


WHY CONTEXT REALLY MATTERS

CULTURES | COUNTRIES | COMMUNITIES

KEYS – A WEBINAR SERIES BY IPSOS

23 March 2023



WHY CONTEXT
REALLY
MATTERS
CULTURES | COUNTRIES | COMMUNITIES

KEYS – A WEBINAR SERIES BY IPSOS
23 March 2023

Watch the recording

The image shows a skateboarder in a black hoodie and beanie performing a trick in a concrete bowl. In the background, there are buildings and utility poles. Overlaid on the right side is a black box containing a webinar recording thumbnail. The thumbnail features a grid of four small video windows showing different speakers, the main title 'WHY CONTEXT REALLY MATTERS', the subtitle 'CULTURES | COUNTRIES | COMMUNITIES', the series name 'KEYS – A WEBINAR SERIES BY IPSOS', the date '23 March 2023', and the Ipsos logo. Below the thumbnail, the text 'Watch the recording' is written in white, with 'Watch' underlined.





AGENDA

The dynamics of public opinion

Simon Atkinson

Chief Knowledge Officer, Ipsos

Being Woman

Busisiwe Mahlaba

Client Officer, Ipsos in South Africa

When difference doesn't mean different

Fiona Moss

Head of Global Analytics Team, Customer Experience, Ipsos

The context of brand success

Chris Murphy

Global Service Line Leader, Market Strategy & Understanding, Ipsos

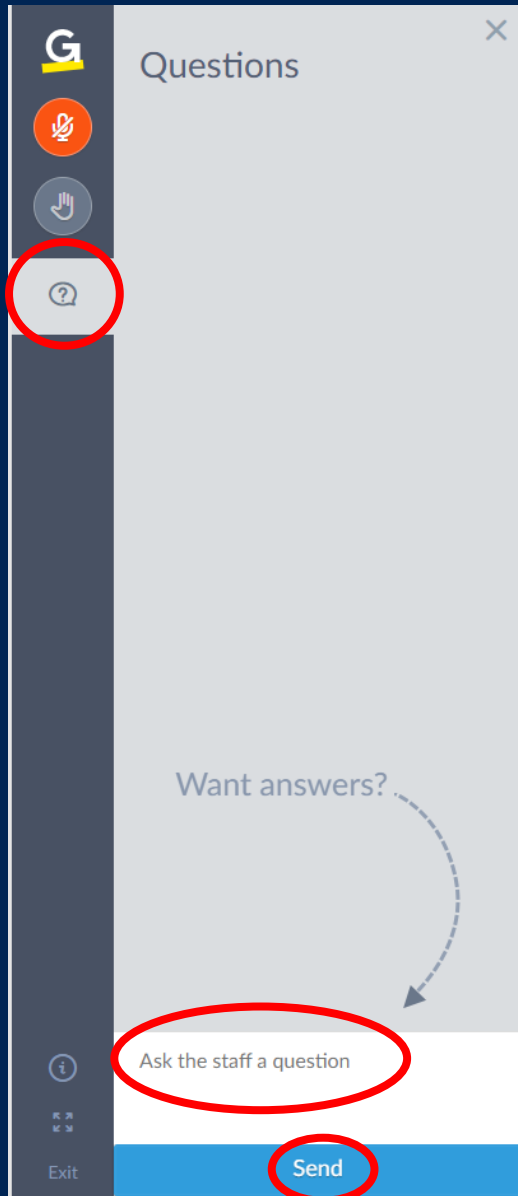
WHY CONTEXT REALLY MATTERS
CULTURES | COUNTRIES | COMMUNITIES

KEYS – A WEBINAR SERIES BY IPSOS

23 March 2023


Watch the recording

A recording thumbnail for the webinar series 'Why Context Really Matters'. It features a skateboarder in a black hoodie and pants performing a trick on a concrete ramp. The background shows an urban setting with buildings and a bridge. The text 'WHY CONTEXT REALLY MATTERS' is overlaid in large white letters, with 'CULTURES | COUNTRIES | COMMUNITIES' below it. At the bottom left, it says 'KEYS – A WEBINAR SERIES BY IPSOS' and at the bottom right is the Ipsos logo. On the left side of the thumbnail, there are four small video call windows showing the speakers: Simon Atkinson, Busisiwe Mahlaba, Fiona Moss, and Chris Murphy.



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.



THE DYNAMICS OF PUBLIC OPINION



Simon Atkinson

THE DYNAMICS OF PUBLIC OPINION

Three headline reports



WHAT WORRIES THE WORLD?



**Have concerns
about inflation
peaked?**

March 2023

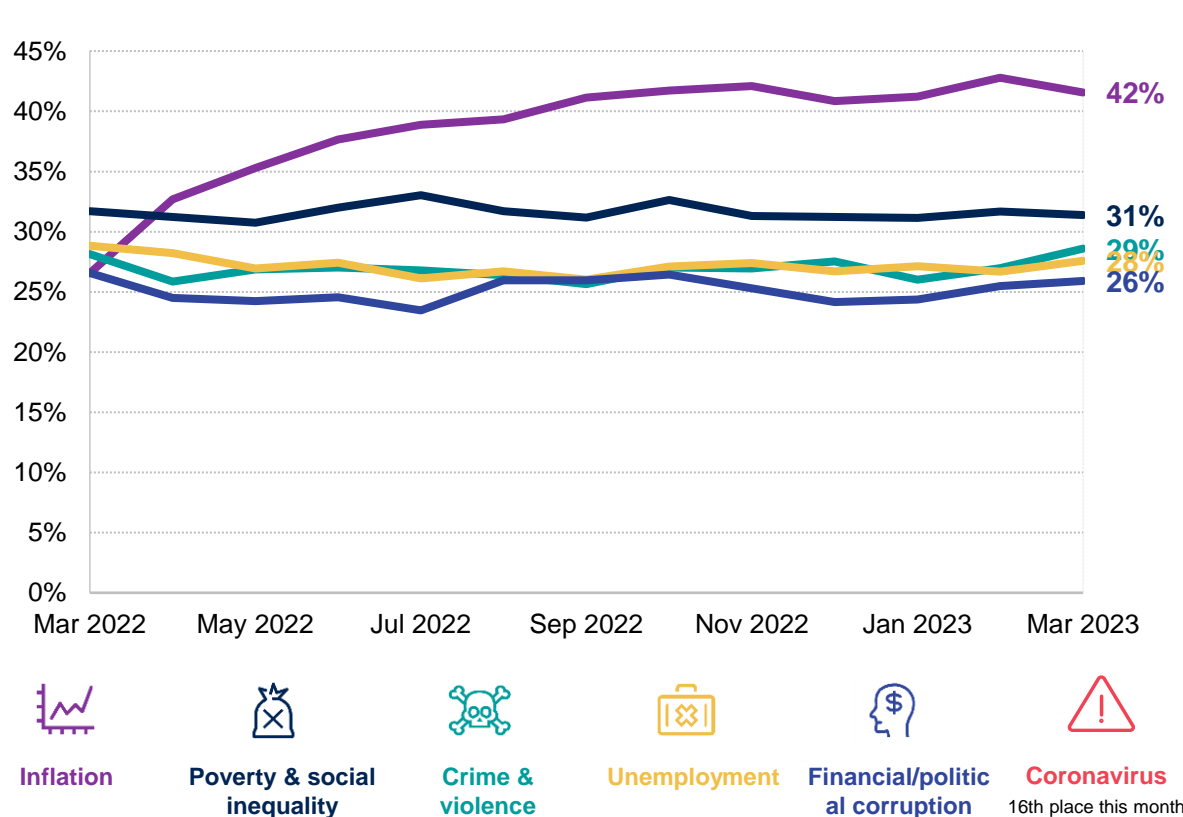
Q: Which of the following topics do you find most worrying in your country?

GAME CHANGERS



WHAT WORRIES THE WORLD? MARCH 2023

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



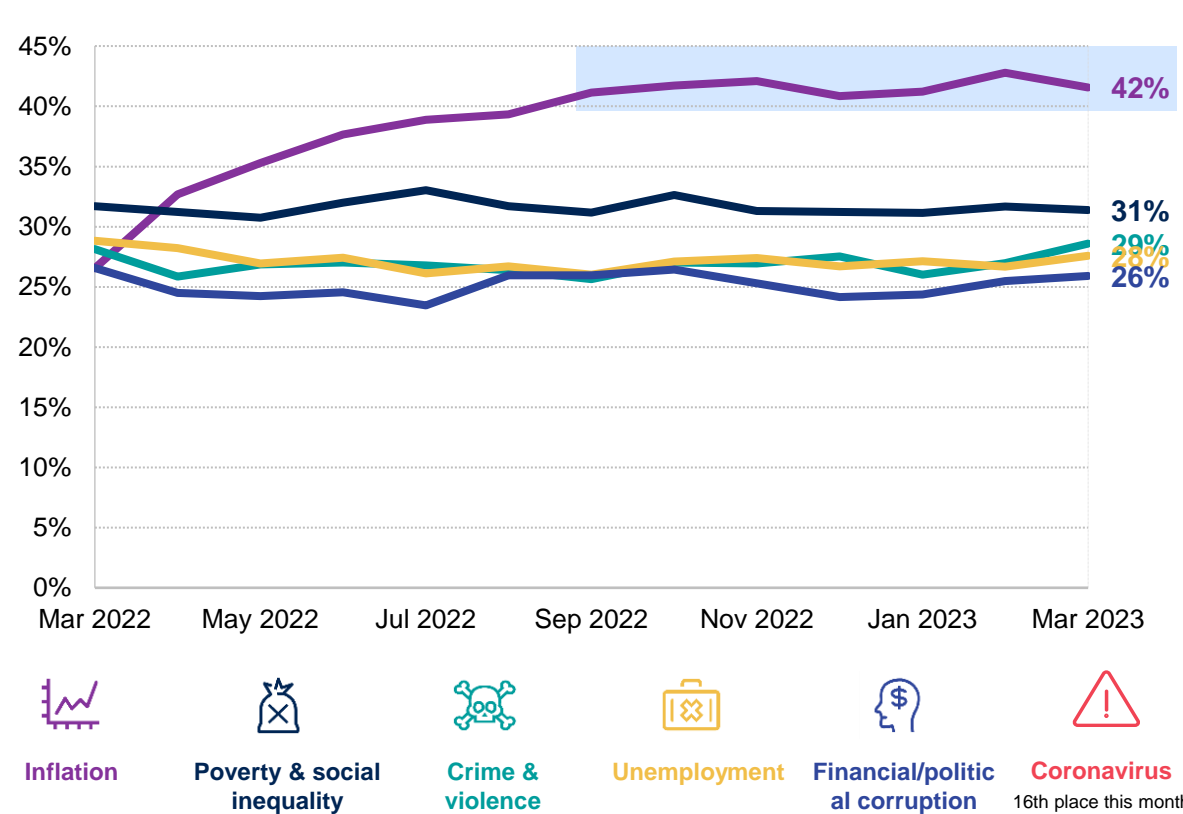
Have concerns about inflation peaked?

Base: Representative sample of c.24,516 adults aged 16-74 in 29 participating countries, March 2022 - March 2023.

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

WHAT WORRIES THE WORLD? MARCH 2023

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



Have concerns about inflation peaked?
~~peaked?~~
 plateaued

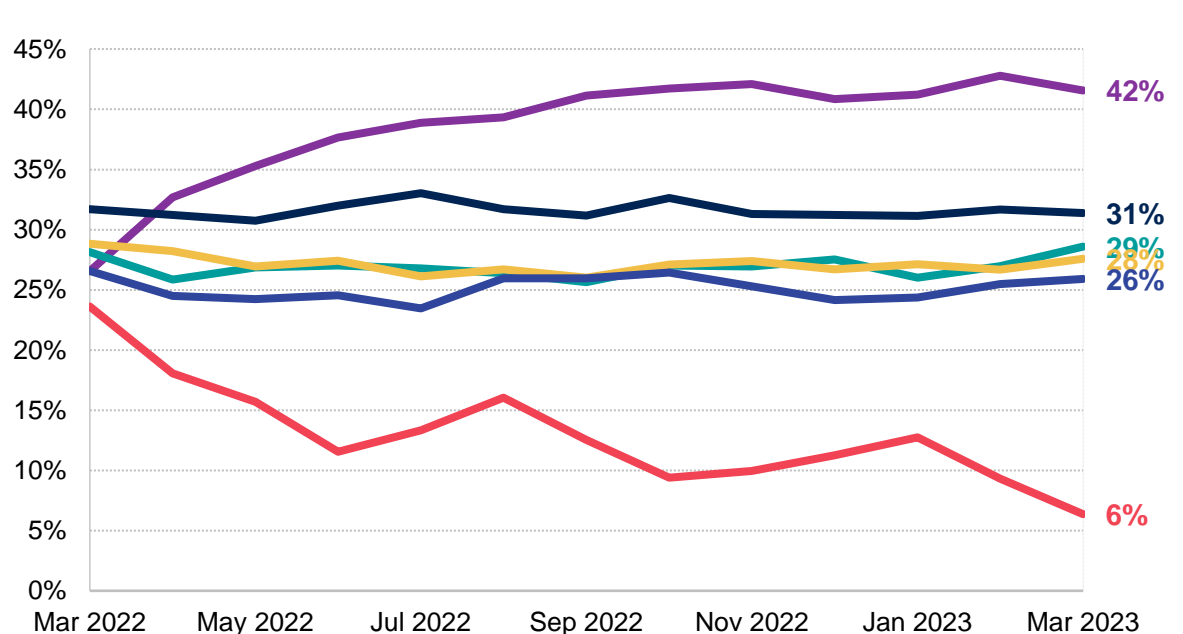
Base: Representative sample of c.24,516 adults aged 16-74 in 29 participating countries, March 2022 - March 2023.
Source: Ipsos Global Advisor. *Global score is a Global Country Average. See methodology for details.*



