

WE NEED TO TALK ABOUT CHANGE

KEYS – A WEBINAR SERIES BY IPSOS

7th July 2022



AGENDA

INTRODUCTION
Jennifer Hubber
Head of Ipsos Global Client Organisation

THE DYNAMICS OF PUBLIC OPINION
Simon Atkinson
Chief Knowledge Officer, Ipsos

THE IPSOS THEORY OF CHANGE
Billie Ing
Global Head of Trends & Foresight, Strategy3, Ipsos

CHANGING CONSUMERS, CHANGING CONTEXTS?
Moneesha Banerjee
Senior Client Officer, Ipsos in the US

THE MEGA TRENDS SHAPING MENA'S FUTURE
Mohammed Minawi
Chief Commercial Officer, Ipsos in MENA

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GAME CHANGERS

Watch the recording [here](#)

GAME CHANGERS



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THE DYNAMICS OF PUBLIC OPINION



Simon Atkinson

7 July 2022

Talking about change...

WHAT WORRIES THE WORLD?

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

July 2021

GAME CHANGERS



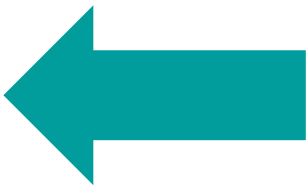
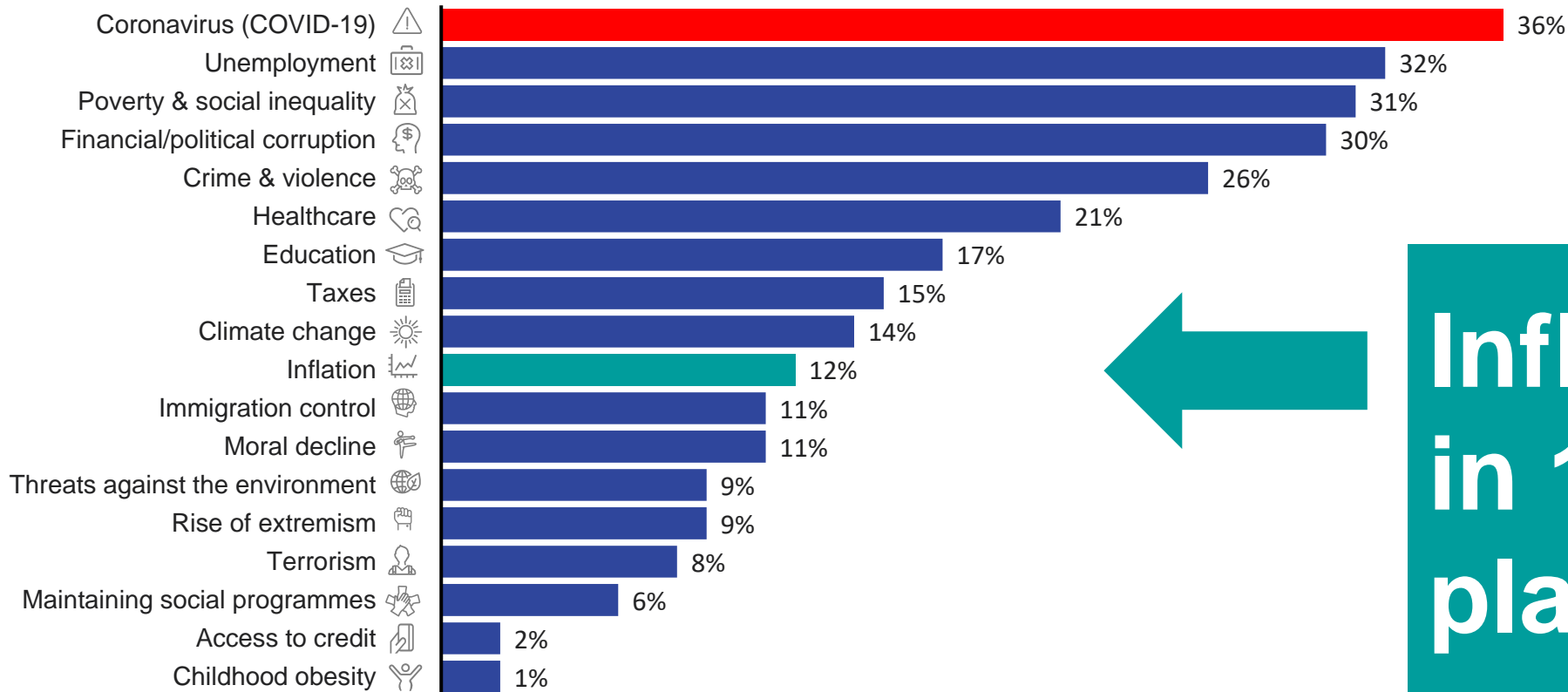
GAME CHANGERS



WORLD WORRIES: JULY 2021

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

% mentioned in July 2021 (global country average)



**Inflation
in 10th
place**

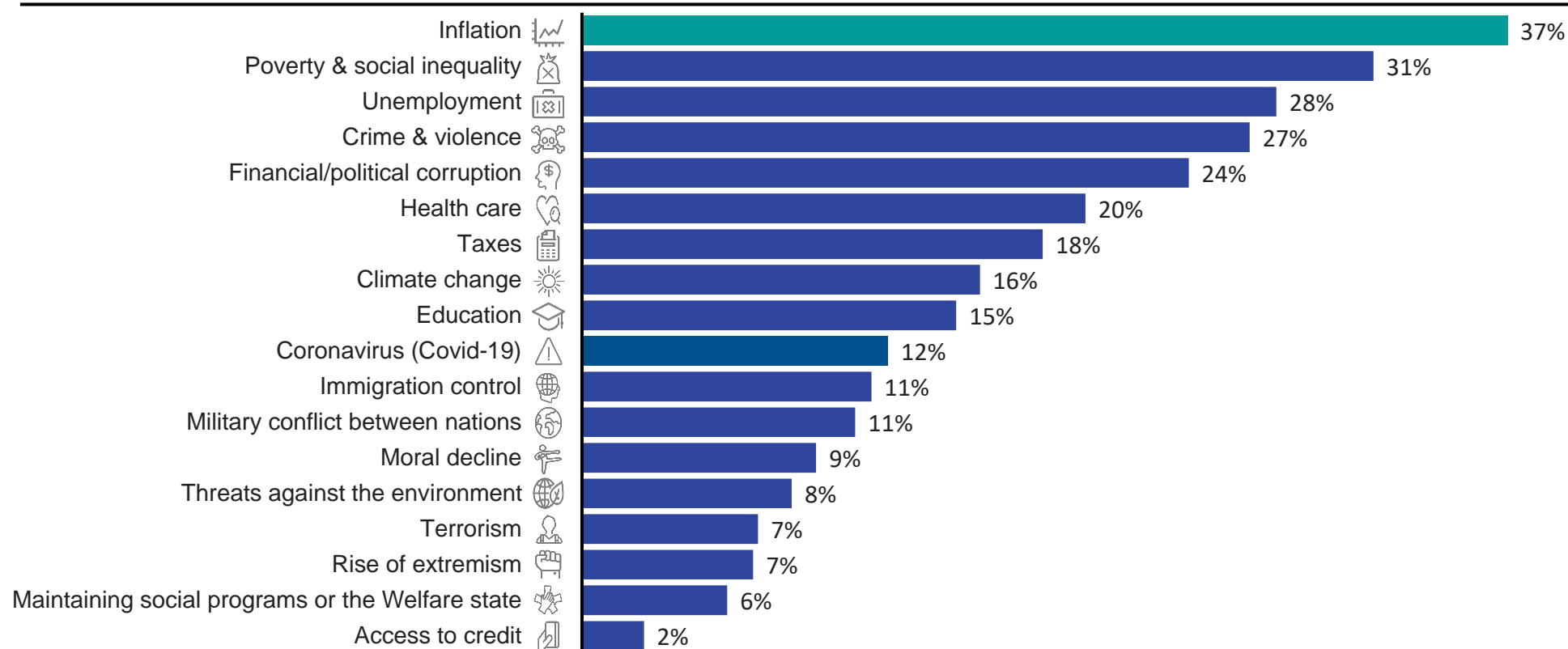
Base: Representative sample of 20,502 adults aged 16-74 in 28 participating countries, June 25th – July 9th 2021.

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

WORLD WORRIES: JUNE 2022

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

% mentioned in June 2022 (Global country average)



Base: Representative sample of c.19,000 adults aged 16-74 in 27 participating countries, May 27th - 2022 – June 6th 2022.

