IPSOS UPDATE

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

August 2021

Ipsos Knowledge Centre

GAME CHANGERS

Ipsos

WELCOME

Welcome to the August edition of *Ipsos Update* – our round-up of the latest research and thinking from Ipsos teams around the world.

The underlying idea of *Ipsos Update* is simple: to present aspects of the “Best of Ipsos” in an easily digestible format. We have not tried to be comprehensive; the focus is on content which will be relevant to more than one market or specialist research area.

Links are provided to the various points of view and information sources, as well as the Ipsos colleagues responsible for each piece of work.

We hope you find this useful. Please email **IKC@ipsos.com** with any comments or ideas, or if you would like to subscribe to future editions.

Thank you.

IN THIS EDITION

SUGAR, FATS & OBESITY
The causes of and solutions to the obesity pandemic

Presenting public opinion and expert insights from regulators, academics, clinicians and food producers, we chart what may happen next in terms of sugar and fat in our diets, and what this means for the obesity crisis.

THE SUSTAINABILITY SAY-DO GAP
Addressing a behaviour-change dilemma

Recent Ipsos surveys show increases in public concern about the environment. However, the adoption of more sustainable lifestyles is not advancing at the same rate. What can be done about this say-do gap?

THE TOKYO OLYMPICS
Many countries show muted interest in the Games

Ahead of the postponed 2020 Summer Olympics in Tokyo, we asked people in 28 countries their views on the event: Should it go ahead? How interested are they? What is the impact of the Games on wider society?

RETURNING TO THE OFFICE
Is flexible working the future?

The Covid-19 pandemic has seen a global reconfiguration of working practices. And this may continue. Preferences for splitting time between home and office vary, but employees do expect more flexibility.

YOUTH SKILLS
The effect of the pandemic on young people

In a 29-country survey, we look at how people think the Covid-19 pandemic has impacted children and young people. The top concerns that emerge are worse mental health and issues around maintaining concentration.

BROKEN SYSTEM SENTIMENT
Public disaffection vs. social progress

In most countries in our global study, we find a prevailing perception from the public that the political and economic system is broken. This is often accompanied by populist, anti-elite sentiment and nativist views.

RUSSIA TREND VISION
Consumers in a changing world

This comprehensive yearly analysis of consumer trends by our team in Russia focuses on the preferences and behaviours that are here to stay in 2021, following the changes forced upon our lives by Covid-19.

FOCUS ON AFRICA
The latest research and analysis

We take a closer look at population dynamics, employment opportunities for young people, and ways that brands can better understand consumer needs in Africa.

SUGAR, FATS & OBESITY

We explore the causes of (and possible solutions to) the obesity pandemic.

A worldwide obesity crisis is impacting our health and imposing huge burdens on healthcare systems and the global economy.

