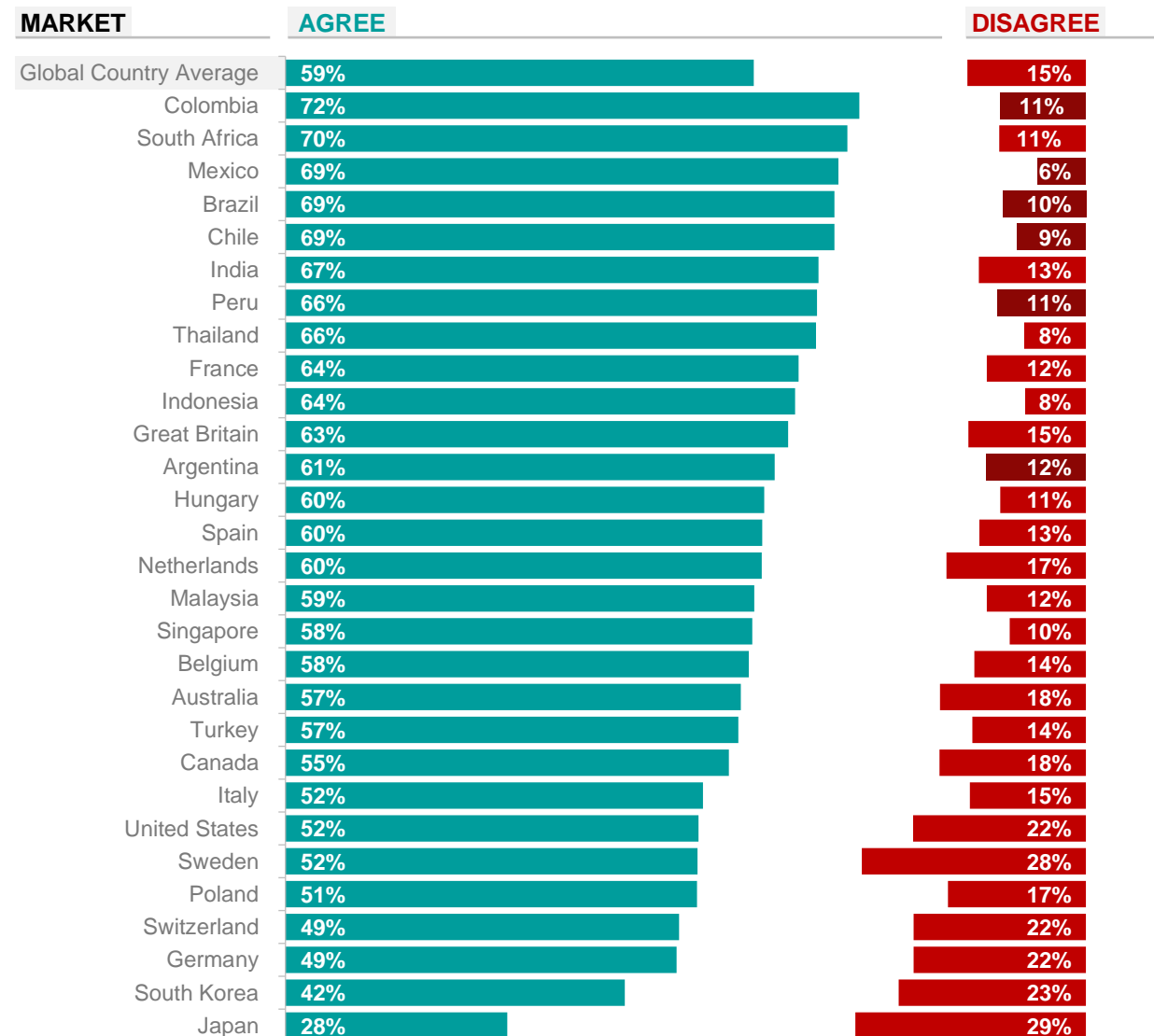
Q1. When it comes to the role of **multi-national companies** in corporate responsibility how important are each of the following areas? Please rank the below areas where 1 is most important and 3 is least important.



Source: IGRM Survey, 27 countries, April 2023

CITIZENS WANT BUSINESSES TO ACT ON CLIMATE CHANGE TOO

Q: To what extent do you agree or disagree with the following: If businesses in [MARKET] do not act now to combat climate change, they will be failing their employees and customers

