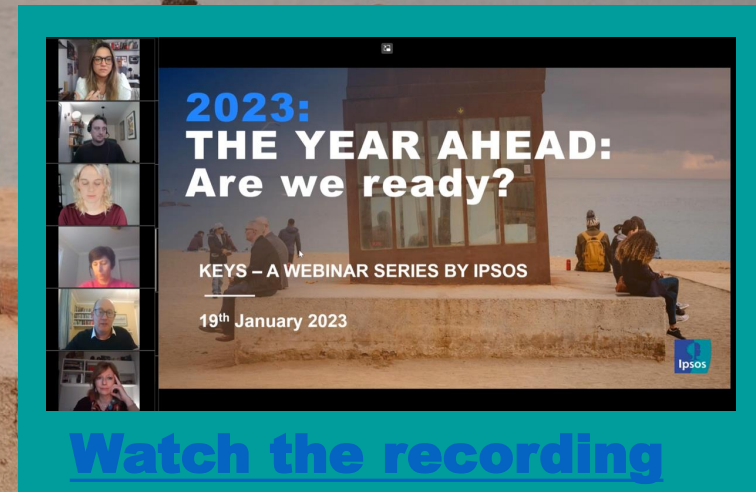


2023: THE YEAR AHEAD: Are we ready?

KEYS – A WEBINAR SERIES BY IPSOS

19th January 2023



Introduction

Jennifer Hubber
Head of Global Client Organisation, Ipsos

Into 2023: The Public Mood

Simon Atkinson
Chief Knowledge Officer, Ipsos

Risk and Resilience

Luda Andriyevska
Research Director, Public Affairs, Ipsos in the US

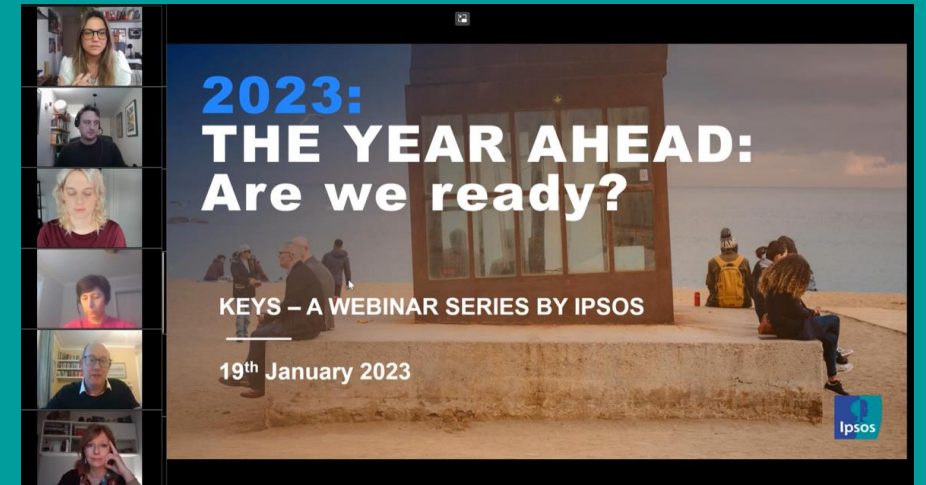
Reputation Matters

Carl Phillips
Research Director, Corporate Reputation, Ipsos in the UK
Priscilla Branco
Senior Manager, Public Affairs/Corporate Reputation, Ipsos in Brazil

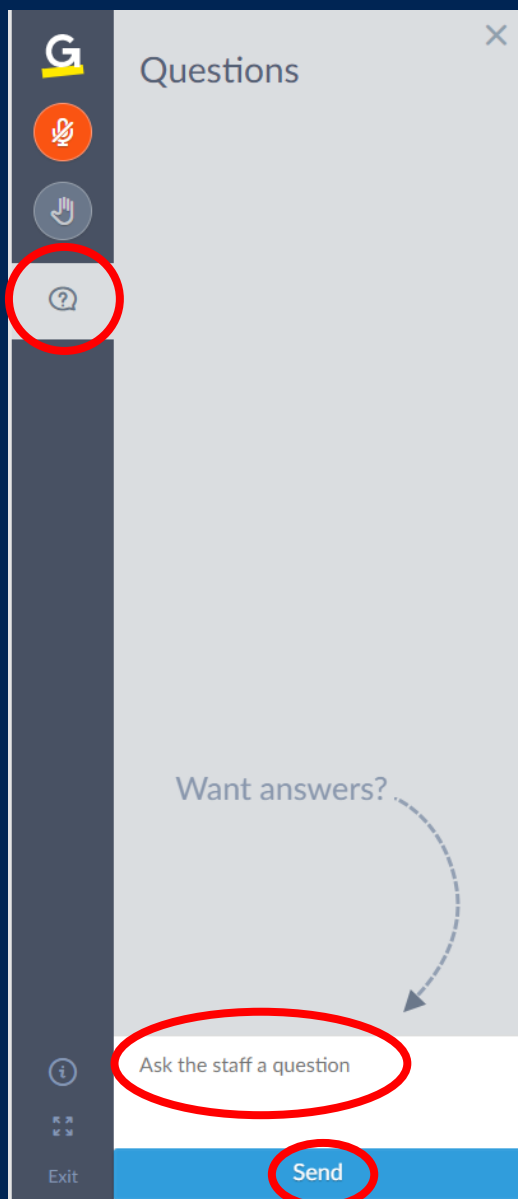
Welcome to the Metaverse

Katelyn Faulks Hall
Director of UX Research, Ipsos in the US

AGENDA




[Watch the recording](#)



QUESTION TIME

Do you have questions for our panellists?

Please send them by clicking on the  the left panel.

You can ask your question at any time during the session.

2023:
THE YEAR AHEAD:
Are we ready?

2022-2023

LOOKING BACK LOOKING FORWARD

The Public Mood

Simon Atkinson

2022-2023 LOOKING BACK

The “return” of inflation



[Download the report](#)

LOOKING BACK: DECEMBER 2021



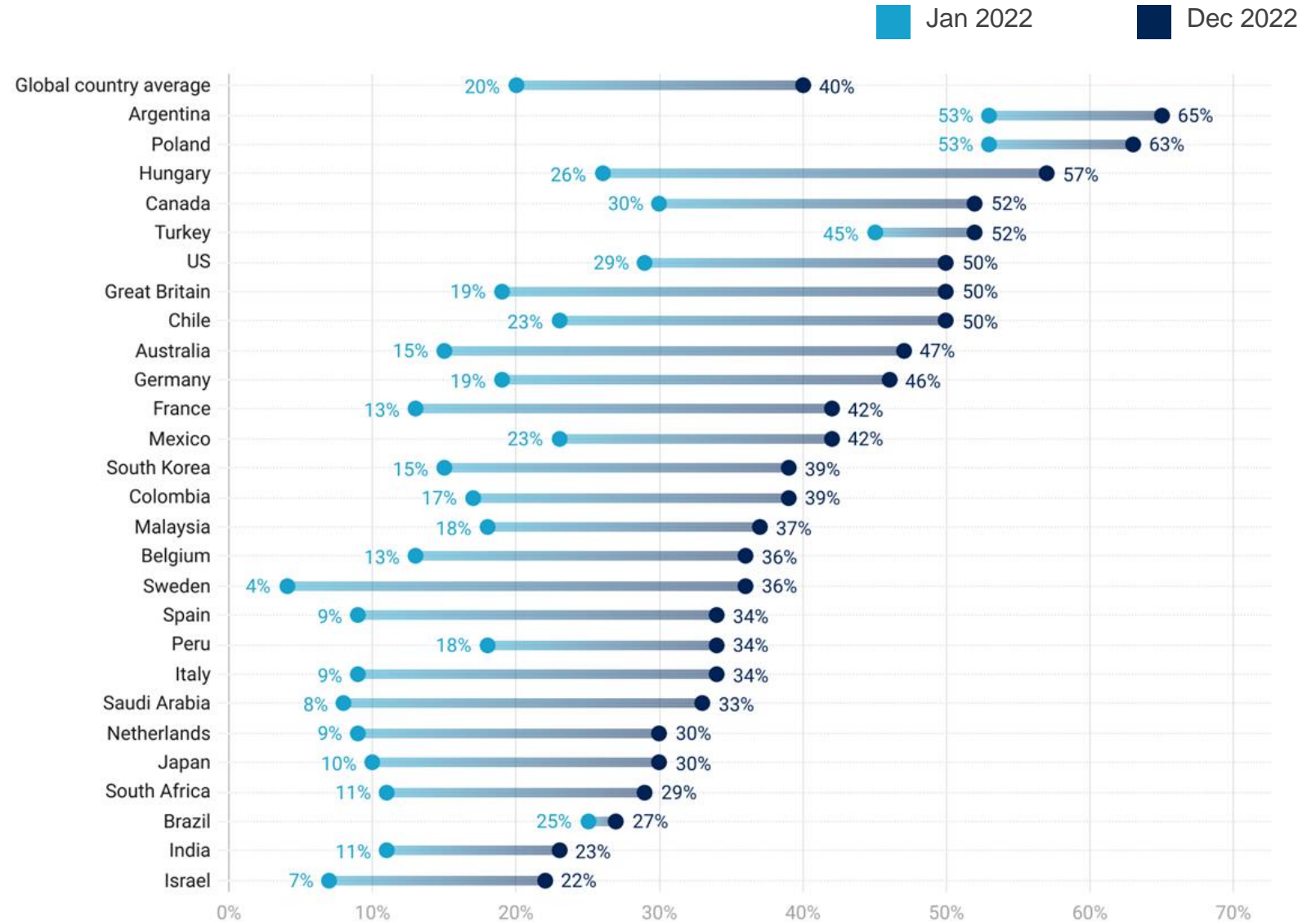
19% mention inflation as a big issue facing their country, ranked **7th** out of 18 issues

HOW IT STARTED... HOW IT'S GOING

% mentioning inflation among
the 3 “most worrying” issues
facing their country



Source: Ipsos Global Advisor. Download the results [here](#)
Base: Representative sample of 19,524 adults aged 16-74 in 27 participating countries,

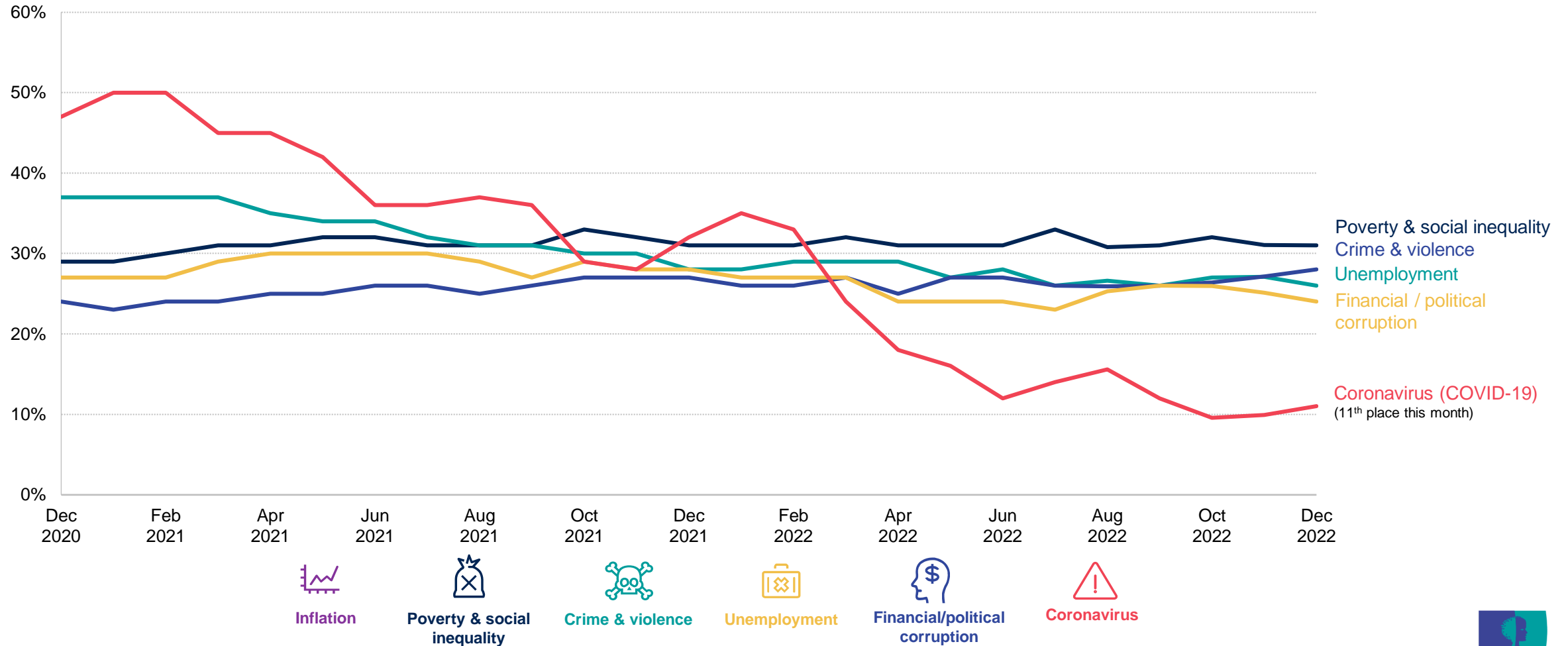


LOOKING BACK:

THE FALL OF COVID

Top global concerns over the past two years

December 2020 – December 2022 (Global country average)

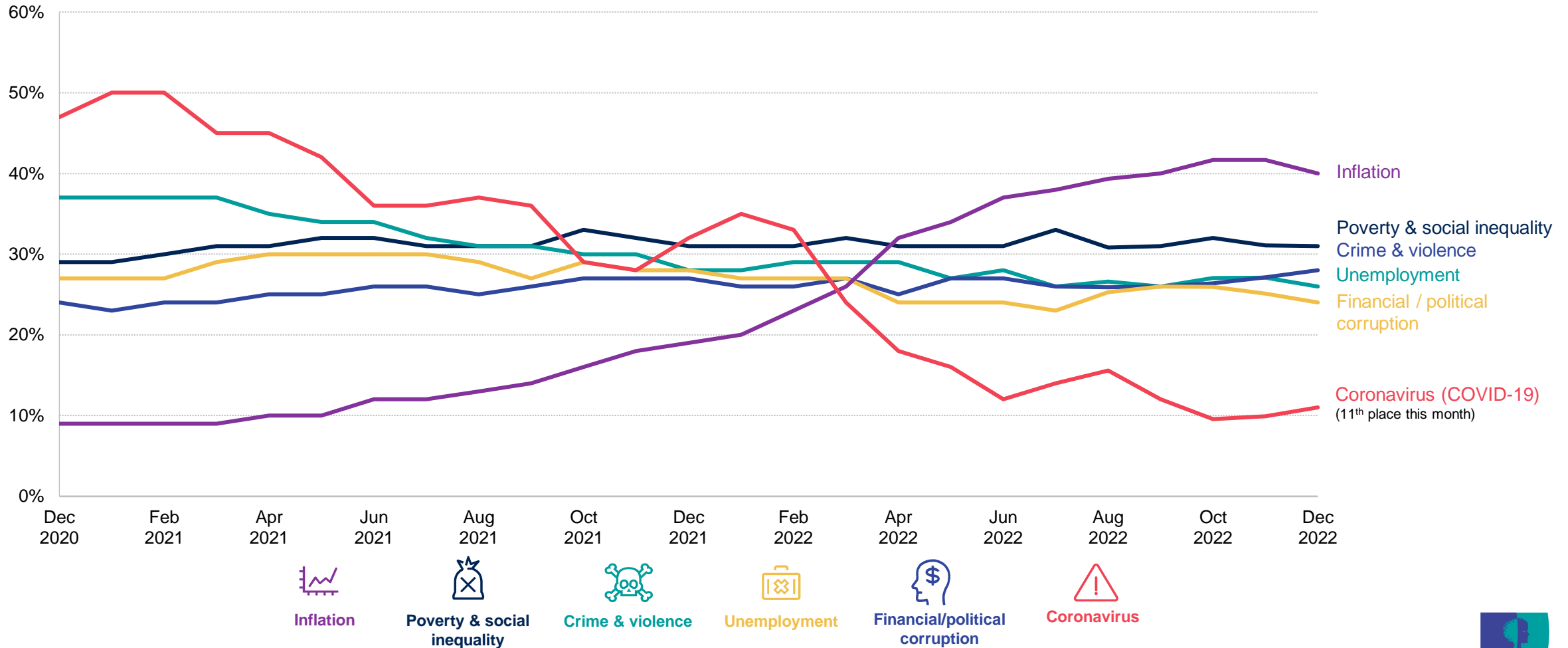


LOOKING BACK:

THE RISE OF INFLATION

Top global concerns over the past two years

December 2020 – December 2022 (Global country average)

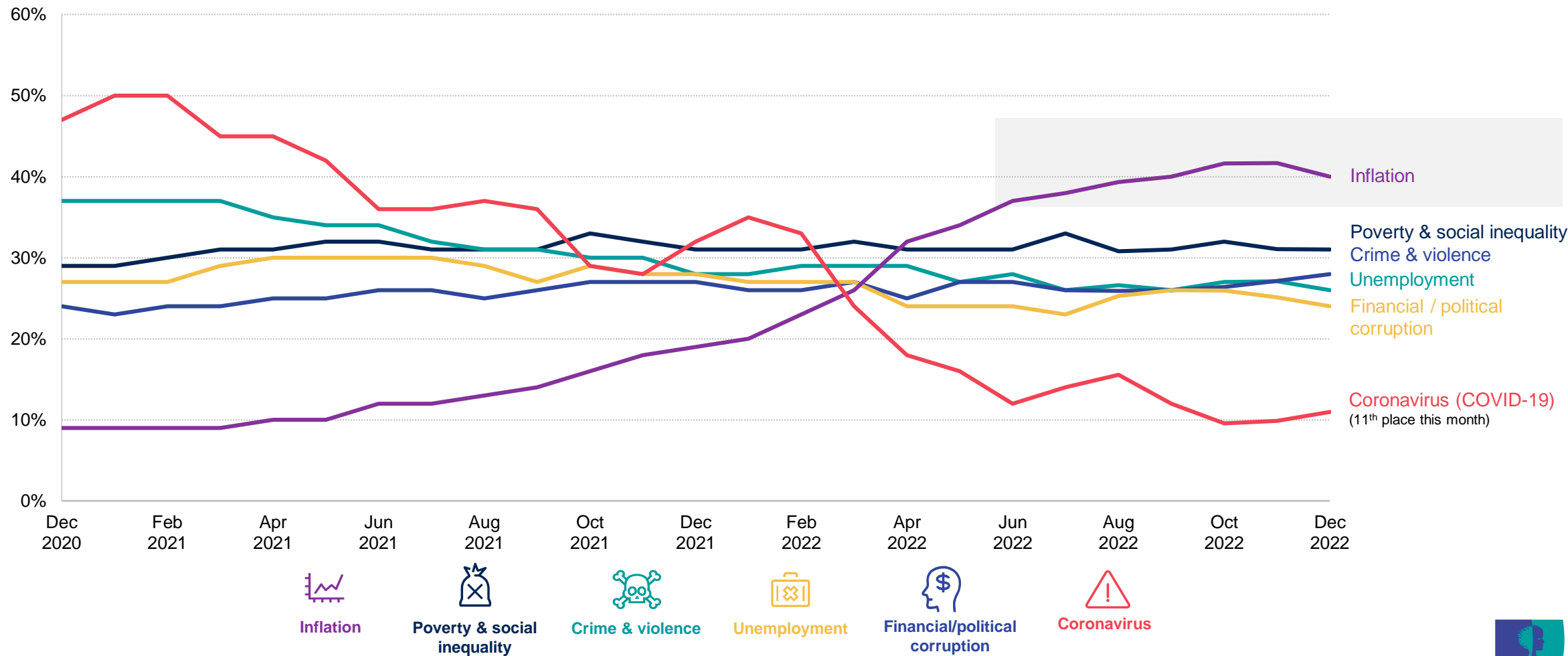


LOOKING FORWARD:

HAS INFLATION PEAKED?

Top global concerns over the past two years

December 2020 – December 2022 (Global country average)



2022-2023

LOOKING BACK

LOOKING FORWARD



2023 PREDICTIONS SURVEY

A 36-country study

<https://www.ipsos.com/en-uk/ipsos-global-predictions-2023>

GAME CHANGERS



LOOKING BACK:

THE YEAR IN REVIEW



**“this year was a bad
year for my country”**

Please indicate if you agree very much, agree somewhat, disagree somewhat or disagree very much with the following statements:

2022 was a bad year for my country

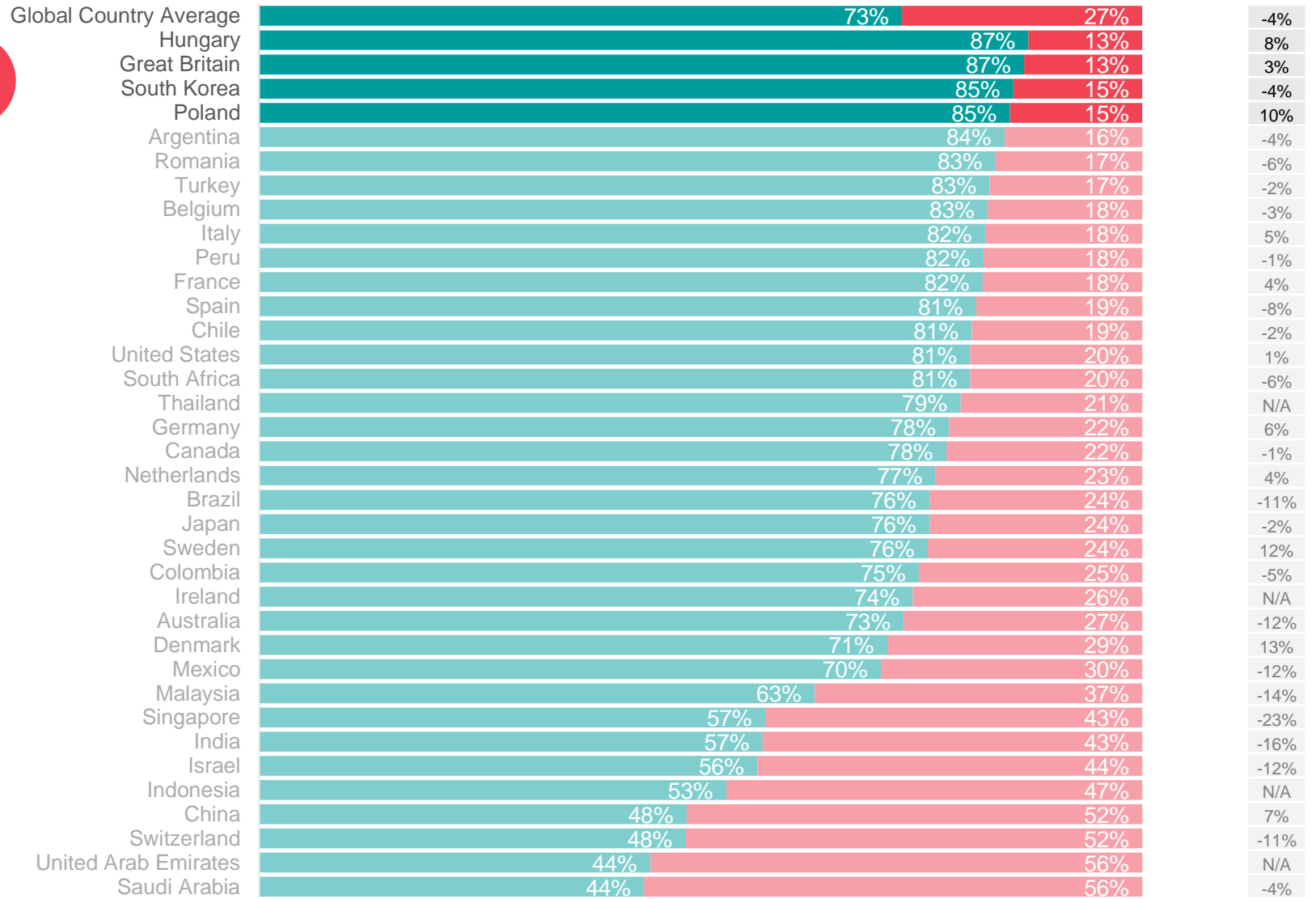
Base: 24,471 adults aged 18-74 in the United States, Canada, Republic of Ireland, Israel, Malaysia, South Africa, and Turkey, 20-74 in Thailand, 21-74 in Indonesia and Singapore, and 16-74 in 26 other markets. Friday, October 21 - Friday, November 4, 2022

Market

Agree

Disagree

Change vs 2021

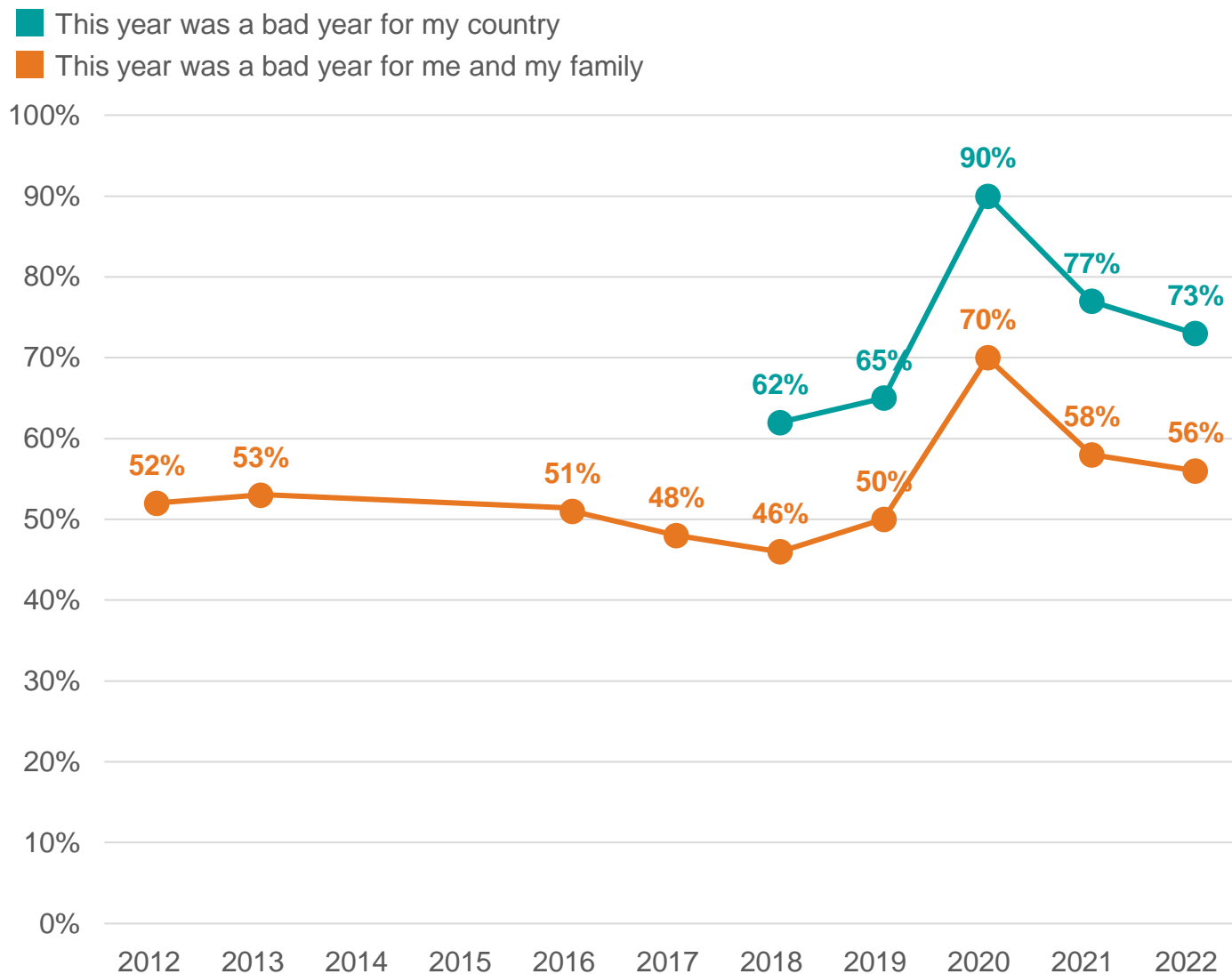


2022 in an historical context

Please indicate if you agree very much, agree somewhat, disagree somewhat or disagree very much with the following statements...?

Base: 24,471 adults aged 18-74 in the United States, Canada, Republic of Ireland, Israel, Malaysia, South Africa, and Turkey, 20-74 in Thailand, 21-74 in Indonesia and Singapore, and 16-74 in 26 other markets. Friday, October 21 - Friday, November 4, 2022

Global averages - % agree



LOOKING FORWARD:

A SPIRIT OF OPTIMISM?



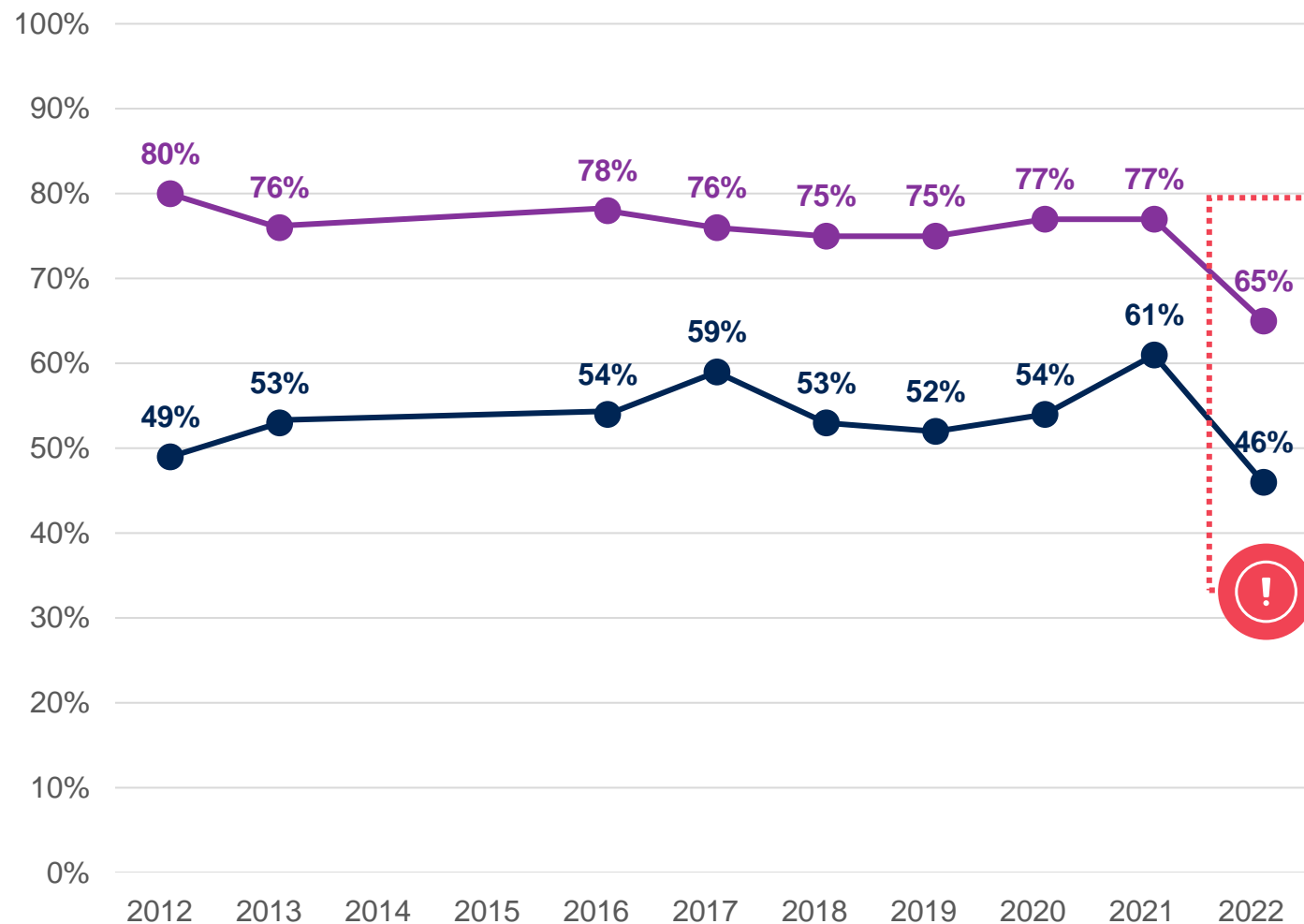
Outlook for 2023

Please indicate if you agree very much, agree somewhat, disagree somewhat or disagree very much with the following statements...?