WHAT WORRIES THE WORLD? MARCH 2023

Q

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



- 
Inflation
- 
Poverty & social inequality
- 
Crime & violence
- 
Unemployment
- 
Financial/political corruption
- 
Coronavirus
16th place this month

Base: Representative sample of c.24,516 adults aged 16-74 in 29 participating countries, March 2022 - March 2023.
Source: Ipsos Global Advisor. *Global score is a Global Country Average. See methodology for details.*

9 -

Filter: Country: World | Current Wave: Mar 23



Lowest-ever Covid score



SIGNALS

Understanding the
coronavirus crisis

26 March 2020

AN IPSOS WEBINAR

GAME CHANGERS



THE CONTEXT THEN

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

(Global 29-country average)

APRIL 2020

COVID19

61%

INFLATION

9%



THE CONTEXT NOW

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

(Global 29-country average)



APRIL 2020

COVID19

61%

INFLATION

9%

Beyond the “Global” Figures

MARCH 2023

INFLATION

42%

COVID19

6%

“LATAM INDEX”

INFLATION:

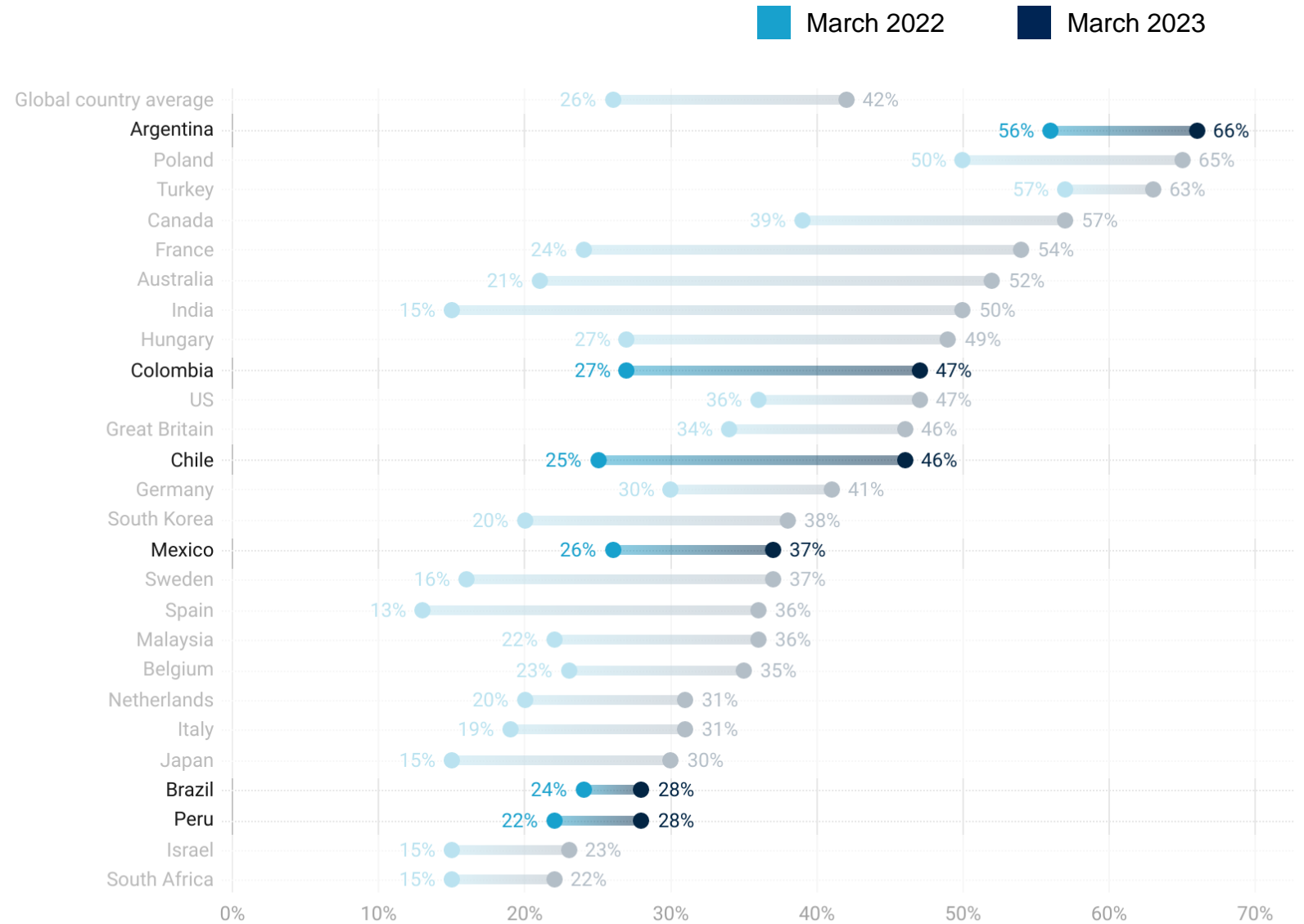
42%

THE COUNTRY CONTEXT REALLY MATTERS...

% mentioning
INFLATION as one
of the the 3 “most
worrying” issues facing
their country



Source: Ipsos Global Advisor. Download the results [here](#)
Base: Representative sample of c.20,000 adults aged 16-74 in
26 participating countries,



THE DYNAMICS OF PUBLIC OPINION

Three headline reports



GLOBAL HAPPINESS 2023

Life Satisfaction Across the World

A 32-country Global Advisor survey

March 2023

GAME CHANGERS



KEY DRIVERS OF HAPPINESS

- ✓ Feeling my life has meaning
- ✓ Feeling in control of my life
- ✓ Mental health & wellbeing
- ✓ Social life
- ✓ Living conditions
- ✓ Social status

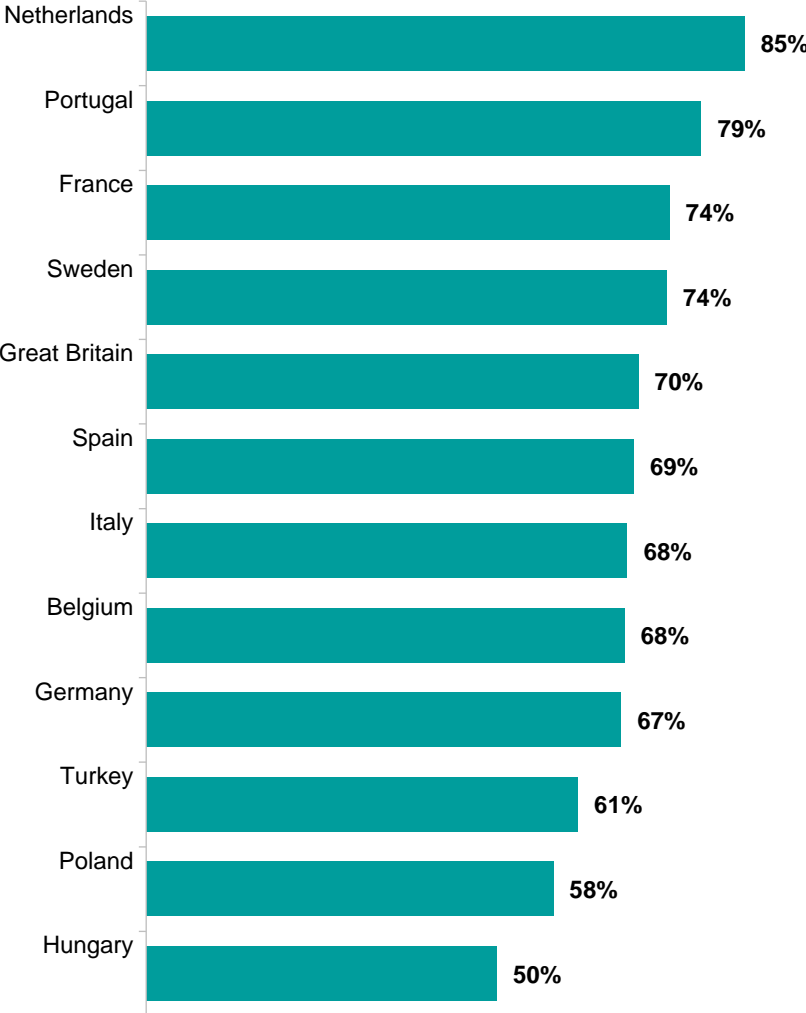


LEVEL OF HAPPINESS BY COUNTRY



Happiness by country

Q. Taking all things together, would you say you are: very happy, rather happy, not very happy, not happy at all?



EUROPE
“HAPPINESS
INDEX”

69%

Base: 22,508 online adults under the age of 75 across 32 countries, interviewed Dec. 22, 2022 – Jan.6, 2023.



Happiness by demographics

Q. Taking all things together, would you say you are: very happy, rather happy, not very happy, not happy at all?

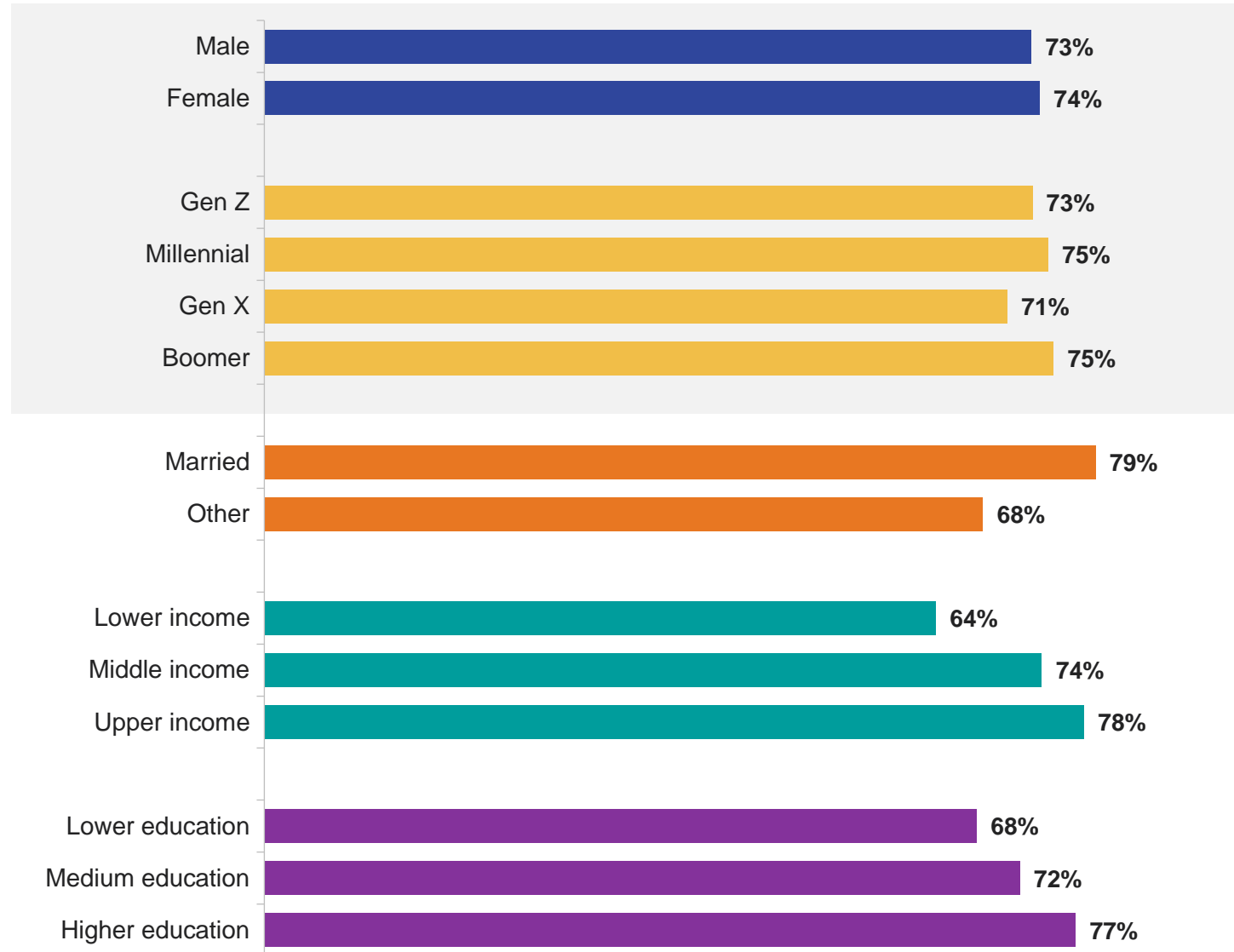


Base: 22,508 online adults under the age of 75 across 32 countries, interviewed Dec. 22, 2022 – Jan.6, 2023.