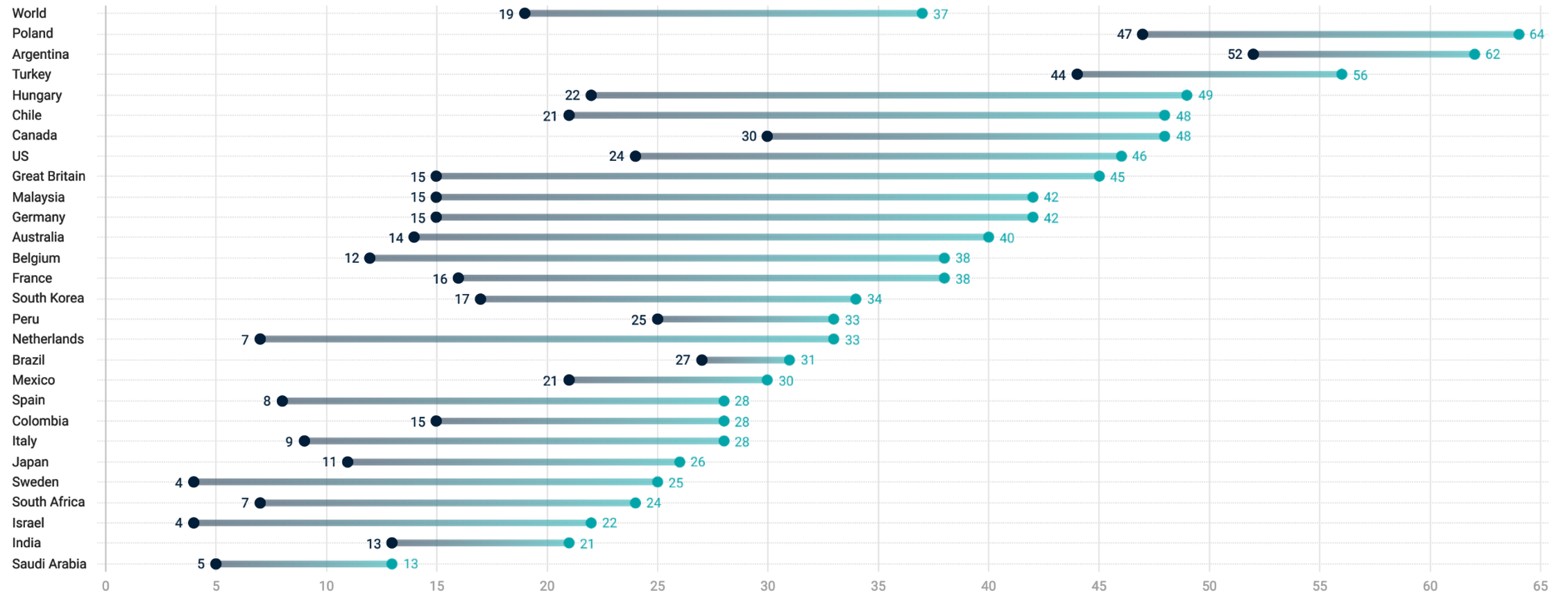
Source: Ipsos Global Advisor. *Global score is a Global Country Average. See methodology for details.*

CONCERNS ABOUT INFLATION ARE RISING EVERYWHERE

(%) worried about INFLATION in each country

Jan 2022

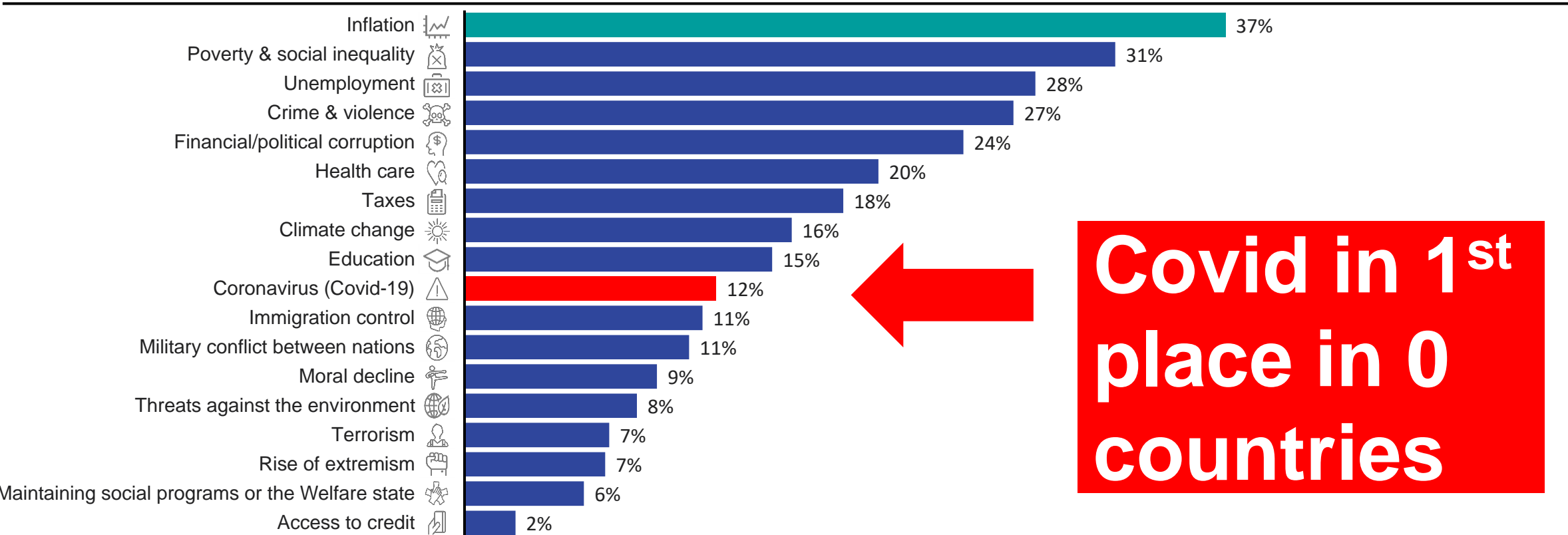
June 2022



WORLD WORRIES: JUNE 2022

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

% mentioned in June 2022 (Global country average)



**Covid in 1st
place in 0
countries**

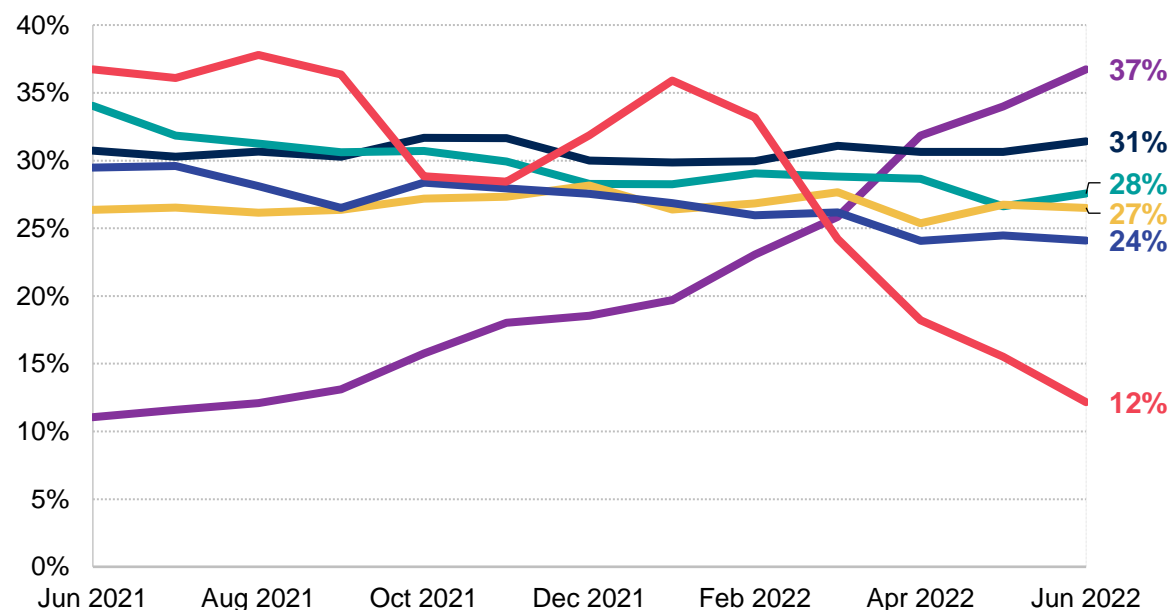
Base: Representative sample of c.19,000 adults aged 16-74 in 27 participating countries, May 27th - 2022 – June 6th 2022.
Source: Ipsos Global Advisor. *Global score is a Global Country Average. See methodology for details.*

WHAT WORRIES THE WORLD? THE 12-MONTH TREND

Q

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

Chart shows top 5 issues plus Coronavirus



Inflation



Poverty & social
inequality



Unemployment



Crime & violence



Financial/political
corruption



Coronavirus
10th place this month

“A year of
dramatic
change”

Base: Representative sample of c.19,000 adults aged 16-74 in 27 participating countries, May 27th - 2022 – June 6th 2022.

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

WHAT WORRIES THE WORLD: THE 8-YEAR TREND

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

Global country average

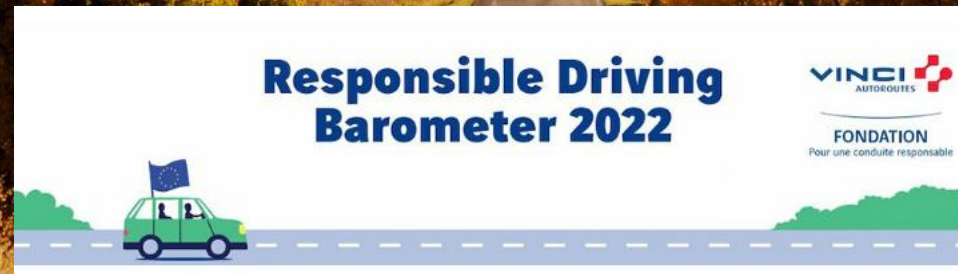


Base: Representative sample of c.19,000 adults aged 16-74 in 27 participating countries, May 27th - 2022 – June 6th 2022. Source: Ipsos Global Advisor. Global score is a Global Country Average. See methodology for details.



