

IPSOS UPDATE

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

February 2022

Ipsos Knowledge Centre

GAME CHANGERS



IPSOS UPDATE FEBRUARY 2022

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

A new year may be underway, but it's hard to celebrate it as a new dawn. Some 80% of people around the world tell us they expect to see another wave of coronavirus infections in their country. And, despite the impressive resilience of societies and economies, there remains an unsettling feeling: six in 10 people around the world report that "things in my country are out of control right now".

Whatever our fears about the pandemic, our day-to-day concerns about work, crime, and poverty did not go away. This month's *What Worries the World* analysis is a case in point. The omicron variant has led to Covid-19 returning to the top spot in our global ranking. But once we turn to individual countries, a more varied pattern emerges. Meanwhile, concerns about inflation continue to rise and are now running at record levels.

All of which is a reminder of why we need to be in tune with the perspectives of different cultures and countries. Our *Russia: In The Flow of Change* report paints a picture of the sociocultural profile of the population, underlining the role national traditions still play in marketing to the modern consumer.

Elsewhere, our team in Colombia explore how their country can build on the diversity of both its people and its landscapes and be at the heart of the "Fourth Industrial Revolution" in the region in their [new in-depth report](#).

There is much to reflect on as we assess the effects of the pandemic on longer-term trends already underway, for example in medical science and technology. We explore this in [my latest podcast](#) and in our *Global Trustworthiness* report. This study underlines the importance of behaving responsibly when it comes to building a strong reputation. Perhaps reflecting the part they have played in responding to the challenges of the pandemic, we see improvements in public perceptions of pharmaceutical companies, banks and governments.

Each of the articles here include links to help you explore the topic in more detail. Please get in touch directly with our research teams 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

GLOBAL TRUSTWORTHINESS MONITOR

Trust in pharma and banking on the rise

The Ipsos Global Trustworthiness Monitor analyses the role that trust plays today across sectors and against the changing backdrops of the pandemic, climate emergency, and fake news.

PUTTING IN THE EFFORT

Treating customers fairly for business success

Our latest *Ipsos Views* paper advances research on the 'Customer: Company Effort Ratio' to demonstrate the revenue implications of not getting the balance of effort right with customers.

WHAT WORRIES THE WORLD?

The latest from our monthly issues tracker

The recent rise in concern about Covid-19 continues in 2022 – but people are, in general, less worried than this time last year. This month's report includes a new feature on the economic context.

COLOMBIA FLAIR

Building on diversity

Our in-depth publication on Colombian society, markets, and people reflects a reality in which diversity can mean beauty and pride, but also tensions and conflict.

GLOBAL VIEWS ON ARTIFICIAL INTELLIGENCE

A mix of positivity and concerns worldwide

A 28-country survey for the World Economic Forum finds countries divided on the impact that artificial intelligence will have on daily life over the next three to five years.

START WITH THE END IN MIND

A three-step segmentation remedy

Segmentation initiatives fail because we postpone considering the activation stage until the end of the process. But if we account for this early on, we can take specific actions to ensure success.

THE FUTURE OF WELLNESS

What are the trends shaping health and wellbeing?

Wellness encompasses everything from mental and spiritual to financial wellbeing and, of course how we feel physically. Read expert perspectives on what the path ahead looks like.

RUSSIA FLAIR

In the flow of change

This edition focuses on the socio-cultural profile of Russians and what it means in a changing world. Analysis of family values, home, leisure, shopping, and health builds a human picture of consumers.



GLOBAL TRUSTWORTHINESS MONITOR

Trust in pharma and banking grows worldwide.

The latest wave of the Ipsos *Global Trustworthiness Monitor* finds that trust in pharmaceutical and banking companies, as well as in governments, has risen significantly since 2018.

