IPSOS UPDATE

A selection of the latest research and thinking from Ipsos teams around the world

November 2022

Ipsos Knowledge Centre

GAME CHANGERS

IPSOS UPDATE NOVEMBER 2022

Our round-up of research and thinking from Ipsos teams around the world.

Welcome to the ongoing "polycrisis" that seems certain to envelope much of the world in the 2020s. Debt, war, disease and inflation are all now limiting growth: globally worries about inflation have now risen for 15 consecutive months, and it has obliterated concern about Covid19 – except in China and Japan. Of course, while the world looks more uncertain than ever, as we show in this month's *Ipsos Views* podcast, most predictions – long-term and short-term – end up being wrong. Of course, we need deep experts on particular subjects. But when it comes to thinking about the future, with all its infinite possibilities, we always have to be humble about what we don't know, and more diversity of ideas and thought along the way is helpful.

Ipsos aims to provide that – one thing that might cheer you up is that while two out of three people say their country is heading in the wrong direction (64%), this figure is very similar to the 66% who said the same back in 2012: we all have a consistent bias towards pessimism about the world as a whole (less so about ourselves).

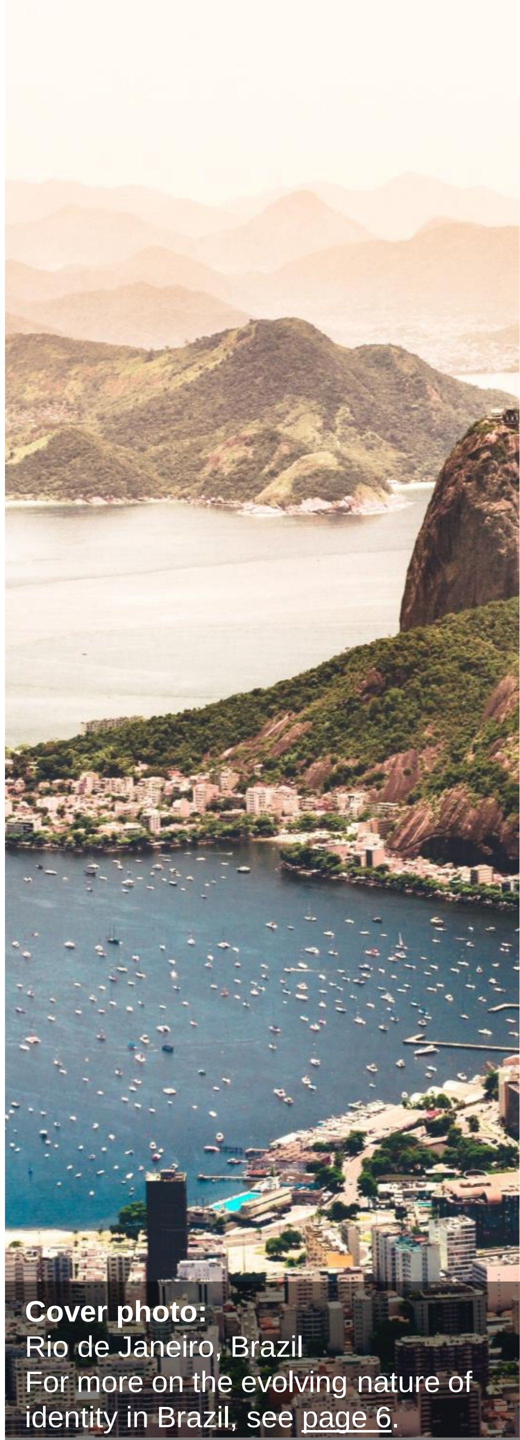
Even though 2022 is not over, it's clear that the "metaverse" is already a candidate for being the business word of the year. Some 52% of people around the world now say they are familiar with the term. But a consensus among business leaders about what it all adds up to is, so far, lacking. Our annual Reputation Council report finds corporate communicators split on whether the metaverse will "transform the way we do business": only 36% agree, 23% disagree, and 41% say they're just not sure.

As Brazil reacts to the results of its Presidential Election, our new Ipsos Flair report profiles the challenges the country faces. As they review the choices that lie ahead for Brazil, our team poses a set of questions which are also being asked in many other countries around the world: who are we exactly, and what do we want our country to look like?

Each of the articles here include links to help you explore the topic in more detail. Please get in touch with your Ipsos contact if you'd like to find out more or talk about a particular question or challenge you are facing. We do hope you find this edition useful - please email IKC@ipsos.com with any comments or ideas.