**Some things
change more slowly**

Attentive Calm Courteous Vulnerable
Stressed Aggressive Irresponsible Dangerous



*Q: Which two
adjectives most
accurately describes
YOU while driving...*

*Q: Which two
adjectives most
accurately describes
OTHER drivers...*

SOME THINGS CHANGE MORE SLOWLY

DESCRIBES **YOU**

Attentive

2017	2022
74%	74%

Calm

2017	2022
54%	58%

*At least 1
positive
adjective*

2017	2022
97%	97%

Source: Ipsos/Vinci Foundation
Responsible Driving Barometer 2022.
12,400 people in 11 European countries



SOME THINGS CHANGE MORE SLOWLY



DESCRIBES
OTHER DRIVERS

Attentive

2017	2022
15%	20%

Calm

2017	2022
11%	15%

*At least 1
negative
adjective*

2017	2022
83%	79%

NEWS ARTICLE | 28 March 2022 | Directorate-General for Mobility and Transport

Road safety in the EU: fatalities in 2021 remain well below pre-pandemic level

Today the European Commission published preliminary figures on road fatalities for 2021. An estimated 19 800 people were killed in road crashes last year. This was an increase of 1 000 deaths (+5%) on 2020, but still represents almost 3 000 (-13%) fewer fatalities compared to the pre-pandemic period in 2019. The overall target is to halve the number of deaths by 2030. EU-wide, the last decade saw a fall of 36%.

Source: [European Commission](#)

Source: Ipsos/Vinci Foundation
Responsible Driving Barometer 2022.
12,400 people in 11 European countries




Talking about the public mood

#1

Bring in other sources of information

GAME CHANGERS





Ipsos Poll **Core Political Data**

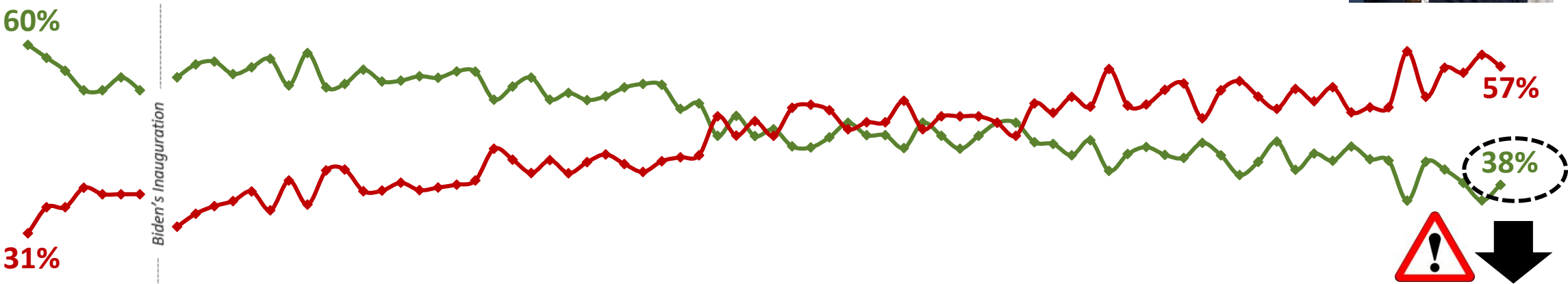
June 29, 2022

JOE BIDEN'S WEEKLY JOB APPROVAL

Overall, do you approve or disapprove of the way Joe Biden is handling his job as president? (previously 'president-elect')

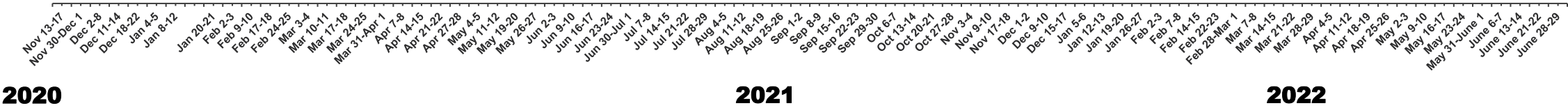


Total Approve



Incumbent 40% approval score gives 50/50 chance of re-election

Total Disapprove



Talking about the public mood

#2

Be cautious
with our
conclusions

GAME CHANGERS



ATTITUDES TOWARD REFUGEES

78% agree that people should be able to take refuge in other countries, **including their own**, to escape war or persecution



WORLD REFUGEE DAY

Global attitudes towards refugees

June 2022

World Refugee Day 2022: New Ipsos survey shows greater compassion for forcibly displaced as war in Ukraine wears on

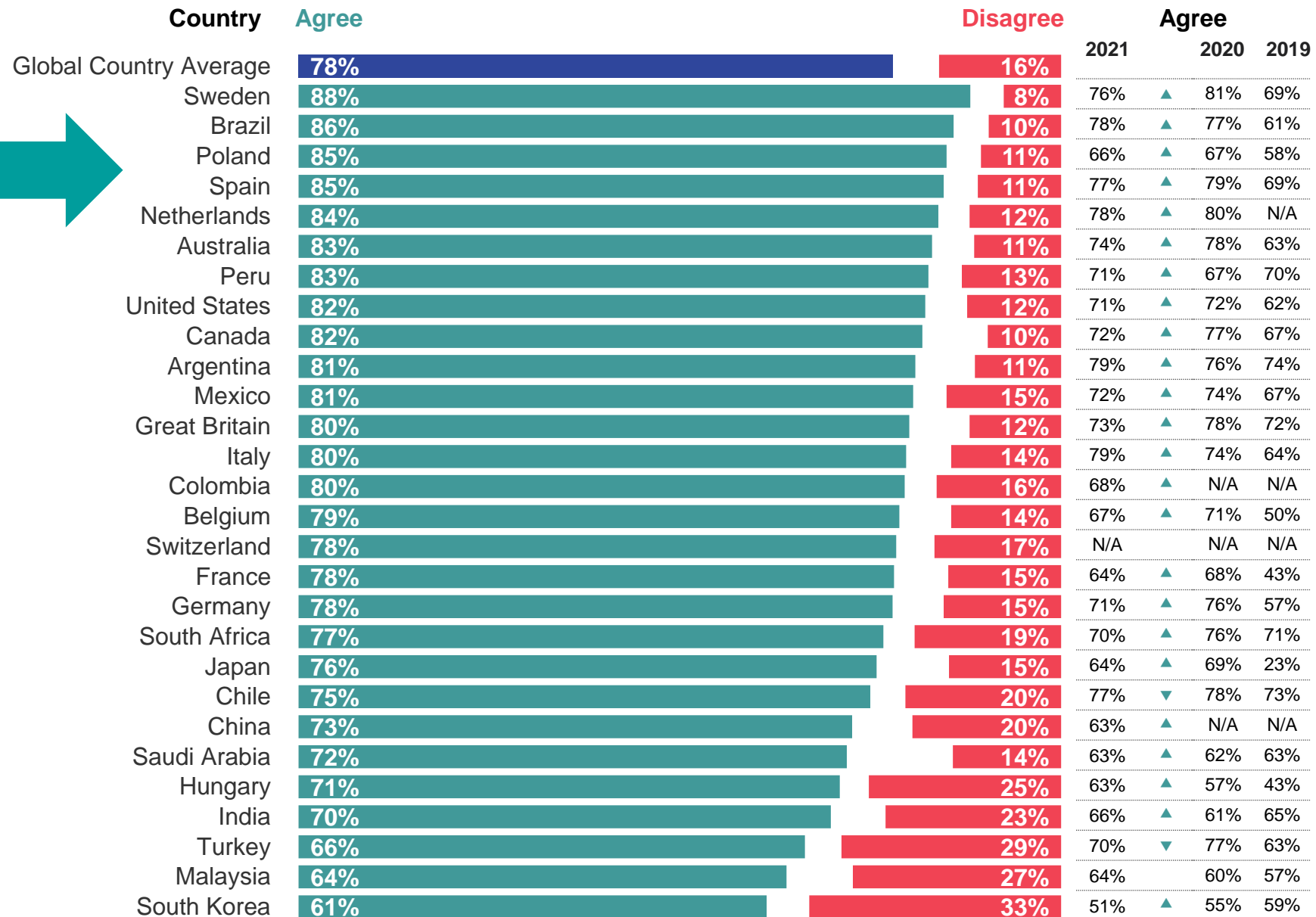
Majorities in the U.S. and globally support allowing more refugees fleeing war, violent conflict, natural disaster, or the effects of climate change into their country

17 June 2022 International / Immigration / Society

Agreement has increased since last year in most countries

Q: Thinking about your country, do you agree or disagree with the following statements?