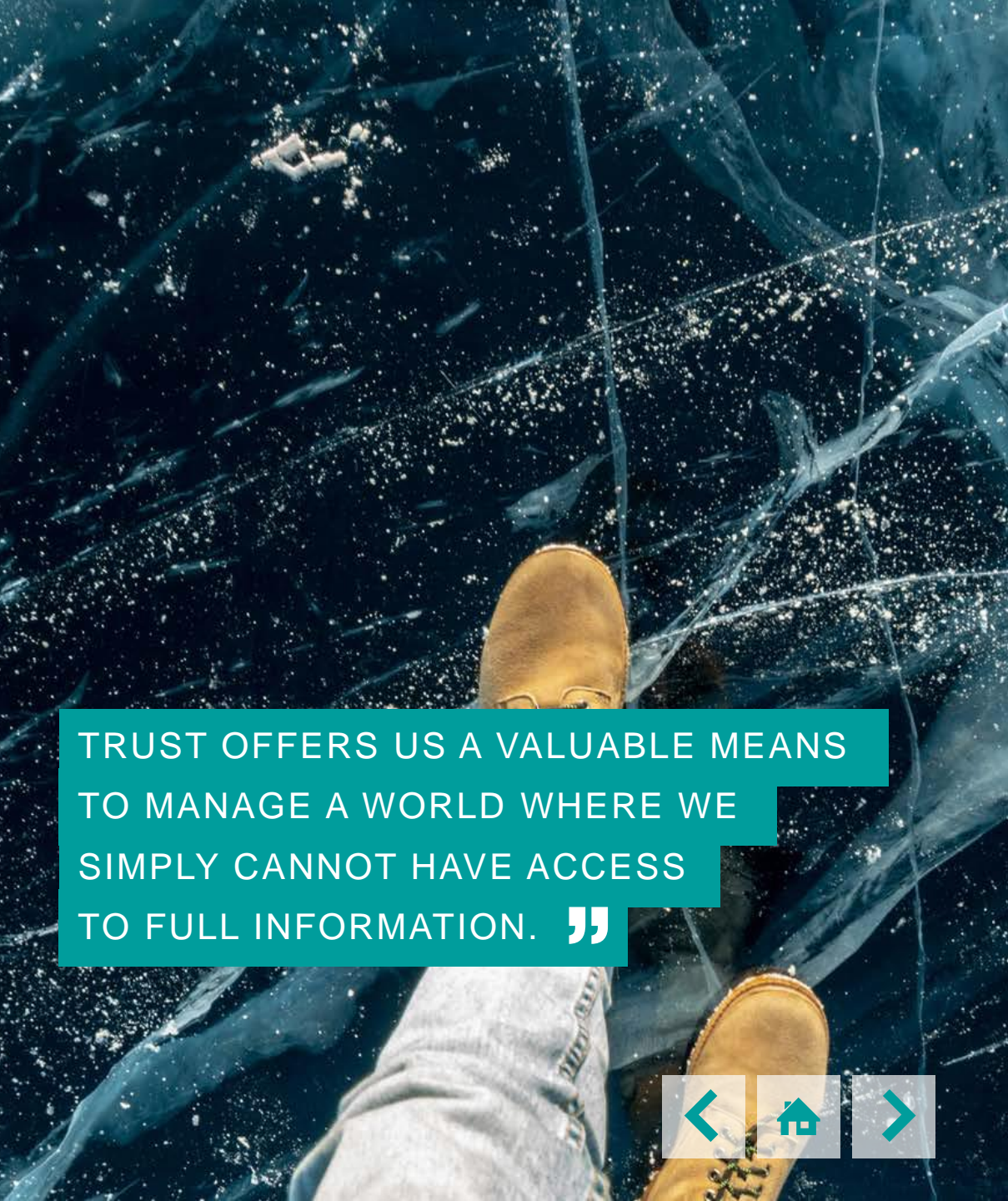
Across 29 countries surveyed, an average of 31% say that pharmaceutical companies are trustworthy (+6 points since 2018). It seems clear that the pandemic has had a positive impact on the public's perception of the industry, but despite the overall strong results there is strong variation from one country to another: 55% of people in Malaysia view the sector as trustworthy compared to just 12% in Chile. It remains to be seen if this increase in trust will continue as the pandemic abates.