Happiness by demographics

Q. Taking all things together, would you say you are: very happy, rather happy, not very happy, not happy at all?

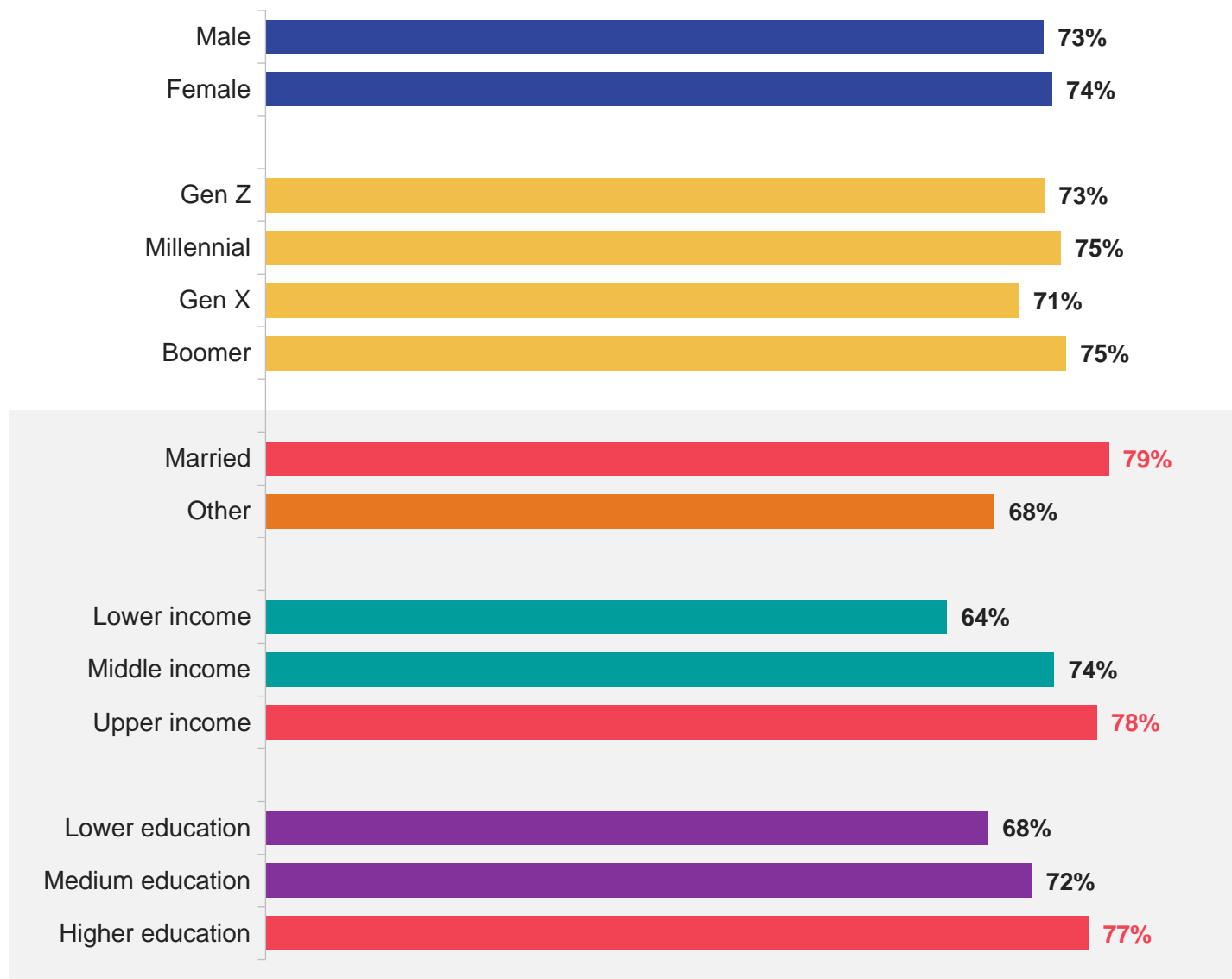
Base: 22,508 online adults under the age of 75 across 32 countries, interviewed Dec. 22, 2022 – Jan.6, 2023.



Happiness by demographics

Q. Taking all things together, would you say you are: very happy, rather happy, not very happy, not happy at all?

Base: 22,508 online adults under the age of 75 across 32 countries, interviewed Dec. 22, 2022 – Jan.6, 2023.



THE DYNAMICS OF PUBLIC OPINION

Three headline reports



INTERNATIONAL WOMEN'S DAY

2023

A 32-country study

THE GLOBAL
INSTITUTE
FOR WOMEN'S
LEADERSHIP

KING'S
College
LONDON



68%

I believe there is currently an **inequality between women and men** in terms of social, political and/or economic rights **in my country**

54%

When it comes to giving women equal rights with men, **things have gone far enough in my country**



INTERNATIONAL WOMEN'S DAY
2023

A 32-country study

© Ipsos | International Women's Day 2023

THE GLOBAL INSTITUTE FOR WOMEN'S LEADERSHIP
KING'S COLLEGE LONDON

GAME CHANGERS
Ipsos



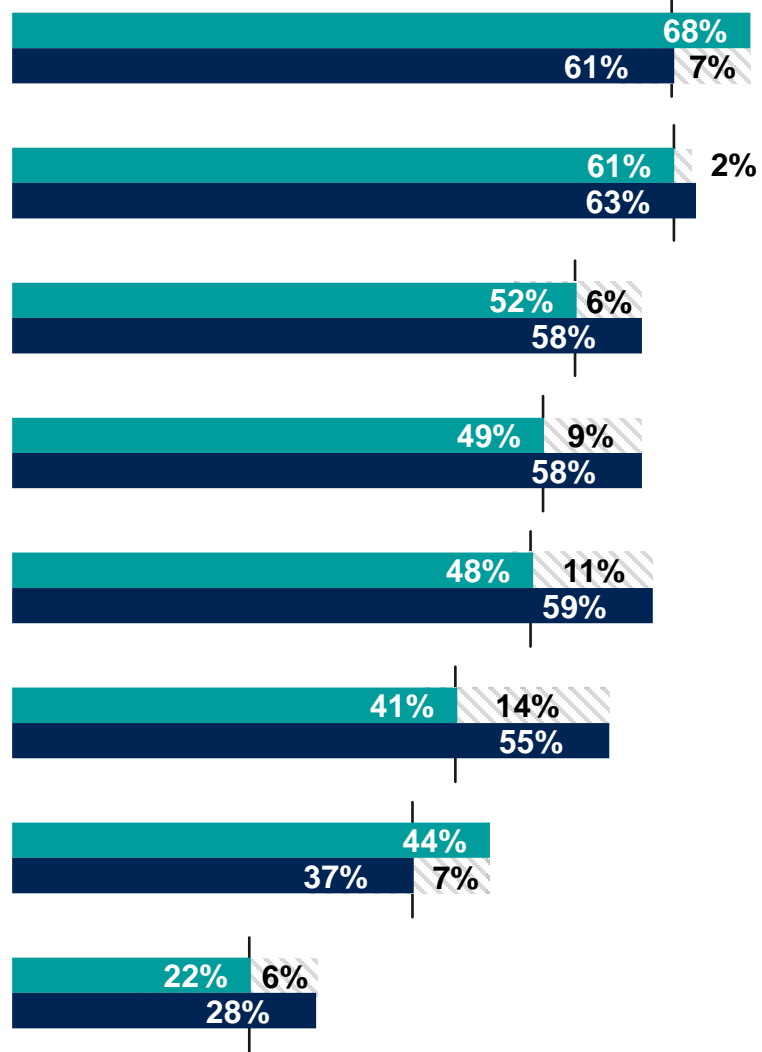
Below is a list of statements. For each, please indicate whether you strongly disagree, somewhat disagree, somewhat agree, or strongly agree.

The Gender Gap

Global country average

- Women won't achieve equality in ... unless men take actions to support women's rights too
- There are actions I can take to help promote equality between men and women
- Equality between men and women will be achieved in my lifetime
- When it comes to giving women equal rights with men, things have gone far enough in my country
- Men are expected to do too much to support equality
- We have gone so far in promoting women's equality that we are discriminating against men
- I define myself as a feminist
- A man who stays at home to look after his children is less of a man

% agree somewhat/strongly



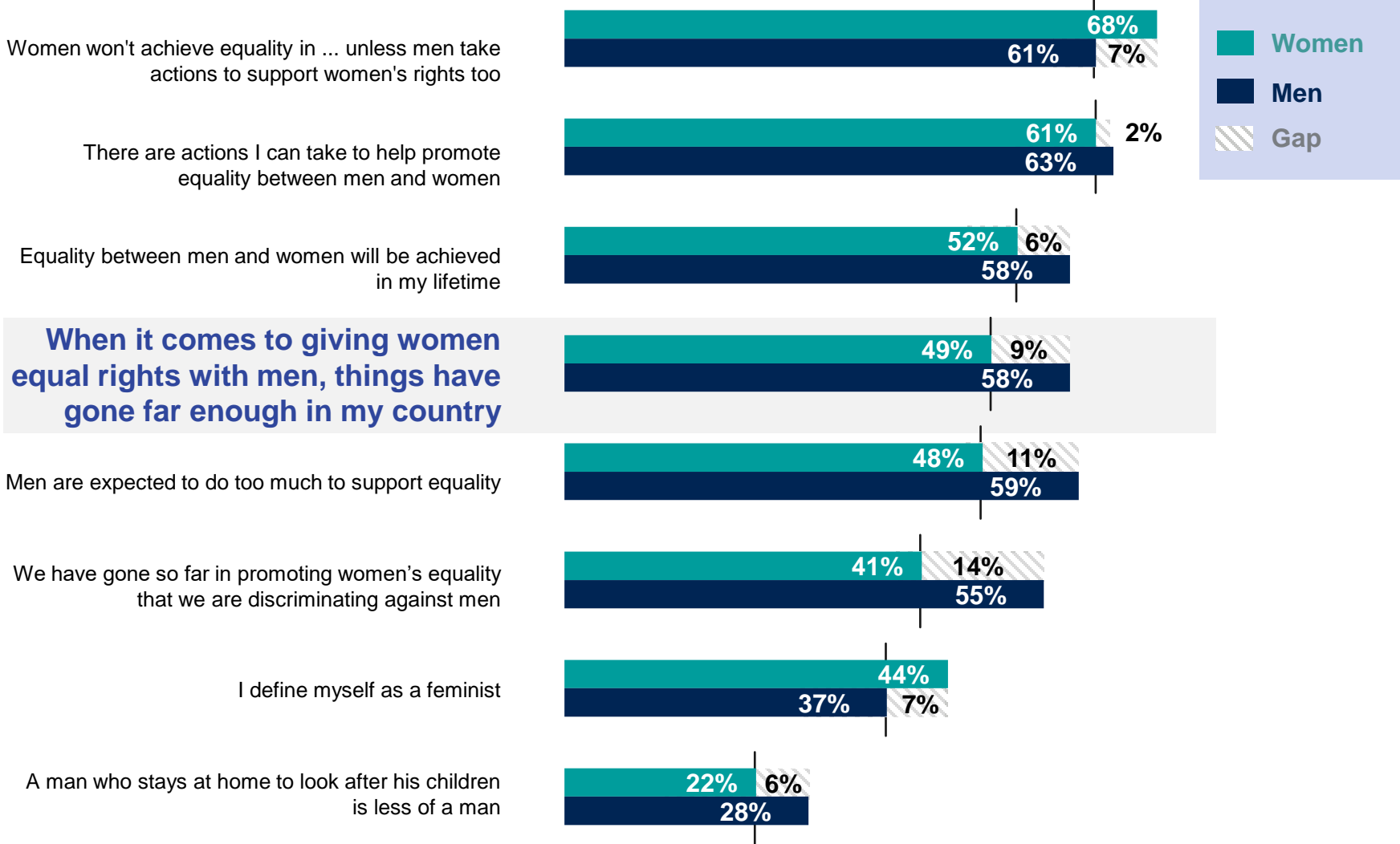



Below is a list of statements. For each, please indicate whether you strongly disagree, somewhat disagree, somewhat agree, or strongly agree.

The Gender Gap

Global country average

% agree somewhat/strongly

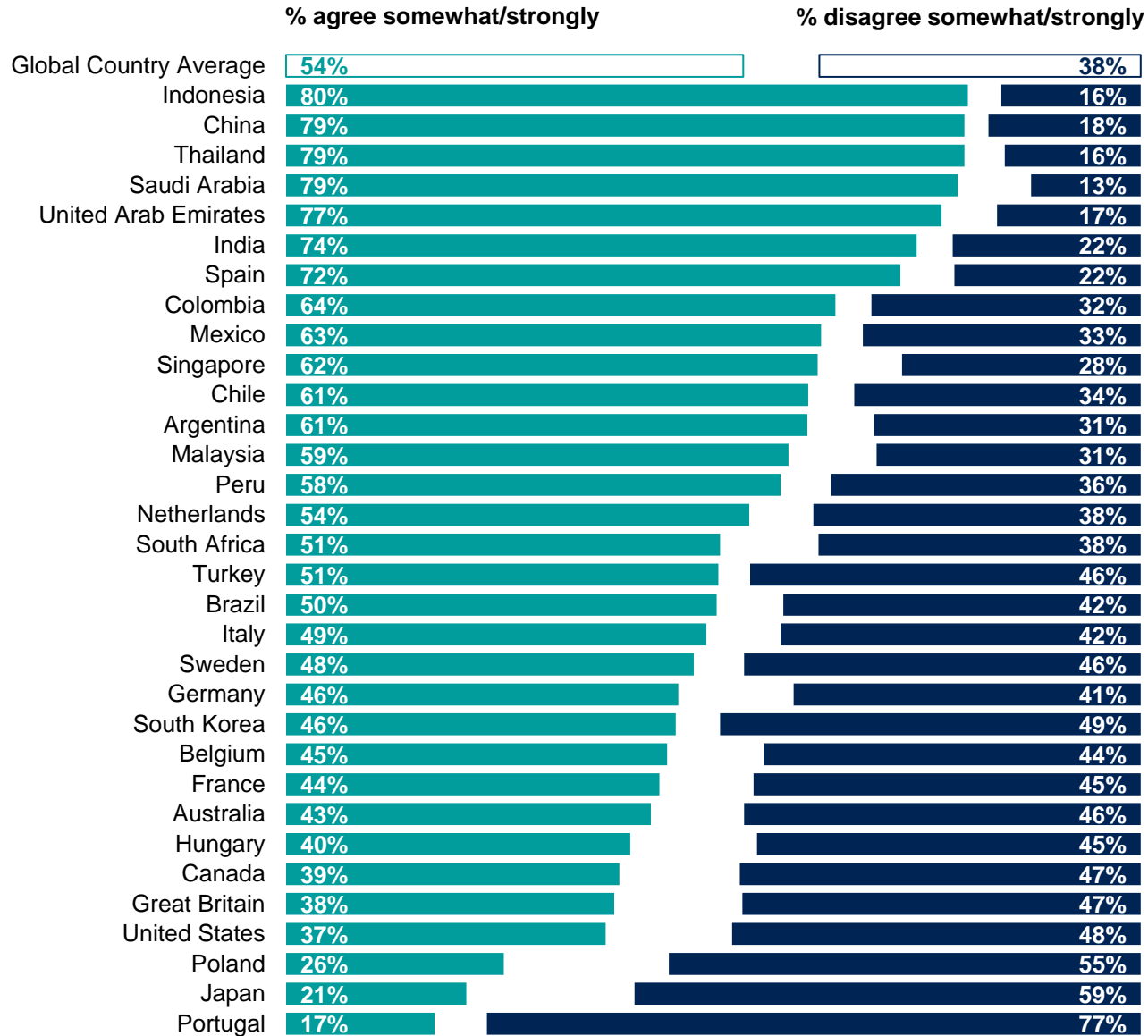


Q

Below is a list of statements. For each, please indicate whether you strongly disagree, somewhat disagree, somewhat agree, or strongly agree.