Ben Page, Ipsos CEO

IN THIS EDITION



Cover photo:
Rio de Janeiro, Brazil
For more on the evolving nature of identity in Brazil, see page 6.

WHAT WORRIES THE WORLD

Concern about inflation doubled since January

The cost of living remains the biggest concern globally, with more than four in ten (42%) choosing inflation as one of the top worries affecting their country. Inflation has now been the top global worry in our *What Worries the World* survey for the last seven months, with a two-point rise in October marking 15 consecutive months of increasing concern.

Worry about rising prices has now more than doubled since the beginning of the year, when 20% considered it a major problem facing their country. This time last year only 16% picked inflation as a worry and eighteen months ago, in April 2021, that figure was just 10%. Now in six countries more than one in two people choose inflation. This rises to two in three people in Argentina (66%) and seven in ten in Poland (70%).

Great Britain (-13pp) has seen the biggest fall in concern since September, but it remains the country's top worry. In October, inflation is a number one worry in 13 countries: Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, Poland, Saudi Arabia, South Korea, the US, and Turkey.

Almost one in five (17%) say climate change is one of the biggest issues affecting their country. France, previously the most concerned country globally, has seen worry fall by 7pp to 27%. However, it is still the country's joint-third largest concern alongside poverty, but behind worry about inflation which stands at 43%.

Coronavirus is now at the lowest level since it was added to our list of 18 worries in April 2020. One in ten (10%) choose it as an issue facing their country, down 2pp from September, falling to 13th on our list of global worries. Although three in 10 still consider it a top issue in Japan (29%), this is 11pp less than in September.

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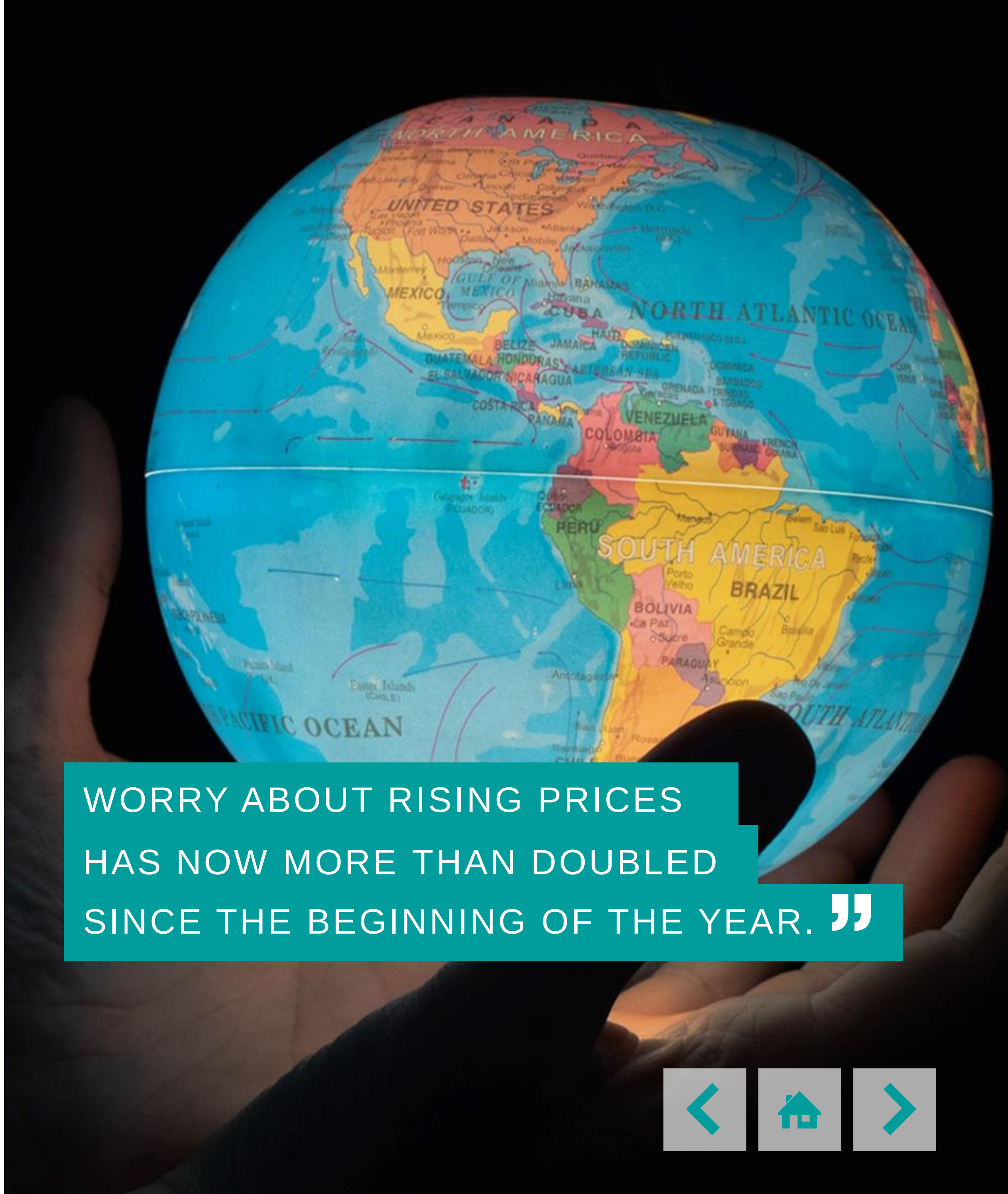

