IPSOS UPDATE

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

January 2022

Ipsos Knowledge Centre

GAME CHANGERS

IPSOS UPDATE JANUARY 2022

Welcome to this month's round-up of research and thinking from Ipsos teams around the world.

Happy New Year! We face a barrage of predictions by media pundits and others about the next 12 months. It's only natural – as humans, we think about the future all the time. The challenge is that our predictions are very often wrong. Most people expected 2021 to be better than 2020 and ended the year by saying it wasn't. Many of today's expert predictions about the year ahead will be wide of the mark.

In this vein, we invite you to explore our annual public predictions survey, which finds people cautiously optimistic about the year ahead; hope springs eternal! Progress will be contingent on the twists and turns of the pandemic, including vaccinations. 56% are confident that more than 8 in 10 around the world will receive at least one dose of the vaccine by the end of 2022. Let's hope they are right.

Inflation is a certainty, but how much, and for how long? Globally, 7 in 10 say they've noticed prices rising. Our *What Worries the World* survey finds concern at record levels. This reflects the apparent end of a largely low-inflation environment since the start of the century.

Our working lives remain disrupted in many countries. Employers have had to pay far more attention to employee wellbeing and one clear priority is to provide a safe environment as the pandemic continues. Some 8 in 10 say they want their colleagues to be fully vaccinated to attend a place of work and expect to see other measures like mask-wearing in place as well. One thing that looks certain is the continuation of hybrid working for knowledge workers in many economies, with all the impacts that has on commuting, retail and more.

As ever, each of the articles here include links to help you explore the topic in more detail and get in touch directly with the Ipsos research teams if you'd like to find out more, or talk about a particular question or challenge you are facing. Personally I will be paying close attention to the supply crunch and its ripple effects on inflation, on the ongoing data explosion, to China, India, climate change, and the impact of our ageing societies.

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

PREDICTIONS FOR 2022
Optimism that this year will be a better one.

Marking another year impacted by Covid-19, our 33-country survey finds more than half saying that 2021 was a bad year for them and their family. But there is greater hope for the year ahead.

COVID AND THE WORKPLACE
Majority support for workplace vaccine mandates.

Our global survey for the World Economic Forum finds widespread support for vaccine and mask mandates at work. Many employees would feel uncomfortable in the absence of such protections.

A PANORAMIC VIEW
With whom and with what do I truly compete?

This paper demonstrates how understanding consumers' decision-making processes can help companies to see where their competition lies and where the branding opportunities are.

HARNESSING THE POWER OF DATA
Digital transformation and human-centricity.

The final instalment in our *Future of Insights* series explores the different approaches available to companies as they seek to create value through their data and analytics teams.

SPOTLIGHT ON INFLATION
People worldwide experiencing higher prices.

An Ipsos survey across 30 countries finds six in 10 on average saying the prices they are now paying for many products and services seem higher than they were six months ago.

CLIMATE OPINION OBSERVATORY
The climate: neither downgraded, nor a priority.

While the environment has risen in the rankings of worrying topics, our new study finds it cannot always compete with more pressing concerns about everyday life such as living costs and coronavirus.

UP CLOSE AND PERSONAL
Humanising the omnichannel experience.

Humanising omnichannel means seamless customer journeys are just the start. Retailers must design or rethink their channel strategy based on a personal understanding of their customers.

A GREAT BRITISH RECOVERY?
The road ahead from the pandemic.

The latest edition of *Understanding Society* looks at what will shape Britain's recovery from the pandemic with a series of articles covering health, economy, society and the environment.

PREDICTIONS FOR 2022

Widespread optimism that next year will be a better one.

Marking another year impacted by Covid-19, this annual Ipsos survey (across 33 countries) finds 56% saying 2021 was bad for them and their families - down from 70% last year. Looking ahead, three-quarters (77%) overall expect a better year in 2022. *Hear more about the Perils of Prediction*.

Of the nine questions where we have trend data since 2020, four show significant change, indicating a more optimistic view of what 2022 will bring. Nonetheless, concerns about the environment and rising prices persist. And while most expect higher vaccination rates around the world, half (47%) expect a new deadly strain of Covid-19 to appear.

More than half of people (56%) believe that over 80% of the world's population will receive at least one dose of a Covid-19 vaccine in 2022. Latin Americans are highly optimistic, with figures rising to 81% in Peru, 76% in Brazil, and 69% in Chile.