When it comes to giving women equal rights with men, things have gone far enough in my country

The Country Gap



63 points

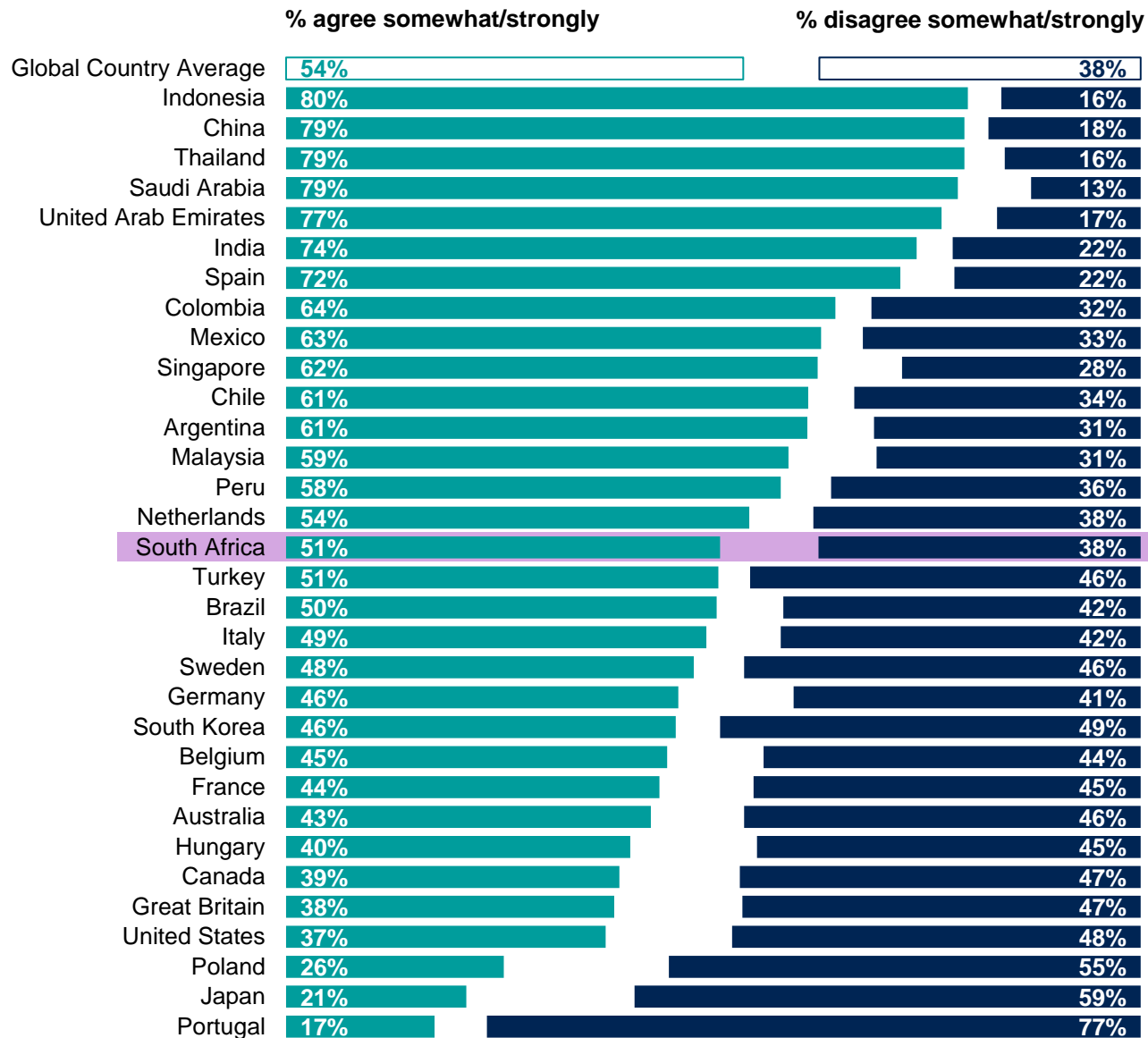


Q

Below is a list of statements. For each, please indicate whether you strongly disagree, somewhat disagree, somewhat agree, or strongly agree.

When it comes to giving women equal rights with men, things have gone far enough in my country

The Country Gap





Download the
32-country report

[HERE](#)



ATTITUDES TOWARDS GENDER EQUALITY



6 - © Ipsos | International Women's Day 2023



WHO BENEFITS FROM GENDER EQUALITY?



21 - © Ipsos | International Women's Day 2023



PEOPLE'S EXPERIENCES OF GENDER DISCRIMINATION



26 - © Ipsos | International Women's Day 2023



TAKING ACTION WHAT DO PEOPLE DO?



31 - © Ipsos | International Women's Day 2023



TAKING ACTION WHAT BARRIERS DO PEOPLE FACE?



42 - © Ipsos | International Women's Day 2023



KEYS

AN IPSOS WEBINAR SERIES

Access the recording, presentations
and resources from this episode



[\[Webinar\] KEYS - Why context really matters - Cultures | Countries | Communities | Ipsos](#)

JOIN US for our next KEYS webinar:
Thursday, April 27
11:00 & 17:00 Central European Time

THE EMPATHY EFFECT

KEYS WEBINAR – 27th APRIL



THE DYNAMICS OF PUBLIC OPINION



Latest releases @Ipsos and
on www.ipsos.com

BEING WOMAN: FROM EQUALITY TO FREEDOM



Being
Woman

GAME CHANGERS



Ipsos

UNDERSTANDING GENDER THROUGH A CULTURAL LENS

- Gender - a uniquely human, social construct, shaped by social culture
- Culture lense applied to any topic = Deep fundamental and human insight

CULTURE
– one of the most critical aspects shaping gender today

GENDER in Nature

- *Biological, 'sex' roles , no gender*
- *No conflict, no hierarchy*
- *No quest for 'equality'*



GENDER in Humans

- *Socially determined 'gender' roles*
- *Combined with inner sense of identity*
- *Learnt concept, shaped by culture*



CURATION IN ACTION...

METHOD *Curation*

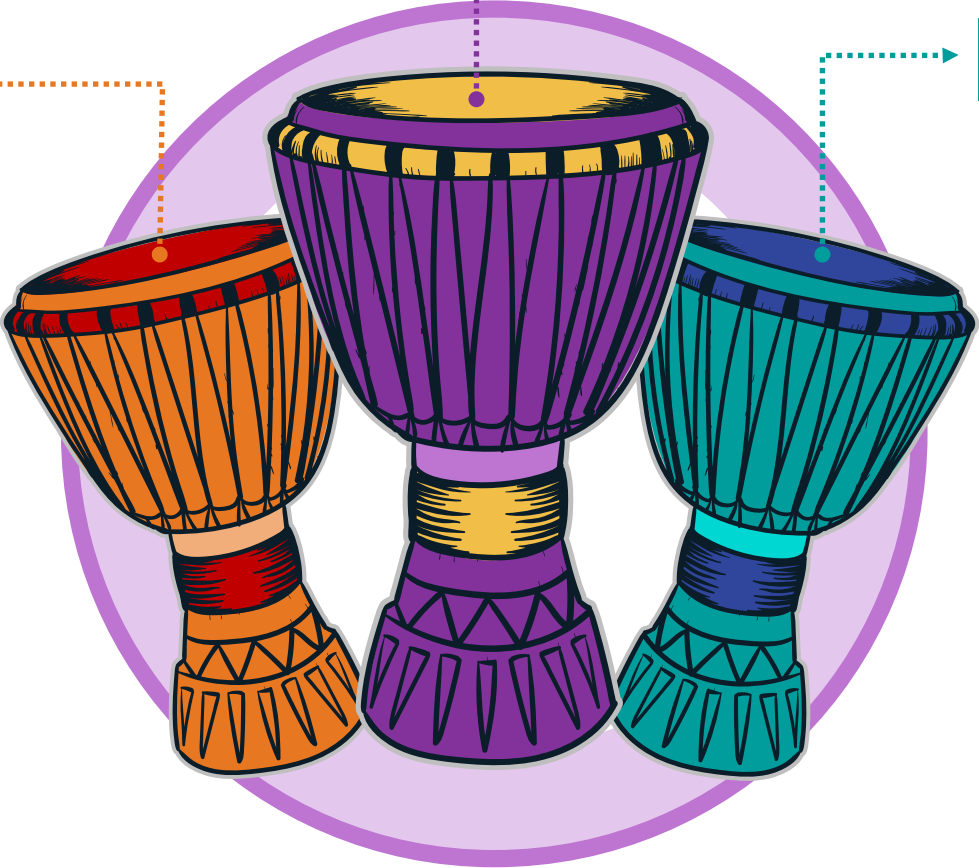
Synthesizing from multiple sources of data/information available
Brought alive with topical examples, case studies, thought starters

SOURCES

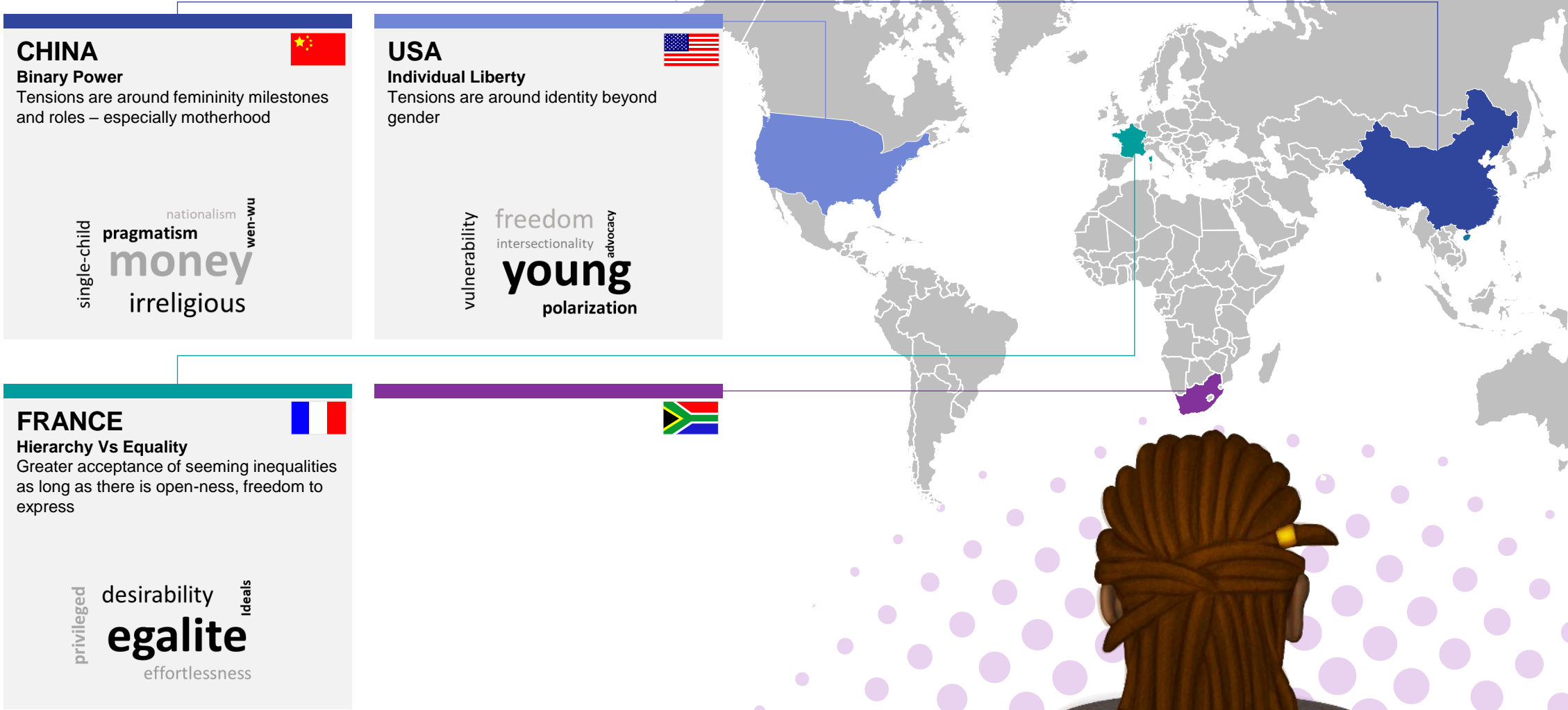
Demographic data – World Bank Data | Statista | CIA Factbook | Stats SA
Trendwatching
Desk research

ASSETS

Global Trends Survey data for past 3-4 years
Global Advisor studies on gender
Ipsos Global, IKC and white papers, global value bank