Base: 24,471 adults aged 18-74 in the United States, Canada, Republic of Ireland, Israel, Malaysia, South Africa, and Turkey, 20-74 in Thailand, 21-74 in Indonesia and Singapore, and 16-74 in 26 other markets. Friday, October 21 - Friday, November 4, 2022

Global averages - % agree

- I am optimistic that next year will be a better year than this year
- The global economy will be stronger next year than it was this year



THE YEAR AHEAD:
CAUSES FOR CONCERN



ECONOMY: 79% say
“prices in my country will rise
more quickly than incomes”

+ 4 POINTS

For each of the following, please tell me how likely or unlikely you think they are to happen...?

Prices in my country will increase faster than people's incomes

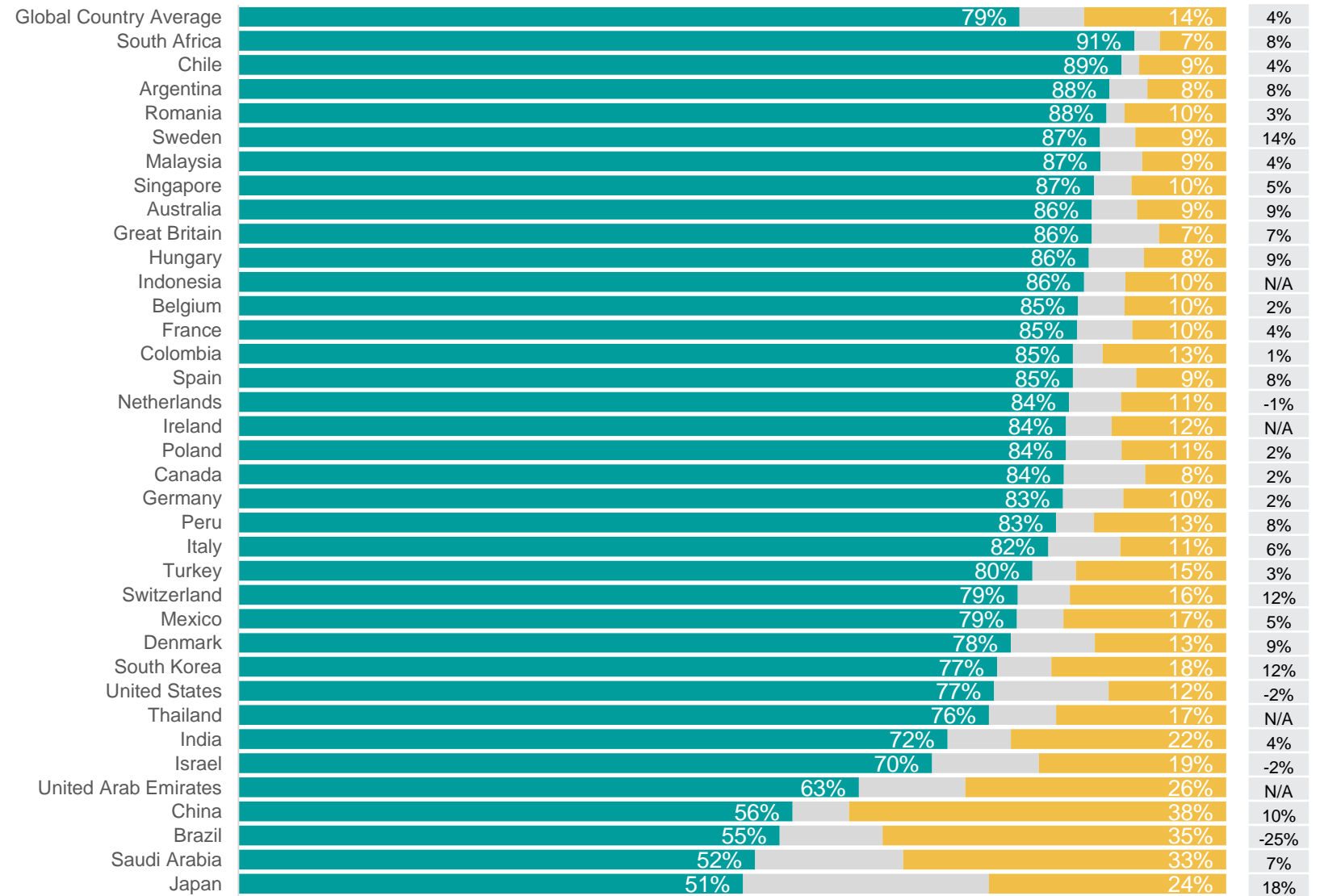
Base: 24,471 adults aged 18-74 in the United States, Canada, Republic of Ireland, Israel, Malaysia, South Africa, and Turkey, 20-74 in Thailand, 21-74 in Indonesia and Singapore, and 16-74 in 26 other markets. Friday, October 21 - Friday, November 4, 2022

Market

Likely

Unlikely

Change vs 2021



THE YEAR AHEAD:

CAUSES FOR CONCERN



ECONOMY

79% say “prices in my country will rise more quickly than incomes” (+4 points)

SECURITY

48% say “nuclear weapons will be used in a conflict somewhere in the world” (+14 points)

CLIMATE

57% say “this year will be the hottest year on record in my country”

For each of the following, please tell me how likely or unlikely you think they are to happen...?

2023 will be the hottest year on record

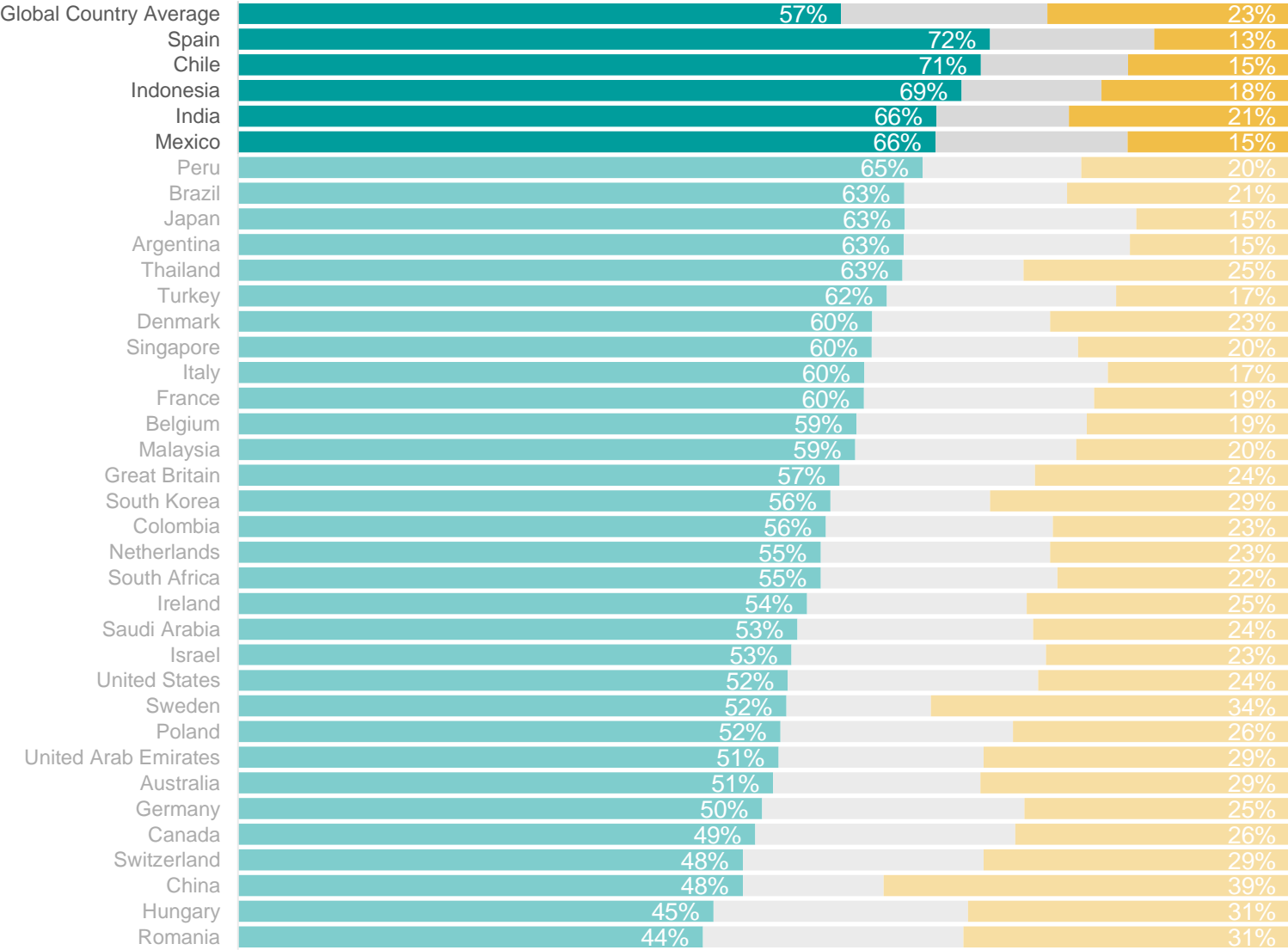
Base: 24,471 adults aged 18-74 in the United States, Canada, Republic of Ireland, Israel, Malaysia, South Africa, and Turkey, 20-74 in Thailand, 21-74 in Indonesia and Singapore, and 16-74 in 26 other markets. Friday, October 21 - Friday, November 4, 2022



Market

Likely

Unlikely



THE YEAR AHEAD: REASONS TO BE CHEERFUL?



60% say “there will be no further lockdowns in my country”



56% say “many more people will live their life in virtual worlds”



2023: THE YEAR AHEAD: Are we ready?



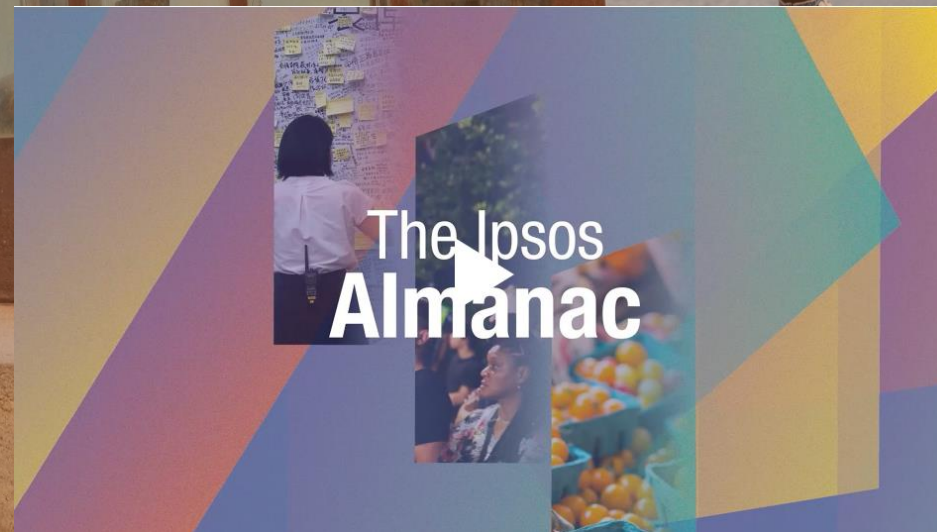
Download the results: [What Worries the World](#) and [2023 Predictions](#)

2023: THE YEAR AHEAD: Are we ready?

OVERVIEW

Welcome to the Ipsos Almanac

We look back at the events of 2022 and how consumers and citizens have reacted, and then reflect on what's next in 2023.



Explore the [Ipsos Almanac](#) including month-by-month review of 2022 and analysis from 30 countries





RISK AND RESILIENCE

Tracking the Experiences of Ukraine

Luda Andriyevska

Risk and Analytics Division, Ipsos Public Affairs, US

1/19/2023

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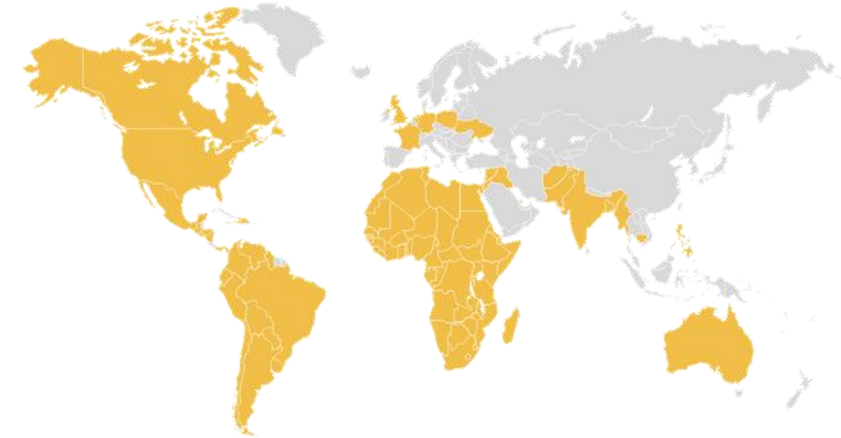
COMBINING SURVEY AND REMOTE SENSING RESEARCH METHODS

Combining Survey and Remote Sensing Data

The Risk and Analytics Division (RAD) at Ipsos US Public Affairs is a specialized unit leveraging technology and alternative data alongside survey data collected globally

- Remote Sensing Data Collection*

- Anonymized Human Mobility
- Satellite Imagery (Optical, Infrared, Multi-Spectral)
- Internet of Things (IoT) Sensors
- Drone
- Surveys
- *Full integration with ground survey collection*



- Teams Engaged

- Ipsos RAD team works with Ipsos offices in different countries (Ukraine, Kenya, Brazil, etc.)
- Local teams help to guide the research strategy, collect and analyze data
- Ipsos RAD team has multidisciplinary teams of researchers: Geospatial and Imagery Analysts, Sampling Statisticians, Developers, and Data Scientists