Most people around the world believe we will see more consequences of climate change in 2022, with 60% saying is likely there will be more extreme weather events in their country in 2022 than there were in 2021. The proportion agreeing with this rises to 72% in the Netherlands, 69% in Great Britain and 66% in Belgium.

A clear majority (75%) expect prices in their countries to increase faster than incomes. Also on the economy, one-third (35%) globally expect to see stock markets around the world crashing – although this is lower than the 40% recorded in 2021. Six in ten (61%) think that the global economy will be stronger in 2022, up from 54% who said the same about 2021 in last year's survey.

Globally, around three in ten (28%) say it's likely that people in their country will become more tolerant of each other. While this rises to 60% in India, only 9% of the French think this is likely to happen.

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SPOTLIGHT ON INFLATION

People worldwide report experiencing higher prices.

An Ipsos survey across 30 countries finds six in 10 on average saying the prices they are now paying for a number of products and services (including transportation, food & drink, and utilities) seem higher than they were six months ago.

Around half report a rise in the cost of clothing and shoes, housing, medical and health care, and entertainment. Two-thirds (66%) say the same for utilities (electricity, gas, water, phone, and internet), while for both transportation and food & drink we find 70% saying costs seem higher than before.

The countries where prices are most widely perceived to have increased include six in Latin America, four in Central and Eastern Europe, Turkey, and South Africa. At the opposite end of the spectrum, consumers in Japan and China are least likely to report higher prices.

When asked how they expect their total household spending to change over the next three months, a global average of 42% say it will increase (12% ‘a lot’, and 30% ‘a little’). A similar proportion, 41%, expect their spending will not change while 17% say that it will decrease.

Higher-income and younger consumers are slightly more likely than less affluent and older people to expect that their spending will increase in the next three months. But expectations of increased spending vary more dramatically across countries, ranging from just 16% in Japan to over 60% in Romania and Argentina. The countries where people are more likely to report spending increases tend to be those where consumers most widely report experiencing price increases.

Meanwhile, inflation has moved up to record levels in our global issues monitor. Read more in December’s *What Worries the World* report.

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COVID AND THE WORKPLACE

Majority support for workplace vaccine and mask mandates.

Most workers across the world support vaccine and mask mandates and would feel uncomfortable going to work if these protections were not put in place, according to our 33-country survey for the World Economic Forum.

On average, around three-quarters of employed adults agree that they and people in their workplace should be fully vaccinated against Covid-19 (78%), undergo frequent testing if they are not vaccinated (74%), and wear a mask in common areas when in close proximity to other people (81%).

However, support for protective mandates varies widely across countries. It is generally highest in Eastern and Southern Asia, Saudi Arabia, and Latin America, and lowest in Central and Eastern Europe, Northern Europe, and the US.

Workplace vaccination mandates are most popular in countries where workers are also most likely to say they would choose to get vaccinated or undergo frequent testing to keep their job.

In the absence of a vaccination, testing, or masking mandate, we find that many workers in most countries (averaging 38% globally) would still be comfortable attending their place of work.

A further 31% (global country average) say they would be uncomfortable if workplace mandates were not in place, but would go to work anyway, while 25% say they would work remotely instead. Some 6% say they would quit their job.

Countries where at least 40% say they would either resign or switch to remote-working in this situation include Malaysia, Spain, South Korea, Japan, and Peru.

SIX TIMES AS MANY WORKERS WOULD CHOOSE TO GET VACCINATED OVER GETTING TESTED FREQUENTLY (68% VS 12% GLOBAL AVERAGE).

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GLOBAL CLIMATE OPINION OBSERVATORY

The climate: neither downgraded, nor a priority.

Obs'Cop is an annual barometer of public opinion on climate change in 30 countries, including the world's biggest emitters, conducted by Ipsos on behalf of EDF.

The 2021 report finds the climate neither downgraded, nor prioritised. Public opinion places the environment fifth in a list of top concerns, overtaking unemployment, and up by 2 percentage points from last year to 41%. However, the environment cannot compete with more pressing concerns about everyday life; it is overshadowed by the cost of living and coronavirus (both 52%).

Despite a year of increased extreme climate events, climate scepticism has continued its slow rise, up 2 points from last year to 34%. Yet, 77% of the planet's inhabitants believe that they are already seeing the effects of climate change in their region.