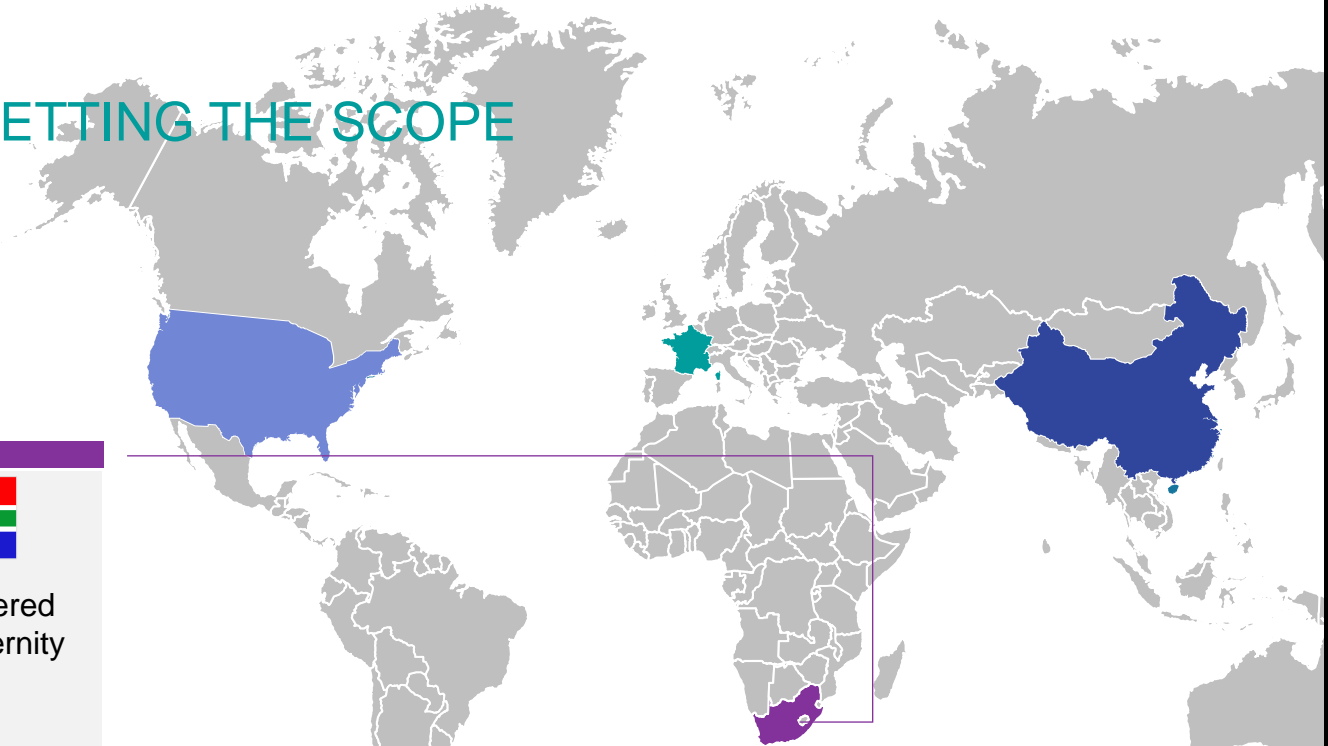


SUMMARIZING THE CULTURAL ROOTS FOR GENDER AROUND THE WORLD



SUMMARIZING THE CULTURAL ROOTS FOR GENDER IN SOUTH AFRICA

Reimagining the new Black identity – SETTING THE SCOPE



SOUTH AFRICA 

Reimagining a new black identity

Tensions: physical safety, economic survival layered with the need to *reconcile traditions* with modernity in the *post-Apartheid* South Africa

apartheid
heritage

hustling

ubuntu

diversity

badging

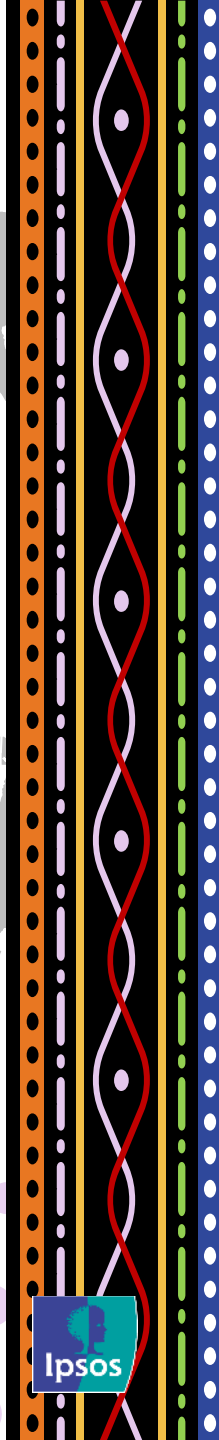
joy ambition

anger

religion



NESPRESSO



CULTURE – THE 3 THINGS WE LEARN ABOUT GENDER FROM CULTURE

The overriding tension of the most basic **freedoms** – of safety and wellbeing



The struggle for SA women to move beyond functional independence to **proud self reliance** – free to pursue own dreams without fear or inhibitions



Profiling SA for gender and social culture – so we can work on the **what** and **how**



KEY FINDINGS FOR SA

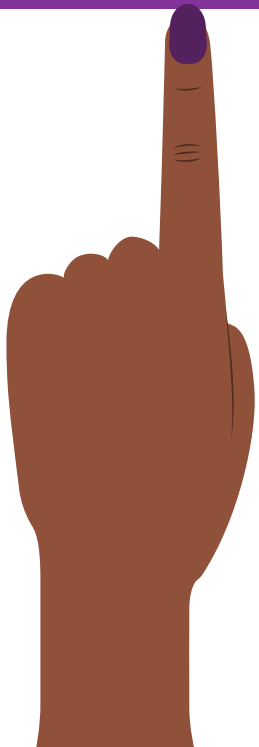
THE TUG OF (GENDER) WAR



FINDINGS THAT RALLIED OUR CLIENTS

3 big topics

FREEDOM VS EQUALITY



PROFILING SOUTH AFRICAN WOMEN



OPPORTUNITIES FOR BRAND/ORGANISATION



ARE WOMEN BECOMING MORE EQUAL, EMPOWERED, HAPPIER?

True empowerment comes when feelings, behavior and capabilities are in alignment



Confidence – narrowing the gap between what they want to do and actually do

Watch-outs: ‘wanting’ to do as men is not necessarily empowering



Equal access to the right power assets:

Education, financial independence, decision making, jobs, tasks



Freedom – to be who they want, especially when it goes against social norms

While all cultures acknowledge the importance of gender equality and empowerment, this means different things in each culture

Shaped equally by gender issues (WHAT women want) as well as the larger social culture (HOW we land this with larger social context that includes men)

Successful engagement can happen when we understand this...

WHAT aspects drive gender issues in each culture and

HOW to customize the strategy as well as activation to these local cultural drivers

A FEMALE VIEW OF EMPOWERMENT

OPPORTUNITY TO SUPPORT:

- Safety
- Relief from additive responsibility (work and home)
- Single mothers' relief
- Workplace support
- Sisterhood
- Fun/enjoyment
- Leadership

Deterrents

- Tradition/cultural roles
- Patriarchal society
- Limited social freedom
- Fear of failure
- Limited role models
- Lack of education

Enablers

- Employers
- Corporate action
- Sisterhood
- Social change
- Connected eco system



NEXT STOP :

- KENYA
- NIGERIA
- EGYPT

WANT TO KNOW MORE?

[Being.Woman@ipsos.com](https://www.ipsos.com/being-woman)



WHEN DIFFERENCE DOESN'T MEAN DIFFERENT

Understanding cultural response bias in global
research programmes

Fiona Moss

March 2023

GAME CHANGERS





1 ■ What is cultural response bias?


Cultural response bias is:

- A market specific scoring tendency
- Applicable to attitudinal response scales
- Substantial and systemic

THREE RESPONSE STYLES ARE TYPICALLY SEEN

10	
9	
8	
7	
6	
5	
4	
3	
2	
1	

Middle response

A watercolor-style illustration of the Earth, showing continents in shades of green and yellow, and oceans in various shades of blue. The style is soft and artistic, with visible brushstrokes and blended colors. The map is centered on the Atlantic Ocean, showing North and South America on the left and Europe and Africa on the right.

Cultural response bias can undermine
the validity of conclusions drawn from
multi-market programmes



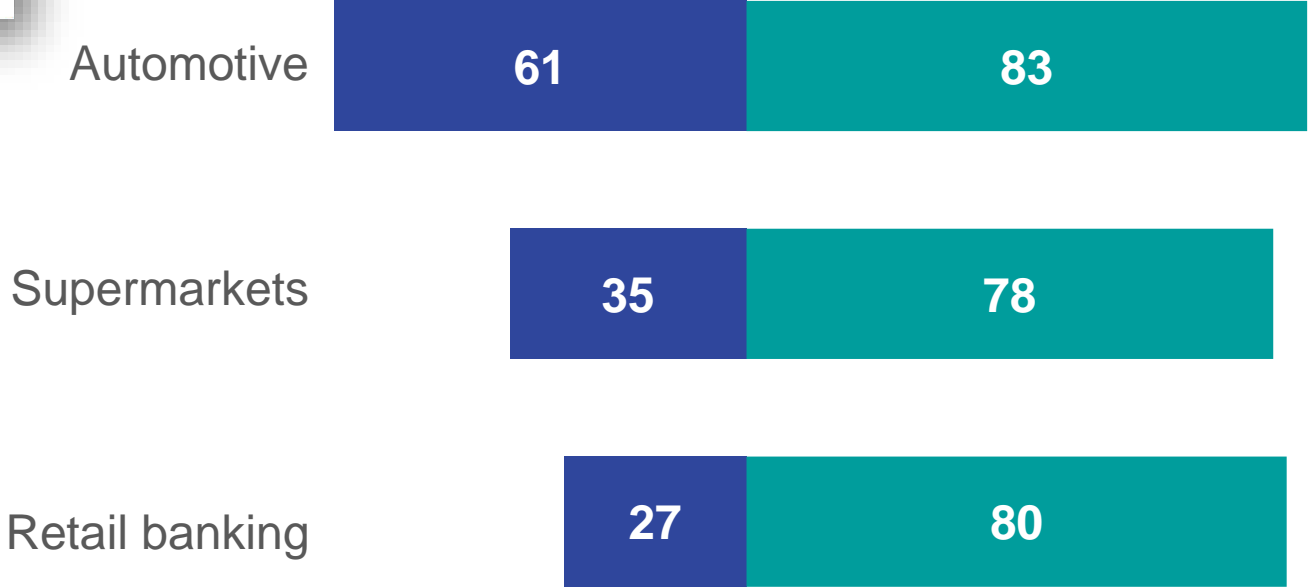
2. ■ What does cultural response bias look like?

PERFORMANCE DIFFERENCES OR CULTURAL RESPONSE BIAS?