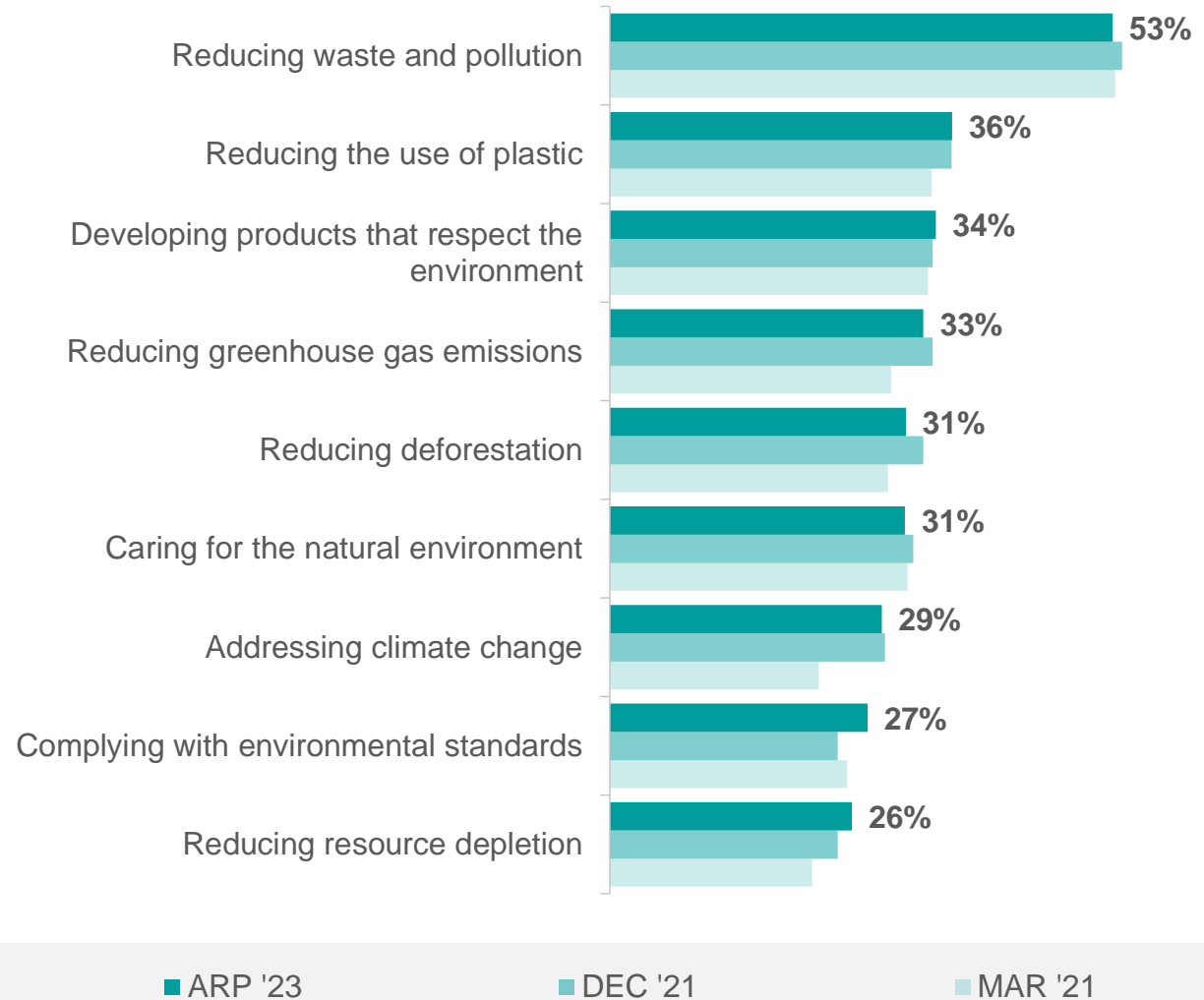


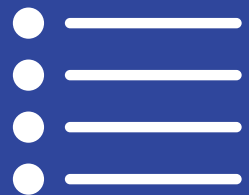
Source: Earth Day 2023, 21,231 online adults under the age of 75, interviewed 20 Jan – 3 March 2023

ENVIRONMENTAL CONCERNS | GLOBAL

Q. When it comes to **protecting the environment**, which two or three of the following do you believe is most important for multi-national companies to address?

Source: IGRM April 2023





FOUR

KEY PRINCIPLES TO FOLLOW

1

**Avoid the pitfall
of ESG silos**

2

**Beware: the
'say-do' or
'believe-true'
gap?**

3

**Make
sustainability a
co-benefit not
'the' benefit**

4

**Say it but say
it right**

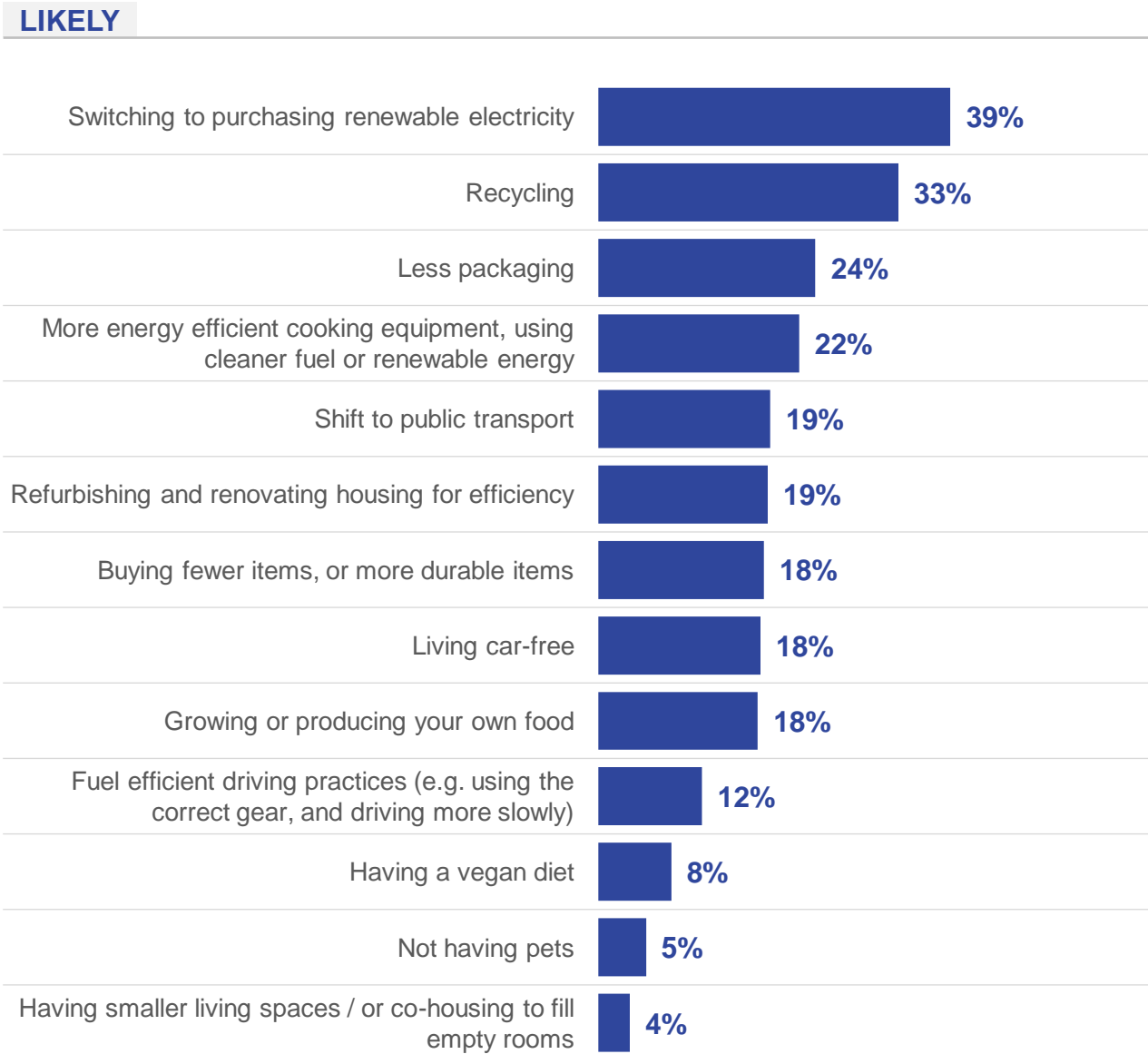
DON'T UNDERESTIMATE THE 'BELIEVE-TRUE' GAP

The public perceive many actions as having a far greater impact on reducing emissions than they do

Global Country Average

Q: Which three of the following actions, if any, do you think would have most impact on reducing greenhouse gas emissions?