Globally, we see renewable energies favourably welcomed as a source of electricity, with 89% on average in favour of solar panels and 81% in favour of wind turbines. Conversely, coal is accepted by a global average of only 25%. We see support for alternative energy sources like nuclear or gas rise when they are suggested as a replacement for coal.

There is divided agreement that the solution to climate change lies in change to individual lifestyles; one in two (51%) globally share this idea, with higher agreement in South America.

One factor behind this is that the climate issue is still seen as a matter for governments, with consumers feeling that they are already doing their part. 69% say that the government needs to be acting to fight climate change but only 50% believe that they are taking any action.

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A PANORAMIC VIEW

With whom and with what do I truly compete?

Defining the competition in today's hyperconnected world can be extremely challenging. The growth of eCommerce means that competition can now come from many different channels, and consumers' needs can often be satisfied by products that span multiple categories.

Based on the latest science on decision-making, this paper demonstrates how your competition can be captured no matter where they come from. This paper presents consumers' product choices as a two-stage process, explaining both the consumers' initial mental set of possible options as well as how they settle on an end product.

In the initial stage of their decision-making process, whether a consumer decides they want a generic product or a specific brand has important marketing implications. Identifying occasions where product categories are more salient than brands presents opportunities to develop strategies, build brand equity, and generate brand preferences.

Some key takeaways from this paper include:

- Consumers make decisions by first self-generating a set of options and then choosing from among those options.
- A critical missing piece in current research is the examination and understanding of the self-generation stage.
- A better understanding of this stage can provide marketers with a broader view of who they compete with, an understanding of the relative salience of categories versus brands, and allow them to determine where branding opportunities are.

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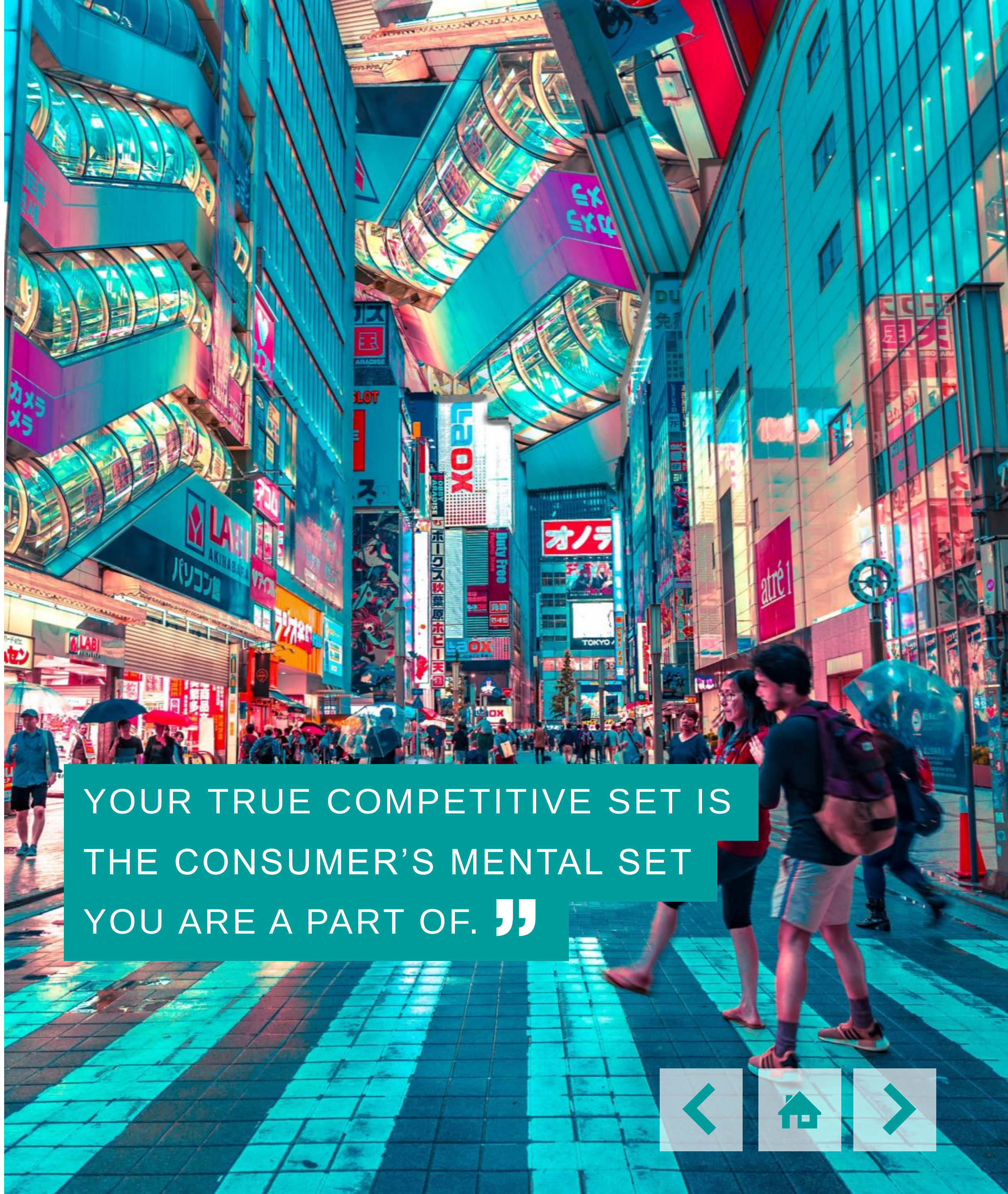