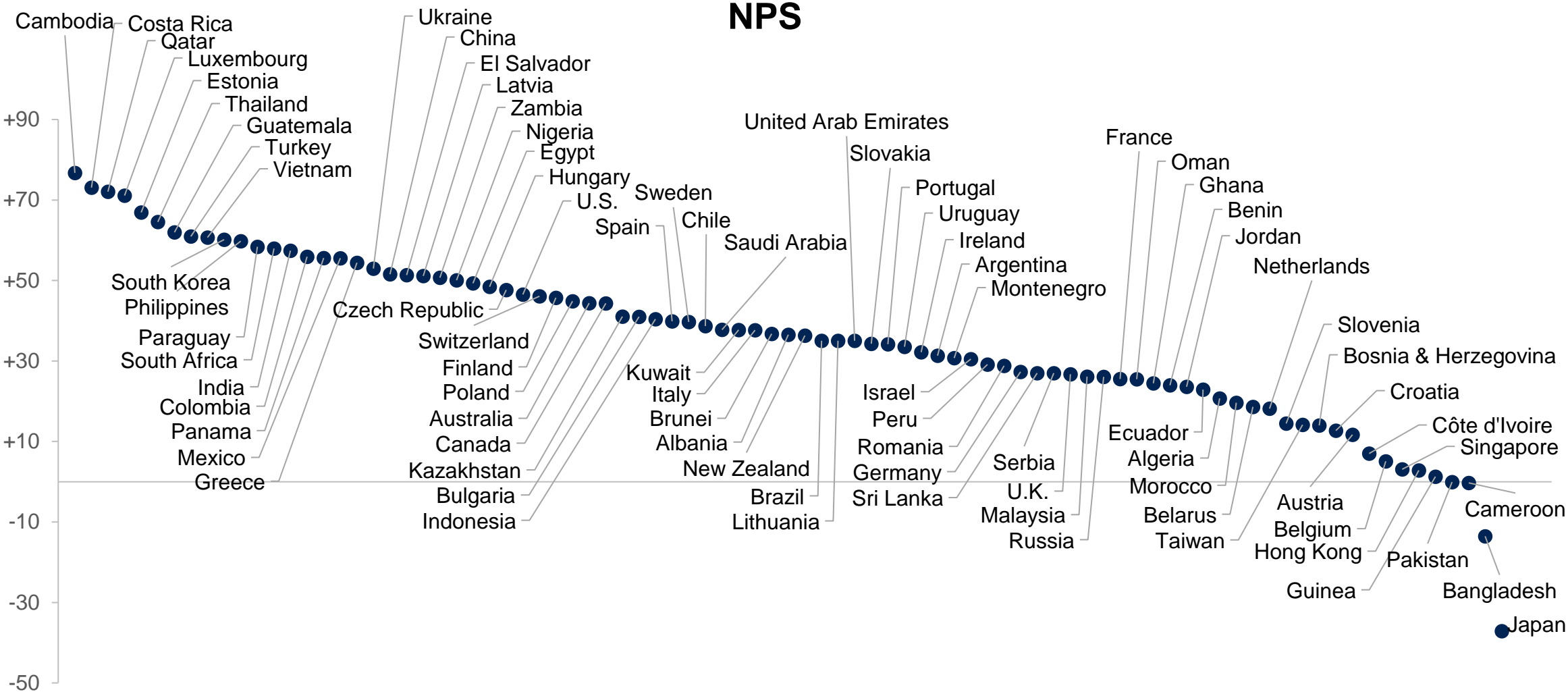


% scoring 8, 9 or 10

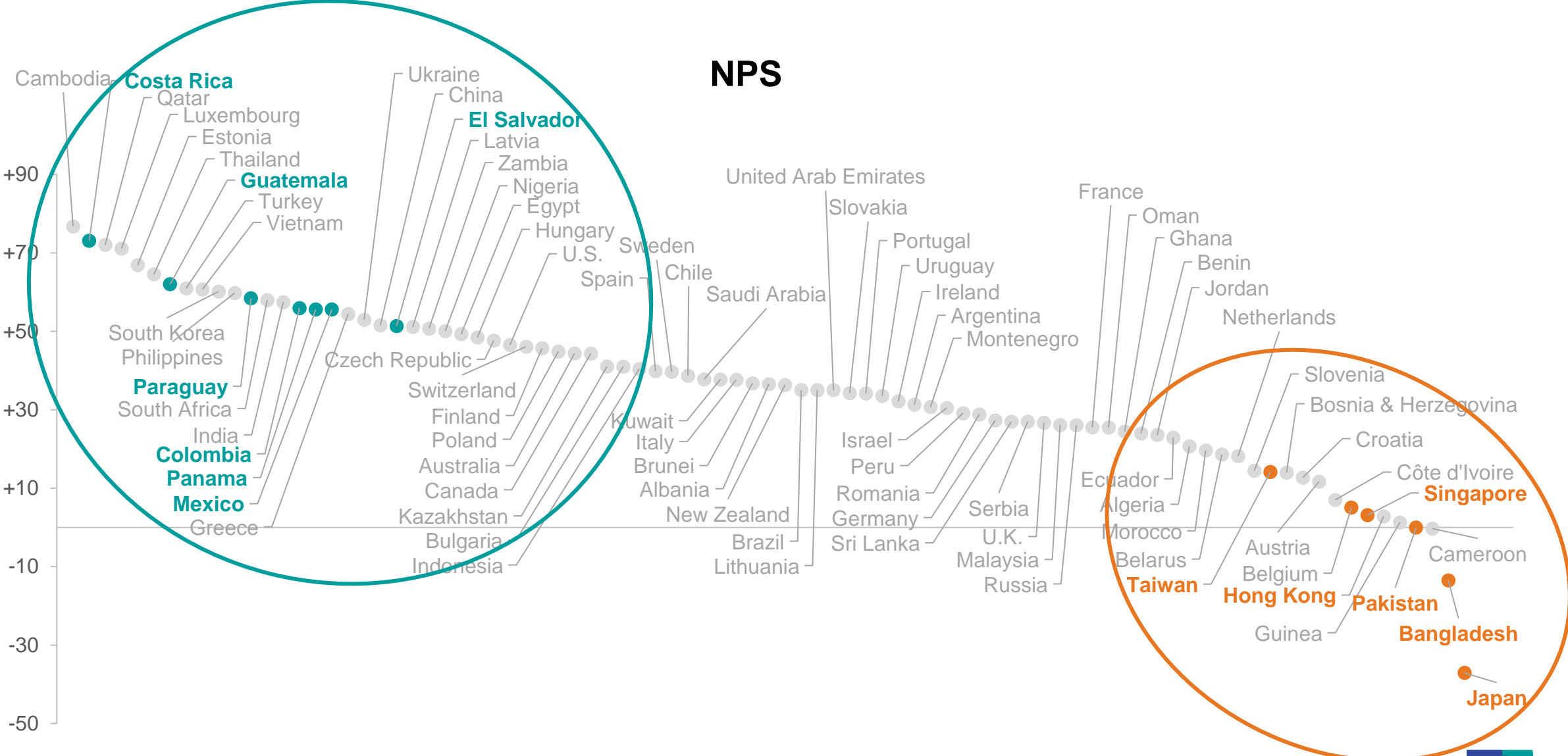
■ Japan ■ Puerto Rico



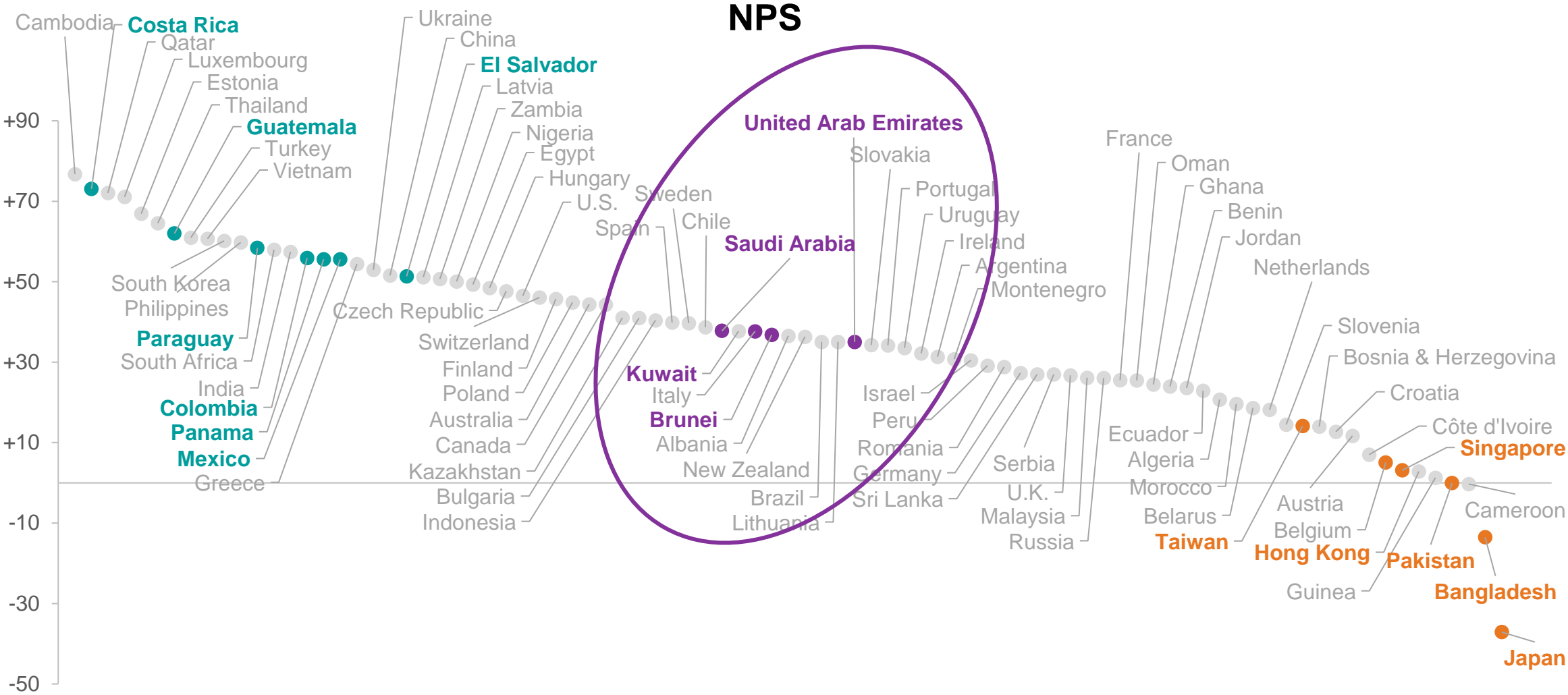
CULTURAL RESPONSE BIAS AT PLAY



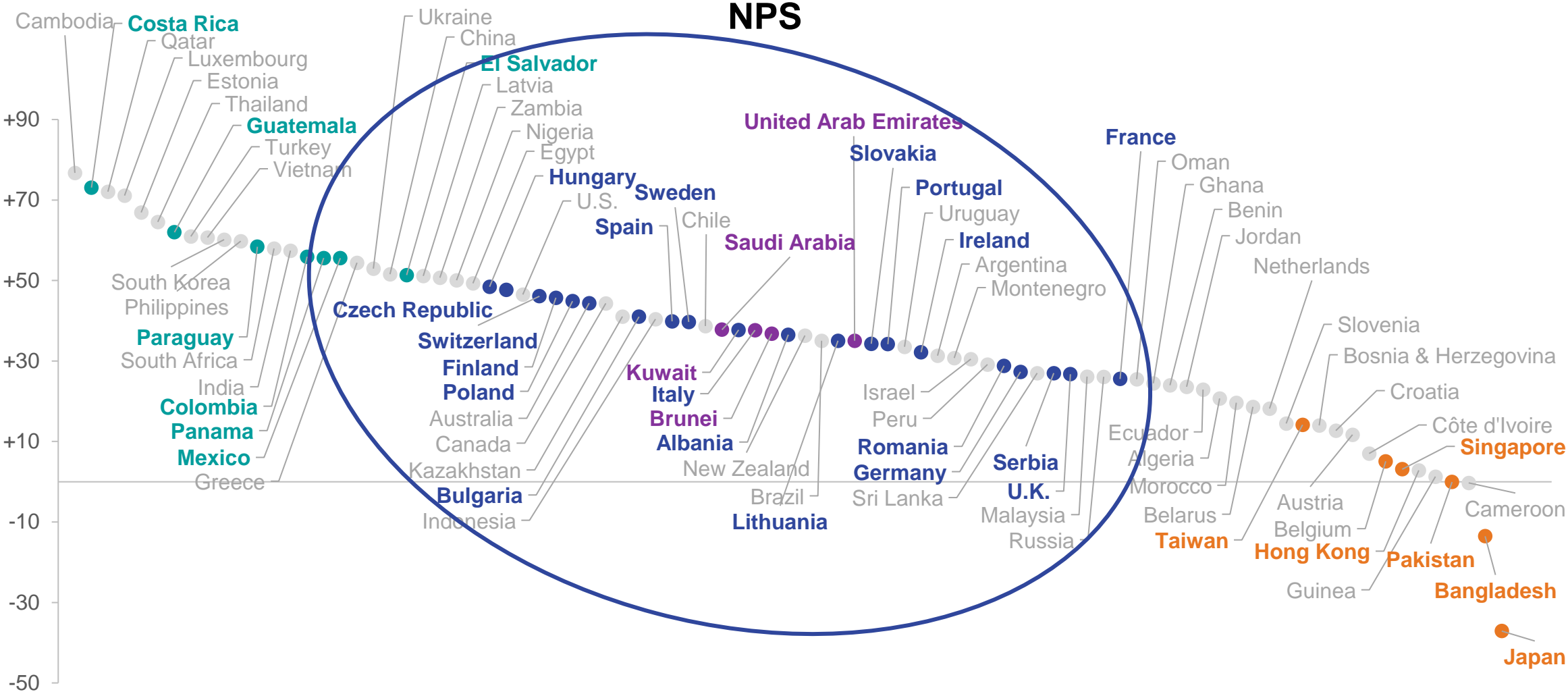
CULTURAL RESPONSE BIAS AT PLAY



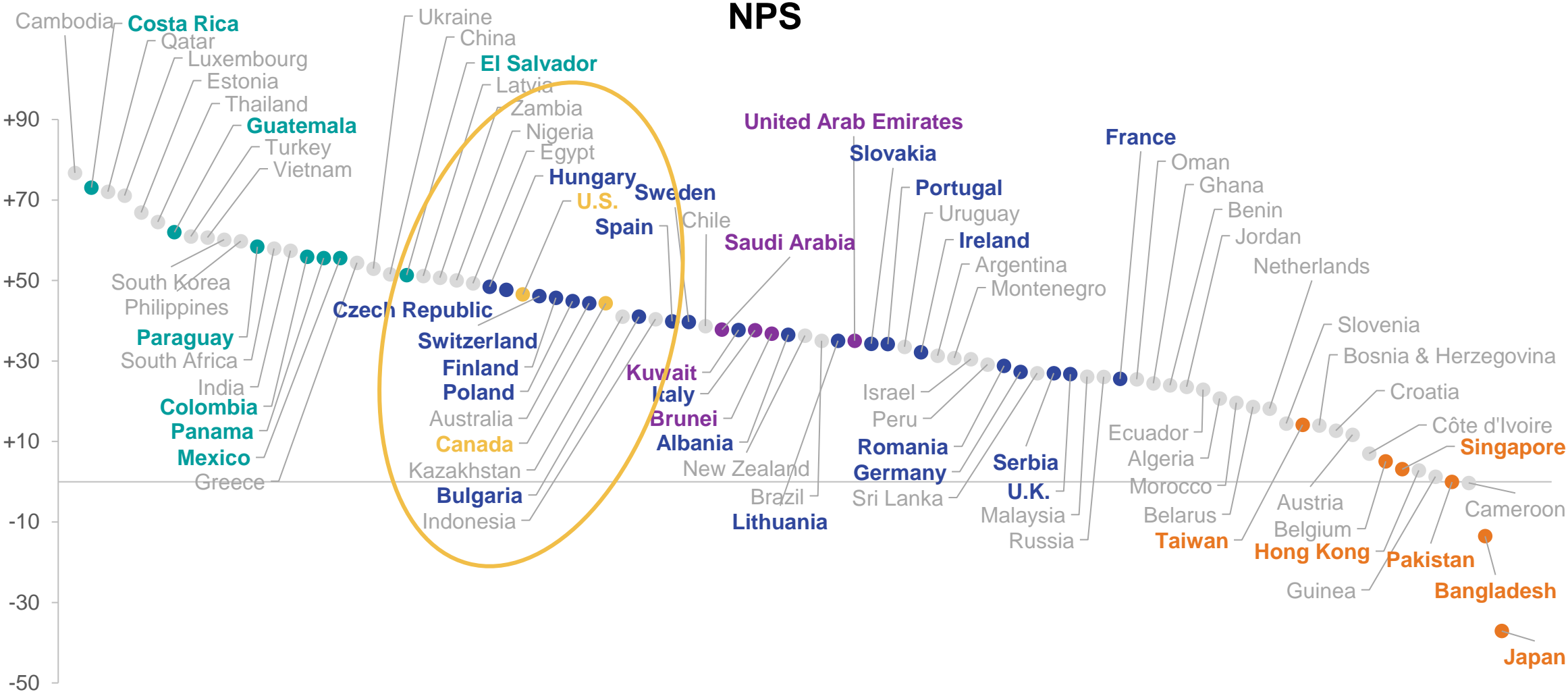
CULTURAL RESPONSE BIAS AT PLAY



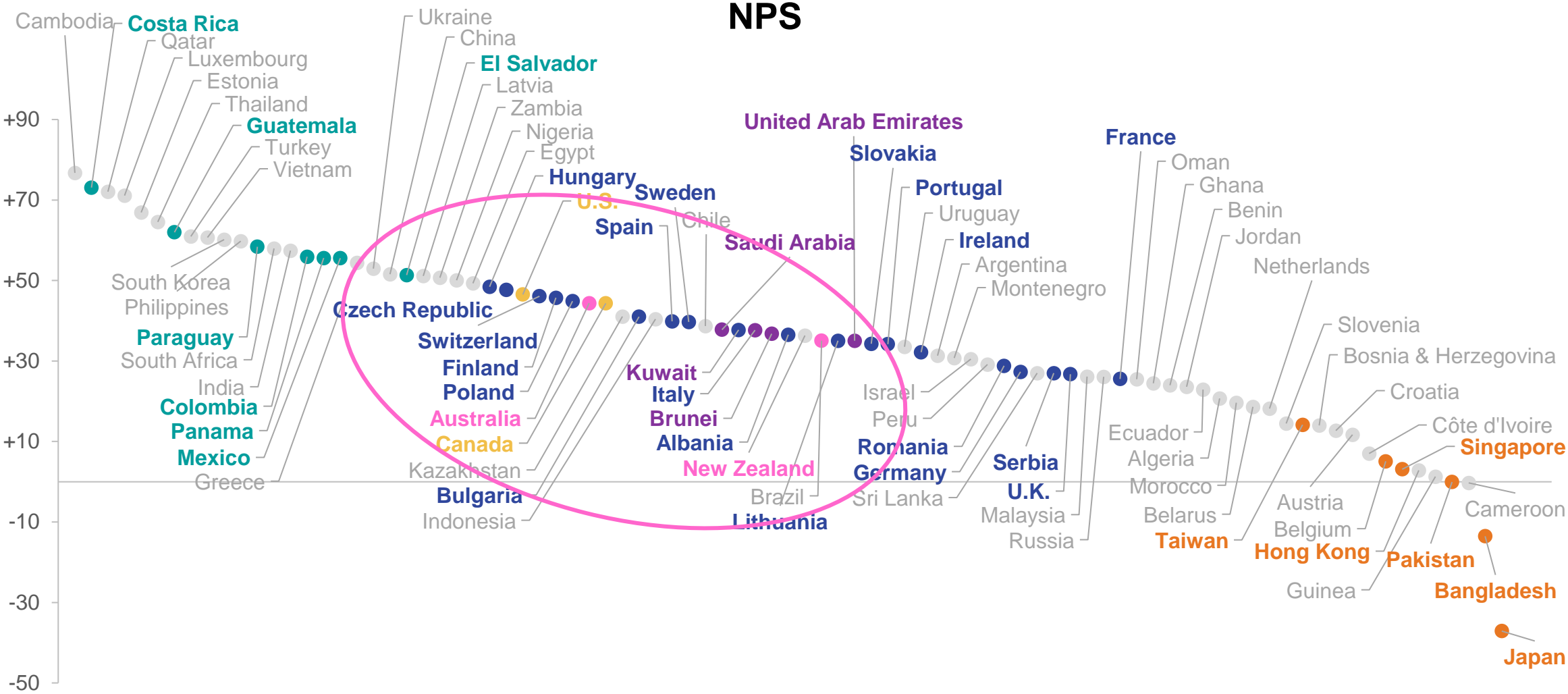
CULTURAL RESPONSE BIAS AT PLAY



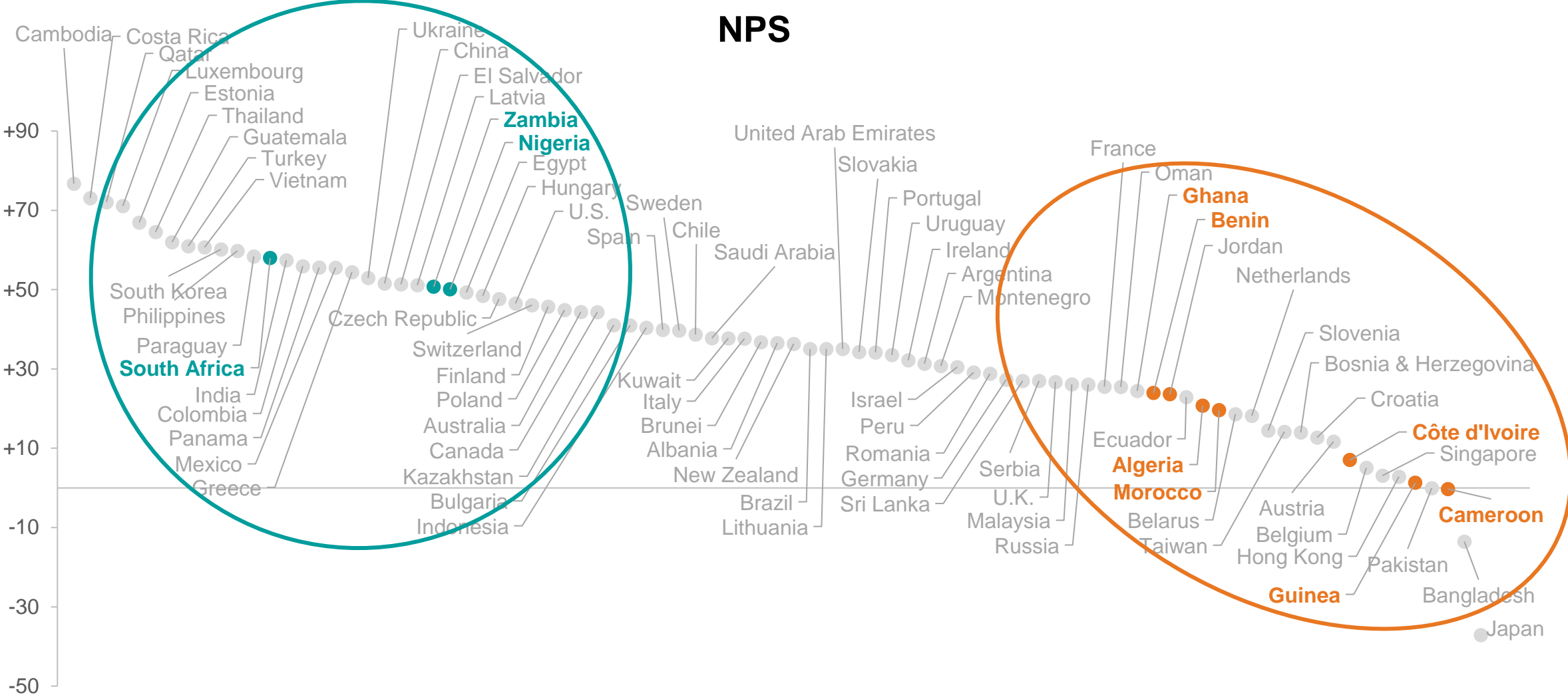
CULTURAL RESPONSE BIAS AT PLAY



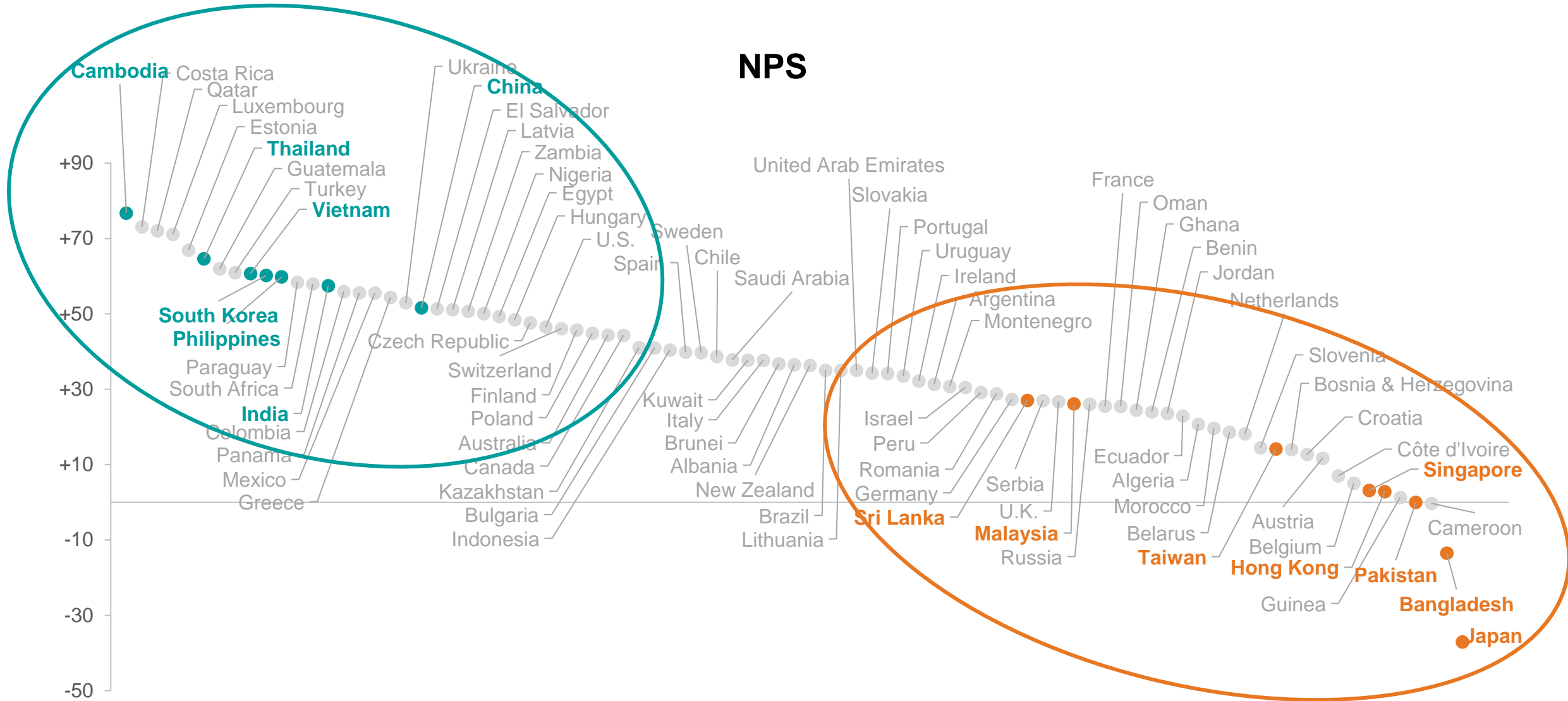
CULTURAL RESPONSE BIAS AT PLAY



BUT REGIONAL PATTERNS CAN EMERGE



AS CAN REGIONAL VARIATION





There is natural variation.
But ‘something cultural’ is at play.



3. ■ What can we do about cultural response bias?



Provide a level playing field at data collection

Solution #1.

Tracking trends over time

- No impact on questionnaires
- Systemic change can be seen
- No direct comparison



Solution #2.

Ranking results within each market

- Provides comparability between markets
- Easy to communicate
- Requires competitor ratings

Solution #3.

Recalibration using well-known global brands reputed for consistent delivery