Source: Earth Day 2023, 21,231 online adults under the age of 75, interviewed 20 Jan – 3 March 2023



DON'T UNDERESTIMATE THE 'BELIEVE-TRUE' GAP

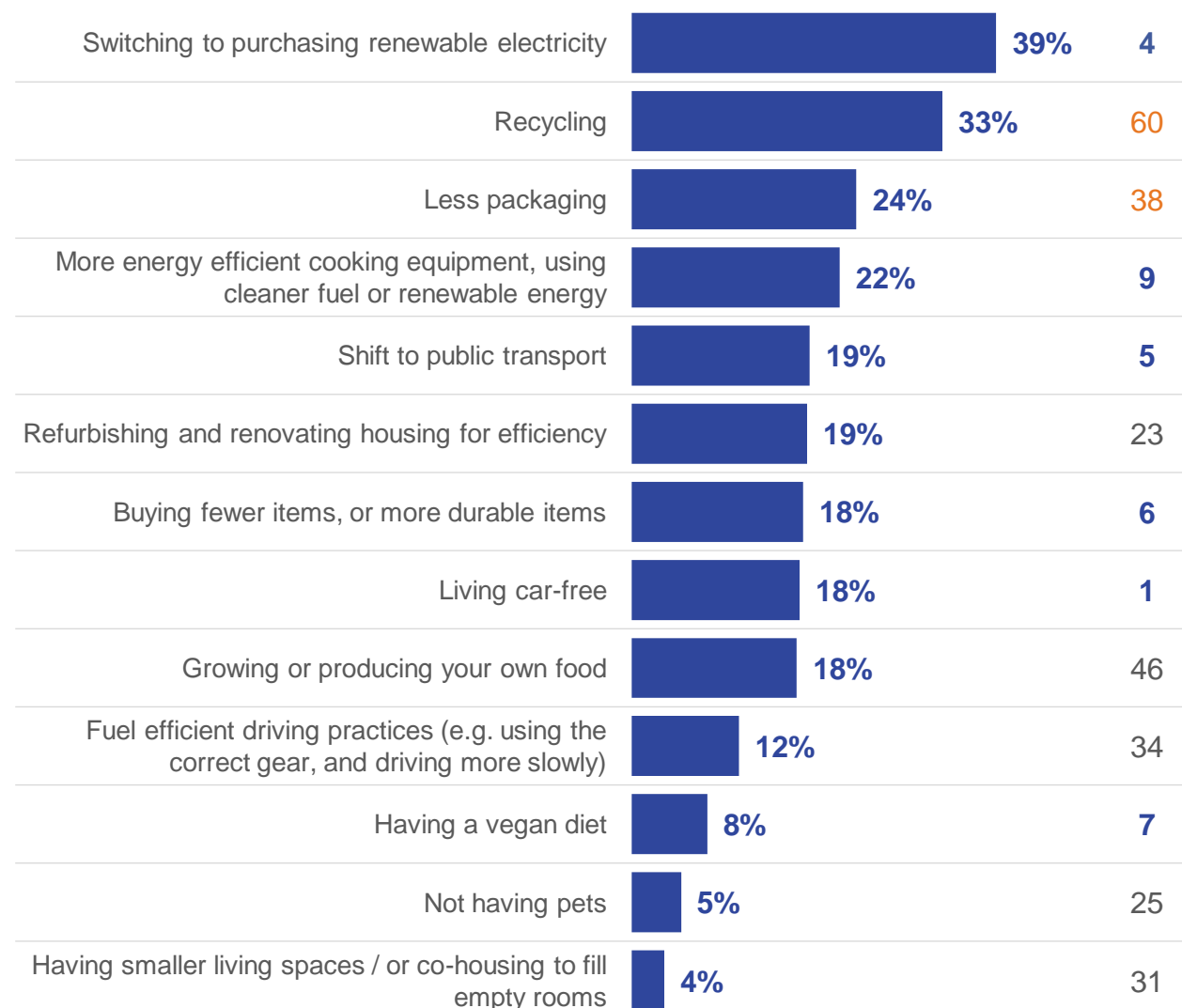
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Source: Earth Day 2023, 21,231 online adults under the age of 75, interviewed 20 Jan – 3 March 2023