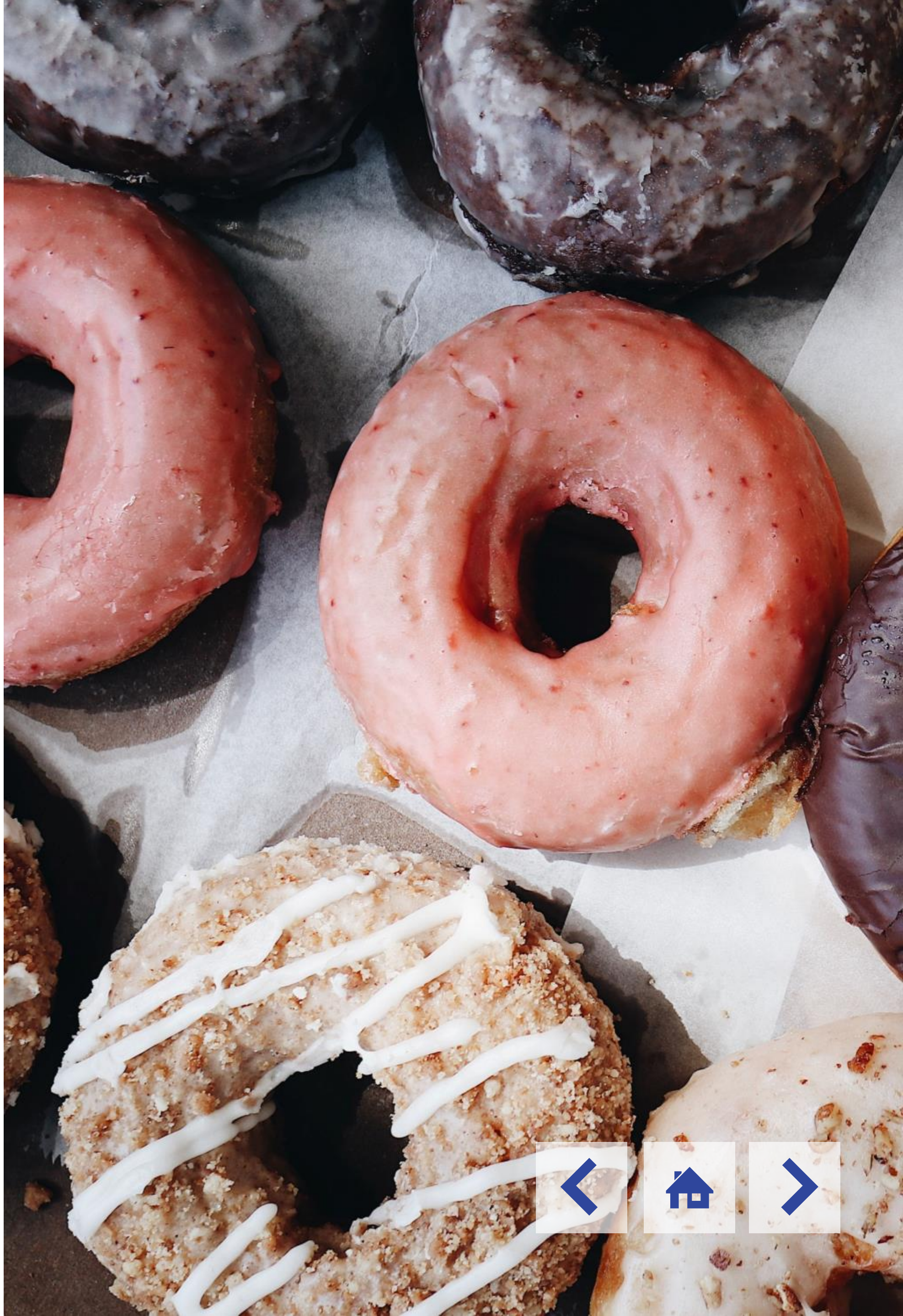
A recent World Health Organization (WHO) study estimated obesity has almost tripled since 1975. In 2019, 39% of people globally were overweight. In some countries, these figures were much higher.

The Covid-19 pandemic may have worsened the obesity crisis. We found that 31% globally reported putting on weight during this time – an average gain of 6kgs – and we see this is more pronounced in countries that already have high levels of obesity.

While the WHO describes obesity as a ‘preventable’ condition, no country has successfully reduced its level of obesity at a national level. This report looks at the causes of and possible solutions to the obesity pandemic, exploring what policymakers, the food industry and individuals can do to tackle this deadly and constantly developing problem.

Key takeaways include: the science of weight gain will continue to be divisive, there are diverse social factors affecting diet, and, while we remain confused about fats, sugar isn’t going anywhere – yet.

READ MORE | DOWNLOAD | CONTACT



THE SUSTAINABILITY SAY-DO GAP

Addressing a behaviour-change dilemma.

Recent Ipsos surveys show increases in reported concern about the environment – 72% of people across 30 countries say that if they do not take personal action to tackle climate change, they will be failing future generations. However, the adoption of more sustainable lifestyles is not advancing at the same rate.