We also see growing trust in the banking sector, up 8 points from 2018 with a global average of 28% viewing it as a trustworthy

sector. This is the largest global increase among the set of sectors included in the survey but despite the growth in positive perception, 49% agree that the banking sector “would try to take advantage of me if it could”.

Overall, governments are still seen as less trustworthy than many other sectors, but the pandemic has led to improvements in perception in many countries, with a global increase of 5 points up to 20%. While there are individual factors at play in each country, the pandemic seems to have created a “rally round the flag” effect, leading to an increase in trust in governments.

The Ipsos Global Trustworthiness Monitor analyses the role that trust plays today across sectors and against the changing backdrops of the pandemic, climate emergency and fake news.

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TRUST OFFERS US A VALUABLE MEANS
TO MANAGE A WORLD WHERE WE
SIMPLY CANNOT HAVE ACCESS
TO FULL INFORMATION. ”



GLOBAL VIEWS ON AI

A mix of positive feelings and concerns worldwide.

On average, six out of 10 people worldwide expect that products and services using artificial intelligence will profoundly change their daily life in the next three to five years, according to a 28-country survey for the [World Economic Forum](#). Half of those surveyed feel this has already been the case in the past few years.

The survey revealed a clear division of attitudes towards AI between citizens of emerging countries and citizens of high-income countries. People from emerging countries are significantly more likely to state that they have a good understanding of AI, trust companies using AI and to have a positive outlook on the impact of the use of AI-powered products and services in their lives.

On average for all 28 countries surveyed, almost two-thirds (64%) claim they have a good understanding of what AI is, but only

half (50%) know which types of products and services use AI. Reported 'good understanding of AI' varies from 41% in Japan and 42% in Italy to 78% in South Africa and 76% in Chile and Peru.

Just half of those surveyed (50%) say that they trust companies that use AI as much as they trust other companies, with highs of 76% in China and 73% in Saudi Arabia and lows of 34% in Canada and France.

Areas people expect AI will change most for them and their family in the coming years are, in order: education and learning (cited by 35%), safety (33%), employment (32%), shopping (31%), and transportation (30%). We see consistent country differences in expectations for AI, with 87% of people in China and 80% in Saudi Arabia expecting AI to make their lives easier compared with just 39% in France and 41% in the US.

SIX IN TEN EXPECT THAT PRODUCTS AND SERVICES USING AI WILL PROFOUNDLY CHANGE THEIR LIVES IN THE NEXT THREE TO FIVE YEARS. ”

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PUTTING IN THE EFFORT

Treating customers fairly is key to business success.

When Ipsos introduced a new Customer Experience (CX) metric called the Customer: Company Effort Ratio (C:CER) – measuring the effort put in by both the customer and company, the response from the CX community signalled we had made a breakthrough.

The C:CER metric proved to be three times more accurate at predicting whether a customer will use a company's services or products again following a complaint or a negative experience than the Customer Effort Score alone.

This paper builds on recent research and analysis in multiple sectors in the UK, South Africa and across Latin America, revealing why it is vital for organisations to get the balance of effort right in the eyes of customers.

When customers believe that they are putting in more effort than the company

to resolve an issue, they feel unfairly treated. This can have drastic consequences on relationship strength and customer outcomes, including churn and negative word of mouth.

Putting in the Effort also quantifies the links between the C:CER and actual customer behaviour, providing clear evidence of the revenue implications of not getting the balance of effort right.


Company effort is about more than providing financial rewards. Companies can salvage negative experiences by being proactive, dedicated, transparent, and simply showing respect.

In this paper, Ipsos' CX team also provides guidance on how to determine which issues should be prioritised, as well as the most suitable and cost-effective response.