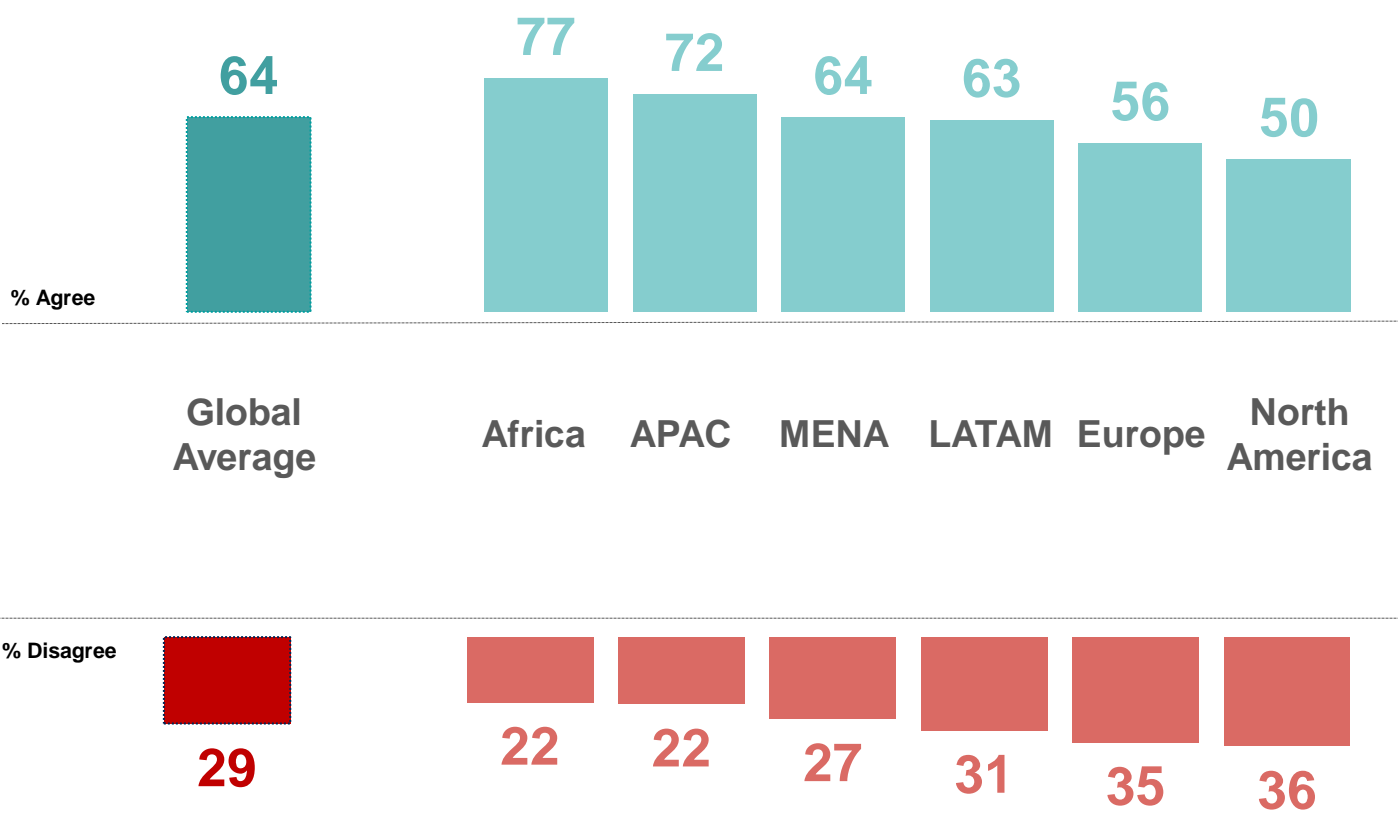
LIKELY



True rank for reducing emissions

WILLINGNESS TO PAY FOR ESG PRODUCTS?

Q: I try to buy products from brands that act responsibly, even if it means spending more

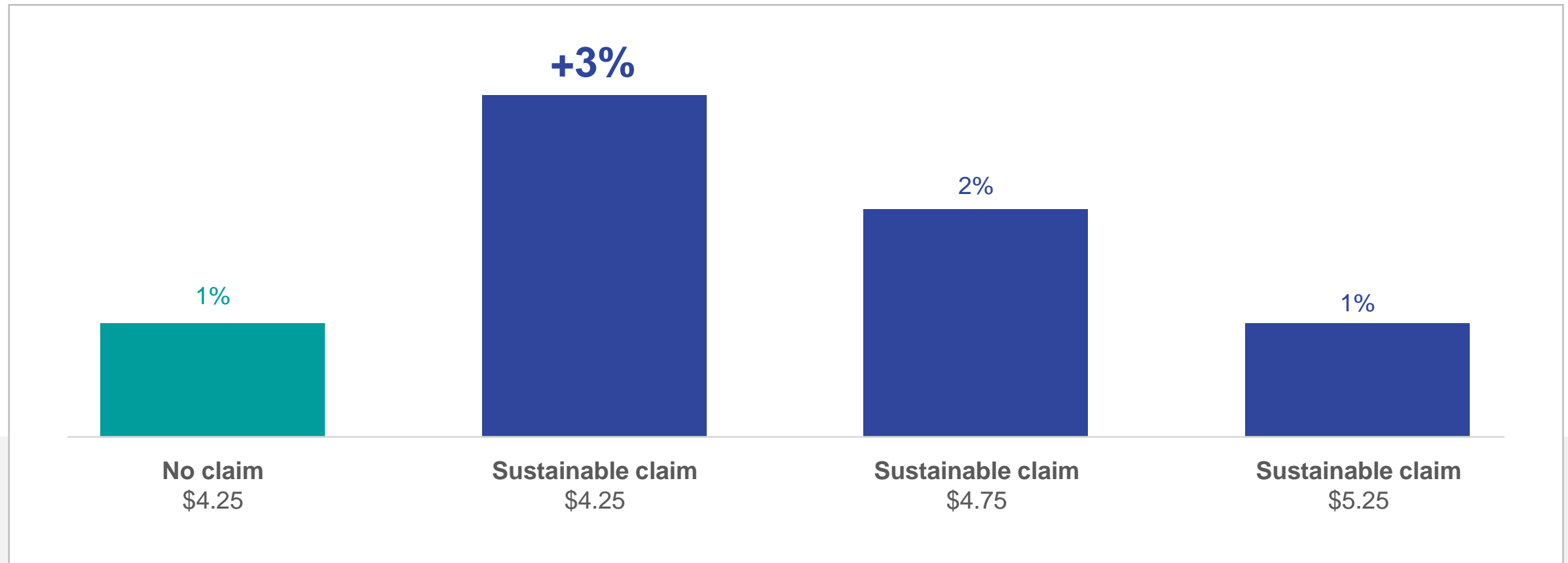


Base: 48,541 adults surveyed across 50 markets between 23rd Sep - 14th Nov 2022. For full methodology see ipsosglobaltrends.com.
Source: Ipsos Global Trends 2023



SUSTAINABILITY AS A CO-BENEFIT NOT 'THE' BENEFIT

Willingness to pay for sustainability?

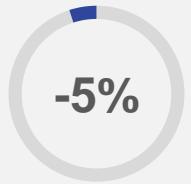


ESG COMMUNICATIONS: SAY IT BUT SAY IT RIGHT

1

Say it creatively

Stand out from the sea of sustainability sameness



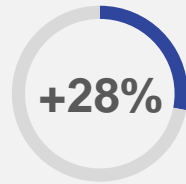
Brand Attention

Ads with a sustainability claim



2

Combine sustainability and brand benefits



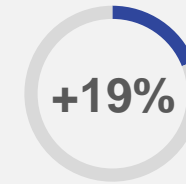
Creative Effectiveness

Integrating sustainability and brand claims



3

Focus on a clear brand action



Creative Effectiveness

Brand action focus



Source: Meta-analysis of Ipsos ad testing data base. 200 Sustainability ads across 15 countries. Indices from Ipsos Creative|Spark test





ESG & CULTURE

Understanding how culture shapes perceptions and priorities for ESG

Radhecka Roy

8 June 2023

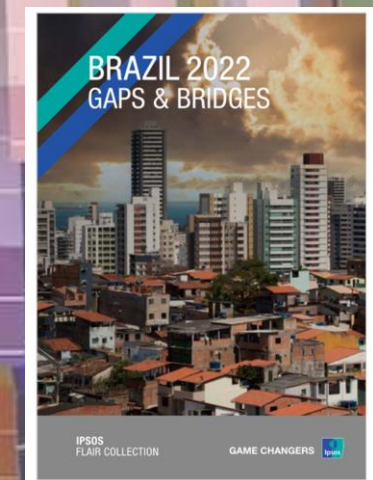
A curated meta-analysis of cultural inputs to ESG

Ipsos Global Trends' data for attitudes towards ESG issues

Ipsos Global Advisor surveys across different markets on ESG

Local market workshops with cultural and ESG experts for insights

Secondary research for cultural values, historical ESG practices



Ipsos framework for Cultural Transferability

- Ipsos fluency across 88+ cultures
- Ipsos assets that help bottom-up understanding of local cultures and how they relate to and shape global concepts
- Helping you navigate the global-local cultural landscape with nuance, empathy and creativity.