WORRY ABOUT RISING PRICES HAS NOW MORE THAN DOUBLED SINCE THE BEGINNING OF THE YEAR.

WELCOME TO THE METAVERSE

What it is, where it's headed and how to be involved

Awareness around the metaverse is growing with one in two adults (52%) in 29 countries saying they are acquainted with the metaverse. Consumers widely expect that over the next decade it will "significantly change" virtual learning, entertainment in VR, and virtual work settings.

The future of the metaverse is a hot topic. In this paper, we begin by examining what the metaverse is now, what people think about it, and consider how brands can be involved.

The concept of the metaverse has been around since the 1980s, envisioned by science-fiction writers and invented by academics and R&D departments. However, it is only recently that the main technologies involved – virtual reality (VR) and augmented reality (AR) – have advanced to a point where they are more than just prototypes in a lab, available for the mass market to use and organisations to consider integrating into their product experiences.

Today we can play fitness games on a VR headset, try-out virtual furniture via AR on our tablets, find geo-located Pokémon around the city using our mobile phones, or go to a virtual fashion show with actual catwalk models. But these virtually augmented experiences are only the beginning of the larger technological transformation that is occurring.

The metaverse will be tomorrow's internet; it is not separate technology, nor merely virtual worlds, but a technological ecosystem that delivers seamless and persistent, connected experiences across physical and virtual worlds - in every part of our lives.

In this paper we investigate possible opportunities in each component of the spatial web ecosystem.