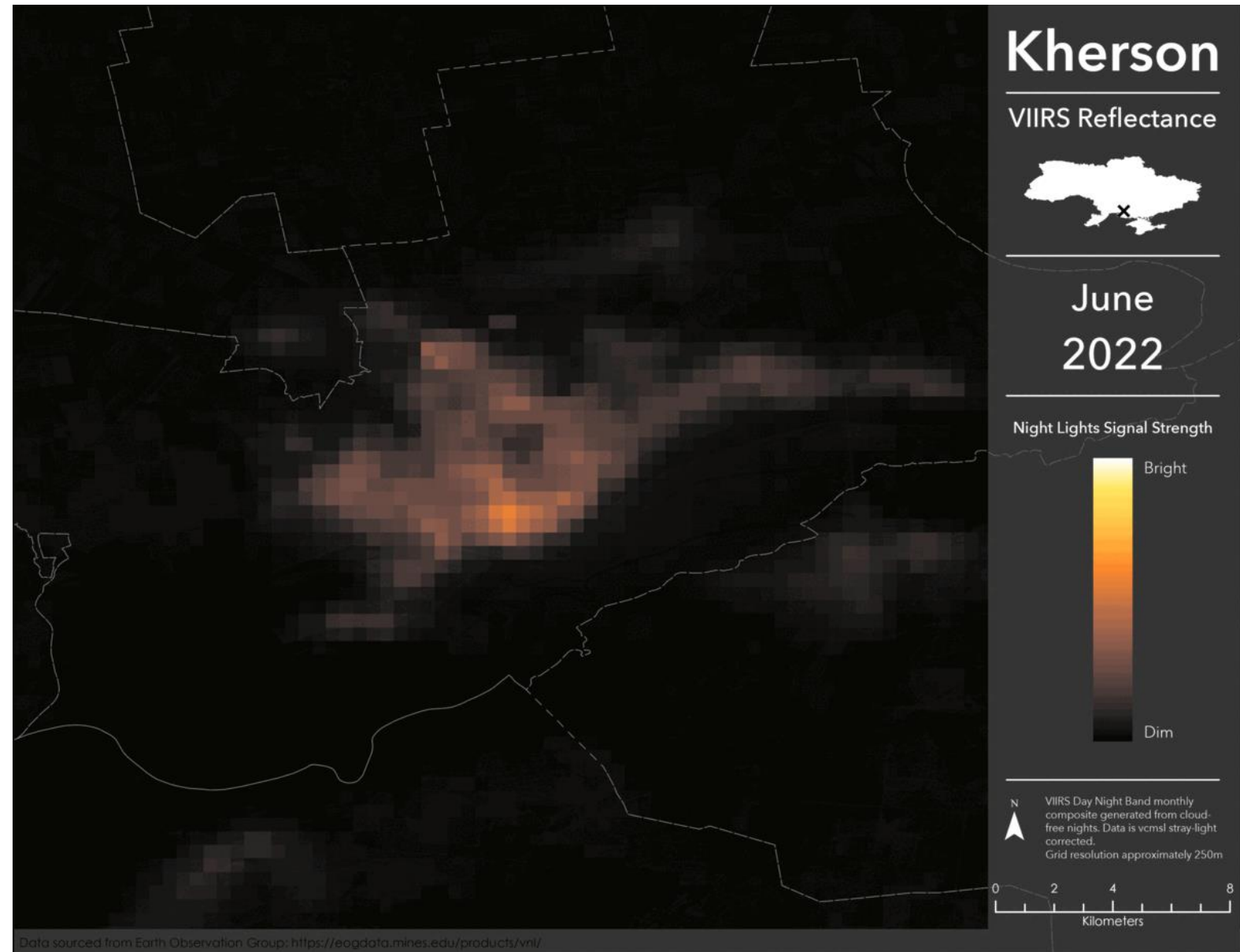
Remote Sensing & Data Integration
Past Performance

- Applications

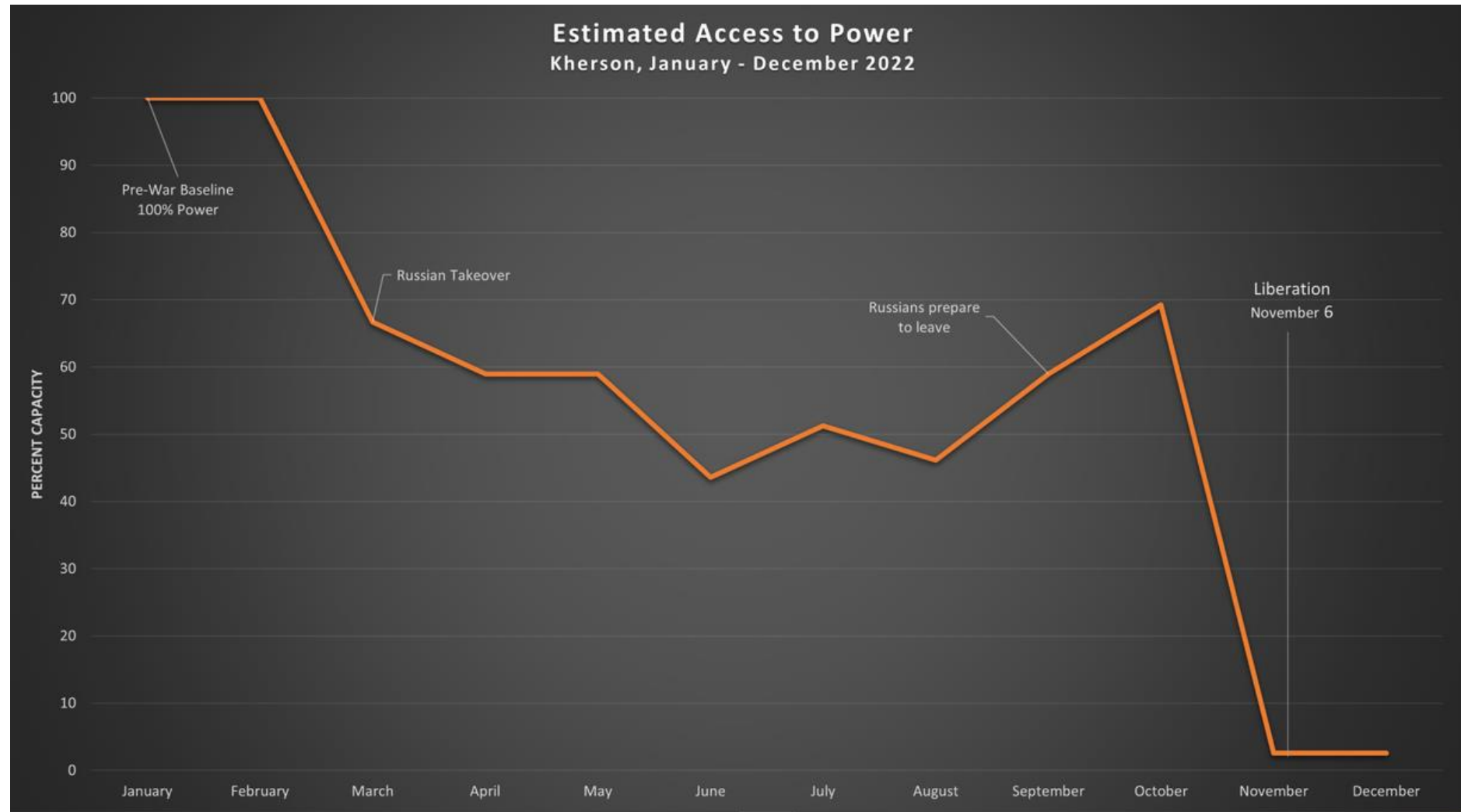
- Supporting Bilateral and Multilateral orgs, INGOs and Fortune 500s
- ESG & Social Impact Issues Monitoring

VIIRS Analysis– in- depth look at Kherson Ukraine

- **Visible Infrared Imaging Radiometer Suite (VIIRS)** data is taken by satellite at night to highlight where lights are present
- Ipsos uses VIIRS data to see which areas of the country or a city have access to electricity, use fires for livelihoods.

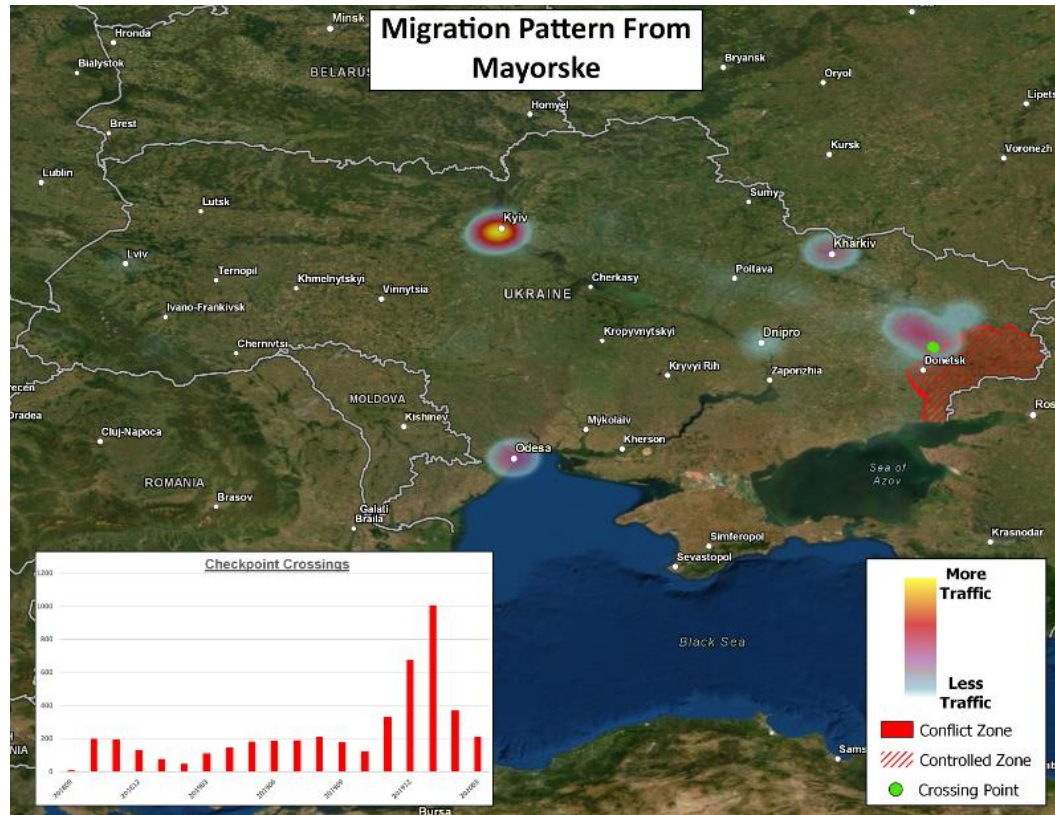


VIIRS Analysis of Kherson in 2022



Examples of Using Anonymized Human Mobility

Ukraine

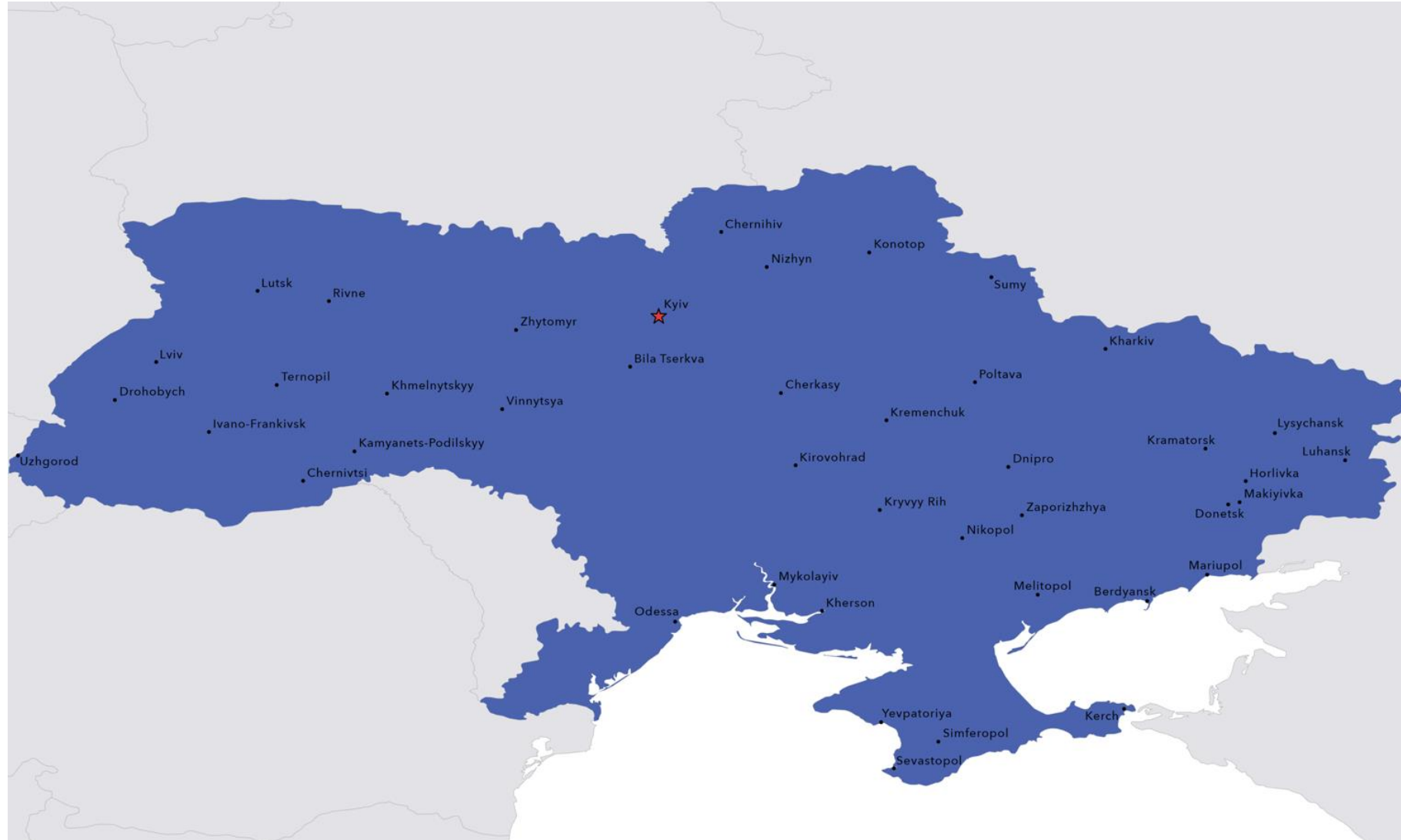


UKRAINE RESILIENCE MONITOR

WHAT IPSOS IS TRACKING IN UKRAINE?

- Public opinion in Ukraine
 - Access to basic services, resilience of the Ukrainian people, national and regional governments, performance of the emergency services
 - Who do Ukrainians trust to plan and execute the reconstruction?
- Energy sector bombings and its impact on Ukraine's economy
- Public opinion on the war in Ukraine in more than 30 countries
- Economic support for Ukraine from the US, UK, Canada and EU
- Potential of a new Russian offensive in Ukraine and flow of refugees to EU

MAP OF UKRAINE



RECENT RESEARCH ON UKRAINE

Basic Services

- Half of the population in Kharkiv and Mykolaiv have no access to heat
- 7 in 10 in Mykolaiv don't have access to safe drinking water
- Access to electricity has diminished all around Ukraine since October 2022 when bombing on energy infrastructure started
 - Residents of Kherson city lost electricity in November 2022 upon the Russian troops' retreat

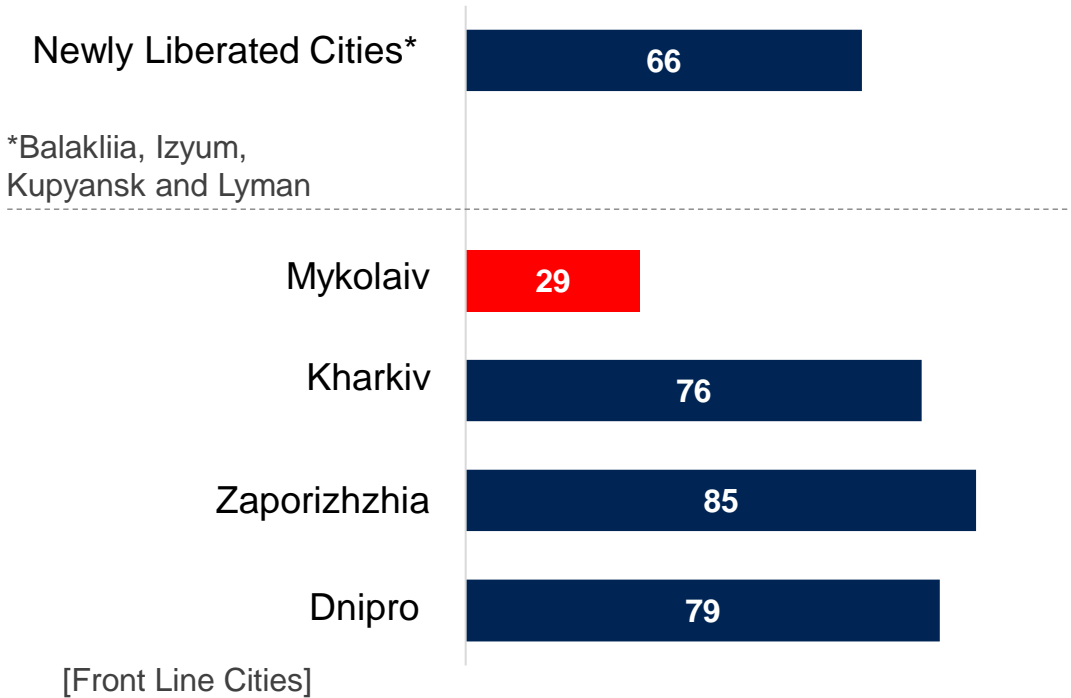
Employment and Economy

- Majority of those living in newly liberated and front-line cities report significant income loss since start of the war
 - Only 1 in 4 in newly liberated cities are employed
 - 2 in 5 in Kharkiv city are employed
- Over 75% of those displaced by the war plan to return home