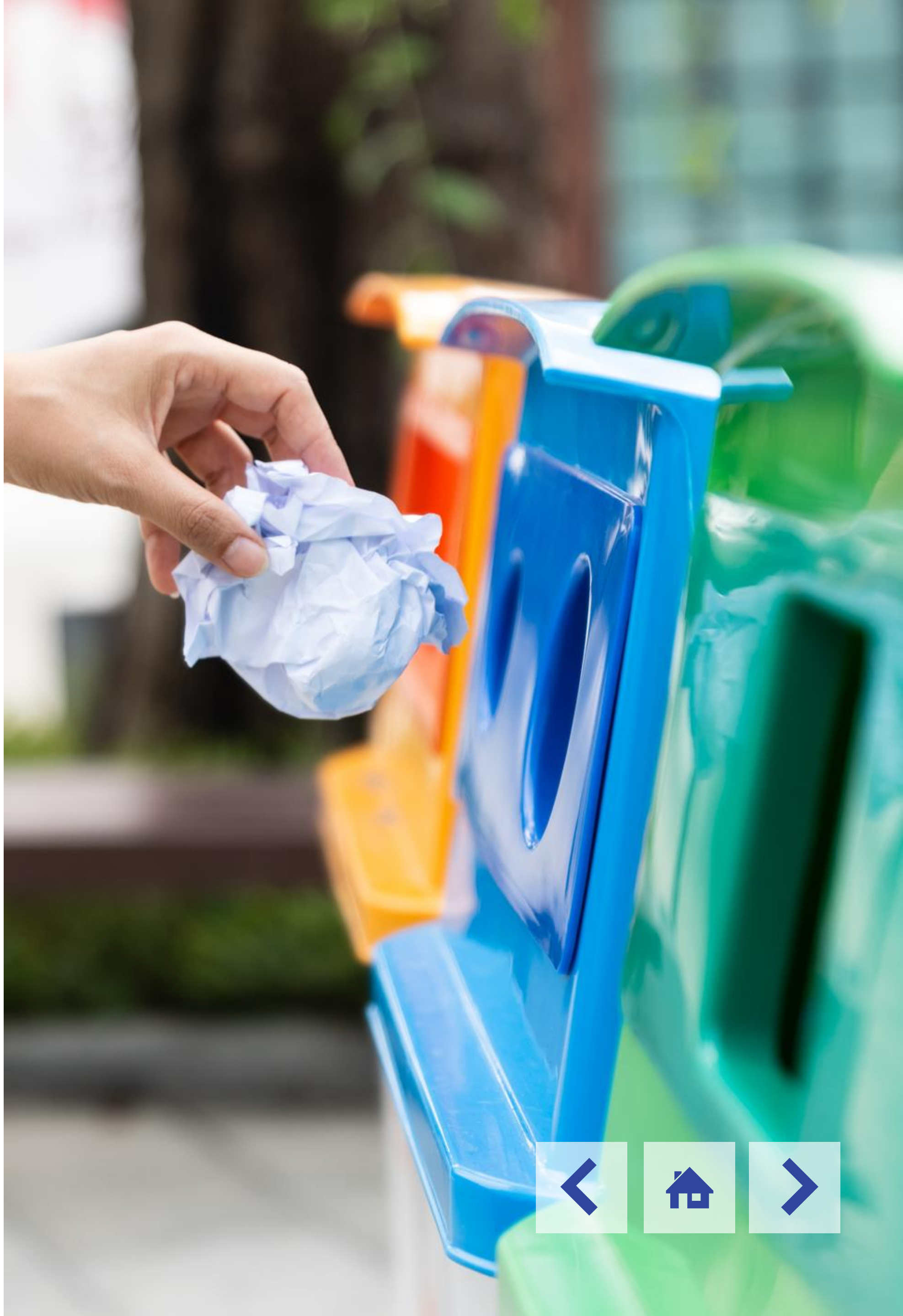
We see this especially with higher-impact actions such as reducing meat and dairy consumption or flying less. Even simple tasks that most people are happy to do (e.g. recycling) don't always get done.

The reasons for this 'say-do' gap are complex, but it is possible to better understand the barriers and strategies to enable change through our behavioural science framework. This taps into factors such as motivation, ability and the social context.

Crucially, action is not only up to the individual. People expect government and brands to take a leading role in tackling climate change and environmental issues. In this way, organisations should act on their duty to close this say-do (or believe-true) gap.

In this paper, we outline how to take the leadership role that consumers expect, in terms of living more sustainable and environmentally-friendly lives. This involves encouraging people to take actions that they are already inclined to do.

READ MORE | DOWNLOAD | CONTACT



THE TOKYO OLYMPICS

Muted interest in the Games in 2021.

Ahead of the postponed 2020 Summer Olympics in Tokyo, we asked people in 28 countries their views on the event: Should it go ahead? How interested are they personally? What is the impact of the Games on wider society?