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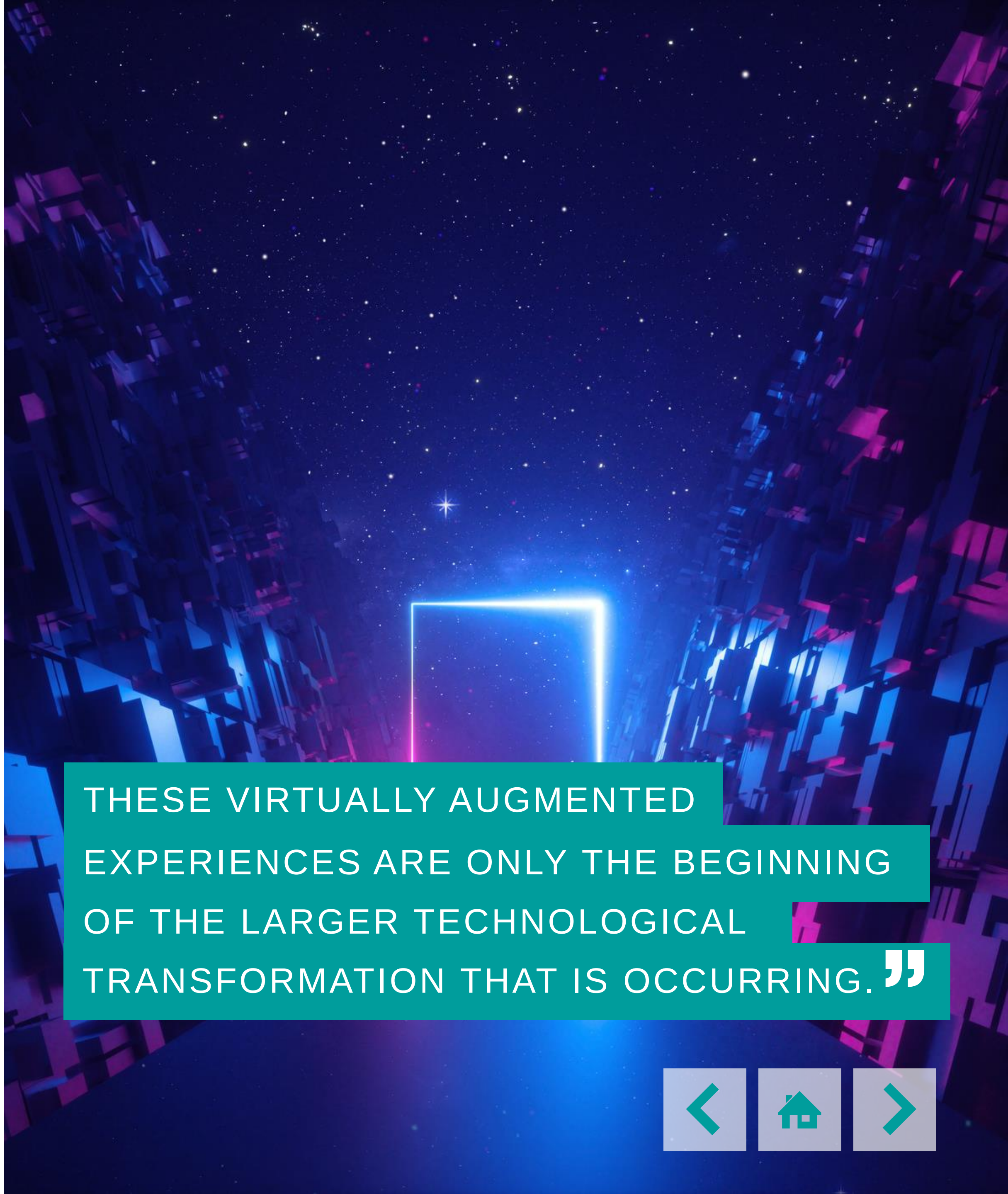

FLAIR BRAZIL

Identities and individuals

To coincide with biggest election in the country for many years, we explore how Brazilian society, consumers, and opinions are changing through a range of articles written by our experts on the ground.

In previous editions of Ipsos Flair in Brazil, we have looked at frustrations, uncertainty, and the opportunities not taken. This edition looks ahead at where the country is going.

While the pandemic is not completely in the rear-view mirror, it is now longer a priority for Brazilians. With the gap left by Covid-19, other crises have begun to bubble up with people reflecting not only who they are today, but who will they be tomorrow. The over-arching theme of the 2023 Ipsos Flair Brazil is focused on identity and what Brazilians what their country to look like.

All of this is analysed with Brazil, like many countries, grappling with rising prices.

Consumers are facing double-digit inflation, and in his article, Ipsos innovation expert Luis Abimerhy explores how consumer behaviour is changing and how brands can respond. For brands the questions include whether to increase prices or 'downsizing', reducing the size of the product but keeping the price the same. He highlights the importance of differentiation in determining whether the product can sustain the price increase.

From the economic to the social, Ipsos qualitative researchers Marcio Aguiar and Pedro Santos explore how Afro-Brazilian culture fits as part of wider society. The authors look at the topic from a brand perspective, discussing what brands have got it right and which have not.

Other articles included in this year's Flair explore topics ranging from ageing and changing demographics in Brazil, brand purpose, diversity and representation within the beauty industry.

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AXA FUTURE RISKS REPORT

Climate change the number one emerging risk worldwide

Based on responses from a panel of 4,500 risk experts from 58 countries and a representative sample of 20,000 people from 15 countries, this report, produced in partnership with Ipsos, measures and ranks the evolution of perceptions of emerging risks.

This year, for the first time, experts in every continent put climate change as their number one concern; last year it ranked top only in Europe. It is also the public's most pressing concern; top in both Europe and America and second in Africa, Asia Pacific and the Middle East.

Both experts and the general public demonstrate declining trust in public authorities' preparedness to tackle climate change. Only 14% of experts and 27% of the general population say that authorities are prepared, down from 19% and 33% respectively last year.