People should be able to take refuge in other countries, including in [COUNTRY], to escape from war or persecution

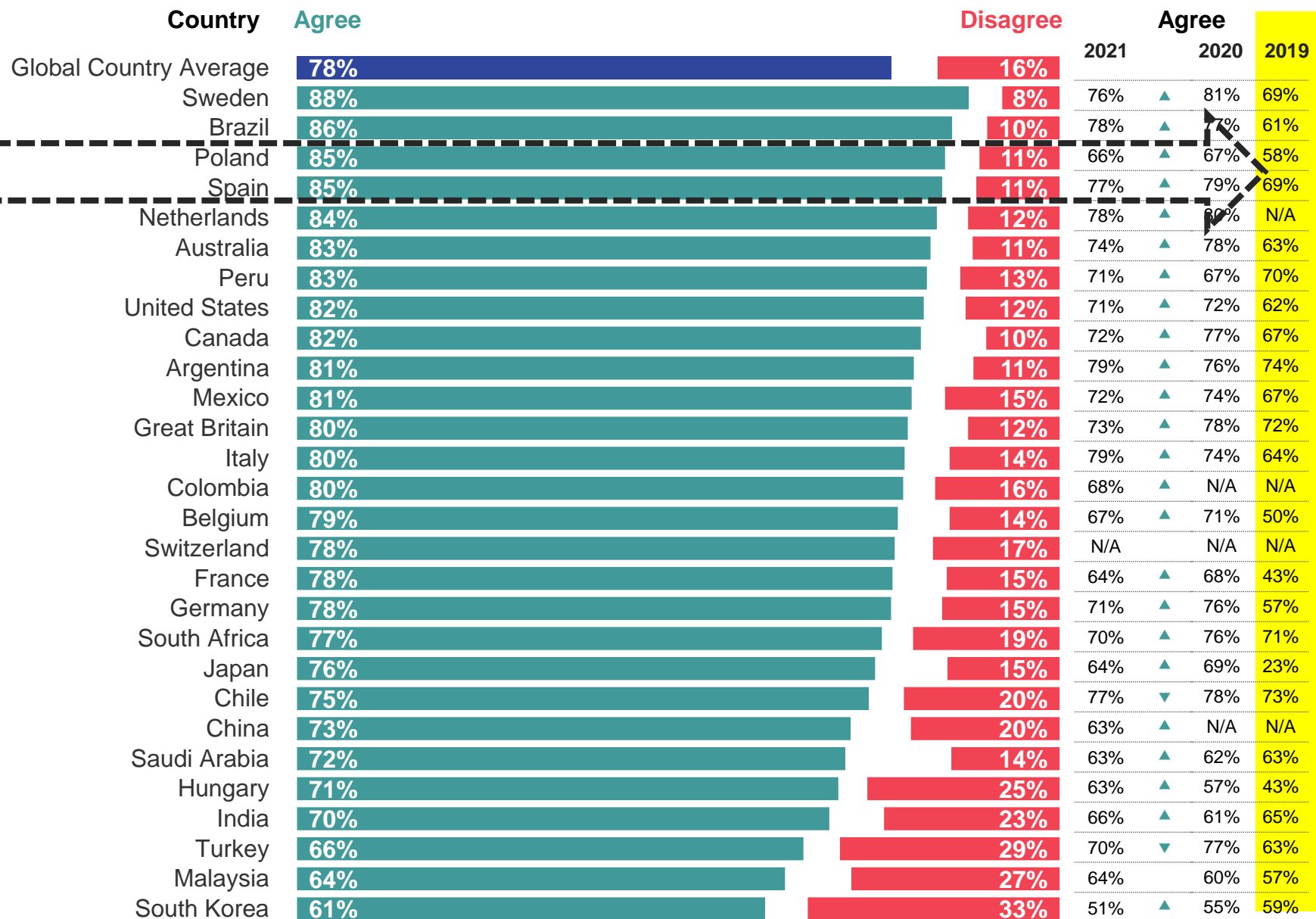


Base: 20,505 online adults aged 16-74 across 28 countries, 22 APRIL – 6 MAY 2022

Agreement has increased since 2019 in most countries

Q: Thinking about your country, do you agree or disagree with the following statements?

People should be able to take refuge in other countries, including in [COUNTRY], to escape from war or persecution



Base: 20,505 online adults aged 16-74 across 28 countries, 22 APRIL – 6 MAY 2022

Talking about the public mood

#3

Be precise
with our
questions

GAME CHANGERS



IPSOS ESSENTIALS

Tracking consumer attitudes and behavior in times of change

Phase 6, Wave 61: June 10 - 13, 2022

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

GAME CHANGERS

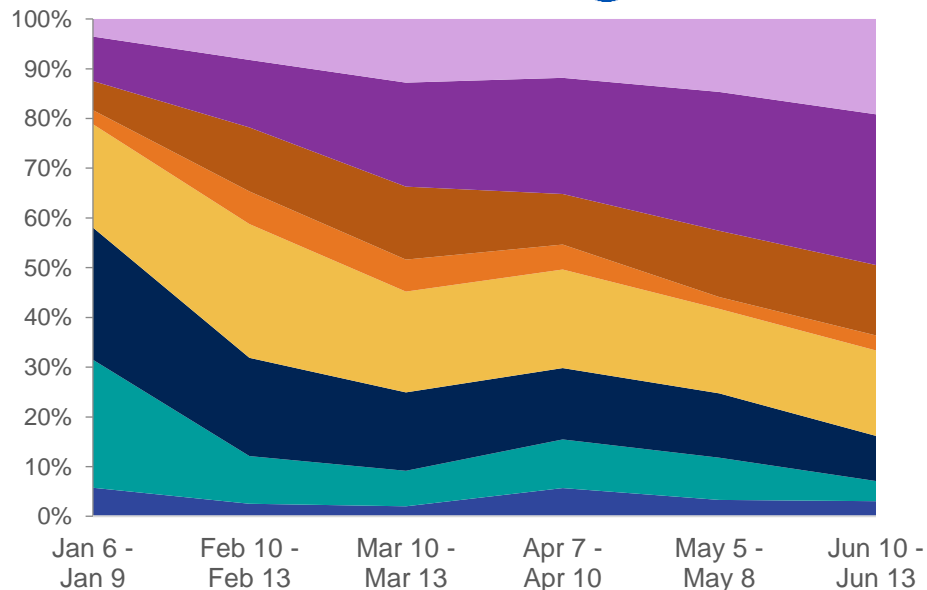


AUSTRALIA AND U.K. ARE LOOKING PAST THE PANDEMIC

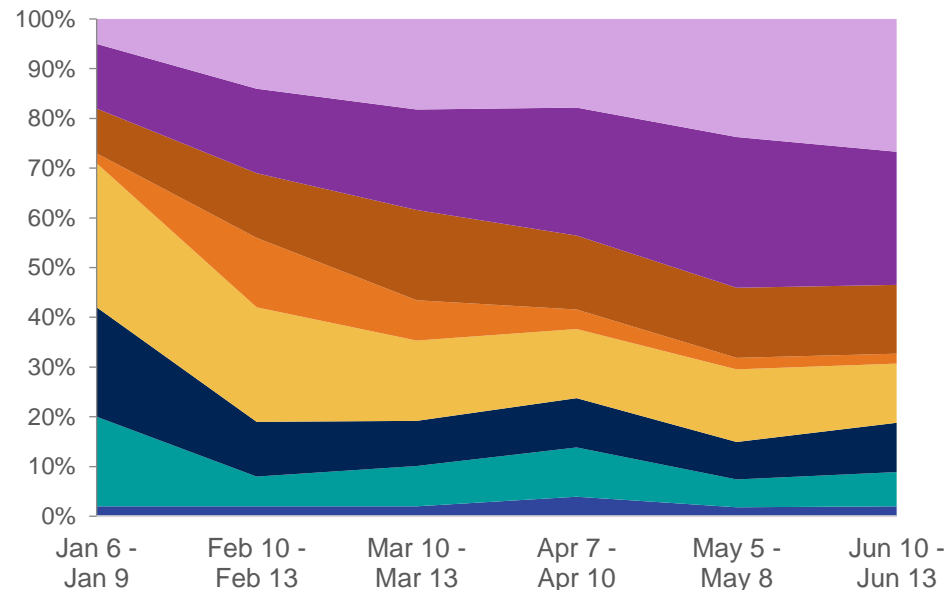
“Which one of the following phases do you feel best describes your current situation regarding the COVID-19 pandemic?”

Pre-Pandemic Preparation Adjustment Acclimation Opening Up Re-start New Normal Post-Pandemic