3 Cultural dimensions shaping sentiments on ESG

1

Relationship with Nature



Conquest or Co-existence?

2

Responsibility



Individual or Institutions?

3

Reward



MY world or THE world?



USA

Activism
Wilderness
Consumerism
Frontiers
Success

ESG





USA



ESG



INDIA

Reuse
Human
Non-violence
Ayurveda
Moderation
Jugaad Balance
Co-living
Repurpose

E S G





INDIA

Conquest

RELATIONSHIP WITH NATURE

Co-exist

Individual

RESPONSIBILITY/AGENCY

Institution

THE World

REWARDS

MY World

E S G

ESG & CULTURE

Understanding how culture shapes perceptions and priorities for ESG

**NEW
REPORT**
Coming
Soon!

**IPSOS
VIEWS**
ESG SERIES

Radhecka Roy

8 June 2023

MORE EQUAL THAN OTHERS

Manuel Garcia-Garcia, PhD



Inequality is the root of all social ills

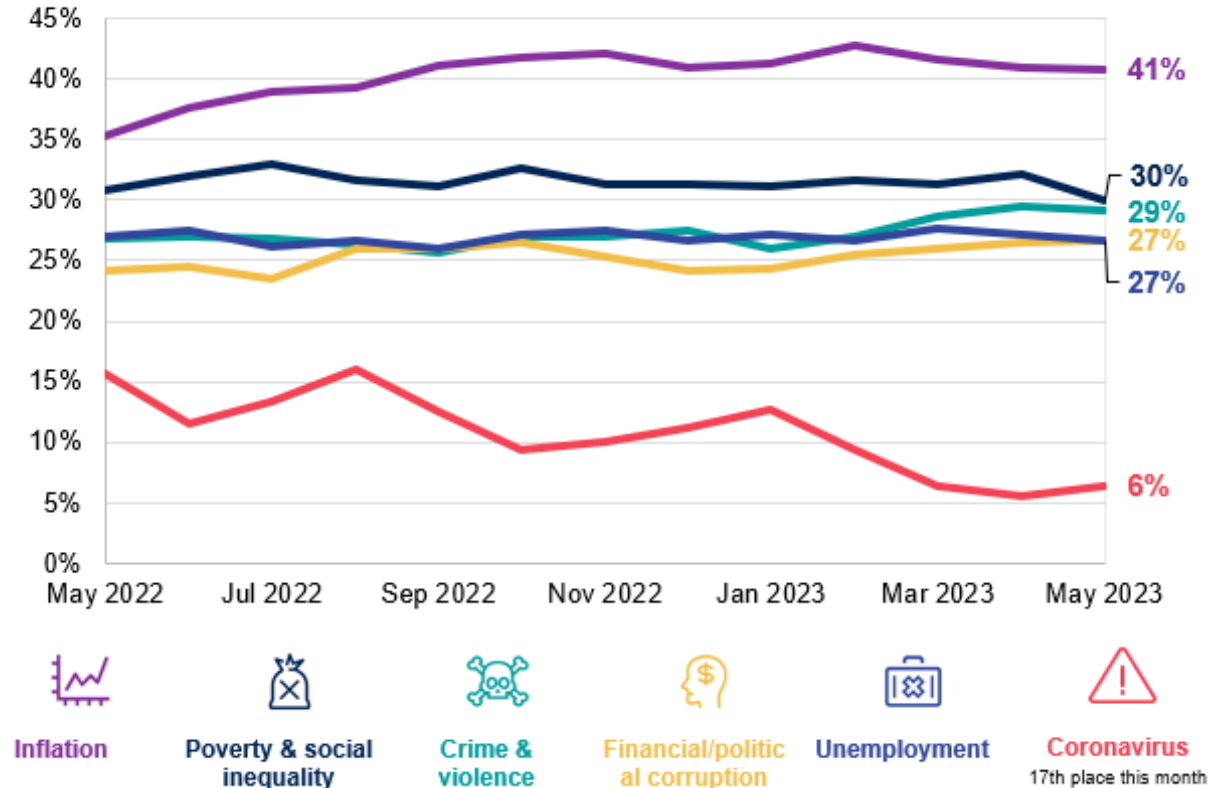
Jean-Jacques Rousseau

Inequality is widening

In spite of general agreement that inequality is a bad thing, it is actually widening in many parts of the world, including most of its major markets.