Meanwhile, experts' perceptions of the risks of geopolitical instability have overtaken cyber and pandemic risks to rank second. Concern is highest in Europe but 94% of experts expect geopolitical tensions to spread around the world. Due to recent geopolitical tensions, energy risks have also shot up, rising more than ten positions to rank fourth with experts and fifth with the public.

Cyber risks ranks third, associated with concerns about geopolitical tensions and the threat of state-sponsored attacks shutting down critical infrastructure and essential services.

The greatest difference between experts and the public is their perception of the risk of pandemics and infectious diseases, which has dropped to fifth among experts but remains in second place among the public. This may reflect the continuing effects of Covid-19 on the public's day-to-day lives.

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UKRAINE RESILIENCE MONITOR

Providing context after seven months of war

The Ipsos Ukraine Resilience Monitor, measures the toll of war on Ukrainians' livelihood and access to basic services.

Unemployment has risen significantly since the start of the war, especially in frontline cities Kharkiv and Mykolaiv, where unemployment has risen by over 20 points since before the Russian invasion. Even in Lviv, the furthest city from the frontline, 76% of people say it is difficult for people in their city to find a job now.

Majorities in most cities have also experienced significant income loss. More than one in two in Kyiv (56%) and Dnipro (59%) report a significantly decreased or loss of income. This rises to seven in ten in the frontline cities of Kharkiv (70%) and Mykolaiv (71%).

Critical infrastructure has been badly affected too: 74% in Mykolaiv don't have access to safe drinking water and only 43% have access to hot water. Almost one in two (45%) in Mykolaiv and a third (34%) in Kharkiv have no access to heating.

It's easy to get stuck in the numbers and lose sight of the people behind the data. Documenting Life During Wartime, Ipsos' weekly photo-essay series, focuses on how the war has impacted Ukrainians from all walks of life, their access to essential services and how the community is responding.

Each week we share a collection of first-hand experiences, anecdotes, quotes and visual stories. One such story is of Ludmilla and Slava, who have been spending every night in a bunker for the past three months. Their story exemplifies the experiences of many others in this conflict. Find more of our coverage of the war in Ukraine here.

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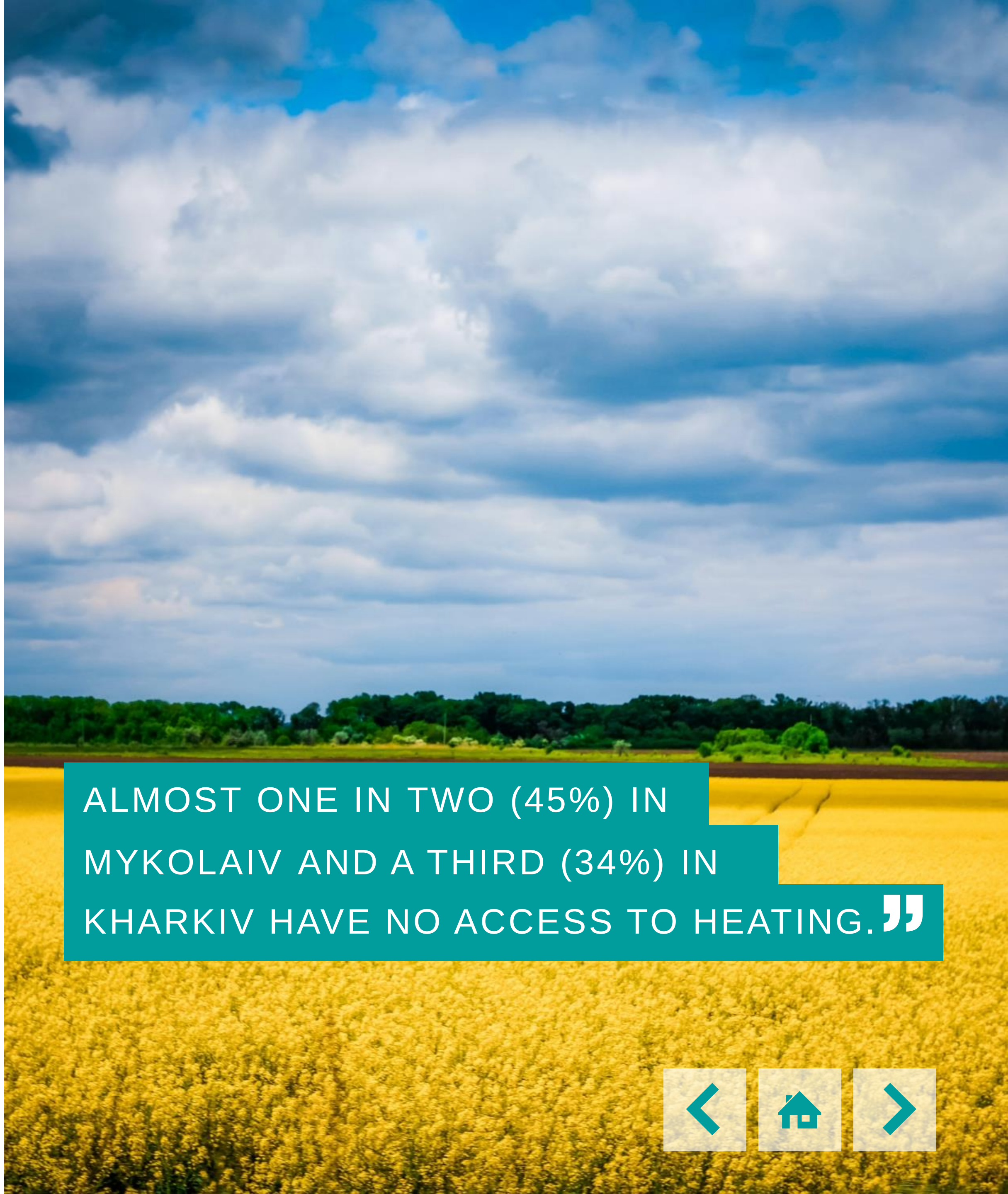