Australia 



UK 



Post-Pandemic
New Normal

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

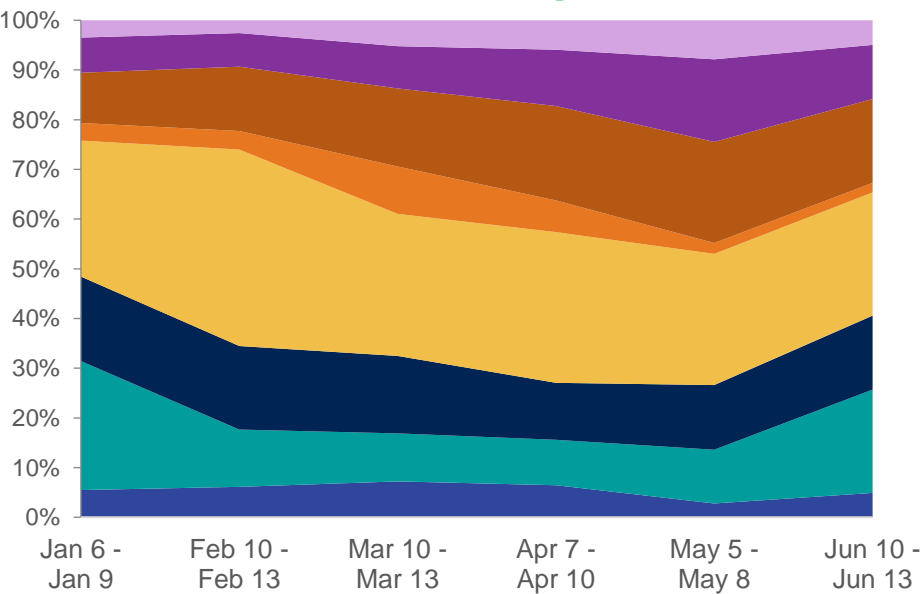
Base: Australia: 505 UK: 1001

MEXICO AND BRAZIL RETURN TO MORE RESTRICTIVE PHASES

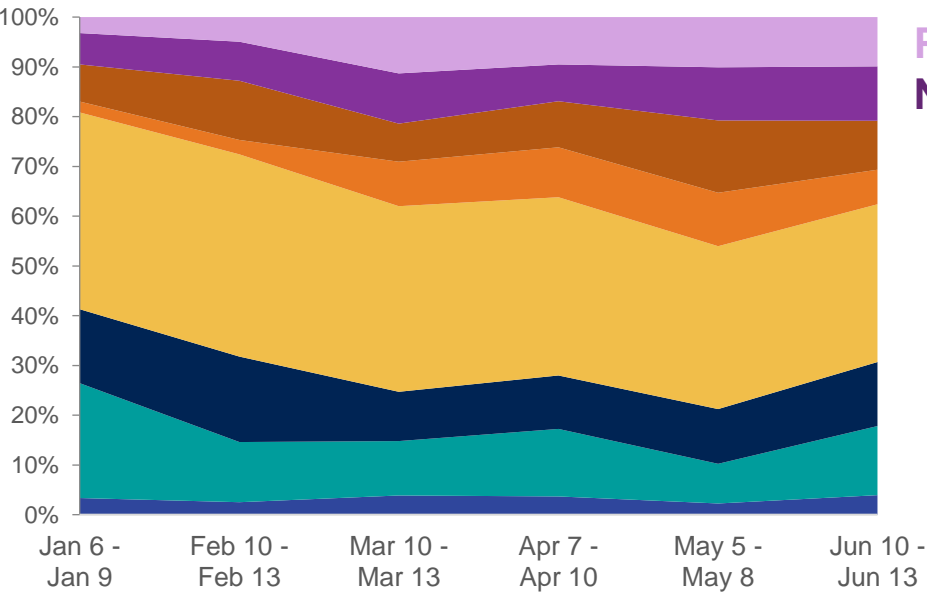
“Which one of the following phases do you feel best describes your current situation regarding the COVID-19 pandemic?”

Pre-Pandemic Preparation Adjustment Acclimation Opening Up Re-start New Normal Post-Pandemic

Brazil 



Mexico 



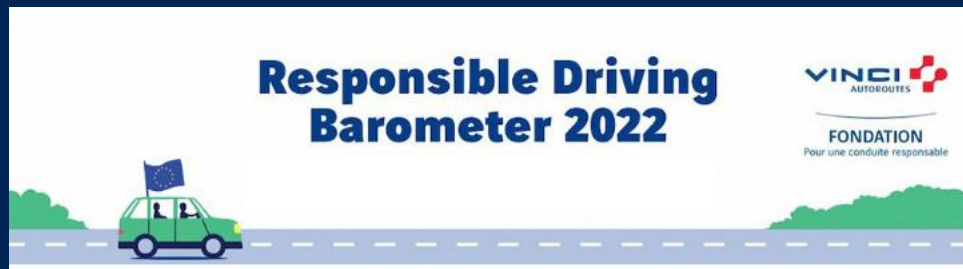
Post-Pandemic
New Normal

Q. Which one of the following phases do you feel best describes your current situation regarding the COVID-19 pandemic?
Base: Brazil: 501 Mexico: 500

THE DYNAMICS OF PUBLIC OPINION

- #1** Bring in other sources of information
- #2** Be cautious about definitive conclusions
- #3** Be precise with our questions

THE DYNAMICS OF PUBLIC OPINION



Explore the resources on the [webinar home page](#)



USING THE IPSOS THEORY OF CHANGE TO BETTER PREPARE FOR THE FUTURE.

Billie Ing
7 July, 2022

SOMETIMES IT FEELS LIKE EVERYTHING IS CHANGING, EVERYWHERE, ALL AT ONCE...

Predictions for 2022: Everything Is About To Change

BY JOSHBERSIN · PUBLISHED DECEMBER 15, 2021 · UPDATED DECEMBER 15, 2021

TechCrunch+

AI's role is poised to change monumentally in 2022 and beyond

Shashank Srivastava 10:46 PM GMT+1 • May 19, 2022

'Great Resignation' in UK Shows 20% Planning to Quit Soon, Survey Shows

The Attention Recession: How inflation and the pandemic are reshaping entertainment

It's the not knowing that gets you.

Coming out of the pandemic – or not, as the case may be – means we're all in uncharted territory.


In a year of huge change, uncertainty is everywhere.

WERE THE LAST TWO YEARS A BLIP THAT DISTRACTED US FROM DEEPER, UNDERLYING TRENDS?

Netflix share price



Source: Yahoo Finance



**We don't have a
crystal ball.**

**It's not about
being right;**

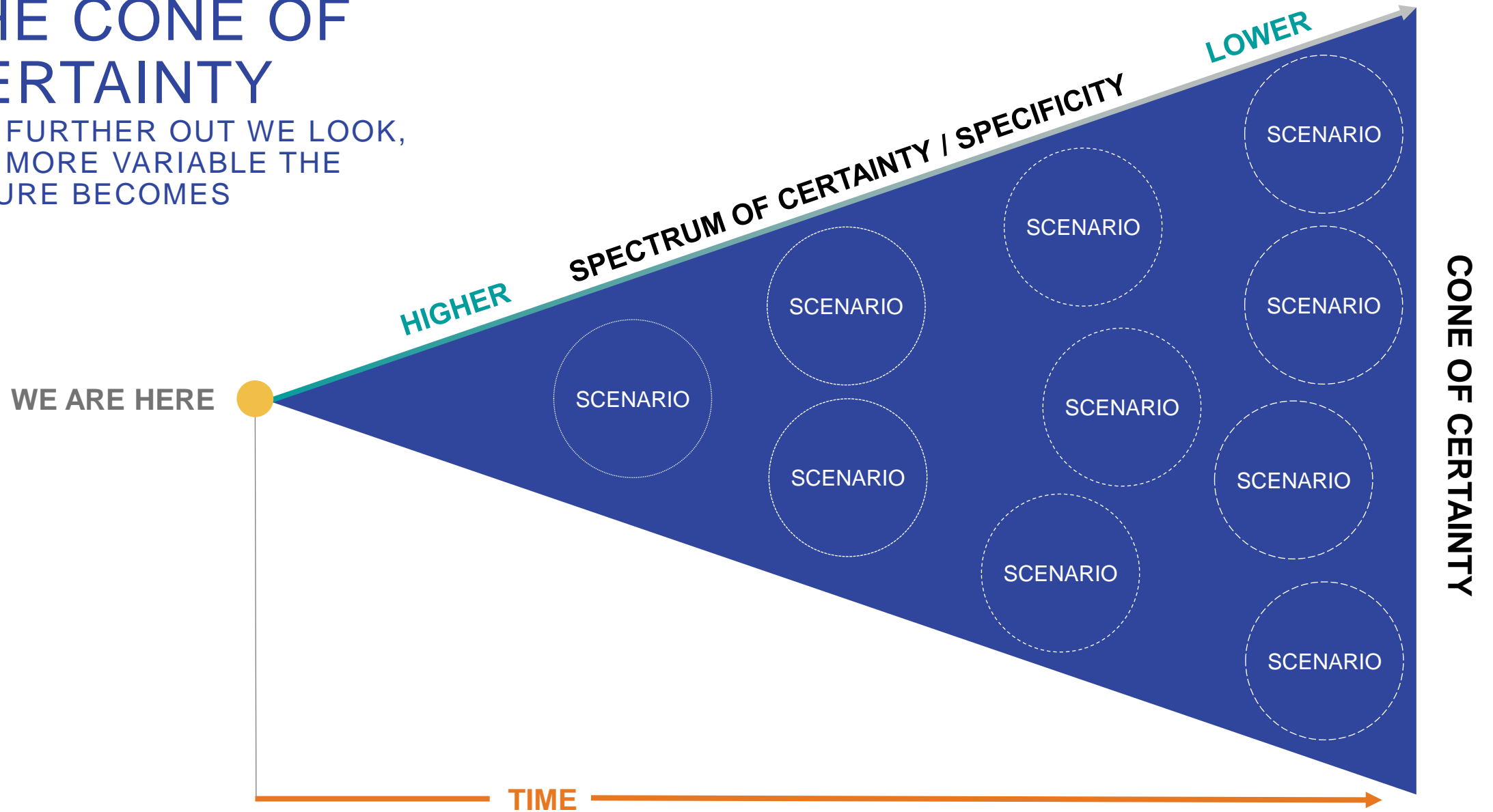
**It's about being
prepared.**

SO HOW DOES CHANGE HAPPEN?



THE CONE OF CERTAINTY

THE FURTHER OUT WE LOOK,
THE MORE VARIABLE THE
FUTURE BECOMES



IPSOS THEORY OF CHANGE

The Ipsos **THEORY OF CHANGE** is a proprietary and comprehensive view of how and why change happens.