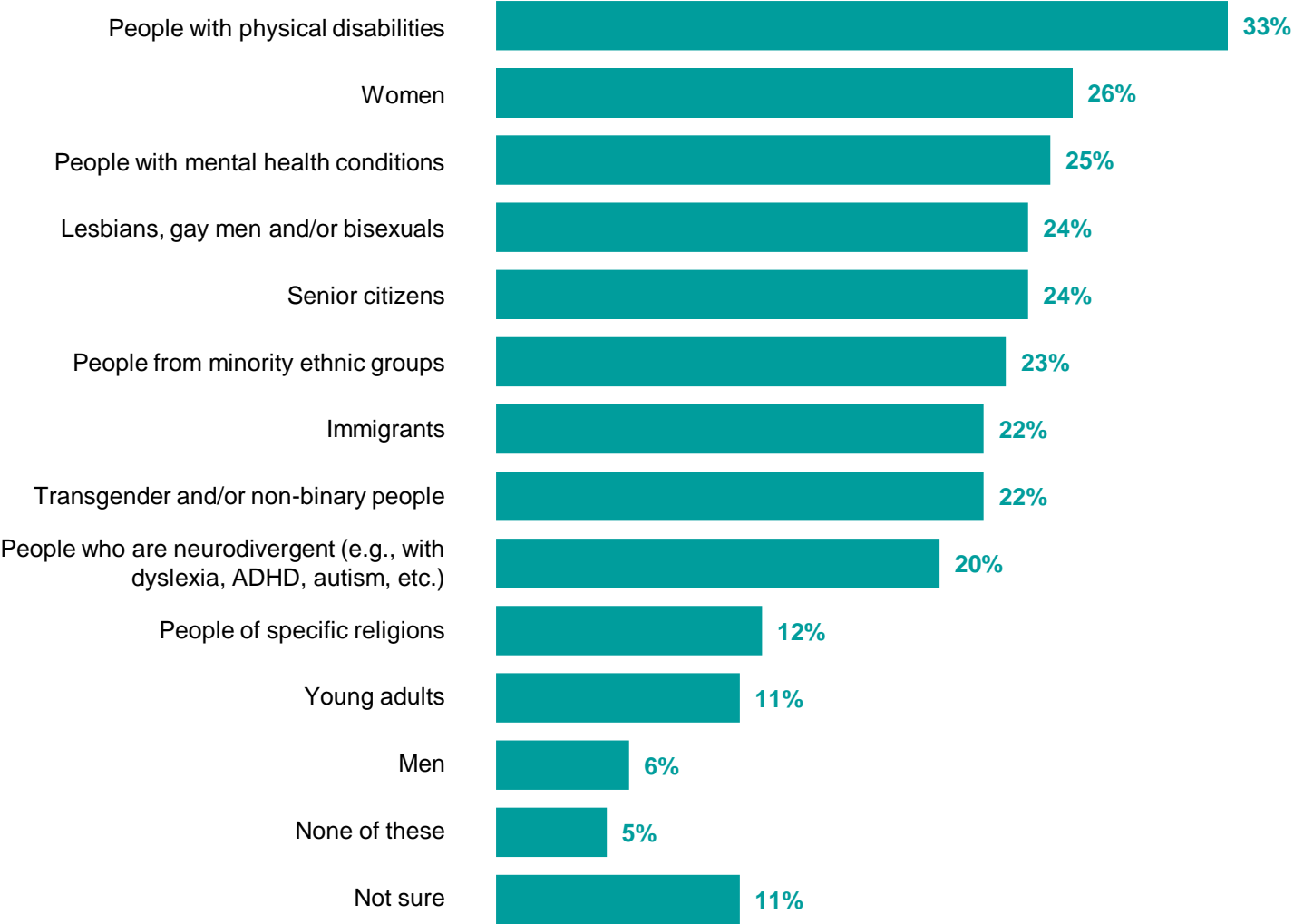


Which three of the following topics do you find the most worrying in your country?



Some groups are perceived as undergoing more unfair and unequitable experiences than others

Global country average



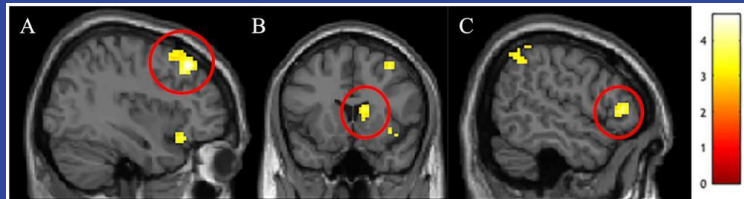
Base: 26,259 online adults aged 16-74 across 33 countries, 17 February – 3 March, 2023

How Inequality is Being Perpetuated

Implicit Bias

Culture Impacts the Neural Response to Perceiving Outgroups

Frontiers Human Neuroscience

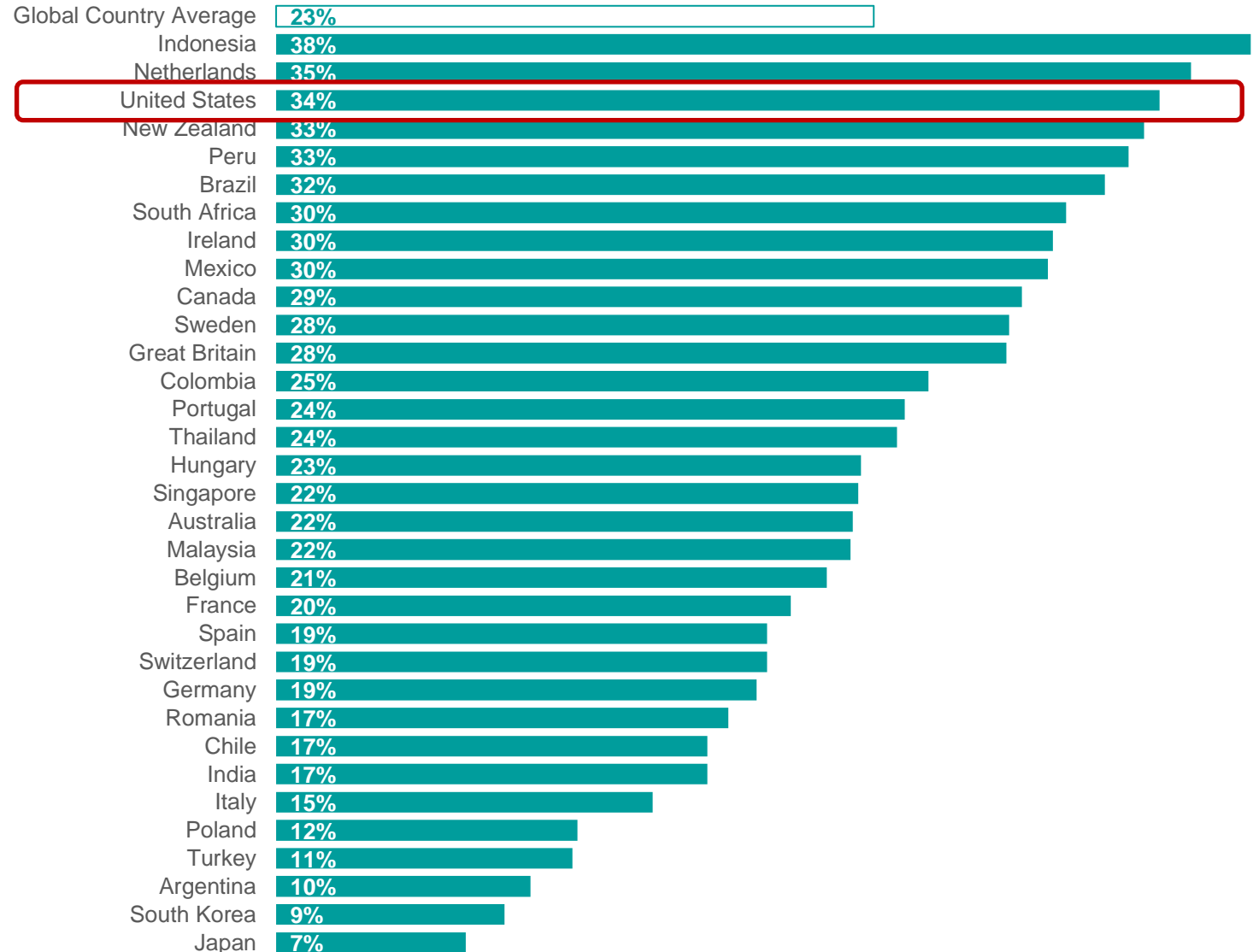


**Bias and Inequality
Stem From a Lie**

Q

Which of these groups of people, if any, do you think most experience unequal or unfair treatment in ... today?