IPSOS REPUTATION COUNCIL REPORT 2022

The latest thinking in corporate reputation management

The 16th sitting of the Reputation Council takes places against a backdrop of global uncertainty – the war in Ukraine, inflation and the rising cost of living and the lingering effects of Covid-19 are just some of the factors impacting the world.

This edition shares insights from over 100 senior corporate communicators in 16 markets on some of the most complex and pressing communications challenges.

We share crisis management best practice for responding when a crisis does occur and a company is in the spotlight. Some key factors to consider include **being authentic** and ensuring that your response is aligned with the values of the organisation, **acknowledging responsibility** and actually apologising, and **communicating action** about what the company is doing to rectify the situation.

The current global turmoil has also increased stakeholder expectations when it comes to ESG (Environmental, Societal and Governance issues). 81% of Council Members agree that poor ESG performance now has material consequences, but one in two (51%) say that keeping up-to-date with changing ESG rules and standards is a big headache. How can organisations hardwire ESG into their activities?

We also consider the credibility of social media as an effective means of communication. Trust in social media companies continues to remain low among the public. While it remains a cost-effective way of reaching multiple audiences, has it become compromised by misinformation and fake news?

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HYBRID WORKING

The never-ending search for the right approach

There is a significant and widening experience gap between leaders and employees when it comes to hybrid working.

Leaders want to see more of their employees back in the office for larger portions of the working week. But at the same time, employees have adapted to new working patters and now expect greater flexibility. So what's the solution?

Ipsos Karian and Box analysed the responses of over half a million employees from across 95 countries to answer the question: what do business leaders really need to know to make a call on the future of office and hybrid working?

The majority of employees globally say they receive significant benefits from remote working. More than eight in ten say they save time and money, and two-thirds say they experience a better work-life balance.

However, senior leaders are not convinced about the benefits of hybrid working and they are much less likely to work from home themselves (10%) compared with middle managers (19%) or junior employees (28%).

They also report seeing and experiencing much more effective collaboration when working in the office (73%), than middle managers (69%) and junior employees (65%).

This report shares five key findings on hybrid working alongside a framework for planning hybrid working approaches that will suit individual organisations' circumstances.

It also provides a checklist for organisational leaders and people managers to help them set up their teams for success in sustaining hybrid working.