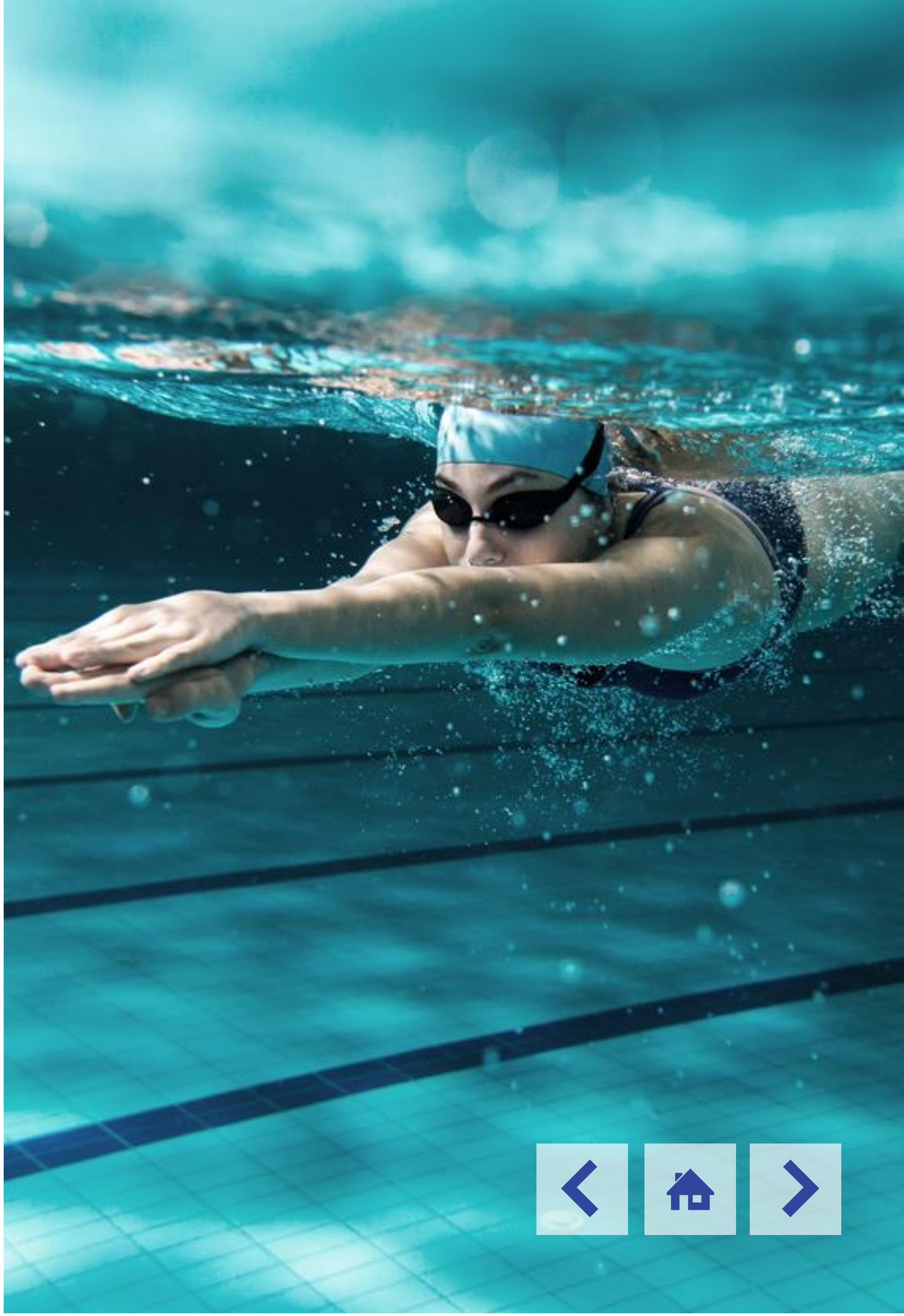
Our survey found a sense of uncertainty about whether the Olympics should go ahead in the first place, due to the continued impact of Covid-19. On average across 28 countries, 43% agreed it should have gone ahead while 57% disagreed. Support was significantly lower in host nation Japan (22% agree/78% disagree).

However, the uniting power of the Olympics is apparent, as 62% on average say the event marks an important opportunity for the world to come together. A similar proportion (65%) agree that the Olympics bring their country together.

Levels of interest in following the Games vary around the world. India, South Africa and China report the highest levels of interest while Belgium, South Korea and Japan show the least.

Football/soccer emerges as the most popular Olympic sport in terms of public interest. Athletics is second, followed by Aquatics (swimming, diving, water polo) in third and Gymnastics in fourth. Preferences vary around the globe. For example, the countries most interested in Athletics are South Africa, Sweden, the UK, Peru and Poland. But the list is completely different for Aquatics, with Hungary, Australia, Mexico, the US and Italy most interested.

READ MORE | DOWNLOAD | CONTACT



RETURNING TO THE OFFICE

Is flexible working the future?

The Covid-19 pandemic has seen a global reconfiguration of working practices. On average, four in 10 employed adults across 29 countries are working from home all, most, or some of the time. We look at how this has altered preferences and expectations.

One in four say that they would like to work from home every day after the pandemic. South Africa, Singapore, Great Britain, the United States, India, and Australia are the countries where people are most likely to want to increase time spent working from home.

But home-working isn't for everyone. Around one-third agree with each of the following statements: 'My home is a difficult place to be productive'; 'I feel disengaged when working from home', and 'I feel more burned out working from home'.

On balance, changes are perceived positively and people are demanding a more flexible approach. Two-thirds (66%) think employers should be more flexible in terms of how often workers are required to go into the office.

Meanwhile, our US team has looked into what returning to the office will mean for Americans in their daily lives. Routines will be disrupted, rebuilt, and many will have hybrid routines for office and 'at home' days. How can brands meet these changing needs?

READ MORE | DOWNLOAD | CONTACT

YOUTH SKILLS

How has the pandemic affected children and young people around the world?