YOUR TRUE COMPETITIVE SET IS THE CONSUMER'S MENTAL SET YOU ARE A PART OF. ”

UP CLOSE AND PERSONAL

Humanising the omnichannel experience.

The pandemic has accelerated the pace of digital transformation, leading to an expansion of digital channels, touchpoints, services and experiences. Nearly a third (31%) of people report that their primary transaction channel is now online.

Ipsos research shows that at times, when operating in the digital environment, people feel that the human touch is missing. Convenience, the dominant motivation behind most online shopping, does not necessarily equate to humanity. In fact, the reverse may be true.

Providing a seamless customer experience and advocating customer-centricity are no longer enough. Neither is looking at omnichannel development through the technology lens. It needs to be human and it needs to be personal.

In an increasingly data-driven environment, it is easy to be blindsided by technology and numbers and lose sight of the people. However, it is ultimately a person who explores your options, opens your package, uses your product, and experiences your service.

To win in the new retail omnichannel world, manufacturers, retailers and service providers need to design or rethink their channel strategy based on a total understanding of their customers: their lives, their needs, and their challenges.

Presenting four examples from Ipsos research, this paper explores the stages in customer journeys where personalisation and human touches are most important, as well as which touchpoints are best suited to achieving this.

It also shows what human-centred innovation looks like; which innovations truly solve a customer's need rather than innovating for innovation's sake.

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NEARLY A THIRD (31%) OF PEOPLE REPORT THAT THEIR PRIMARY TRANSACTIONAL CHANNEL IS NOW ONLINE. ”

HARNESSING THE POWER OF DATA

The latest instalment in our *Future of Insights* series.

The Covid-19 pandemic has elevated the value of high-quality data and analytics, driven by the acceleration of digital transformation and the increasing importance of becoming more human-centric in order to recognise the changing dynamics of consumer attitudes and behaviours.

To understand this shifting landscape, Ipsos conducted more than 70 client interviews during 2021 around the world and synthesised the key learnings from these interviews to capture how organisations are evolving to harness the power of data and technology for better insights.

Building on the first two publications in the series, Transforming the Insight Function and the Value of Insights: Moving to Impact, this paper explores the various approaches in how companies structure their data and analytics teams, the challenges they face in doing so, and the different paths available to create value and drive human-centricity.

From our conversations with clients, we identified two key dimensions that best reflect a company's data maturity and transformation journey:

- **People and Organisation**: focusing on aspects that determine the organisation's capabilities and the behaviours they promote.
- **Tools and Infrastructure**: placing a strong priority on developing and nurturing data ecosystems.

Shaped by Ipsos' Global Client Organisation, this is the third paper in our *Future of Insights* series on how research is changing and how to elevate its impact.