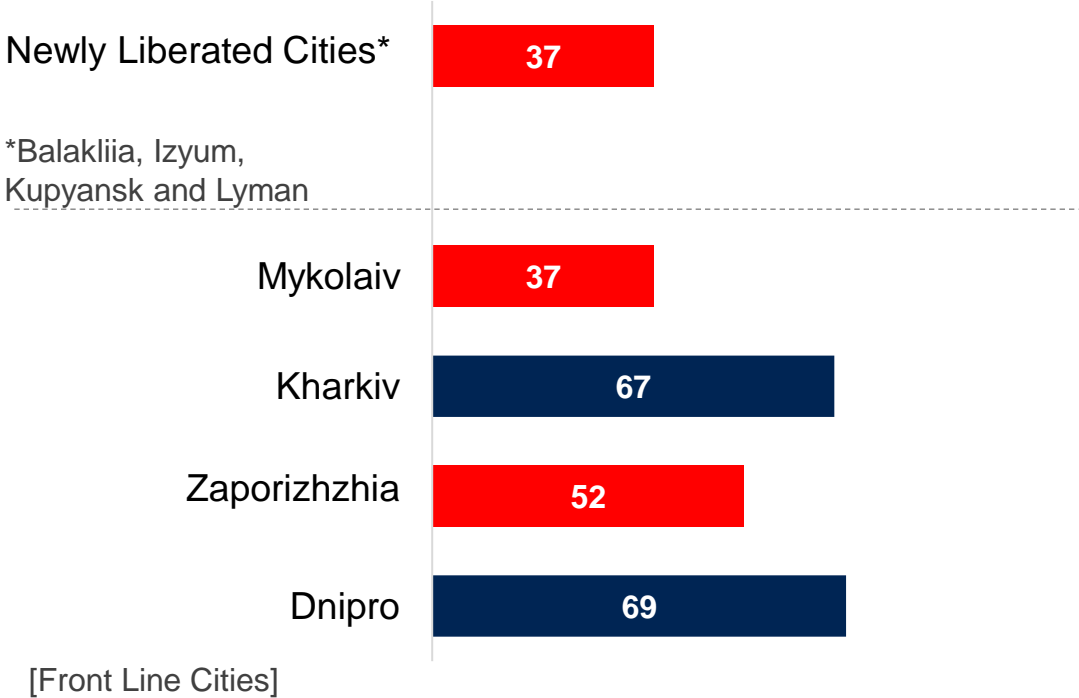
LESS THAN 30% OF MYKOLAIV RESIDENTS HAVE SAFE DRINKING WATER

I have access to :

Safe Drinking Water



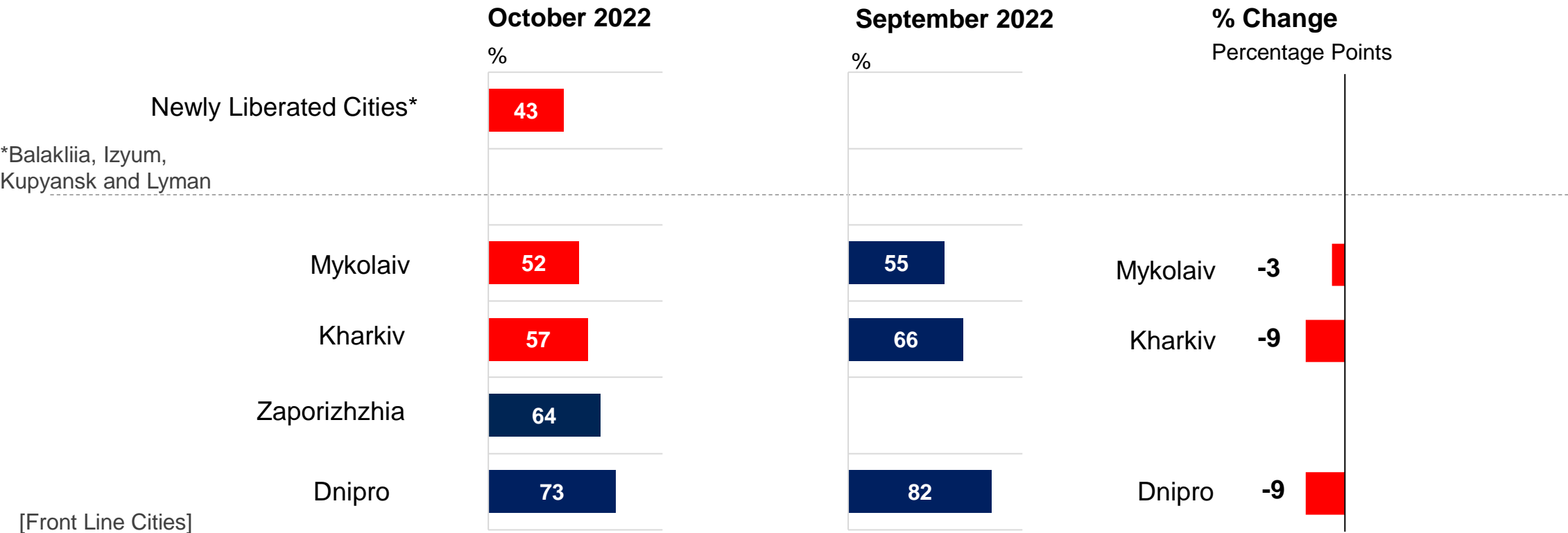
Hot Water



Q18. Current Access to Services: **At the place where you live at the moment (your home or temporary housing), do you have access to...**

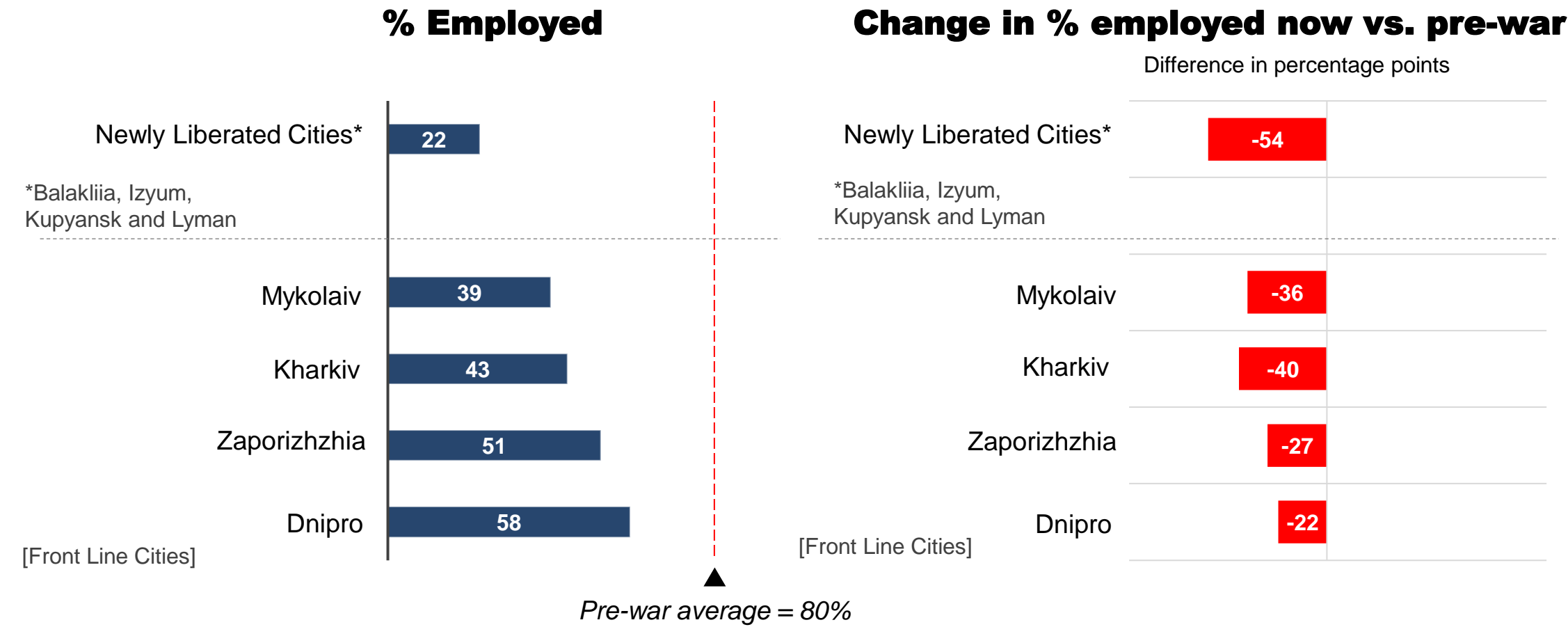
HEAT ACCESSIBLE TO ONLY 1 IN 3 IN NEWLY LIBERATED CITIES, RECEDING IN OTHER CITIES

% Access to Heat



Q18. Current Access to Services: **At the place where you live at the moment (your home or temporary housing), do you have access to...**

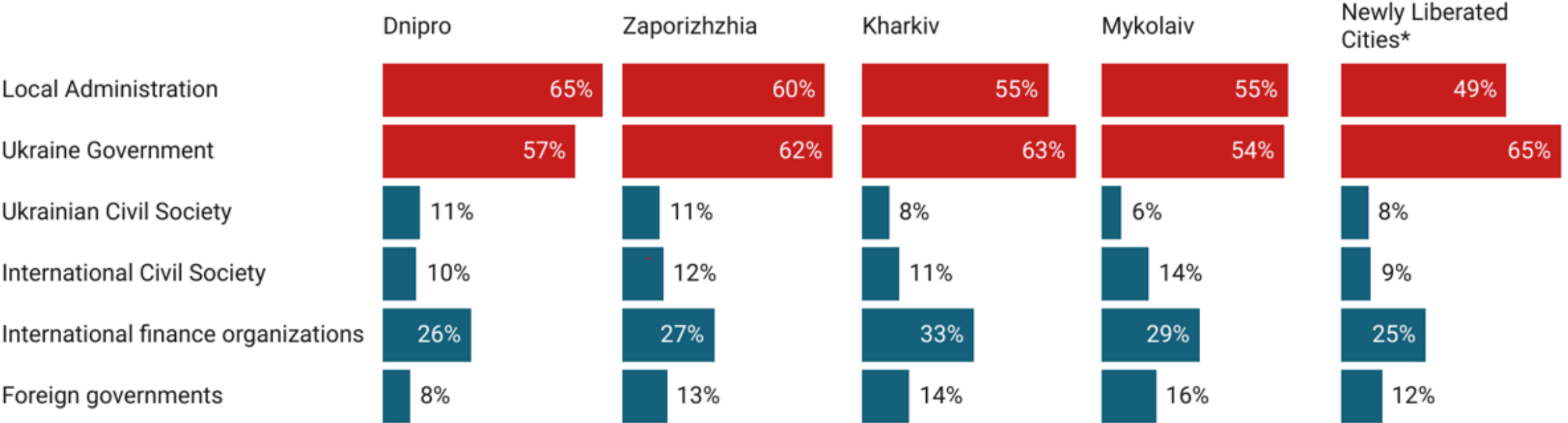
ONLY ONE QUARTER OF NEWLY LIBERATED CITIES' RESIDENTS ARE EMPLOYED



Q12. Current Employment: **Do you work now (we are talking about paid employment)?**
Q13. Employment pre-war: **Please, indicate what was your employment status before 24 February 2022**

MAJORITY BELIEVE THE UKRAINIAN GOVERNMENT SHOULD BE RESPONSIBLE FOR PLANNING THE RECONSTRUCTION

Percent who believe the following institutions should take responsibility for planning, executing, and overseeing reconstruction in the following cities



**Balakliia, Izyum, Kupyansk and Lyman | Q20. In your opinion, which authority should take the responsibility to plan/execute/oversee the damage reconstruction in [CITY]?*

Source: Ipsos Ukraine Resilience Monitor | October 2022



WHAT LIFE IN UKRAINIAN CITIES LOOKS LIKE

Power generators, candles and solar lamps are in high demand in Ukraine



HOSPITALS OPERATE IN DARKNESS



UKRAINE WAR IMPLICATIONS

- Global economy will continue to see **disruptions** in many sectors that are impacted by the war in Ukraine:
 - Energy
 - Agriculture
 - Food processing
 - Steel production
- The War in Ukraine **distracts** many governments and international institutions from
 - Climate change agenda
 - Disasters and emergencies in Africa and Asia



RISK AND RESILIENCE

Tracking the Experiences of Ukraine

Explore the [Ukraine Resilience Monitor](#) & [Voices of Ukraine](#) research

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IPSOS GLOBAL TRUSTWORTHINESS MONITOR

STABILITY IN AN UNSTABLE WORLD

Carl Phillips

Jan 2023

The global narrative is that trust in the critical institutions and sectors that govern daily life is in crisis.



In the context of the COVID-19 pandemic, the need to reset priorities and the urgency to reform systems have been growing stronger around the world. **Rebuilding trust and increasing global co-operation are crucial to fostering innovative and bold solutions to stem the pandemic and drive a robust recovery.**

Klaus Schwab, Executive Chairman of the World Economic Forum, 2021



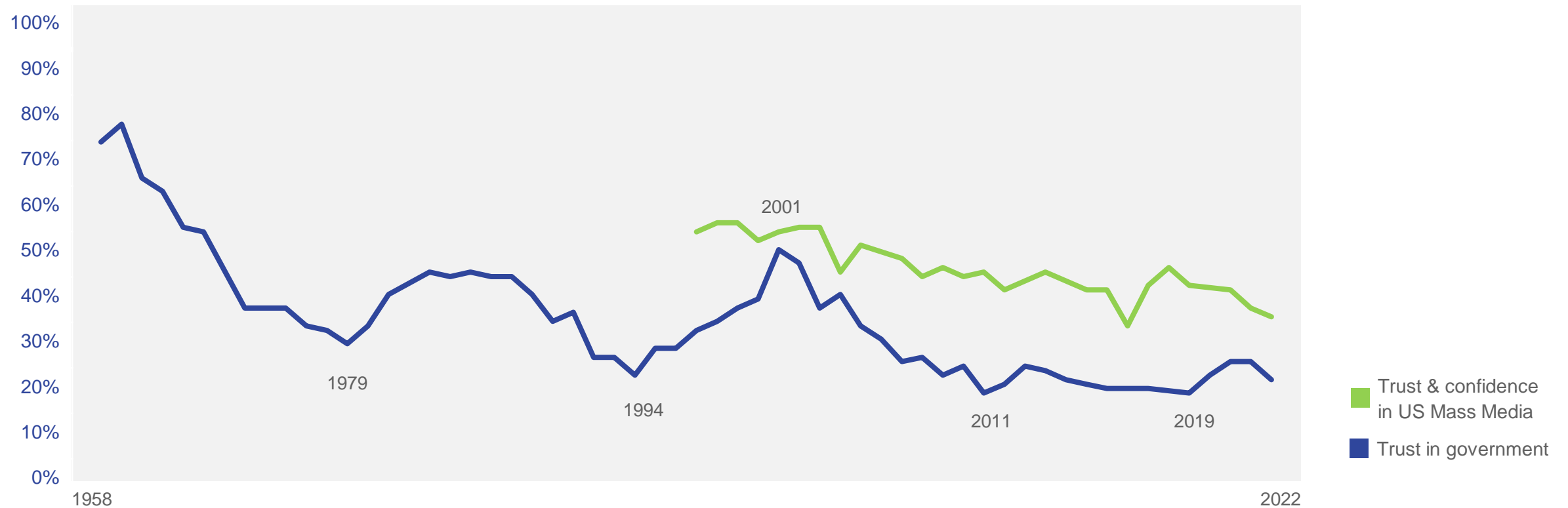
We find a world ensnared in a vicious cycle of distrust, **fuelled by a growing lack of faith in media and government.** Through disinformation and division, these two institutions are feeding the cycle and exploiting it for commercial and political gain.