Our 29-country global survey for World Youth Skills Day 2021 examines the impacts of the Covid-19 pandemic on young people. A global average of almost four in ten people (37%) think that worse mental health and wellbeing among children and young people will be a long-lasting outcome of the pandemic.

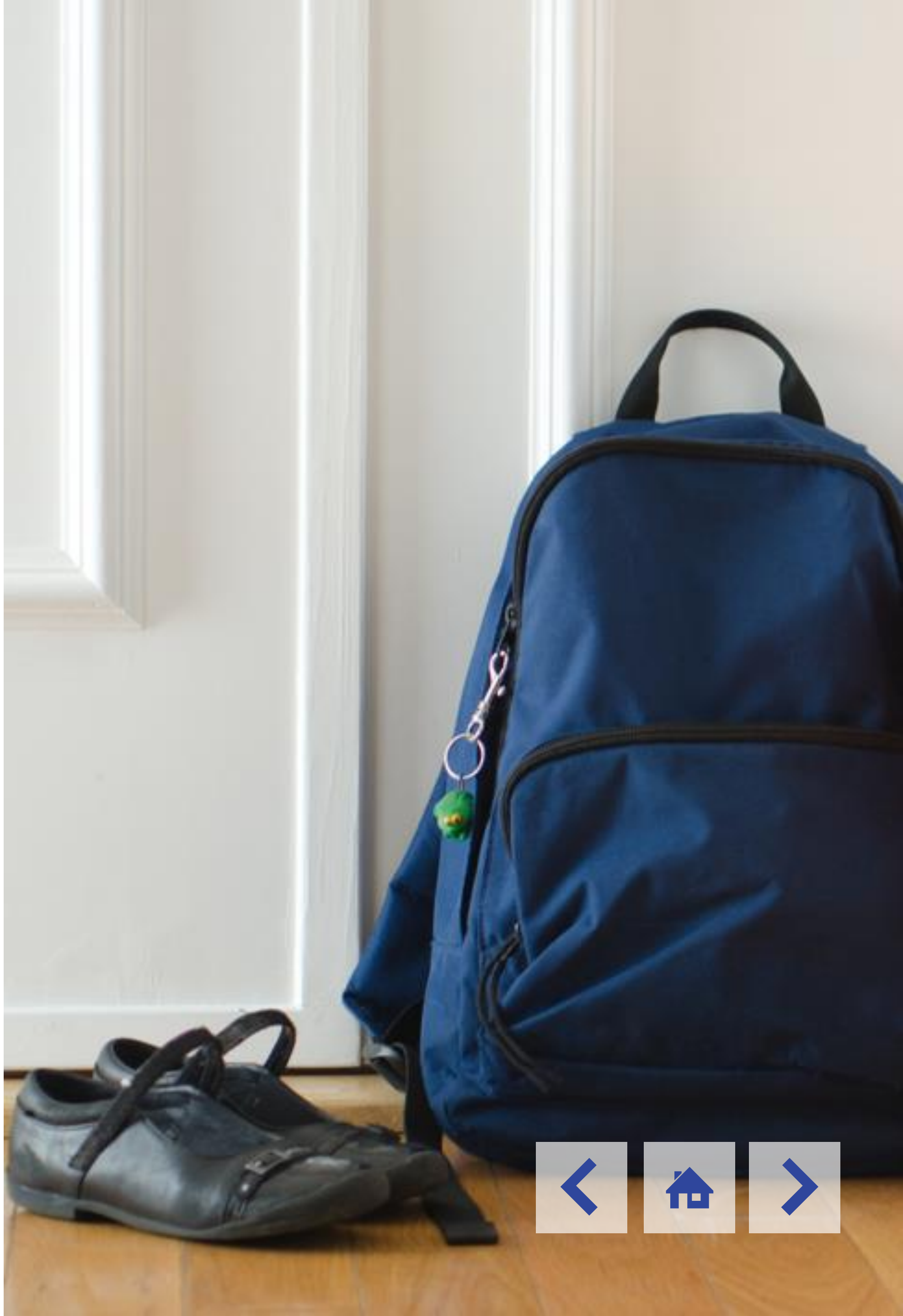
Maintaining focus and concentration on schoolwork is seen as the biggest issue affecting children and young people of all age groups as they return to the classroom.

Almost two in five (a global country average of 35%) believe that children will be unable to make up for missed formal education, resulting in worse qualifications. Despite this, the public remain supportive of school closures, with a global average of 62% agreeing that this measure was (or is) an acceptable price to pay to reduce the spread of the virus.

Support for families who need it to fund school uniforms, books, transport, and other education-related expenses is perceived to be most important to improving access to education.

However, opinion is split on how to allocate public spending more broadly. Only around a quarter (a global country average of 27%) see spending on primary and secondary education as a priority.