People from minority ethnic groups

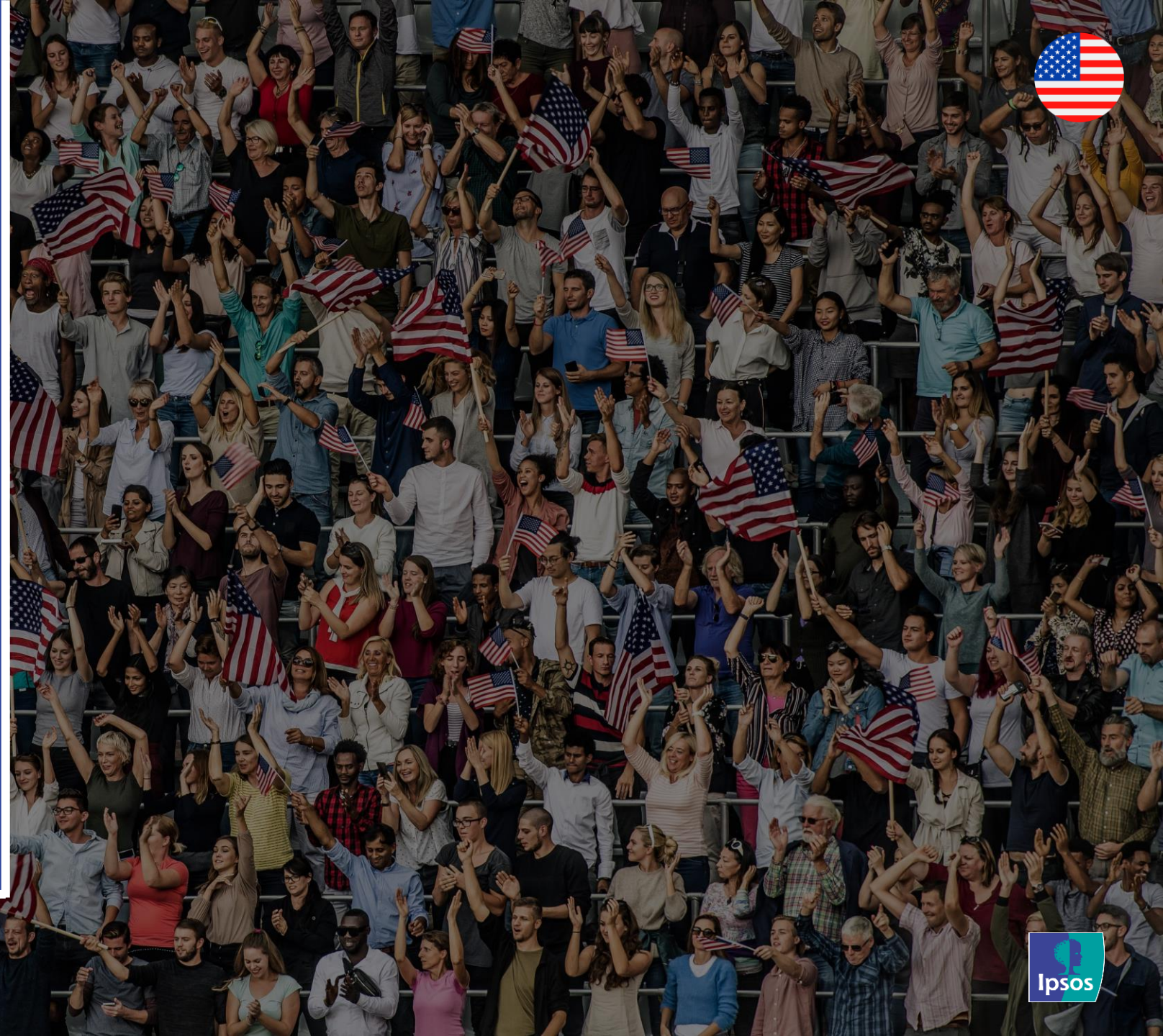


A Look at Race in the United States

The racial wealth gap has widened again in the United States since the 1980s as capital gains have mainly benefited white households.

Closing equality gaps would benefit all.

Studies show that closing the persistent US racial wealth gap could lead to an increase of 4 to 6 percentage points in the U.S. GDP by 2028 (Noel et al., 2019, McKinsey).





Brands have a role to play in making advancements in society on equality issues.

It's not just a nice to have, it's expected.

Appropriate for **any brand/industry to communicate their stance on equality issues**



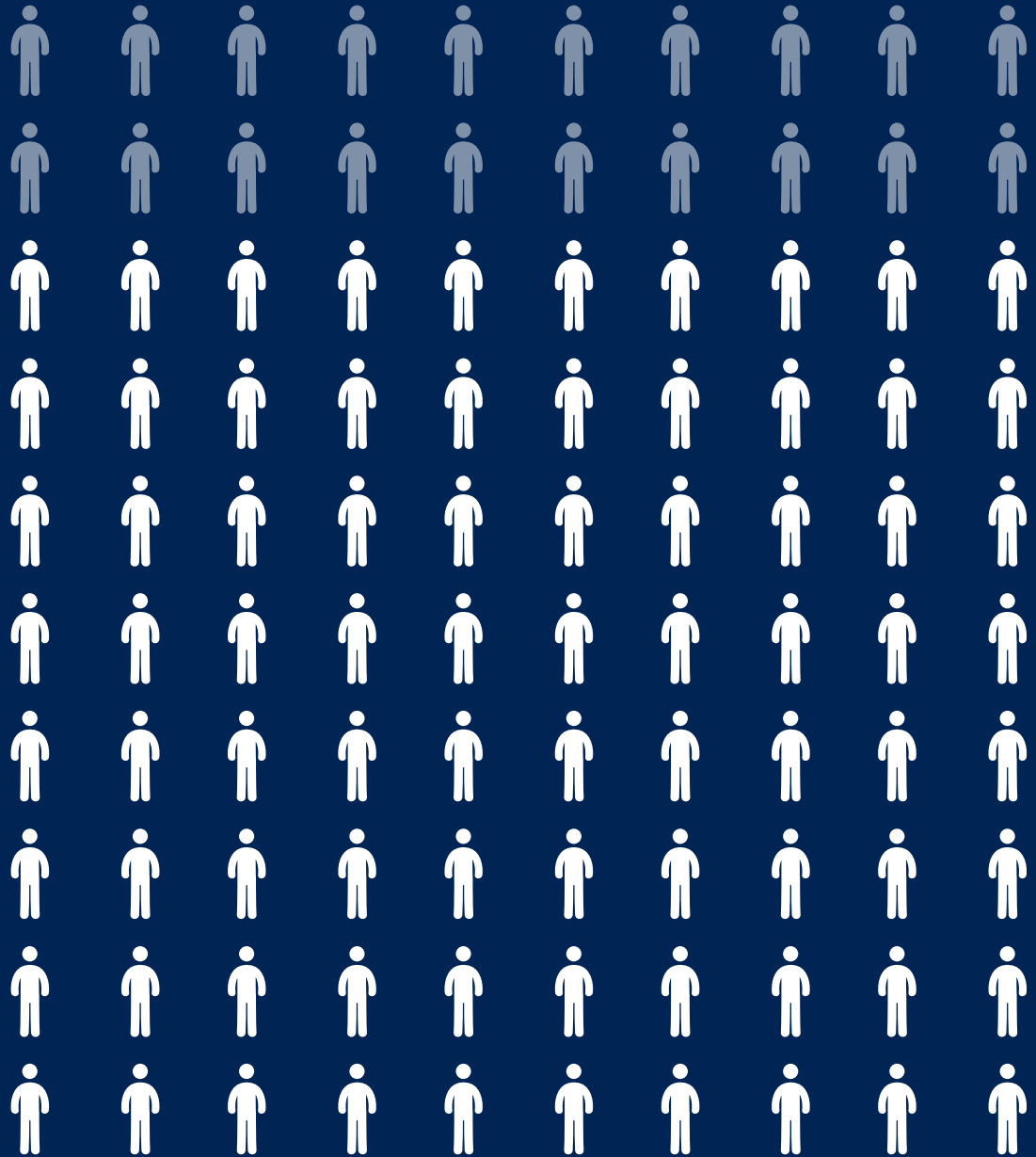
95% EXPECT brands to take a stand on equality issues
(among those that find it appropriate completely/somewhat agree T2B)