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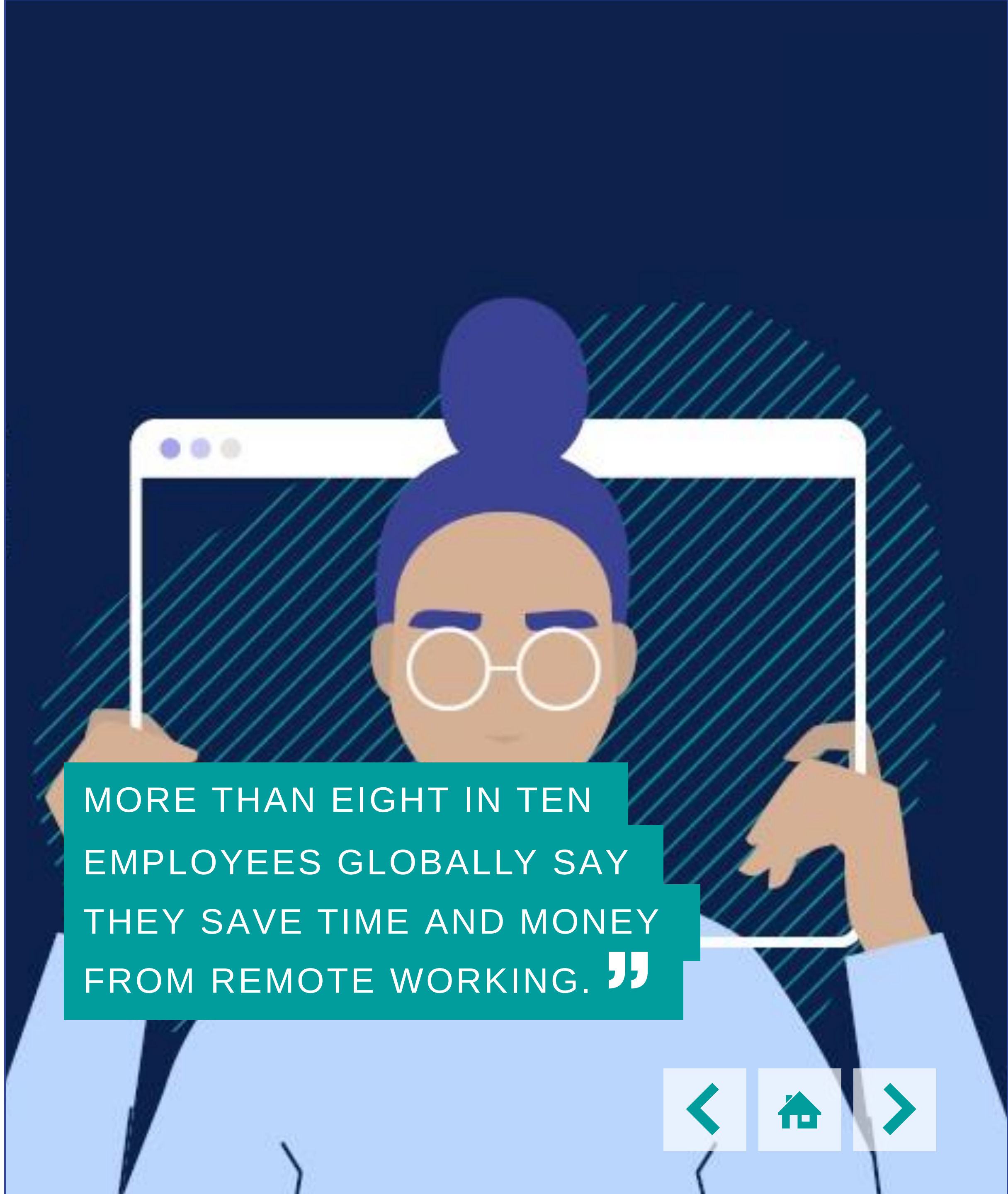

PODCASTS

The Perils of Prediction

It's extremely difficult to make accurate predictions, but that has never stopped anyone from trying. But even people with deep subject matter expertise have mixed forecasting records - so we all need to wary of the projections that are offered to us.

Nevertheless, we still need to be ready for what's coming towards us, to make ourselves resilient and be prepared for a range of possible futures.

In this new *Ipsos Views* podcast "The Perils of Prediction" you can hear our Global CEO Ben Page, our resident futurist Rob Gear, and some special guests from the year 1966 explain why and how we should take a different approach to facing an uncertain future.

You can also read the transcript of this conversation or watch Ben Page discuss more on this topic. Subscribe to the *Ipsos Views* podcast series on Apple / Spotify.

LISTEN HERE

Black History Month

As the theme for Black History Month 2022, is 'Time for Change: Actions, not Words', Ipsos' REACH (Race, Ethnicity and Cultural Heritage) Network has brought together some Black employees from Ipsos in the UK to discuss Black Joy.

In this three-part podcast mini-series, you'll hear about what Black Joy is, the different ways it is experienced, why it's needed and how it plays a role in our work lives as well.