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A woman in athletic wear is running on a grey track with pink lane markings. She is captured in a dynamic pose, leaning forward with her arms pumping. The background is a blurred track surface.

IT IS VITAL FOR ORGANISATIONS
TO GET THE BALANCE OF
EFFORT RIGHT IN THE EYES
OF CUSTOMERS. ”



START WITH THE END IN MIND

A three-step segmentation remedy.

Segmentation approaches used in market research have often faced accusations of failing to live up to expectations. All too often, these criticisms are warranted.

One area that often brings down segmentation initiatives is that the complexities and organisational discomforts of activation are postponed to the final stages. If these realities are accounted for from the beginning – *starting with the end in mind* – we can take specific actions to ensure success.

It is not a matter of who owns and controls the best data full stop, but about identifying the right data for a specific purpose and showing how it can be connected to address the business question needing to be answered.

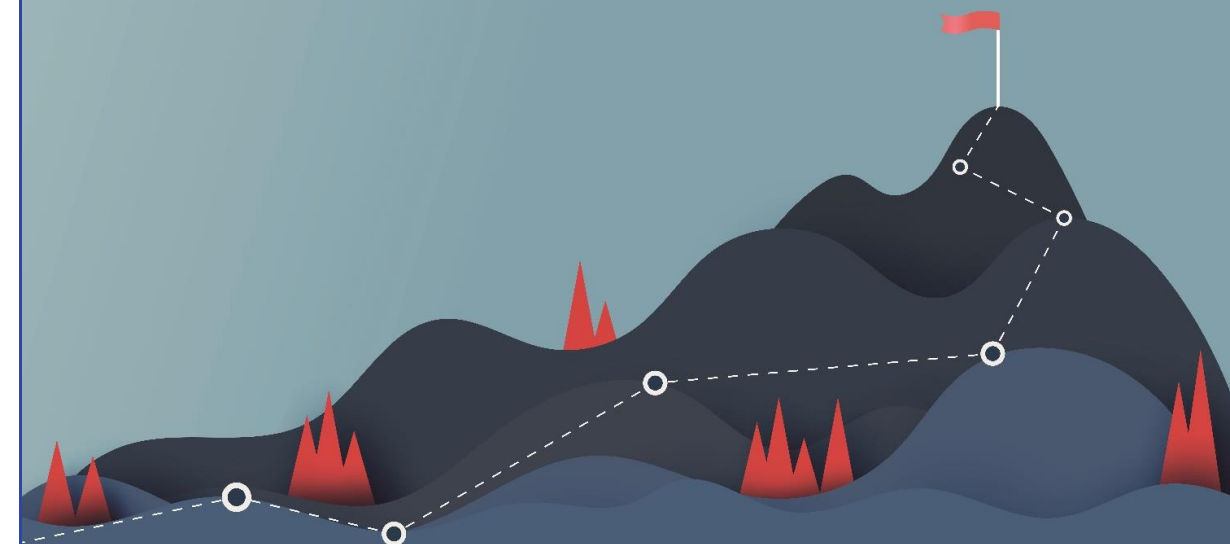
The combination of behavioural and survey data creates a powerful starting

point to build a strategy and activation across the business. This requires creating cross-functional teams.

In some cases, this also means bringing those teams under one management structure, sharing ownership, and acknowledging the value of different data sources. But this also requires top management leading the process.

Without consistent support and management buy in, it is hard for those leading the functional teams to implement the insights. We have heard from our own clients that there is a strong need for them to be supported by their superiors: it is all about leading by example.

This also requires training across the board, so the formerly siloed teams learn how the other team works, what they need, why and how to connect the dots.

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IT IS NOT ONLY ABOUT CONNECTING DATA, BUT ALSO CONNECTING PEOPLE – WITHIN AND OUTSIDE YOUR ORGANISATION. ”



WHAT WORRIES THE WORLD?