We use this framework to understand **MACRO FORCES**, **SHIFTS** and **SIGNALS**, the interrelationships and tensions between the three levels, and systems of resilience, resonance and reciprocity.

These dynamics help us to develop, deliver and disseminate **TRENDS** and **FORESIGHT** and assess how it will impact our clients' current and future organisations.



BRINGING OUR THEORY OF CHANGE TO LIFE

**TREND: Fewer things attract a majority of people:
Welcome to the era of the
Missing Middle.**

In this context, the challenge for organisations seeking broad appeal is to find new areas of agreement to unite people, or to adapt their messages and portfolios to resonate within a series of different contexts.



MACRO FORCES: Ageing Boomers

In 2018, over 65s outnumbered the under 5s for the first time in human history.

In 2030, baby boomers all reach the age of 65.

With older people holding more wealth, could this divide generations?



A background image of a bustling outdoor market. In the foreground, a woman with long dark hair, wearing a white blouse with colorful embroidery, is looking down at a basket of fruit. To her left, a man in a striped shirt is also looking at the produce. In the background, other shoppers and vendors are visible, creating a lively atmosphere. The lighting is warm, suggesting late afternoon or early evening.

SHIFTS: Move towards local

80% of consumers globally have a preference for products from their own countries rather than abroad.

A rise of c.10ppts since 2019.

Will this mentality fuel divisions between nations?

SIGNALS: Protectionism and Polarisation

Draw bridges are going up all around the world.

Will these signals further fuel deglobalisation?



Germany approves
€100bn fund to modernise
its armed forces



Nike joins a large group of
high-profile global brands
that have exited Russia



The UK has reached agreement
to modernise the terms of the
Energy Charter Treaty



US starts building chip
manufacturing facilities



Chinese platforms ask for
Chinese phone number and
official identification for access



The European Union
welcomes the Digital
Markets Act

SO HOW CAN WE PLAN FOR CHANGES WE CAN'T PREDICT?



Change is complex –
we shouldn't over
simplify it - we need to
get comfortable with
uncertainty.



Rather than feeling powerless, being reactive or even proactive, we should start becoming pre-emptive.



Foresight is
empowering - we can
all create the future by
capitalising on the
opportunities and
becoming more
resilient to future
threats.



CONTEXT MATTERS



Moneesha Banerjee

7th July, 2022





**Change impacts the
context in which our
consumers experience
our brands**

“Priority is a function of Context”

- Steven R Covey



**Are emotional
and functional
attributes enough
for brand growth
today?**





**Or is there
more to it?**






MOVE TO ZERO

We exist to serve athletes* everywhere and that's why we're on a mission to protect the future of sport. Because protecting the future of sport means doing our part to protect the planet. Nike is taking climate action through Move to Zero, our journey towards a zero carbon, zero waste future.

*If you have a body, you are an athlete.

Contextual drivers are increasingly influencing brand choice today

Drivers of Brand Choice (% = Relative Importance)

Traditional		Contextual		
CATEGORY DRIVERS Which functional & emotional expectations should the brand meet?		SOCIETAL + Behavioural Drivers		
		SOCIETAL DRIVERS How can the brand have positive impact on society?	BEHAVIOURAL DRIVERS What behavioural elements can stimulate brand choice?	
	54%	46%	33%	13%
	44%	56%	28%	28%
	47%	53%	30%	23%

Source: Random Forest Driver Analysis for R&D studies - Sweet snacks: Mexico, Finance: Colombia, Plant Based: UK



**SO HOW
SHOULD WE
THINK ABOUT
CONTEXT**

THE ANATOMY OF CONTEXT



Personal – Me
IN THE MOMENT



Personal context

- The occasion
- The need
- The benefit



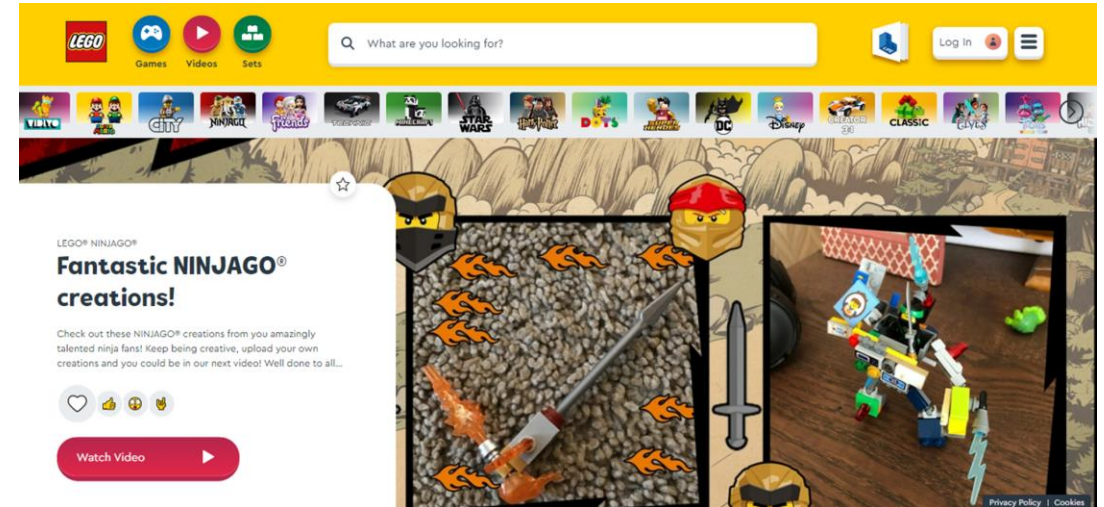
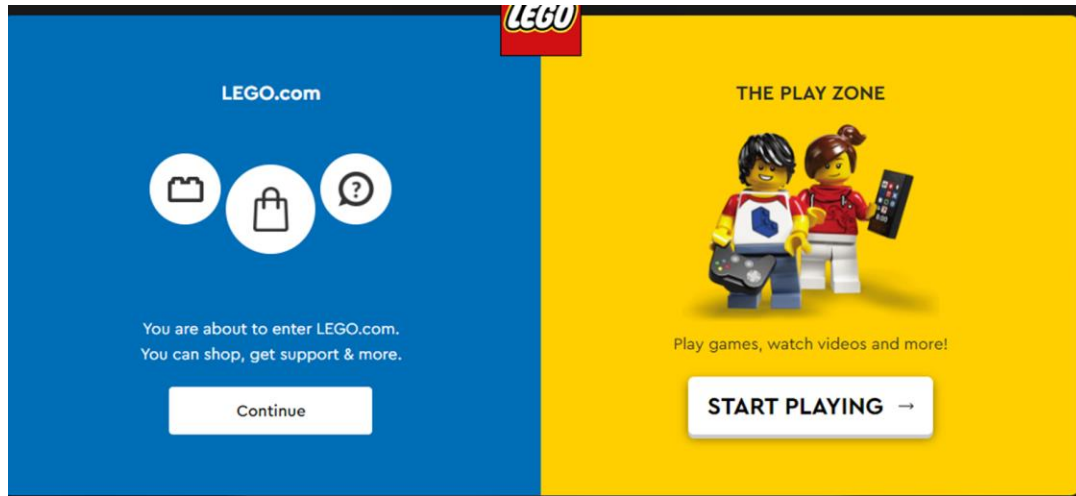
THE ANATOMY OF CONTEXT



Social - Family, Household,
Community – AROUND THE
MOMENT

Personal – Me IN THE
MOMENT

#letsbuildtogether



Supporting families by involving kids in learning & play

USD 50M In supporting underprivileged kids

Clutter breaking content and high ROI during challenging times

Dove has always been leading the way in staying in tune with the changing context as they have evolved from #RealBeauty to #DetoxYourFeed