Source: Ipsos Social Values Research. Q: Now we want you to think specifically about the social value of equality (gender, race, sexual orientation, age, etc.). Please indicate your agreement with the following statements:
It is appropriate for any brand/industry to communicate their stance on equality issues. I expect brands to take a stand on equality issues in an effort to make advancements on these issues in society.

80%

of people globally agree
that it's possible for a
brand to support a good
cause and make money at
the same time

Source: Ipsos Global Trends 2023



Equality Begins at Home



**ROBUST
MEASUREMENT**

**EQUALITY VS
EQUITY IN
OPPORTUNITY**

**INCLUDE EVERYONE
IN THE
CONVERSATION.**

**MAKE IT A
STRATEGIC
PRIORITY**



Looking Ahead

Global Opportunities

By *Brishti Basu* 18th August 2020

Colourism is a form of discrimination that favours light-skinned members of the same ethnic group. Despite its major impact on communities around the globe, it's been barely discussed – until now.

How Mexican advertising featuring rich white people perpetuates racism and classism

March 25, 2019 9.30am EDT

EFJ | European
Federation of
Journalists

ABOUT EFJ ▾ NEWS

Migrants and ethnic minorities are underrepresented in media

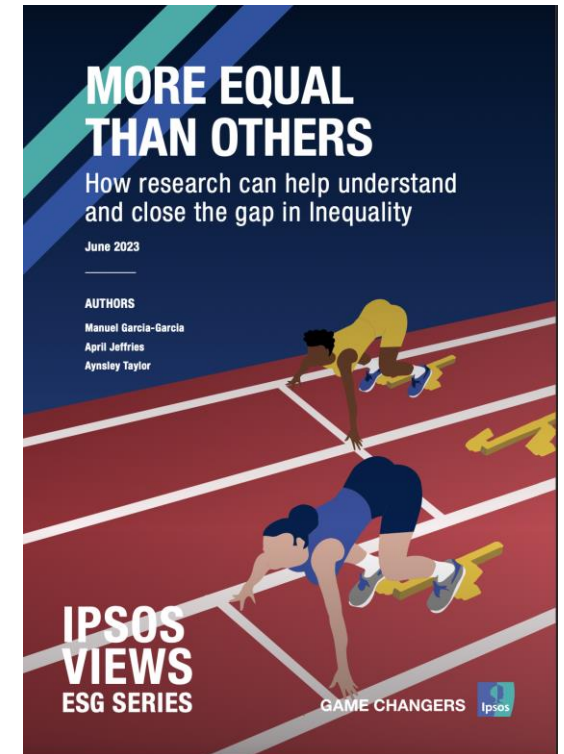
Relevant Publications



A Question of Gender



PRIDE



More Equal Than Others

Contacts



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Global Lead of Neuroscience

Global Science Organization



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Ipsos > Innovation & Knowledge > Society > Ipsos and ESG

Ipsos and ESG

Organisations are coming under an increasing amount of pressure to do business more sustainably. As a result, ESG (Environmental, Social, Governance) considerations are now a key part of companies' strategic plans and roadmaps. At Ipsos we leverage research specialisms and cross-sector expertise to understand governments, businesses, and citizens to inform better decision making when it comes to all aspects of ESG.


10 May 2023Environmental, Social and Governance (ESG)

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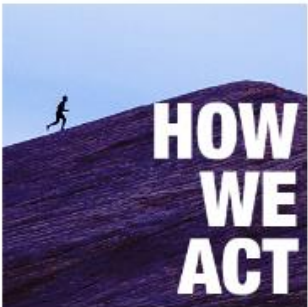

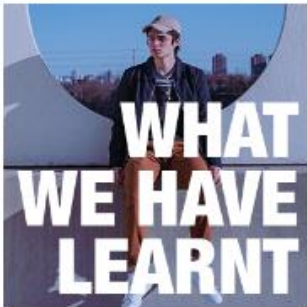
Why People, Planet & Prosperity matter



Whilst we know that global concerns will usually be dominated by immediate issues, whether that be the COVID-19 pandemic or inflation, [Ipsos data](#) indicates climate change, poverty and social inequality remain constant and significant worries that unite people across the world.



The solution will lie in governments and industry pursuing economic, social and environmental sustainability in tandem – what we at Ipsos refer to as People, Planet and Prosperity.

“81% of Ipsos Reputation Council members say that poor ESG performance has material consequence and 55% agree that ESG has fundamentally changed the way their business operates”







KEYS

AN IPSOS WEBINAR SERIES

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[\[Webinar\] KEYS - The ESG imperative | Ipsos](#)

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THURSDAY, JULY 06
11:00 & 17:00 CEST