The recent rise in concern about Covid-19 continues.

Our monthly *What Worries the World* survey explores what people think are the most important social and political issues across 28 countries, drawing on 10 years of data to place the latest scores in context.

After declining to a low point of 28% (and 3rd position in the list) in November, concern about Coronavirus has now risen for the second month running. Although it is now back in the top spot, today's 35% is still much lower than this time last year (50% in January 2021).

The countries where Covid-19 is a particular concern in January 2022 are: South Korea (58%), Australia (51%), Malaysia (50%), and Canada (48%).

The remaining top 5 issues are: Poverty/ Social inequality (31%), Unemployment (28%), Financial/Political Corruption (27%), and Crime & Violence (26%).

Inflation sees record levels of concern, with one in five (20%) singling it out as a worry for their country today. Argentina and Poland currently show highest levels of worry about inflation (53% in each). Meanwhile, North America has seen dramatic increases in concern about inflation in these last 12 months: from 6% last January to 30% today in Canada and from 2% to 29% in the US.

New to this month's report is a spotlight on the economic context: 38% globally say that the current economic situation in their country is 'very' or 'somewhat' good, while the majority (62%) say that it is 'very' or 'somewhat' bad. But this figure ranges greatly by country – from 95% rating their economy as good in Saudi Arabia to just 11% in Argentina.

A global country average of 63% say that things in their country are heading in the wrong direction. This rises to over 80% in Peru, Colombia, and Argentina.

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THE RECENT RISE IN CONCERN
ABOUT COVID-19 FOLLOWING
THE SPREAD OF OMICRON
CONTINUES INTO 2022. ”



THE FUTURE OF WELLNESS

What are the trends shaping health and wellbeing?

Imagine it's 2028: the continued waves of the pandemic have left the healthcare system strained. People are increasingly taking their health and wellbeing into their own hands. They get encouragement from social media, from friends and family. They get nudged by everyone from pharmaceutical companies to insurers, employers, and to the best behavioural science that tech companies can utilise. And yet, wellness is out of reach for many, whether economically or logistically.

Find out how Ipsos' US team formed this vision in this issue of *What the Future*. It features the latest data and consultations with leaders in health organisations, personalised health, nutrition, psychology, and technology.

Here are some of the questions we asked:

- How precise could wellness tracking be for optimal health?

- Can the healthcare system support wellness – for us all?
- Will our food become more like medicine?
- What role do people play in their own wellness?
- Can devices help us hack our way to wellness?
- What role could food play in mental wellness?
- How does diet impact wellness?

Wellness is a broad topic that encompasses everything from mental and spiritual wellbeing to financial wellbeing and, of course, physical wellbeing. The future will be impacted by macro trends such as an ageing population, which will worsen the ongoing caregiving crisis. Products and services will need to innovate to meet growing needs. Climate change and our built environment play a role too.

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62% OF AMERICANS AGREE
THAT THEIR HEALTH IS MORE
IMPORTANT TO THEM NOW
THAN BEFORE THE PANDEMIC. ”



COLOMBIA FLAIR

Building on Diversity.

Colombian society is pixelated in its diversity, made up of clusters of homogeneous groups. Where diversity is present, tensions between groups become apparent. *Flair Colombia: Building on Diversity* reflects this reality at a time when Colombia is marked by protests and differences.