READ MORE | DOWNLOAD | CONTACT



BROKEN SYSTEM SENTIMENT

A prevailing sense of social and political disaffection.

A 25-country Ipsos study shows that majorities in most of the nations we surveyed express feelings of alienation as citizens of their country. There are prevailing perceptions of a broken political and economic system, often accompanied by populist, anti-elite sentiment and nativist views.

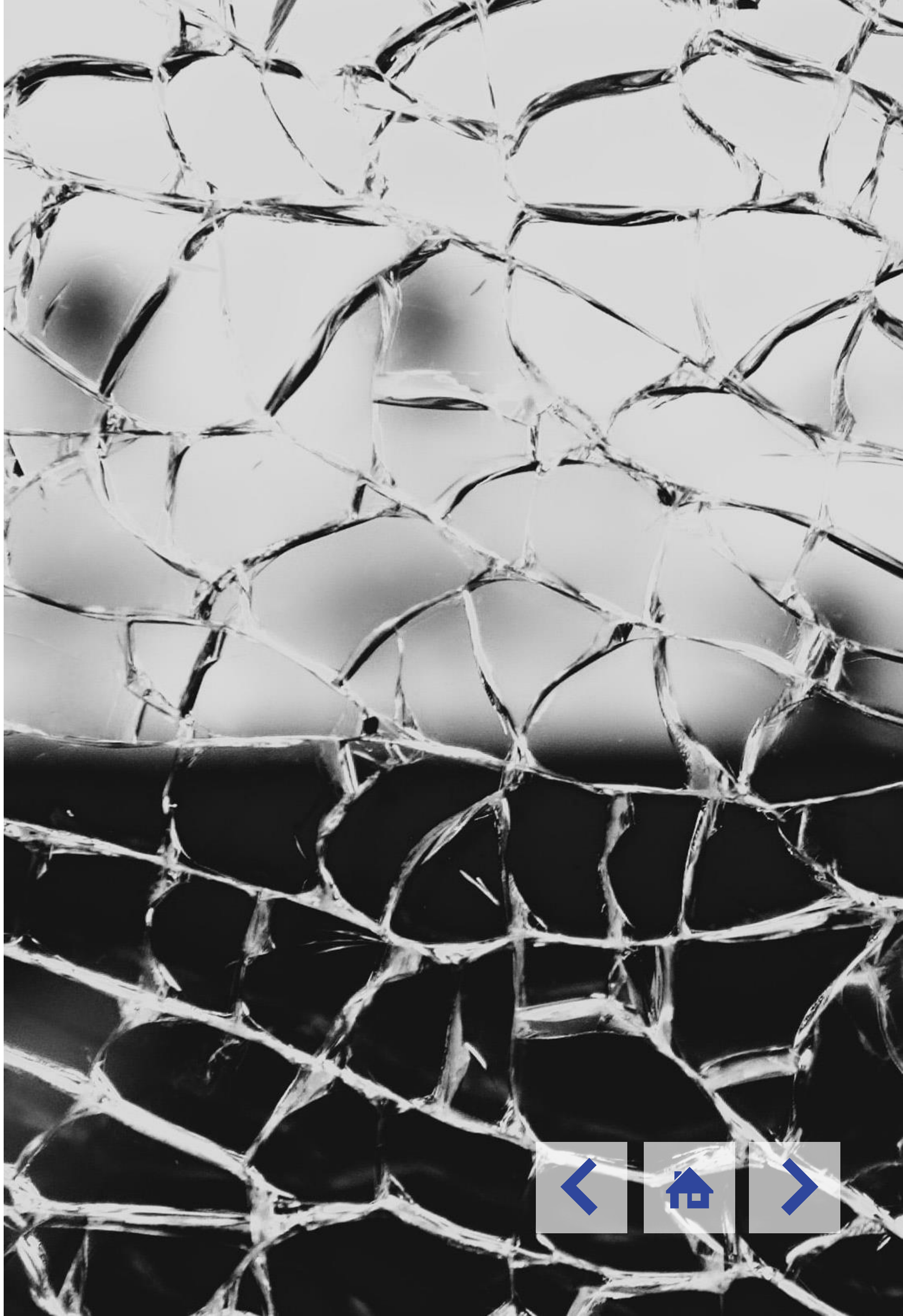
On average, 56% agree their country's society is broken and 57% agree that their country is in decline. Levels of "broken system" sentiment are based on responses to five statements, including:

- "The economy is rigged to favour the rich and powerful" (71% agree across 25 countries, on average);
- "Traditional parties and politicians don't care about people 'like me'" (68%); and
- The country "needs a strong leader to take the country back from the rich and powerful" (64%).