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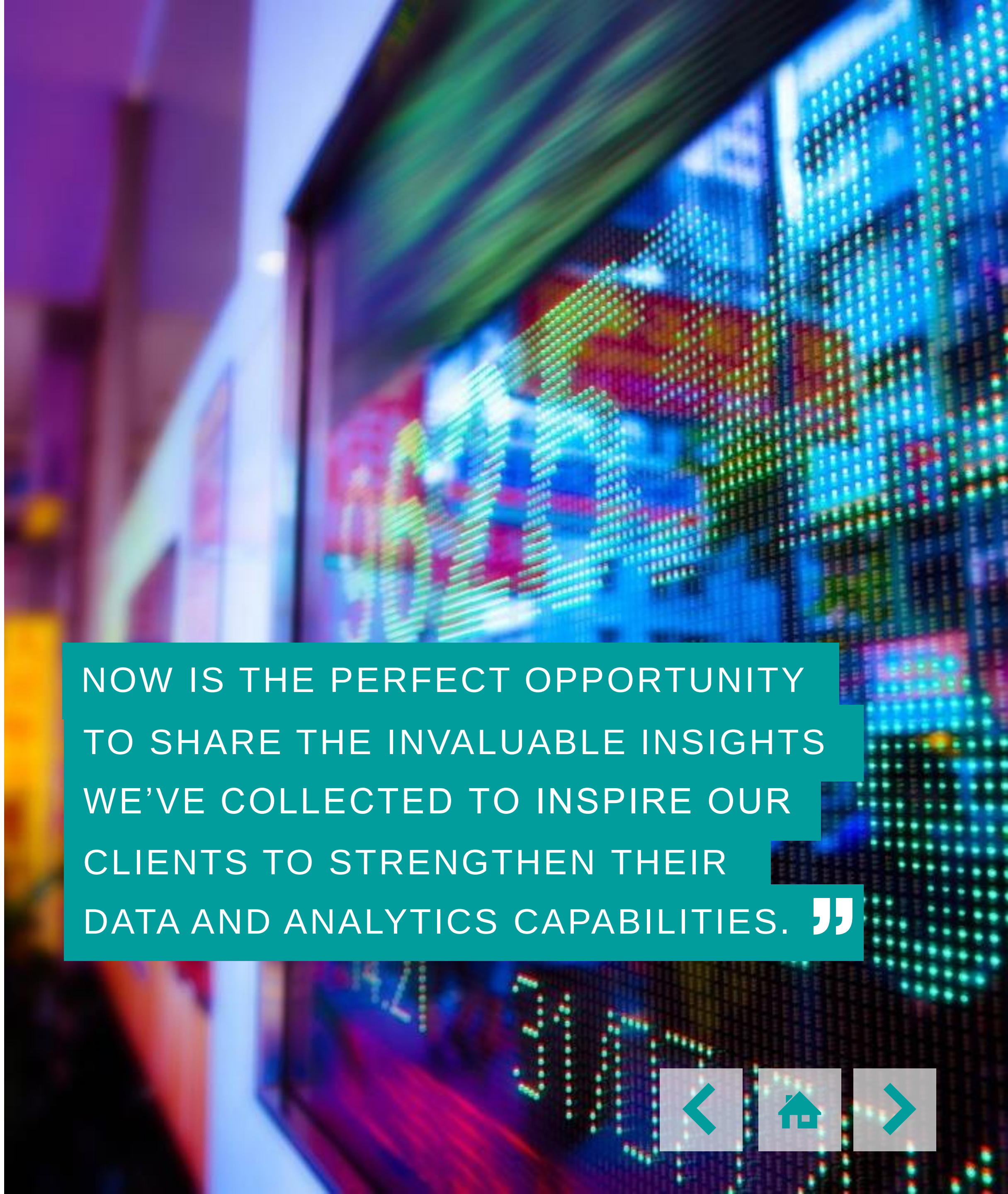

NOW IS THE PERFECT OPPORTUNITY TO SHARE THE INVALUABLE INSIGHTS WE'VE COLLECTED TO INSPIRE OUR CLIENTS TO STRENGTHEN THEIR DATA AND ANALYTICS CAPABILITIES. ”

A GREAT BRITISH RECOVERY?

The road ahead from the pandemic.

The latest edition of *Understanding Society* from Ipsos in the UK looks at what will shape the country's recovery from the Covid-19 pandemic, with a collection of articles covering health, economy, society and the environment.

The Covid-19 pandemic reached high levels in our UK Issues Index, comparable to other era-defining concerns such as the 2008 financial crash, and Brexit in 2019. But in our most recent waves, Covid-19 no longer stood out on its own but shared top billing with concerns about the economy, the effects of Brexit, the NHS, and especially climate change.