THE ANATOMY OF CONTEXT





Zero Waste Promise

**Truly understanding
the consumer
context means
creating a personal
and human
relationship with
them**



CONTEXT MATTERS



Moneesha Banerjee

7th July, 2022

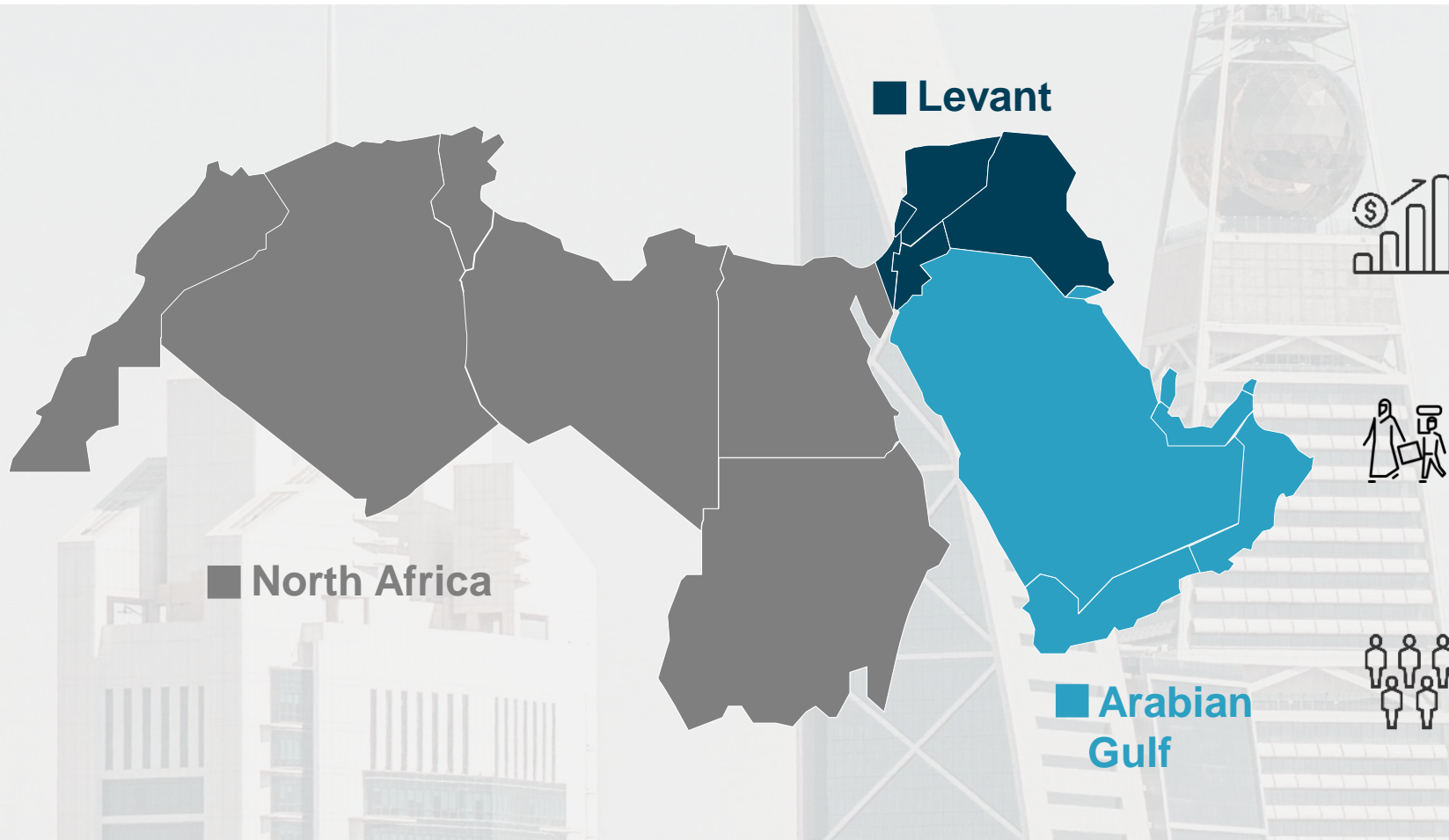
Key Megatrends Shaping The MENA Region

Mohammed Minawi
Chief Commercial Officer
Ipsos in MENA

GAME CHANGERS



A Tale Of Three Sub-Regions But All Are Impacted By Similar Trends



Oil-rich Arabian Gulf with MENA's two largest economies

GDP: KSA \$700 Billion UAE \$360 Billion



Highly educated and urban Levant but struggling economically

Largest refugee population in MENA



Less urban but more populous North Africa is where 1 in 2 people in MENA reside

Egypt is the most populous: 100+ million

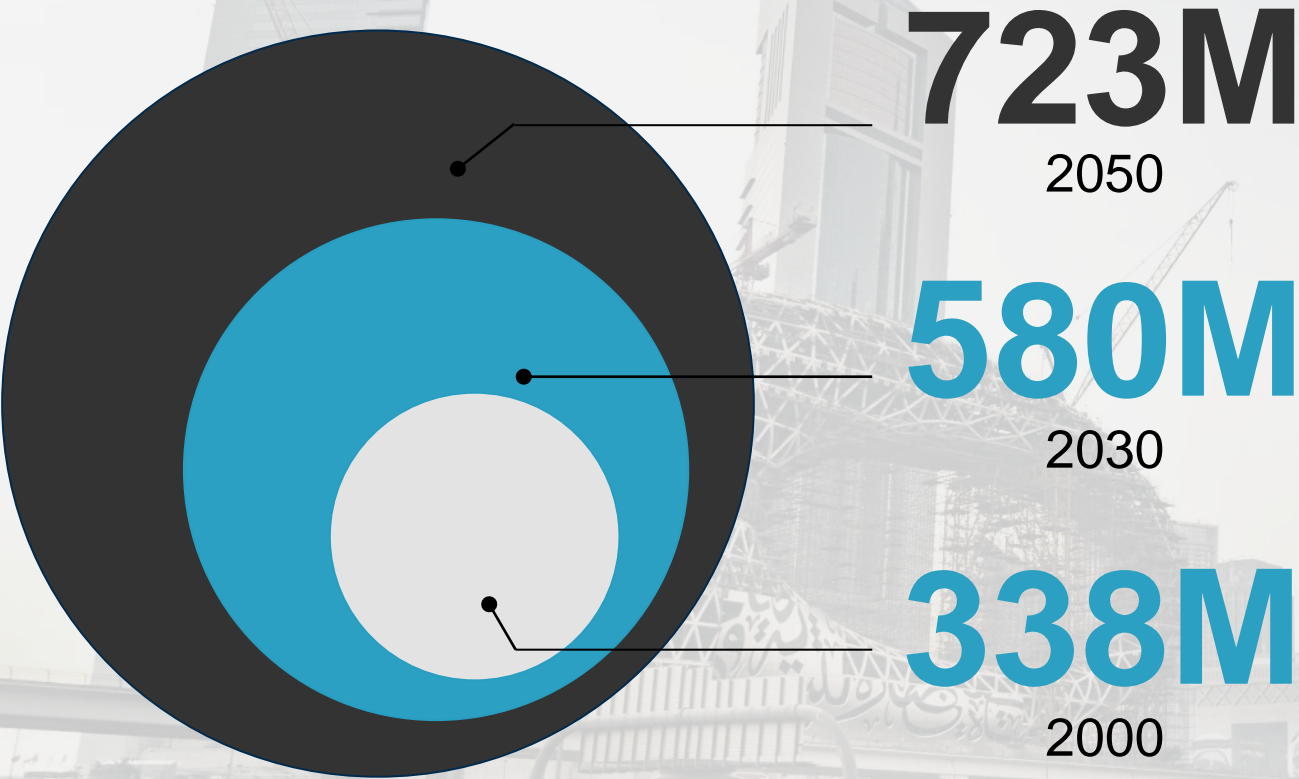
A photograph of a city skyline at dusk, featuring several tall skyscrapers with illuminated windows. In the foreground, there are palm trees and streetlights. The sky is a deep blue.

1

A Rapidly Maturing Region

MENA Is One Of The Fastest Growing Regions Globally

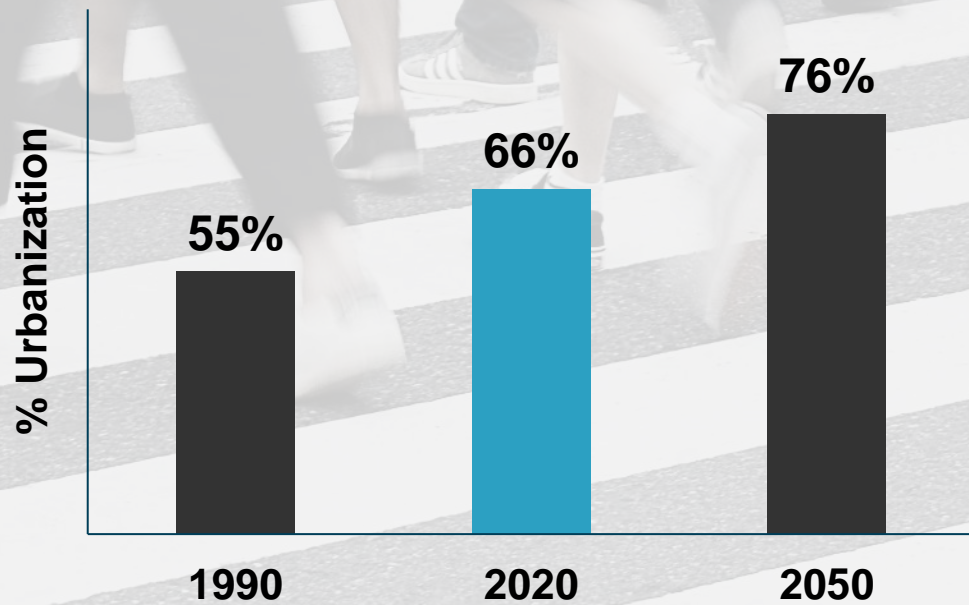
Population in Millions:



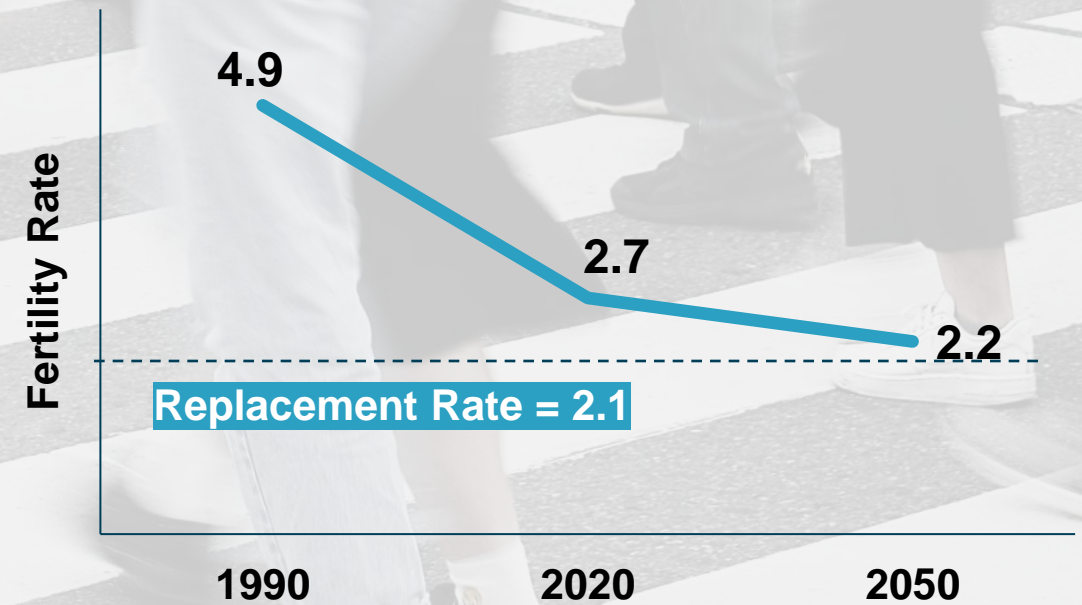
MENA's population will exceed that of Europe by 2050

Rapid Urbanization Is Contributing To Declining Fertility Rates

150 million more people will be living in urban areas by 2050

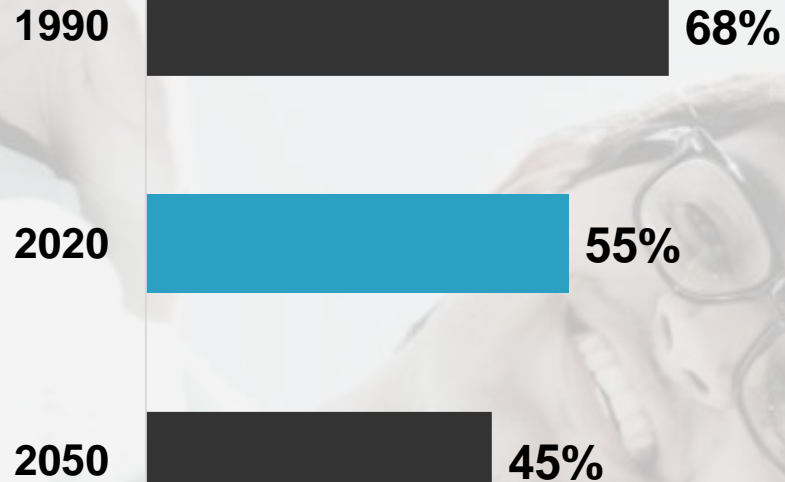


Fertility rates are fast approaching replacement rates



While Still Predominantly Young The Region Is Ageing

% Youth (Below 30)



Median Age

20

27

33

Seniors are the fastest growing age segment

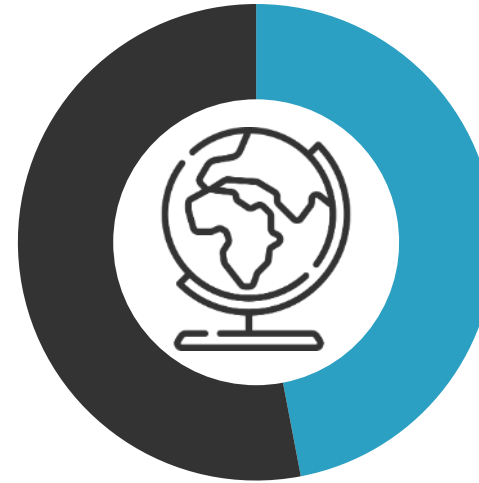


1 in 7

Will Be Over 65
By 2050

With These Changes, Society Is Transforming

People's values and attitudes are
starting to shift



1 in 2
See themselves
as global citizens



1 in 2
Don't share the
same values as
their parents

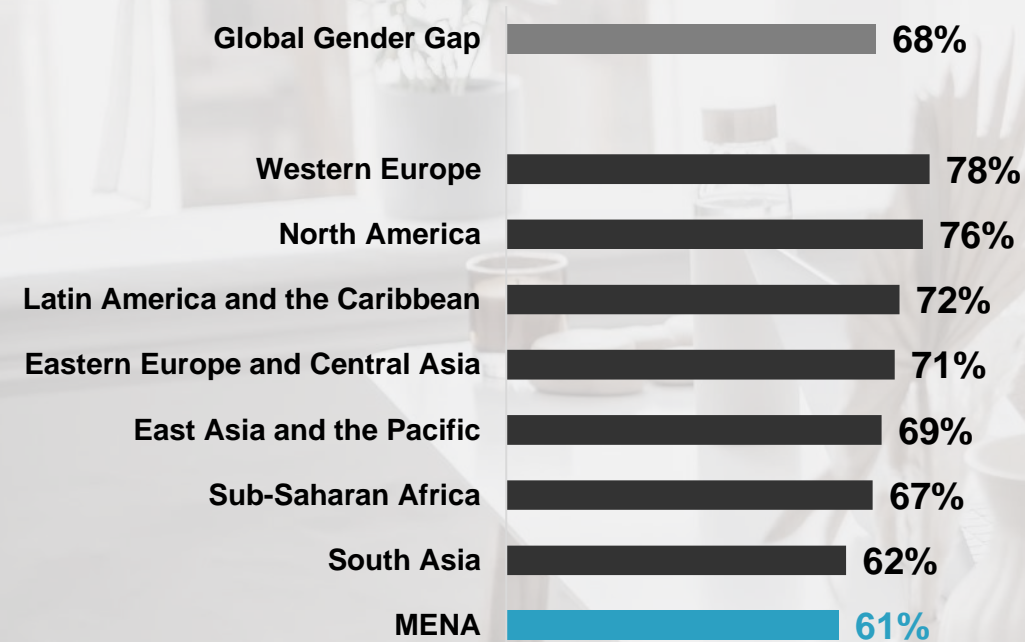
A woman wearing a dark red hijab and a white checkered blazer is seated at a light-colored desk, working on a laptop. To her left is a large vase of white hydrangeas. In front of her is a glass of orange juice. To her right is a red notebook with a pen and a pair of glasses. The background shows a blurred interior with a patterned sofa and a white door.

2



Gender Equality Becomes Necessity

The MENA Region Has The Widest Gender Gap Globally

MENA ranks last when it comes to closing the gender gap:



MENA has the lowest female labor force participation levels globally!



Only 1 in 5

Females In MENA Participate In The Workforce

Driven By Conservative Attitudes Towards Gender Equality



Only
2 in 5

Believe in having equal
freedoms between
women and men

By Gender :

Male

34%

Female

49%

But The Economic Costs Of Exclusion Are Enormous

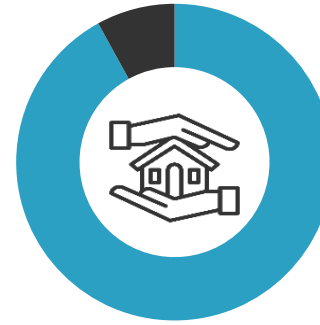
\$575 Billion

Is the annual cost of gender-
based discrimination in MENA





Economic Considerations Are Fueling The Women Empowerment Movement



92%

Of women are key decision makers within their households



1 in 2

University students in MENA are women

Number of women enrolling in university
more than doubled
in the past 2 decades



71%

Believe women's role should extend beyond the household

3

The Economy Shapes Consumer Choices



Economic Factors Consistently Rank First On Consumers' Lists Of Concerns

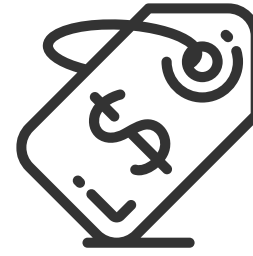
2 in 3

See The Economy As
A Primary Concern



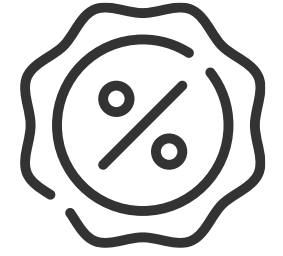
Financial Burdens Are Influencing Consumer Purchase Decisions

As a result, people are becoming
more conscious shoppers



67%

Know the price of
everything they buy



54%

Are deal
seekers



40%

Increased usage of
store brands



40%

Continuously explore &
purchase new brands

Key Takeaways On Change From MENA's Megatrends

1. Change is not always obvious, sometimes big changes come in small doses. Its important to view change through the right lens and be prepared.
2. Change is complex - change in one area usually leads to wider changes elsewhere. Understanding these relationships is important.
3. Context is key – it's important to understand how change manifests itself in different regions and situations, and to consider local nuances.



Thank You

For more information:

Mohammed Minawi
Chief Commercial Officer - MENA
mohammed.minawi@ipsos.com

GAME CHANGERS



KEYS

AN IPSOS WEBINAR SERIES

Access the recording, presentations
and resources from this episode



[KEYS - We need to talk about change | Ipsos](#)

JOIN US for our next KEYS webinar:
Thursday, Sept 22nd
11:00 & 17:00 CET

LESSONS FROM INFLATIONARY TIMES

KEYS - A WEBINAR SERIES BY IPSOS