The four countries with the highest scores across these measures are all in Latin America – Colombia, Peru, Brazil, and Chile.

Since 2016, broken-system sentiment has gained ground most in Japan, South Africa, Sweden, the United States, and Argentina; it has receded most in Spain, Mexico, and France.

READ MORE | DOWNLOAD | CONTACT



RUSSIA TREND VISION

Consumers in a changing world.

Our comprehensive yearly analysis of consumer trends by our team in Russia focuses on the preferences and behaviours that are here to stay in 2021, following the changes forced upon our lives by the pandemic.

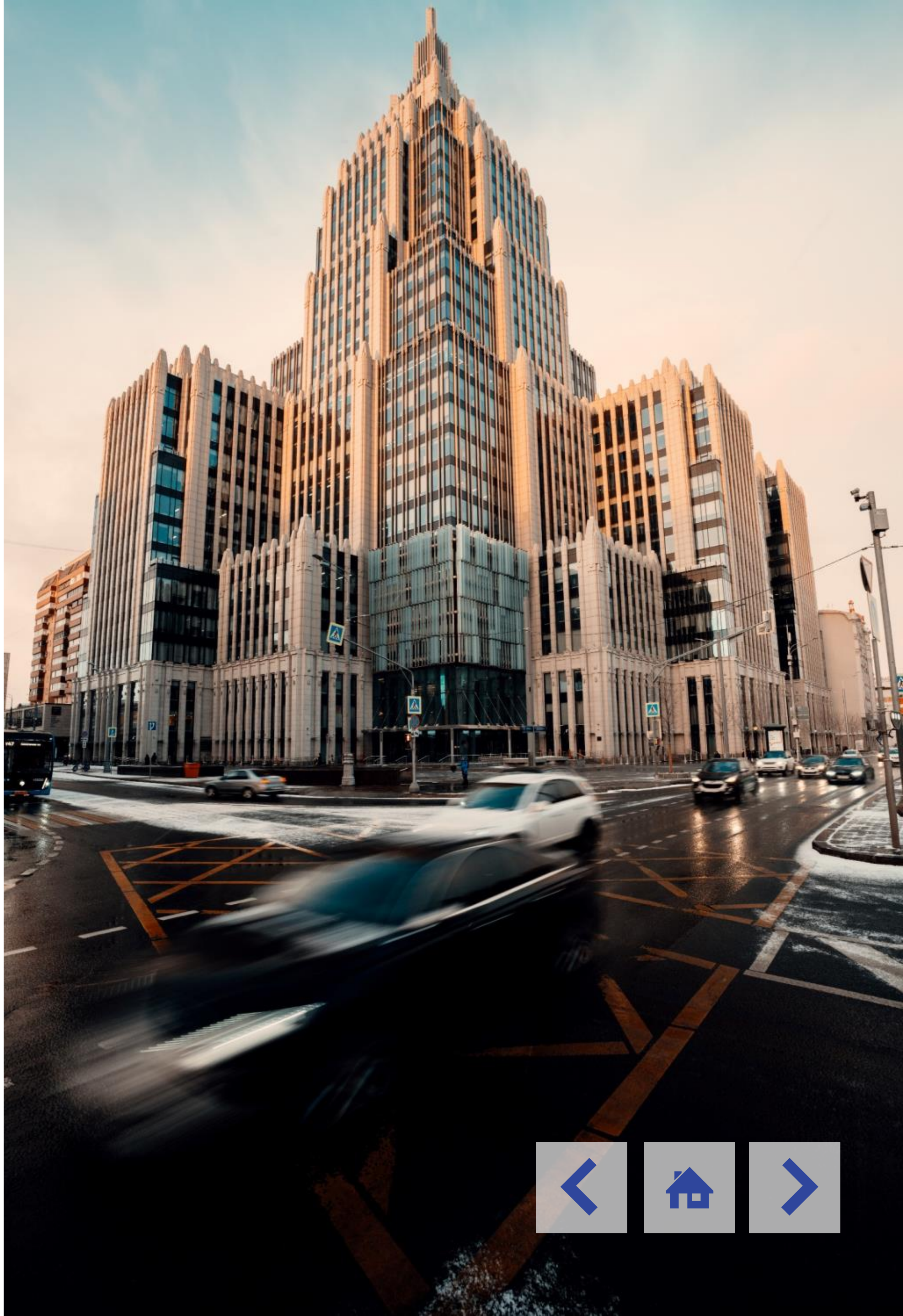
More than one year on, we have the opportunity to reflect on consumers' experiences of technologies, products, and services that they have tried out during this time. Are new habits and behaviours taking root? What are the barriers to adoption? Which innovations are people ready to make part of their lives now?