This is not to say that the public are now blasé about the pandemic. We have seen public opinion move swiftly in reaction to changes in the virus and official responses, and if cases continue to increase, it would not be surprising for the public mood to shift again.

In terms of business, British business leaders are optimistic about economic recovery, with 8 in 10 expecting their own company's situation to improve over the next 12 months. But supply chain issues, labour shortages and inflationary pressures look set to remain into 2022, with the year ahead looking to be a challenging one.

Key findings from the "levelling up", immigration, and green recovery articles include:

- 67% think that the government doesn't care about their local area, rising to 77% in the North East and 76% in the North West.
- Two-thirds (65%) agree that employers should be allowed to recruit from overseas for any jobs where there are shortages.
- 57% believe that tackling climate change will create new jobs and boost the economy.

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WHILE THERE ARE HOPES THAT BRITAIN COULD EMERGE A BETTER PLACE AFTER THE PANDEMIC, PEOPLE ARE SCEPTICAL THAT IT WILL. ”

SHORTCUTS

What Worries the World?

The final wave of our 28-country *What Worries the World* survey of 2021 (conducted between 19th November and 3rd December 2021) finds Covid-19 back at the top of our global issues ranking.

Throughout the year, we saw levels of concern about the virus gradually fall until it ceased to be the number one global issue in October. Last month it was in third place with 28%, the lowest score recorded. However, we now see it increase by 4 points to 32% in December 2021, with the continuing spread of the Omicron variant.

- The largest month-on-month increases in concern about Covid-19 are seen in Germany (+23 points), the Netherlands (+19) and Belgium (+16).
- Poverty & Social Inequality is the second top issue this month, just behind Covid-19 with 31%.
- A global country average of 65% say that things in their country are heading in the wrong direction, which is 3 points higher than this time last year.

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The Social Outlook in LatAm

Based on findings from the Ipsos *Global Advisor* survey, Jean-Christophe Salles, CEO of Ipsos in Latin America, presented on the social context in the region at the 2022 Canning House LatAm Outlook event. He highlighted the following key points:

- Over three-quarters (77%) of Latin Americans say things are heading in the wrong direction.
- The Ipsos Disruption Barometer finds all Latin American countries in negative territory. This could signal social instability and a desire for political change.
- The top four highest-scoring countries in the Ipsos broken system sentiment index are in Latin America.
- Crime & violence, Financial/political corruption, Poverty/social inequality, and Unemployment are all pressing concerns in Latin America while Covid-19 is a less prominent issue.
- 45% of Latin Americans believe economic recovery from the pandemic in their country will take more than 3 years.

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Year in Review 2021

It was a year that promised to be better than the last: 77% around the world thought the year would be a better one for them and their family. But just four in 10 thought that life would be completely back to normal.

Our *Review of the Year 2021* takes a look back at some of the most striking findings from our global surveys. Among them, eight in 10 say that their mental and physical health are equally important to their wellbeing and three-quarters of people say that tensions exist between the rich and the poor in their country.

We explore how our research shed light on some of the big stories from the events of the year, including global vaccination programmes, the Tokyo Olympics, and the COP26 climate change conference.

We also review Ipsos' analysis on this year's developments when it comes to retail, brand, society, research methods and more, with a recap of publications from teams around the world.

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POLL DIGEST

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

INDIA: Urban Indians see India as a top influencer: 88% think it will have a positive influence on world affairs in the next decade

ITALY: A new survey on migration finds that 40% of Italians have never lived abroad and don't know anyone who has.

CANADA: Only half (50%) of Canadians currently working from home expect to return to the office regularly in 2022.

GERMANY: A narrow majority say their health system is in good shape, but they are concerned about a growing list of problems.

UNITED STATES: Many Hispanic/Latino Americans believe the Democratic and Republican Parties take them for granted.

MENA: A social media analysis shows wildlife conservation is the sustainability topic that drives the highest levels of engagement.

UK: 62% of the British public say it's likely that Boris Johnson will not be Prime Minister by the end of 2022.

PERU: 56% say the country is heading in the wrong direction, the highest level recorded for many years.

NETHERLANDS: 1 in 12 Dutch people invest in cryptocurrency, with half investing under €500.

AUSTRALIA: The latest Life in Australia report finds Metro Perth and Regional Victoria are the "most liveable" locations in 2021.

FRANCE: 68% say the 2024 Olympics opening ceremony on the River Seine will make them proud to host the Games.

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