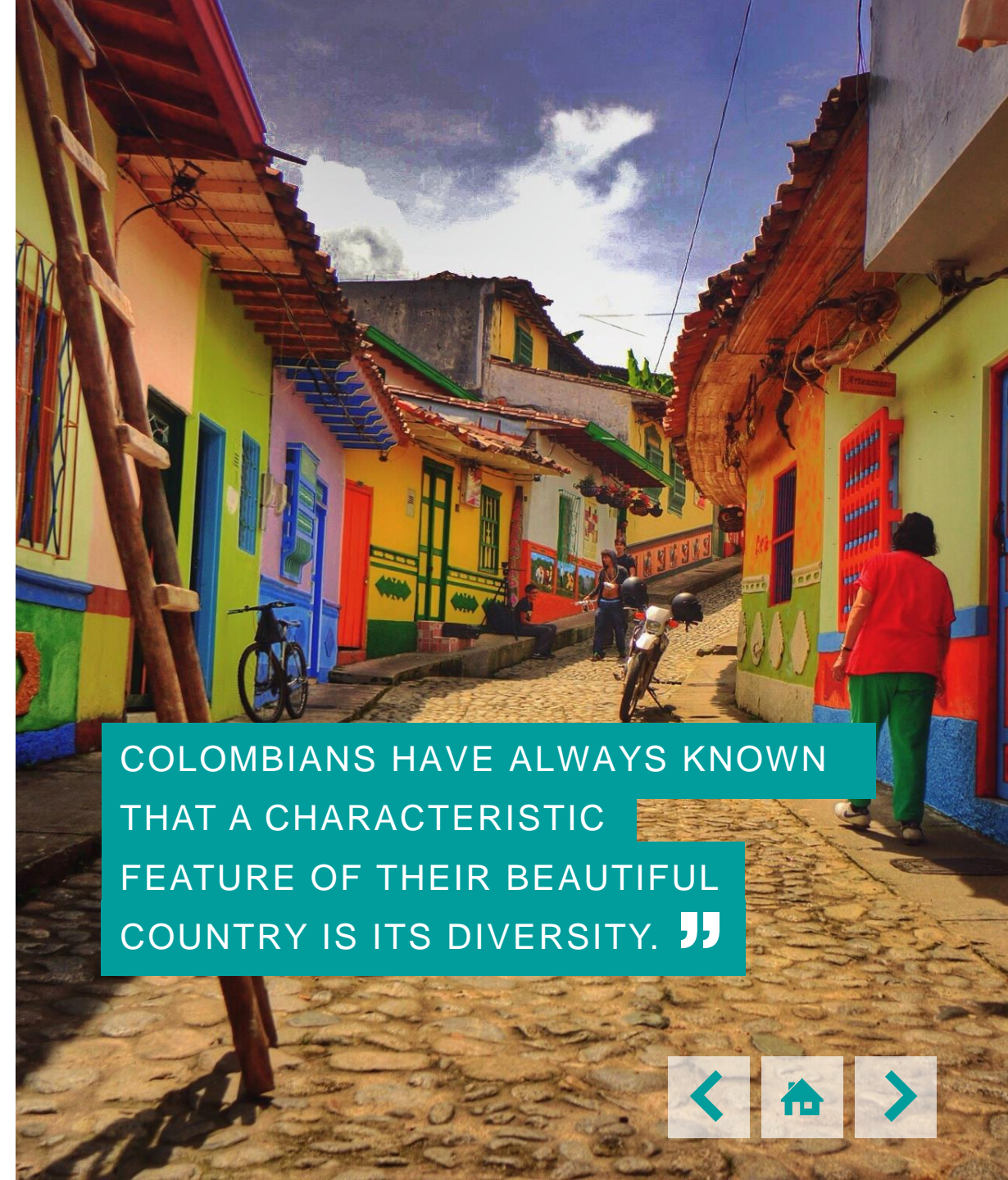
Colombians have always known that one of the characteristic features of their beautiful country is its diversity. In primary school, children learn in detail the range of climate zones scaling altitudes, the immeasurable variety of fauna hosted by the land, the infinite universe of flora that adorn the regions, and the different races and ethnicities that have lived together throughout history. It is all so rich and prolific that people say that five different countries could comprise the nation of Colombia.

Colombia is a hub of creativity, as shown by the many start-up businesses and

innovations seeking to solve local or international problems. As one of the strongest-performing economies in Latin America, looking forward, Colombia wants to be the heart of the “Fourth Industrial Revolution” in the region. There are ambitions to make tourism “the new oil” of Colombia and develop a great paradise of global ecotourism, transforming areas where terror has reigned for decades.