Edelman Trust Barometer report, 2022

The available long term trends show fluctuations and long term decline, but nothing that could be called a crisis.

% who trust the government in Washington always or most of the time (Pew)

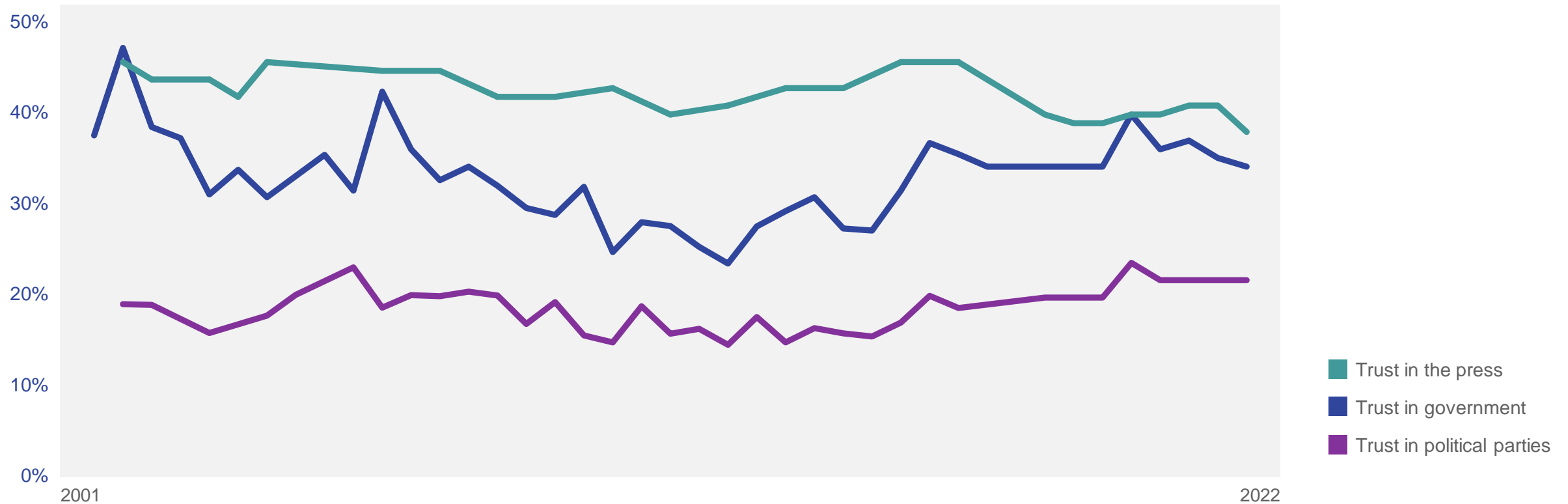
% Trust and confidence in Mass Media (US) to report news fully, accurately and fairly (Gallup)



Source: Gallup poll, and Pew Research Centre. Both USA data only.

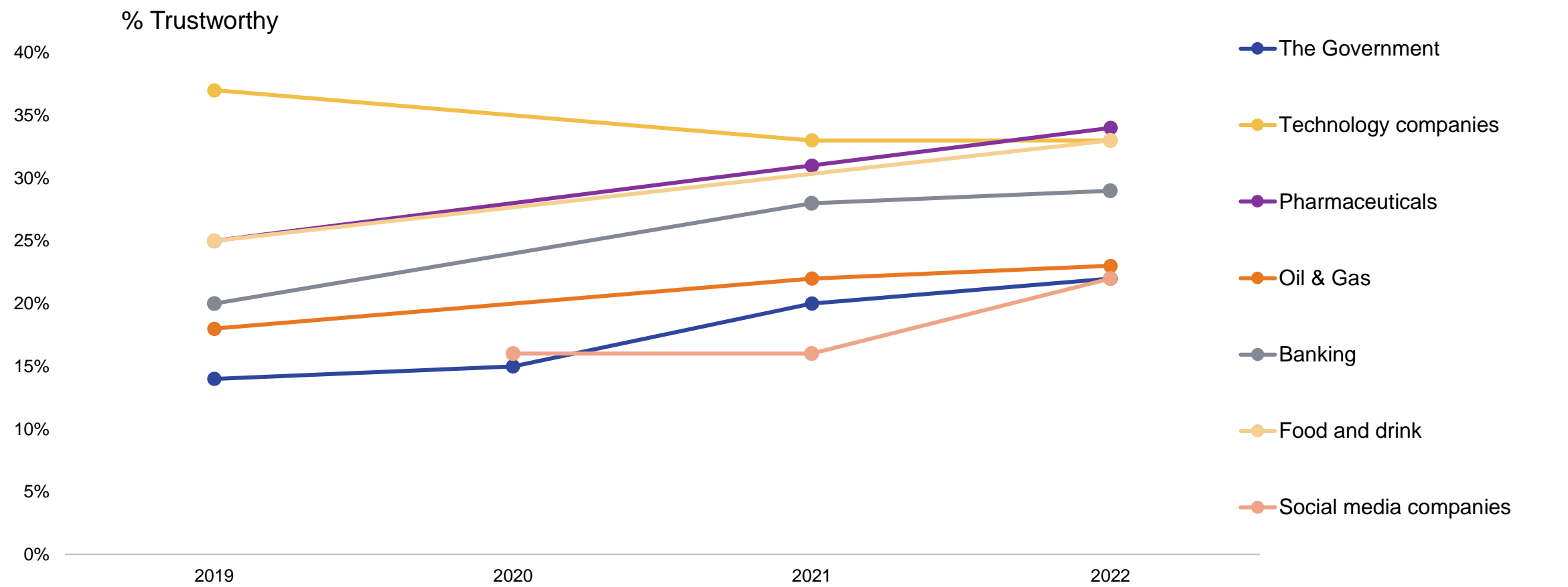
While there has been fluctuation in Europe in how much governments are trusted, the long term trends for media and political parties are stable.

I would like to ask you a question about how much trust you have in certain media and institutions. For each of the following media and institutions, please tell me if you tend to trust it or tend not to trust it. The (NATIONALITY) government/Political parties/The Press

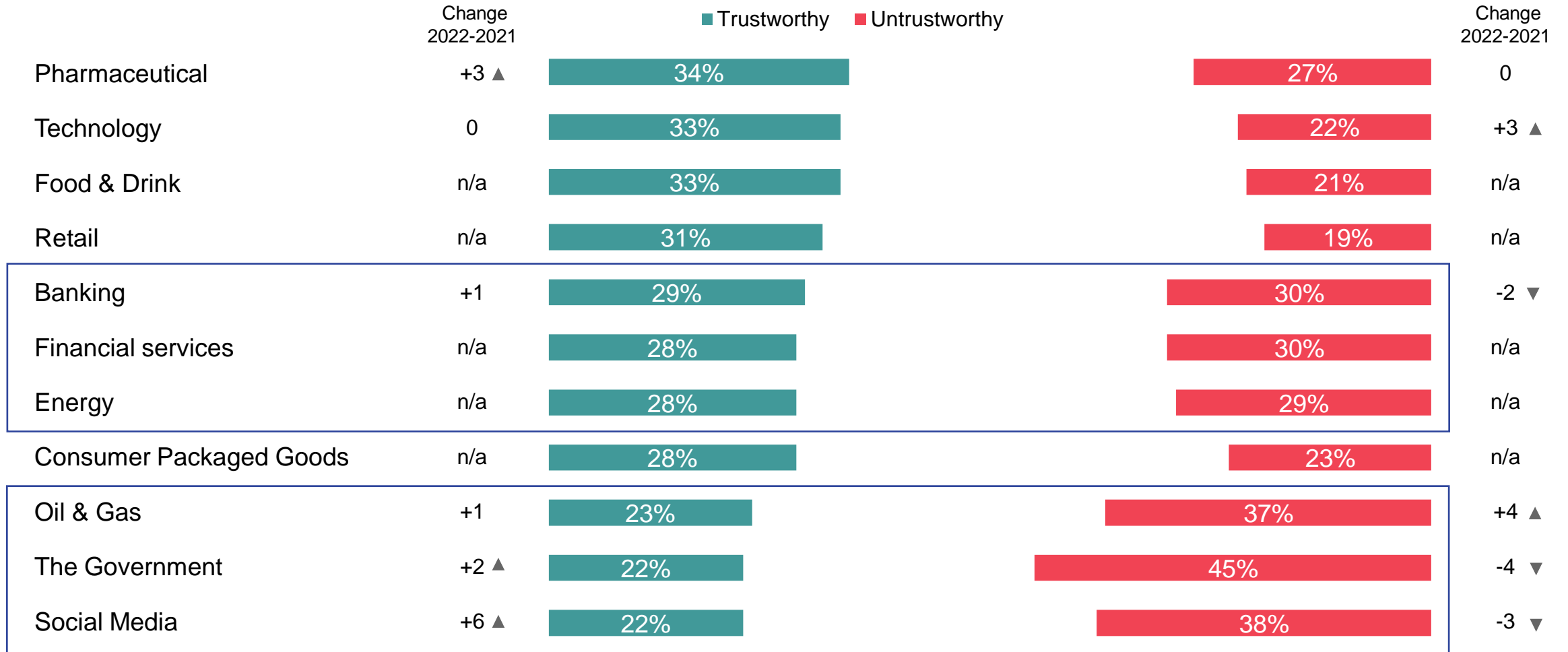


Source: Eurobarometer. Data from c. 28 markets each wave.

Ipsos's trend data shows incremental improvement for most sectors, with Tech's slow decline the outlier.

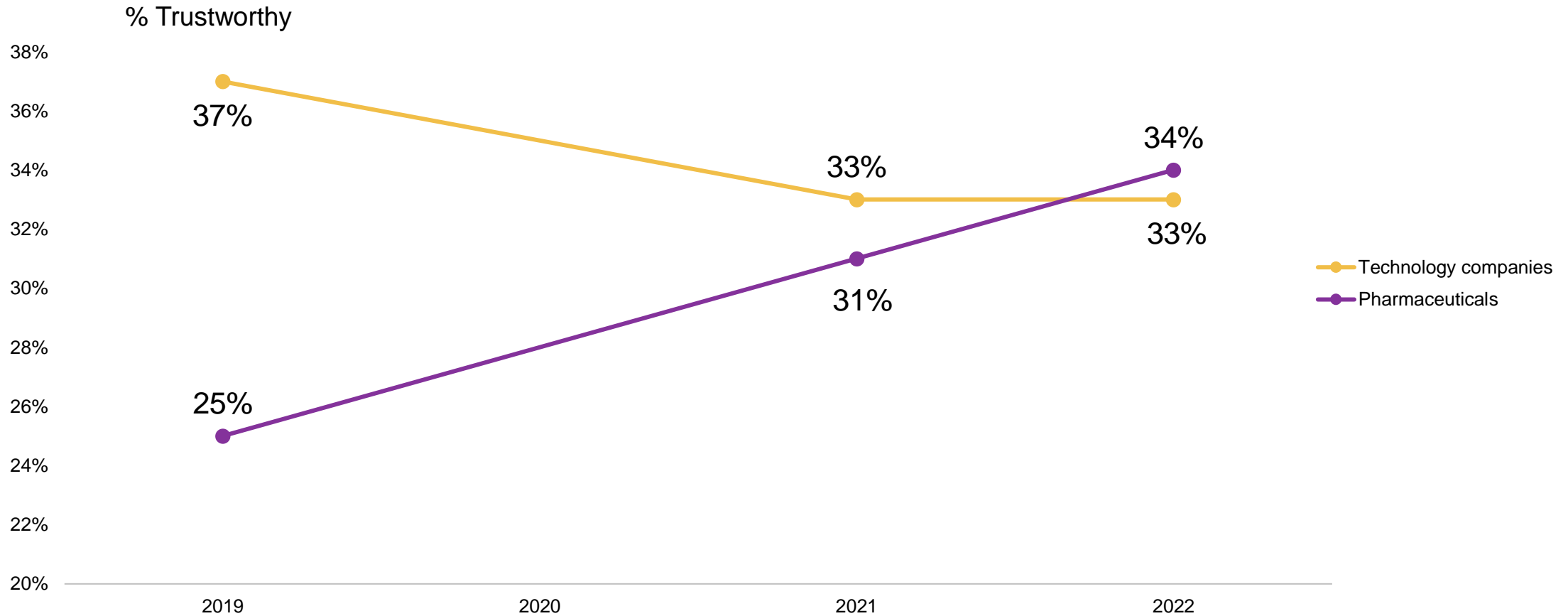


Only 12 points separate top and bottom, and six sectors are net negative.

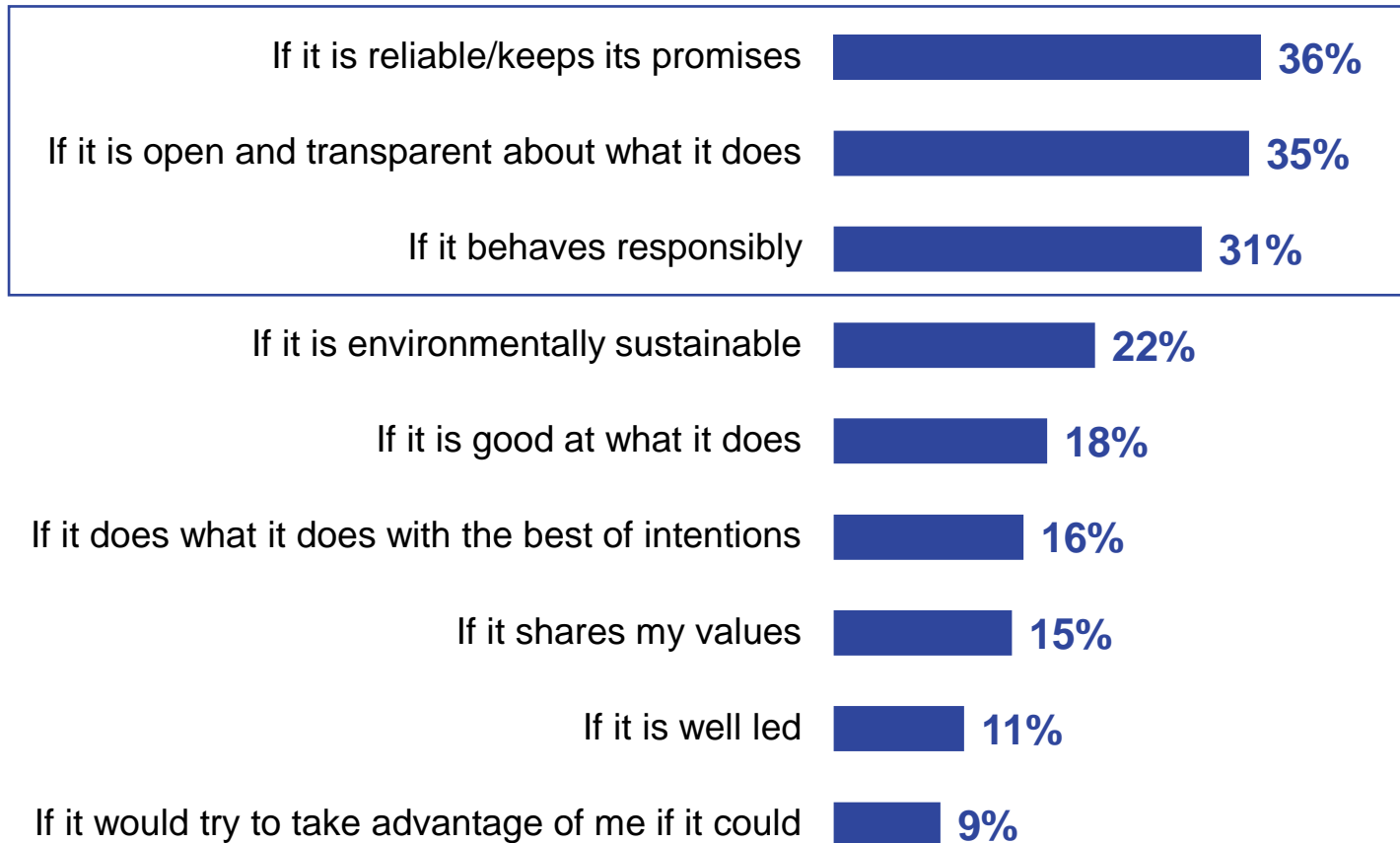


▲▼ Statistically significant difference since 2021

The spectacular rise of the Pharma sector has taken them into the top spot as the most trustworthy sector, overtaking Tech.