- Episode one explores what Black Joy is and how it is important in changing the narrative of what it is to be Black.
- Episode two discusses the manifestations of Black Joy: food, music, clothes, spirituality, creativity and more.
- Episode three asks whether Black Joy in the work environment matters and shares some resources on the topic.

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Crisis? Which Crisis?

In a world that seems beset by continual crises, organisations have to be ready to respond to events quickly, to protect their business from unexpected threats, and to defend their own reputations so that they can maintain their licence to operate and recover quickly once the crisis has passed.

We have many years' experience of supporting clients from around the world who have found themselves in difficult situations and helped them to avoid existential peril.

This 15-minute *Ipsos Views* podcast features Trent Ross (EVP, Corporate Reputation) and Milorad Ajder (Global Service Line Leader, Corporate Reputation) discussing some of the tools and techniques we use to help guide organisations through turbulent periods.

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SHORTCUTS

KEYS: Talking about our generations

Today's marketing and research reports are full of references to different generations and how they may (or may not) be changing the consumer and societal landscape.

Watch the recording of our latest KEYS webinar where we explore how to put generational and demographic analysis to good use. We discuss:

- How to think about generations, exploring the lived experiences of different cohorts, without resorting to hot takes and easy soundbites.
- How India will adapt to the economic and demographic changes, as it overtakes China as the world's most populous country.
- The implications of Italy's low fertility rate and declining population for Italian society today and tomorrow.

Join us on 17 November for our next episode "KEYS: Convergent Commerce", when we'll be reflecting on the dynamics of our changing consumer landscape.

WATCH THE RECORDING

Global views on menopause

Menopause is something that will be experienced in the lives of half of the world's population, yet it still remains something of a taboo for many.

Our latest 33-country survey finds that on average half of people around the world (53%) are comfortable talking about menopause with friends. Globally, people are more comfortable talking about their own financial situation (54%), cancer (67%) and politics (61%).

There are strong differences in comfort levels by region, with 65% in Great Britain and India comfortable talking about menopause with friends, compared with just 22% in Hungary.

We also see geographic differences in knowledge of menopause, with three-quarters considering themselves knowledgeable in India (76%), Indonesia (75%) and Turkey (75%, compared to fewer than four in ten in Japan (37%).

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How Covid-19 shaped views

Living through the Covid-19 pandemic can feel like running a marathon where the finish line keeps moving further and further into the horizon. While exactly when the pandemic will officially end remains to be seen, we can be sure that the past 32 months have had a significant impact on people around the world.

In five infographics, we break down what Ipsos' global polling reveals about the impact the coronavirus pandemic has had on our lives.

Among the findings:

- Mental health rose up the public's rankings of most important health problem
- Vaccinations became a highly polarised issue, with support for compulsory vaccines dropping
- The pandemic was the third most cited reason among Gen Zers/Millennials for choosing not to have children.

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POLL DIGEST

Some of this month's findings from Ipsos polling around the world.

INDIA: Two-thirds of Indians (69%) said they were looking forward to splurging this festival season.

SPAIN: Eight in ten Spaniards say they feel afraid when driving because of the aggressive behaviour of another driver.

CANADA: Most Canadians agree that the Indigenous involvement is needed to ethically develop the country's natural resources.

US: More than one in three teenagers surveyed (38%) say they have been bullied in the past year.

UK: 10% of young people say they have used a food bank in the past six months, and over half are worried about the rising cost of living.

NORWAY: 28% of Norwegians over the age of 18 say they have a TikTok account, a growth of 7pp from last year.

AUSTRIA: Cash remains the preferred payment option in Austria, with 92% saying regularly pay with it in their day-to-day lives.

ITALY: Six in ten Italians (58%) plan to take a holiday this autumn, with a preference for Italian destinations over going abroad.

FRANCE: More than one in two French people (53%) consider electric vehicles a fad while 47% consider it a profound change.

ROMANIA: 97% of Romanians have taken vitamins and/or food supplements in the past 12 months.

CZECH REPUBLIC: 94% of Czechs are worried about having to pay more for housing in the future.

Visit Ipsos.com and our local country sites for the latest polling and research.

CONTACT

All the information within this *Ipsos Update* is in the public domain – and is therefore available to both Ipsos colleagues and clients.

Content is also regularly updated on our website and social media outlets.

Please email IKC@ipsos.com with any comments, including ideas for future content.

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