To identify the key trends and explore these questions, we look at what Ipsos data shows us. We also bring in our understanding of principles of successful product innovation and the dimensions of consumer behaviour change and apply them to this context.

Russia Trend Vision 2021 includes chapters on economic changes, brand purpose, sustainable development, health, food and retail, among other things. Some key points include:

- The economic consequences of the pandemic have been felt most by younger generations.
- Brands are focusing more on social impact during hard times, and volunteer participation is gaining strength.
- 80% of Russians constantly adhere to at least one aspect of a healthy lifestyle.

READ MORE | DOWNLOAD | CONTACT



FOCUS ON AFRICA

POPULATION IN AFRICA

Declining fertility, ageing, urbanisation and migration are the key factors affecting global population dynamics and population decline – as set out in Emptier Planet. While these trends apply to Africa, changes are happening at a different rate.

This release for World Population Day outlines the regional context. It states that population numbers on the continent will continue to grow at a faster rate than in most other parts of the world. Today, Africa houses 17% of the world's population. According to UN estimates this will rise to 39% by 2100.

READ THE REPORT

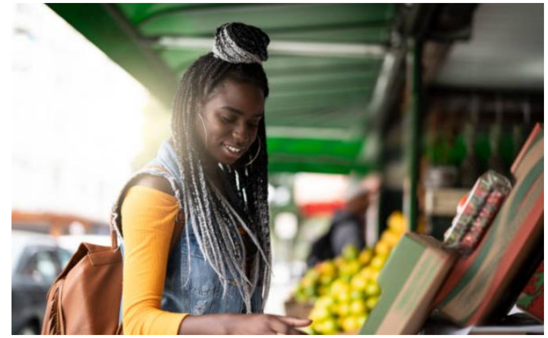
SOUTH AFRICAN YOUTH

A study in South Africa for World Youth Day finds some despondency and desperation but also big dreams among young South Africans. Data shows younger demographics were particularly affected by unemployment during Covid-19.

Around one-quarter (27%) of adult South Africans and four in ten (37%) young people in the country are looking for work.

A large proportion of young South Africans are studying to improve their chances of finding a job, while a small number are generating their own sources of income.

READ THE REPORT



AFRICAN CONSUMERS

In the classic Mercator projection of the world map, the massive landmass of Africa dominates. But a closer look reveals Africa to be a fascinatingly diverse continent.

The culture, ways of thinking and value systems of people in Africa have been influenced by the original cultures, colonial powers, post-colonial ideologies, religion, and globalisation.

With this in mind, our latest KEYS webinar included a special focus on how best to connect with consumers in Africa.

WATCH THE PRESENTATION

SHORTCUTS

WHAT WORRIES THE WORLD?

Concern about Coronavirus is fluctuating from country to country, according to the July 2021 wave of our *What Worries the World* survey. Since last month, Covid-19 concern has eased in 14 countries but become more pronounced in 13 others.

Currently most concerned about Covid-19 are Malaysia (76%), Japan (59%) and South Korea (57%).

After Coronavirus, the issues that people around the world are most worried about are Unemployment, Poverty/Social Inequality, Financial/political corruption and Healthcare.

Looking at national sentiment, a global country average of 63% say that things in their country are “off on the wrong track”, vs. 37% who say they are going in the right direction. Most pessimistic on this measure are Colombia (88%) and Peru (86%).

What Worries the World is Ipsos’ long-running study that tracks public concern about 17 key issues in 28 countries.

READ MORE

NATURAL RESOURCES

A new Ipsos survey for the World Economic Forum explores public attitudes to taxing and labelling product that use scarce natural resources. Some findings include.

- A global country average of 85% across 28 countries agree that information about the use of scarce natural resources should be included on product labels.
- There is majority support in all countries except Japan for taxing companies using scarce natural resources, even if it means consumers having to pay significantly more for products.
- Support for a natural resource tax is far more prevalent in China and India than it is in most EU countries and the United States.
- Views on taxing and labelling natural resource use vary little across levels of education, gender and age groups.

READ MORE

LANGUAGE MATTERS

With society at a crossroads when it comes to diversity and inclusion, a new Ipsos report examines the findings of research conducted for British media organisations into inclusive language.

We examine the importance of using language that properly reflects the lived experience of different communities.

Public awareness and understanding of inclusive terms is mixed, in part due to the meaning and connotation of certain terms evolving over time.

Some new terminology is faced with poor wider comprehension. For example, less than half of participants surveyed (45%) were aware of the term ‘neurodiverse’ and only 13% were confident of its meaning.

This report also covers the importance for organisations, brands, and media owners to enter into candid public discourse on this topic in order to create stronger relationships with their audiences.

READ MORE

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.

www.ipsos.com
@Ipsos