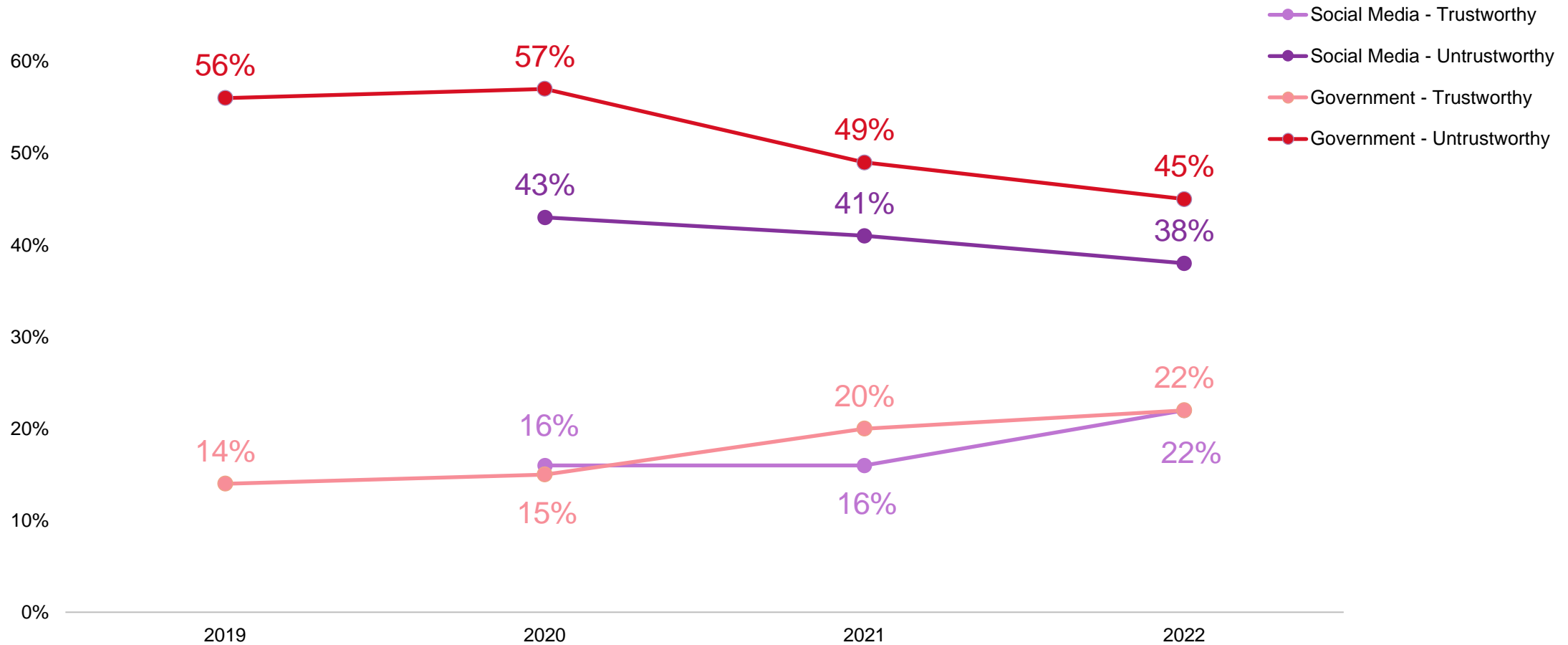
Global consumers say that reliability, transparency and responsibility are the key things that determine trustworthiness.



Pharma has improved on the top drivers of trustworthiness... but so has Tech.

	Pharmaceutical	Technology
“being reliable, keeps its promises ”	41% +4	40% +4
“open and transparent about what it does ”	35% +4	36% +4
“behaves responsibly”	42% +1	40% +5
“environmentally sustainable”	37% +4	37% +6

The two least trustworthy sectors, Social Media and Government, are both slowly improving.




Their progress is driven by improving performances on the trustworthiness driver.

	Government	Social Media
“being reliable, keeps its promises ”	25% +5	30% +7
“open and transparent about what it does ”	26% +4	30% +6
“behaves responsibly”	28% +3	31% +7
“environmentally sustainable”	26% +4	32% +6

For more details



Explore the findings at our [Trustworthiness Monitor](#) web page

A woman with short dark hair, wearing a dark jacket, is smiling and looking up at a transparent umbrella covered in warm white string lights. The background is a dark night sky filled with stars, with a soft orange and yellow glow on the horizon suggesting a sunset or sunrise. In the top left corner, there are two diagonal stripes, one teal and one blue.

The Year Ahead:

An overview of trust in Brazil

Keys - A Webinar Series by Ipsos
January 2023

Priscilla Branco
Sr. Manager, Public Affairs and Corporate
Reputation, Ipsos Brazil

215 million people live in Brazil

61 million people experience some degree of “food insecurity”

47% of the population self declares as “mixed race”

33 million people are starving

60% of the Amazon Basin is in Brazil

38% say that a top concern is Poverty and Social Inequality, making this the highest ranking issue in Brazil.

▲ The rampant inequality in Brazil leaves its marks on social relationships and on the level of trust among individuals.



TRUST IN BRAZIL: WHAT IS THE CURRENT PICTURE?



Last country (out of 30) in “interpersonal trust” 11% of population say “most people can be trusted”. (Global = 30%)

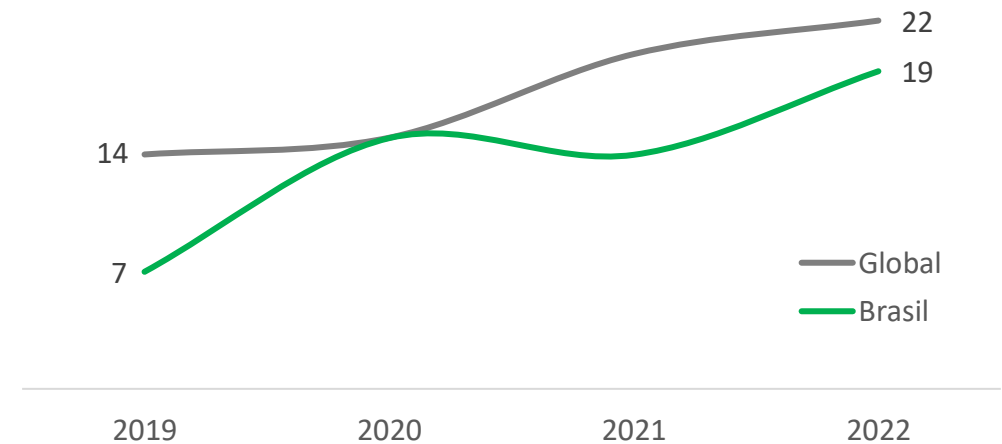


Distrust in politicians and public ministers is historically way below the global average, BUT...



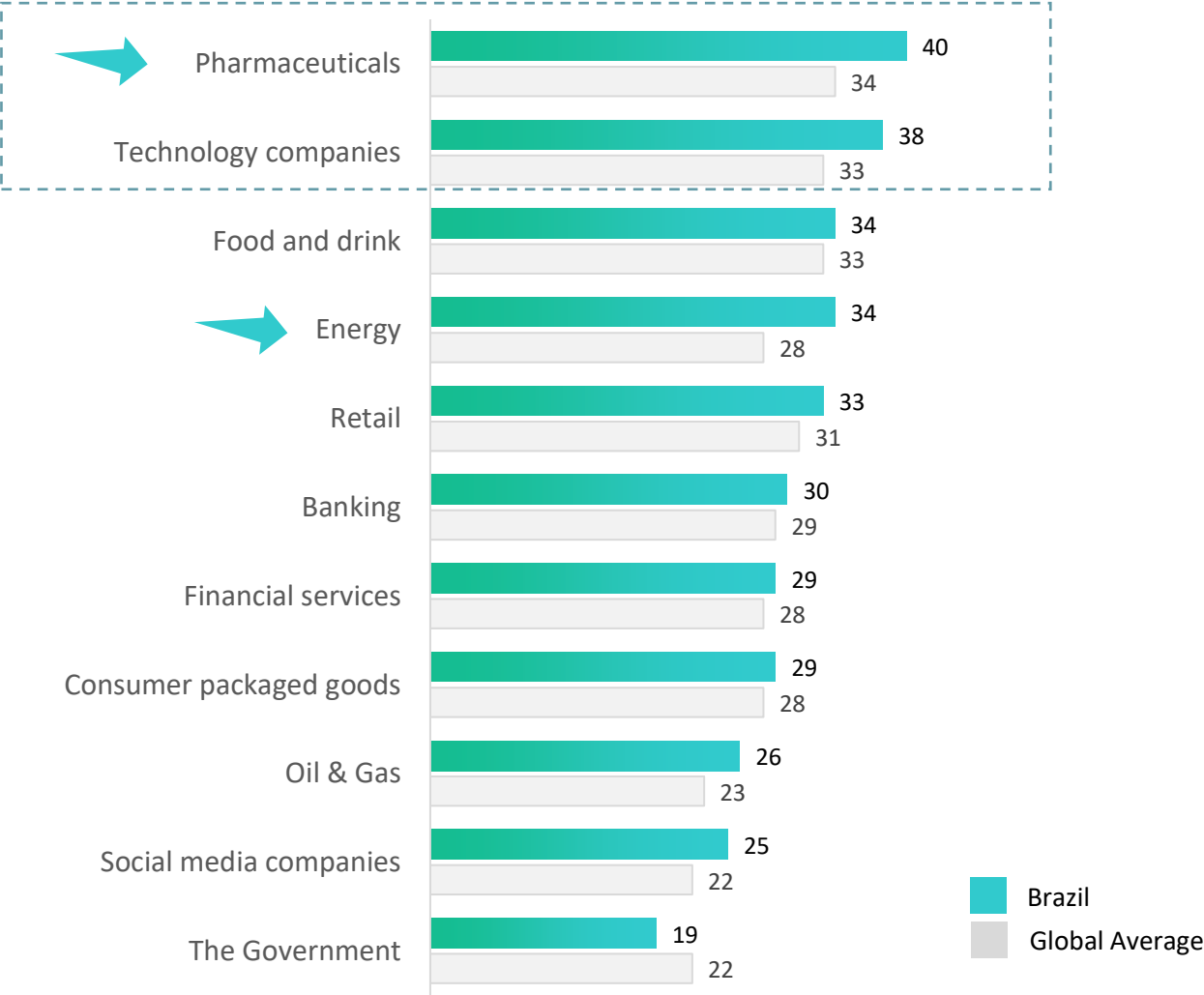
Despite the context of low trust levels, indicators are improving since 2019, following the global trend.

% Trustworthy (Government)



Trust in Sectors – Brazil x Global Average

% Trustworthy (5 and 4)



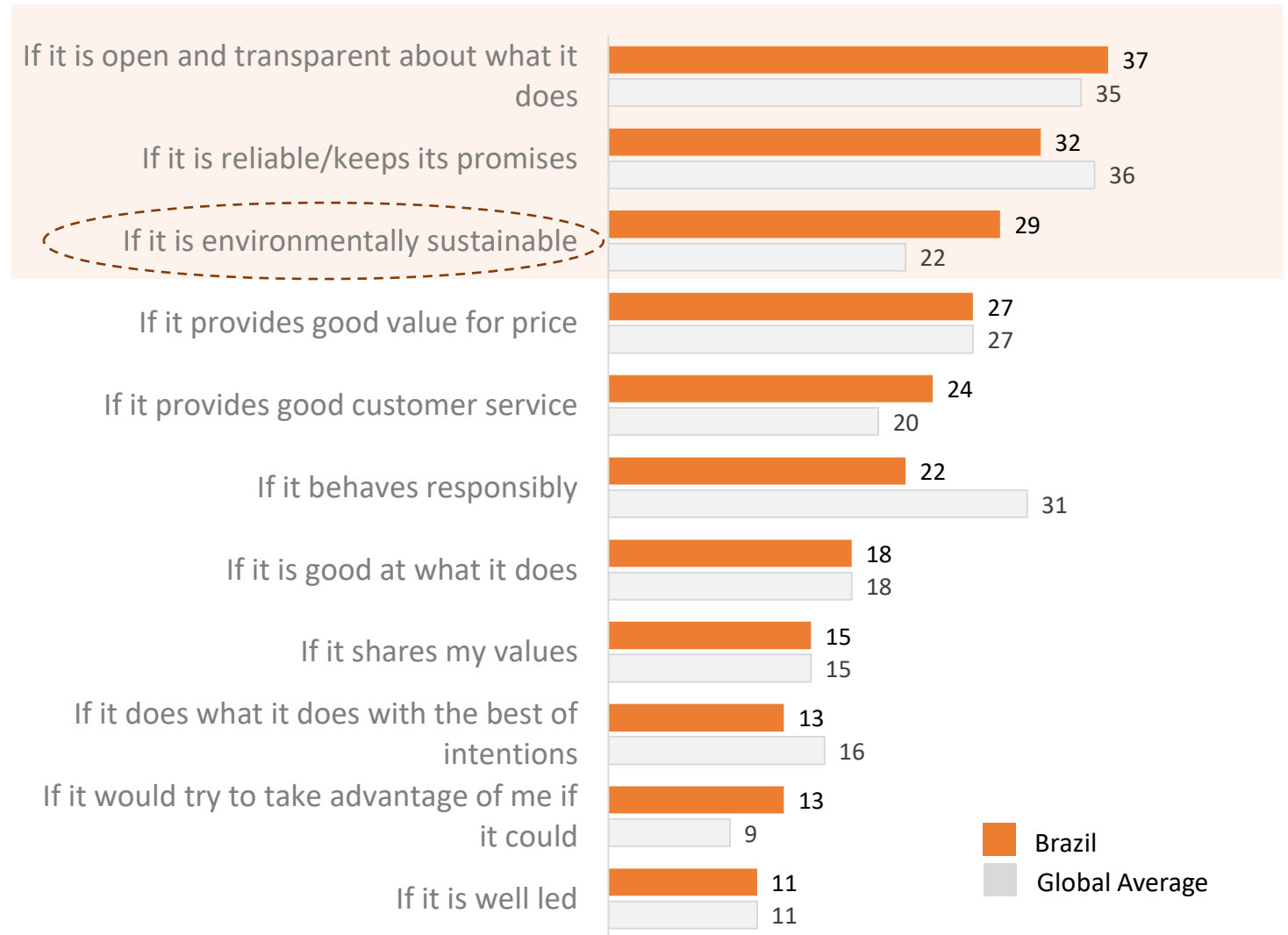
Contrary to trust in government, trust levels towards economic sectors are higher in Brazil, when compared to the Global Average.

Q2. Please look at this list of different types of organisations and institutions. In general, do you think each is trustworthy or untrustworthy?

What is driving trust?



Global Monitor results confirm the importance of sustainability as a driver of trust in Brazil





What about

corporate leadership?