- Provides comparability between markets
- Can be difficult to communicate
- Requires additional brand ratings



There is no single perfect solution.

With planning at questionnaire design, analysis and reporting, reliable global conclusions are possible.

THE CONTEXT OF BRAND SUCCESS

Building Successful Brands

Chris Murphy

Global Leader – Market Strategy & Understanding
23rd March 2023

WE'VE BEEN TOLD...

That brands can be measured through a combination of **rational and emotional associations...**

But are we telling the **full story?**



WE'VE BEEN TOLD...

That brands need to be **meaningfully different, mentally and physically available, loved...**

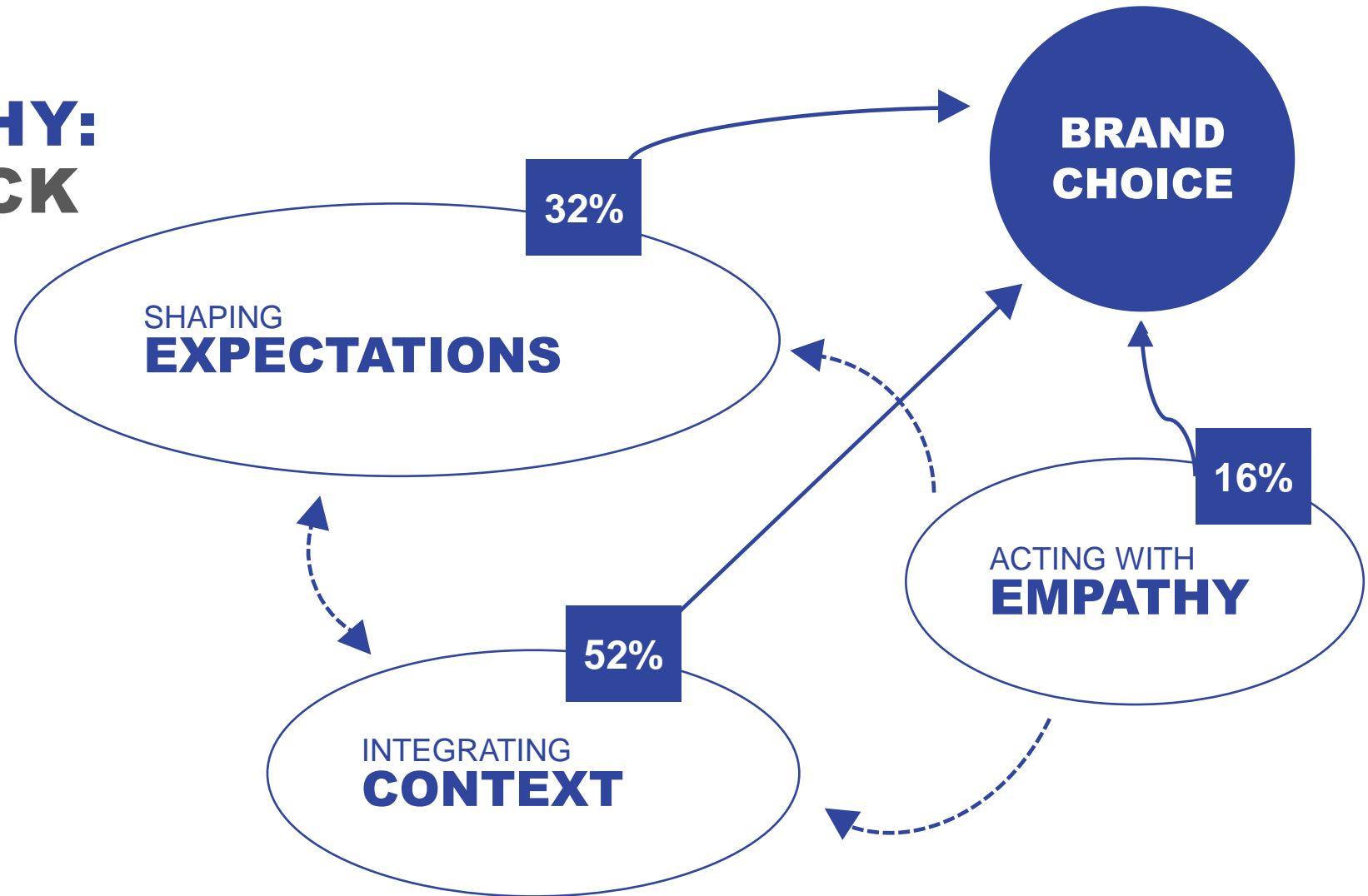
But sometimes strong performance on these dimensions **fails to sync with your commercial realities.**





EXPECTATIONS/ CONTEXT/EMPATHY: 3 KEYS TO UNLOCK BRAND SUCCESS

- Direct Influence
- - - Indirect Influence
- % Influence scores



BRAND SUCCESS VALIDATION

Ipsos R&D 2023: (N=7000)Category Users/Buyers in UK, USA, Japan, France and South Africa across Streaming, Banking, Credit Cards, Sparkling water, Beer, Retail and Analgesics

WHAT DO WE MEAN BY CONTEXT?