The global trend indicates a new role for **corporate leadership**. In countries with low trust in public institutions the demand for action can be even higher

"I expect companies to take a **stand on issues** that matter to me" % Agree

50%

Global

59%

Brazil


"Business leaders have a responsibility to **speak out** on social and political issues affecting my country"
% Agree

50%

Global

54%

Brazil

A woman with short dark hair, wearing a dark jacket, is smiling and looking up at a transparent umbrella that is illuminated with warm white string lights. The background is a dark night sky filled with stars, with a soft orange and yellow glow on the horizon suggesting a sunset or sunrise. In the top left corner, there are two diagonal stripes, one teal and one blue.

The Year Ahead:

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WELCOME TO THE METAVERSE



**Defining an emerging paradigm &
examining its potential impact.**

Katelyn (Faulks) Hall,
Ipsos UXR Director
Head of XR & Emerging Tech

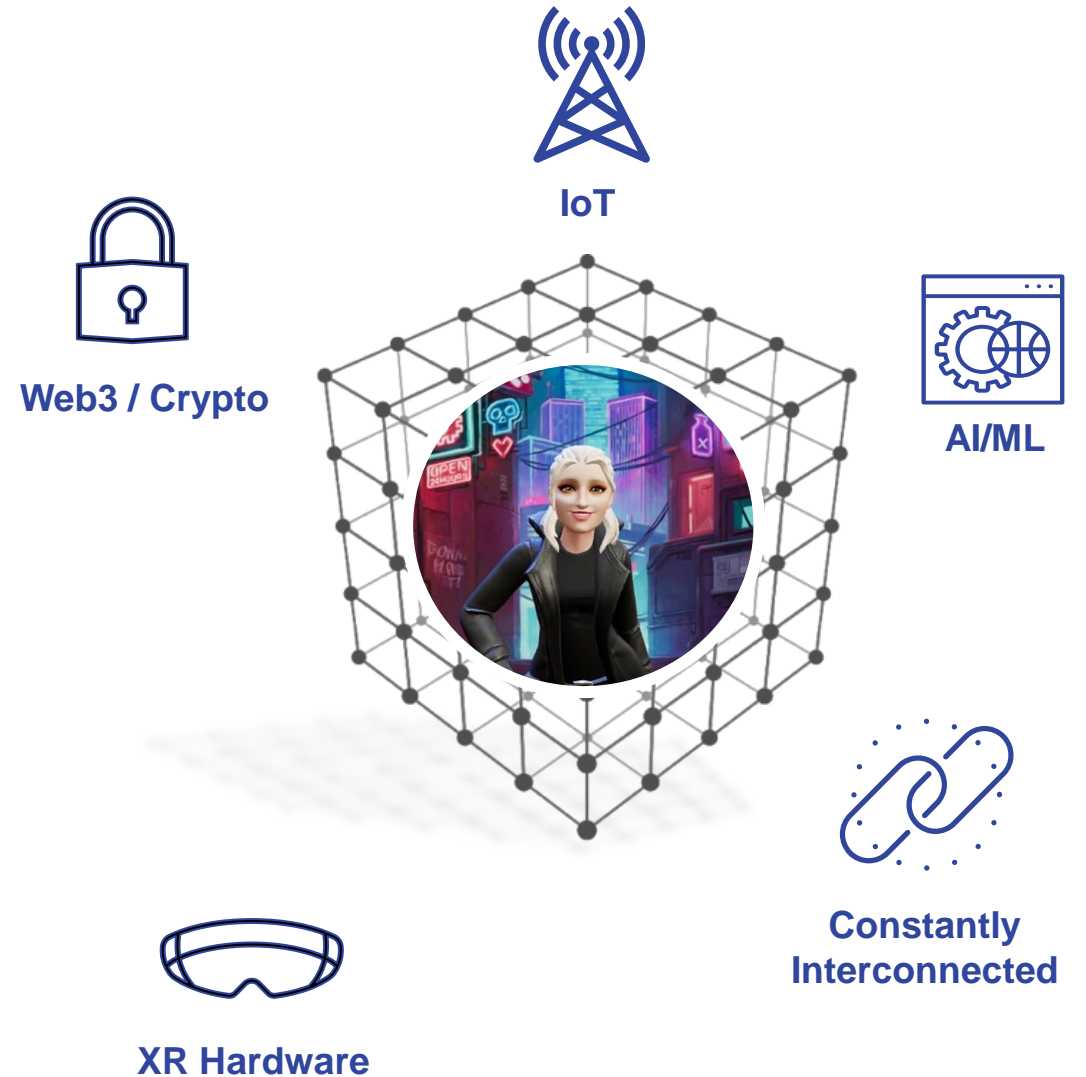
“The Metaverse is here, and it’s not only transforming how we see the world but how we participate in it – from the factory floor to the meeting room.”

- Satya Nadella, CEO of Microsoft



The Metaverse is tomorrow's internet.

A technology ecosystem that delivers seamless, connected experiences across physical and virtual worlds.



Metaverse & extended reality provide a 'phygital' experience

"Where is the nearest...
... clothing boutique?"



Nearest store is
25 min away



OFFER
\$12 TAXI RIDE
2 min to pick-up
Say "TAXI" for geo-location

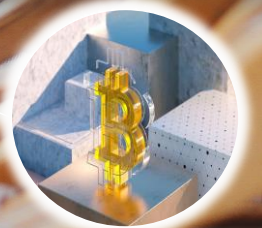
E-TRY ME ON:
VIRTUAL MIRROR



VIEW YOUR
DIGITAL CLOSET



BUY NOW

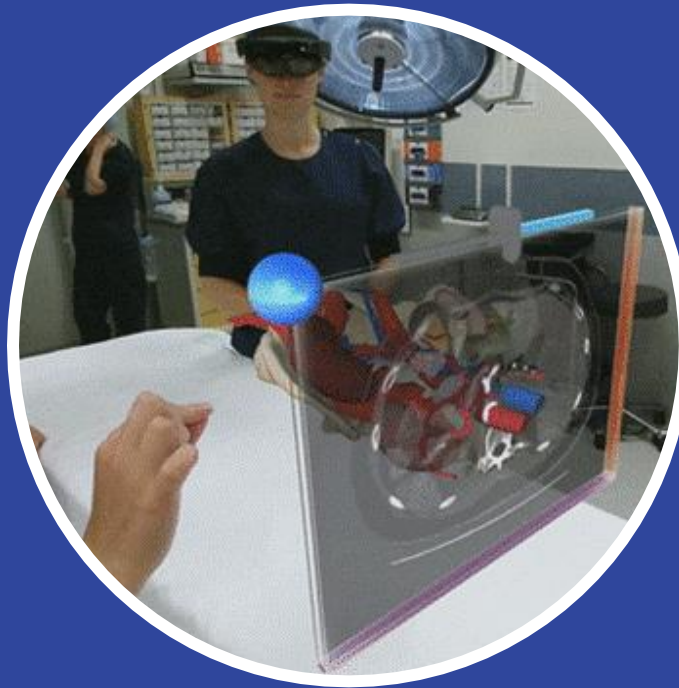


XR technology provides a link for us to *access phygital information* from anywhere in our physical world.

Augmented Reality




Mixed Reality



Virtual Reality



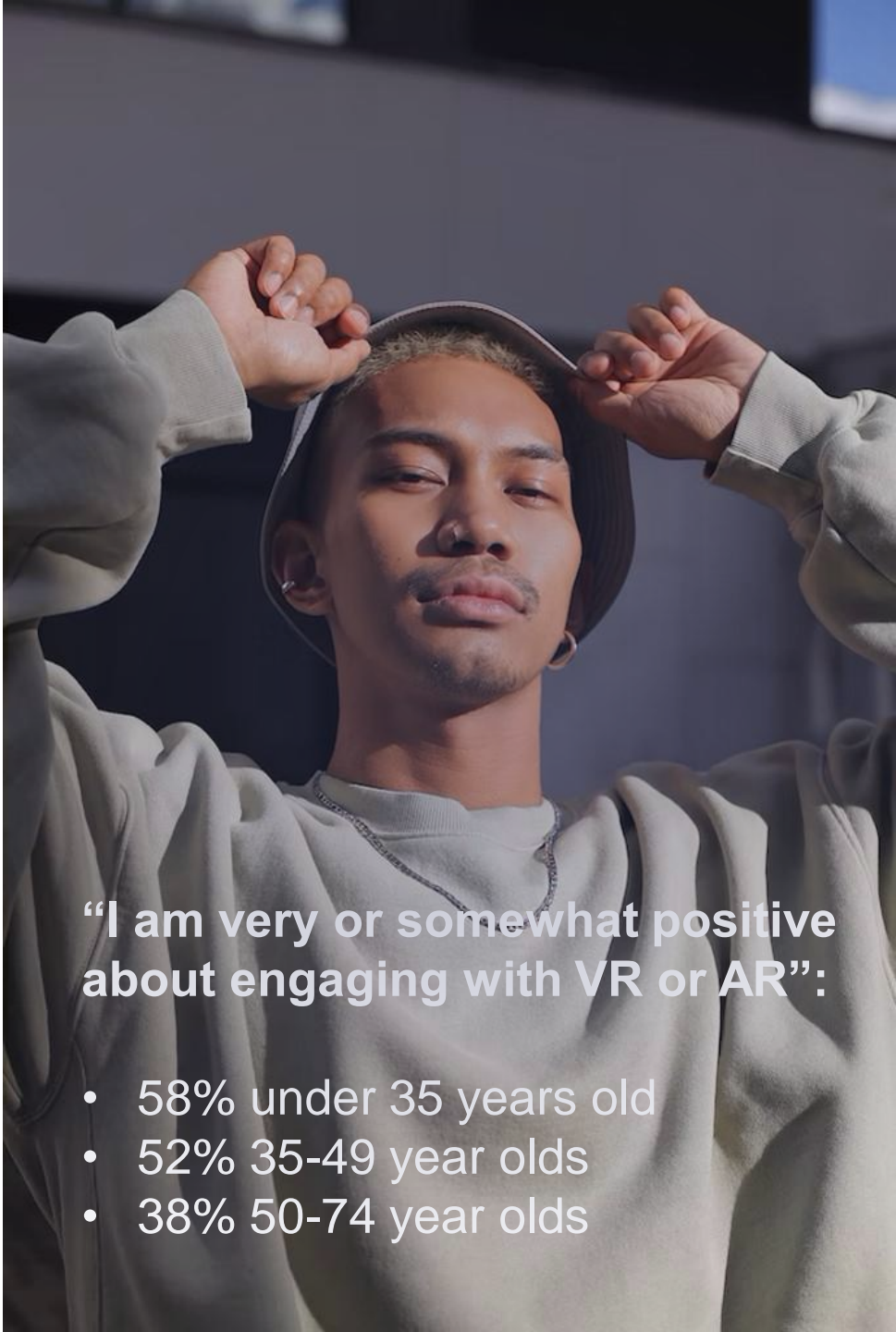


Globally, 52% are familiar with the Metaverse, and 50% have positive feelings about engaging with XR in daily life.

How the world sees the metaverse and extended reality: A 29-country Global Advisor study.
<https://www.ipsos.com/en/global-advisor-metaverse-extended-reality-may-2022>

Familiarity and favorability toward the Metaverse and XR is higher among young adults than other demographics.

How the world sees the metaverse and extended reality: A 29-country Global Advisor study.
<https://www.ipsos.com/en/global-advisor-metaverse-extended-reality-may-2022>



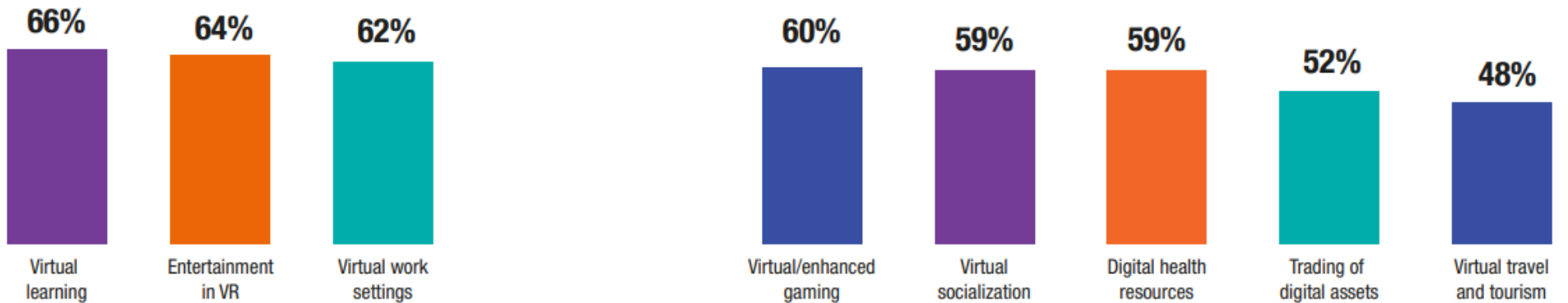
“I am very or somewhat positive about engaging with VR or AR”:

- 58% under 35 years old
- 52% 35-49 year olds
- 38% 50-74 year olds

Half or more believe the impact of the metaverse and XR technology will be substantial.

Q. How much do you agree or disagree that, over the next ten years, the development of the following metaverse applications using XR will significantly change the way people live?

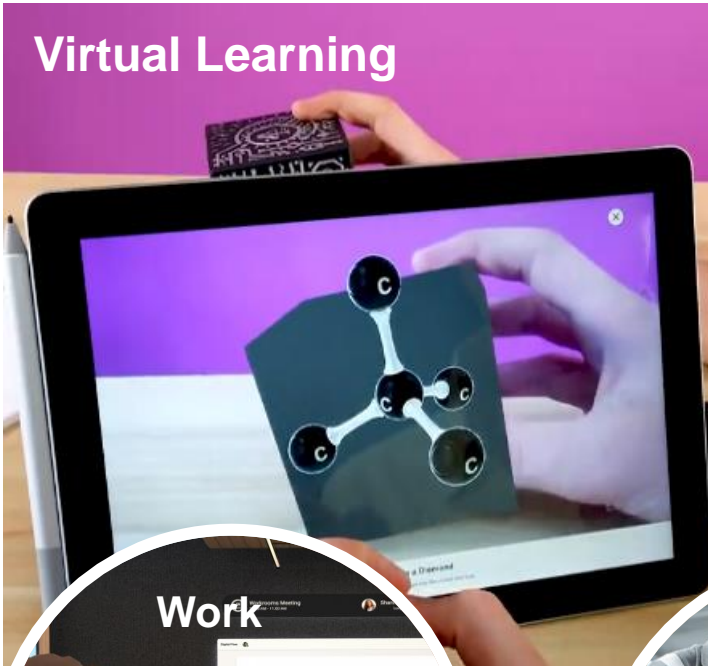
% strongly/somewhat agree



How the world sees the metaverse and extended reality: A 29-country Global Advisor study.
<https://www.ipsos.com/en/global-advisor-metaverse-extended-reality-may-2022>

Half or more believe the impact of the metaverse and XR technology will be substantial.

Virtual Learning



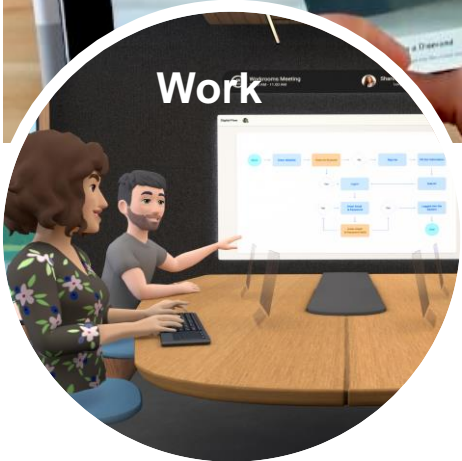
Enhanced Gaming



VR events



Work



Training



Socializing



Fitness



Some may go ‘all-in’ on virtual ... while others may only use the tech for specific occasions.



WELCOME TO THE METAVERSE

Defining an emerging paradigm &
examining its potential impact.

Katelyn (Faulks) Hall,
Ipsos UXR Director
Head of XR & Emerging Tech



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