What's happening in people's lives, and the world around them

Two Broad Types Of Context:



Macro

Societal and cultural values, norms, and prevalent issues, topics, and themes



Micro

The occasions in which people are choosing brands

- **Logistics:** where, when, with whom
- **Needs:** To satisfy which needs, to solve which problems
- **Behavior :** What they are doing today. What frictions exist.
- **Market Effects :** How easy or difficult is it to choose the brand

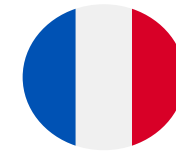
BABBEL: THE IMPORTANCE OF CULTURAL CONTEXT



Diversity



Personal enrichment



Self assurance



Professional boost

CONTEXT MATTERS...in Streaming

DIFFERENT BRANDS DOMINATE DIFFERENT OCCASIONS

56%

OF BRAND CHOICE IN
VIDEO STREAMING IS
DETERMINED
BY CONTEXT

OCCASIONS



Evening entertainment
alone/couple

NETFLIX prime video

CONTEXT MATTERS...in Streaming

DIFFERENT BRANDS DOMINATE DIFFERENT OCCASIONS

56%

OF BRAND CHOICE IN
VIDEO STREAMING IS
DETERMINED
BY CONTEXT

OCCASIONS



Evening entertainment
alone/couple

NETFLIX prime video



Evening
entertainment family

NETFLIX Disney+

CONTEXT MATTERS...in Streaming

DIFFERENT BRANDS DOMINATE DIFFERENT OCCASIONS

56%

OF BRAND CHOICE IN
VIDEO STREAMING IS
DETERMINED
BY CONTEXT

OCCASIONS



Evening entertainment
alone/couple

NETFLIX prime video



Evening
entertainment family

NETFLIX Disney+



While doing
something else

YouTube

WHAT IT MEANS FOR **MARKETERS:**



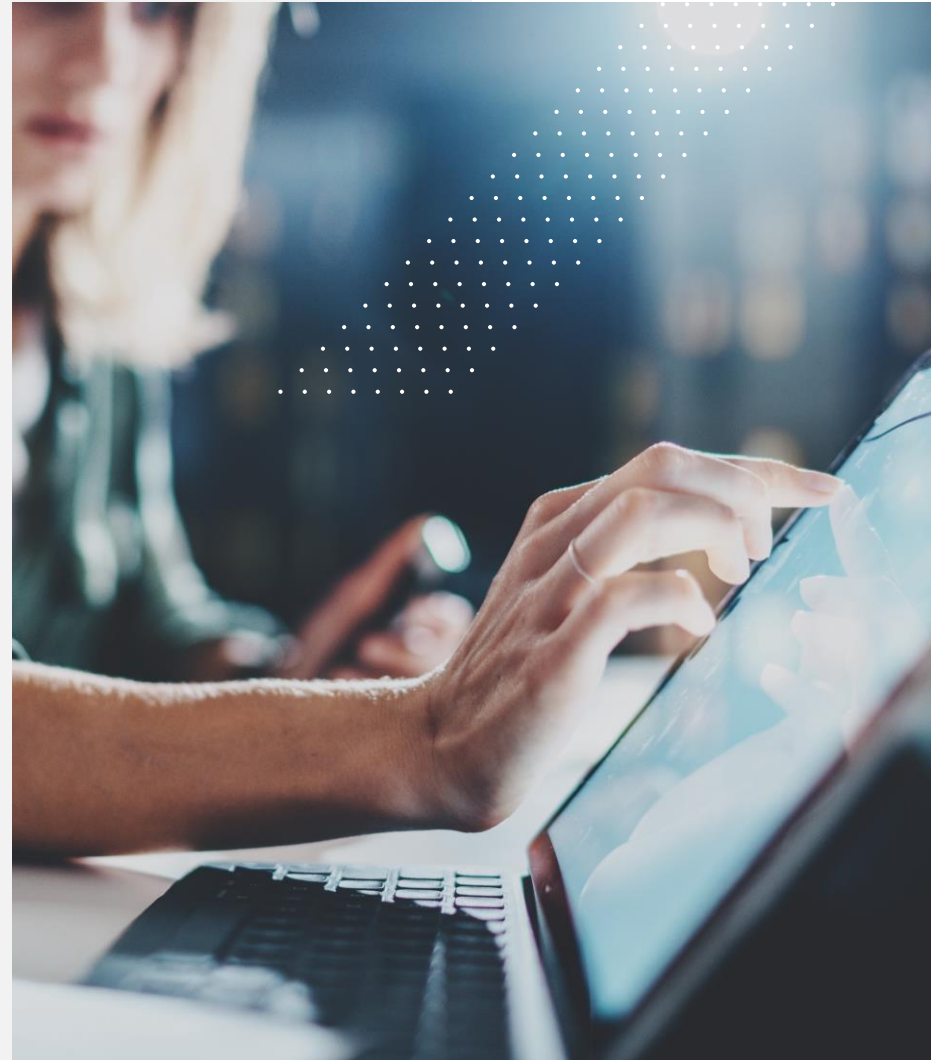
Stay close to **macro trends** and how they differ by subgroup or culture



Investigate **the specific contexts, moments and occasions** in which people engage in your category




Look for white spaces: any unmet moment, occasion or emerging spaces where your brand can play a role



WHAT IT MEANS FOR MEASUREMENT: A DYNAMIC CONTEXT MEANS DOING THINGS DIFFERENTLY

01



FRAMING

FRAME QUESTIONS IN RELEVANT CONTEXT

The image shows a person in a VR headset interacting with a virtual chat interface. The interface has tabs for 'Chat', 'Friends', and 'Lobby'. The chat window is titled 'Chat Room Alpha' and shows several messages from users like @carla5100r12, @sammy123, @mimason1, @gabriel123, and @gabriel123. The person is wearing a white VR headset and a blue and white jacket.

02

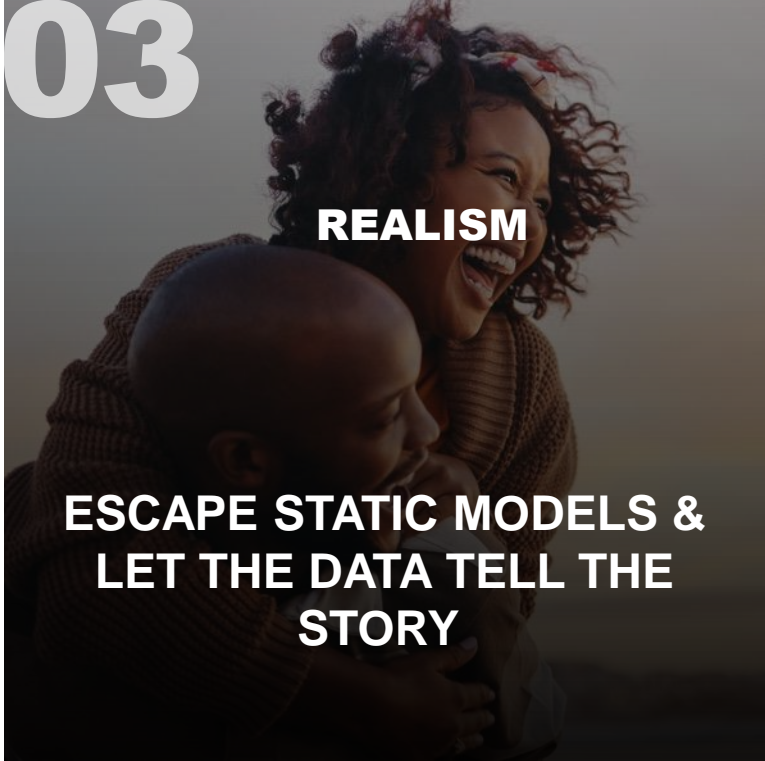


PRAGMATISM

OPEN THE DOOR TO PRAGMATIC AND CULTURAL DRIVERS

The image shows a woman with blonde hair smiling and gesturing with her hand. In the background, there are neon signs, one of which says 'Ramen Station'.

03



REALISM

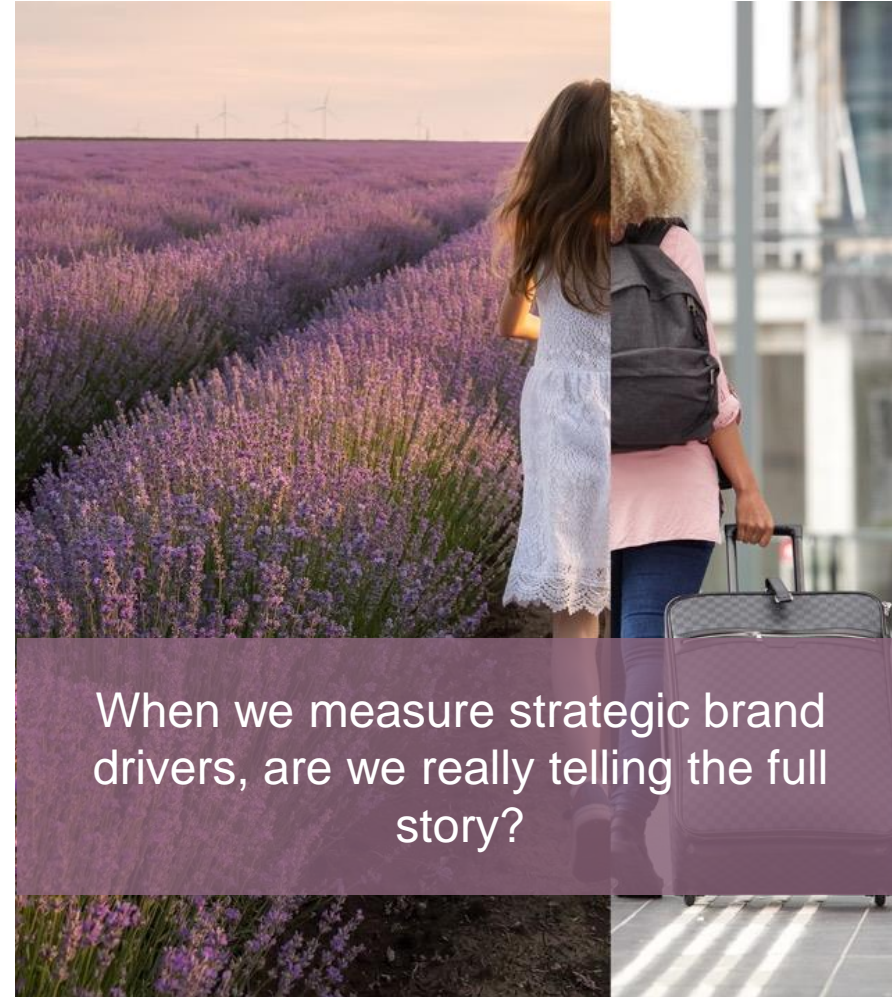
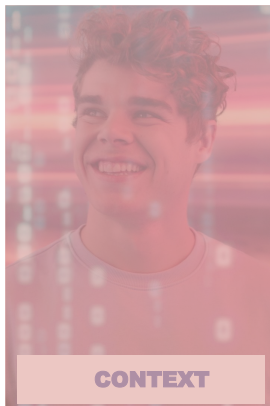
ESCAPE STATIC MODELS & LET THE DATA TELL THE STORY

The image shows a woman with curly hair hugging a man from behind. They are both smiling and looking towards the right.

CLOSING THOUGHTS

**SHAPE AND FULFILL EXPECTATIONS
IN CONTEXT...
WITH EMPATHY**

**NEXT KEYS: EMPATHY
WITH GILLIAN DREWETT**



KEYS

AN IPSOS WEBINAR SERIES

Access the recording, presentations
and resources from this episode



[\[Webinar\] KEYS - Why context really matters - Cultures | Countries | Communities | Ipsos](#)

JOIN US for our next KEYS webinar:
Thursday, April 27
11:00 & 17:00 Central European Time

THE EMPATHY EFFECT

KEYS WEBINAR – 27th APRIL