The technological, social, cultural, and economic challenges present within Colombia are both ambitious and fragile. They shape the eyes of consumers as much as the strategies of marketers. They express themselves in all the subjects that you will discover in this publication of *Colombia Flair*.

Explore the dynamics of a fascinating country in this wide-ranging collection of articles on society, markets, and people in Colombia from Ipsos.

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COLOMBIANS HAVE ALWAYS KNOWN
THAT A CHARACTERISTIC
FEATURE OF THEIR BEAUTIFUL
COUNTRY IS ITS DIVERSITY. ”



RUSSIA FLAIR

In the flow of change.

The 4th edition of *Flair Russia* focuses on the socio-cultural profile of Russians – information that is increasingly valuable during periods of change. Cultural attitudes that exist in society influence how people will react to changes and how their consumption habits evolve, the speed of adoption and adaptation, and the mentality we take into the future. The Ipsos team in Russia is poised to help you choose the right direction in this flow of change.

For this issue, we conducted a detailed analysis of the profile of Russian people and looked at the findings in terms of a transition from the VUCA (volatile, uncertain, complex, ambiguous) world to the more chaotic and troubling BANI (brittle, anxious, non-linear, incomprehensible) world. This allows us to consider which features of the Russian mentality will serve them well and how to power-up the underdeveloped qualities in this context.

We also reflect on how everyday life in Russia and the Russian character are changing. This is seen in family values, at home, through life in the city and the countryside, in leisure activities, shopping, and health. All this will help brands to understand customers not only as consumers and buyers, but also as people from a more human point of view.

This collection of articles includes:

- **A Cultural Profile of Russians**
- **Talks that Matter:** The qualities children learn at home
- **The 21st Century Man in Russia:** Transforming traditional roles
- **Made in Russia:** Pride in the Russian automotive industry
- **Home, Sweet Home:** The changing role of the home
- **Shopping Formats Setting Retail Trends**

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CULTURAL ATTITUDES INFLUENCE
HOW PEOPLE REACT TO CHANGES,
THE SPEED OF ADAPTATION, AND THE
MENTALITY WE TAKE INTO THE FUTURE. ”



SHORTCUTS

Talent transformation

The past several years have been tumultuous for the job market. Employers and employees have needed to find new ways to do things and reassess what and how they will do things in the future. To better understand this new environment and help find solutions for the future, Ipsos carried out a survey for Udacity among employees and managers across the US, UK, France, and Germany.

The findings suggest that digital transformation may be stalling due to a lack of job-ready digital talent. Employers are noticing higher than normal turnover while at the same time finding it difficult to hire the right people. The study revealed that:

- Six in ten employers report that not having enough skilled employees has a major or moderate impact on their business.
- 80% of employers who offer learning & development programmes consider them successful, but only 45% of employees agree.
- In all countries, a majority of younger people believe employers should provide skills training.

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What makes great content?

A thought-piece from our UK team explores what we can learn from one of the most high-profile and record-breaking pieces of content from the past year: Squid Game. Since its release on Netflix in September 2021, it has taken the world by storm, topping the Netflix charts in 90 countries while amassing over 132 million views worldwide.

Ipsos data shows there was an increase of around 50% in the total and average minutes watched by Netflix users over the two weekends following Squid Game's release, compared to the two weekends prior. We also saw Netflix's total audience increase by 10% from 3.9 million to 4.3 million (although these statistics can't all be attributed to Squid Game itself).

Squid Game's success in part comes from how it has placed itself at the apex of several popular current trends and how it has appealed to youth culture. There is no exact recipe of success. But Squid Game has been able to capitalise on current tastes when it comes to content (across both video, gaming and social media) as well as audience behaviour.

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Podcasts

Listen in to some of the latest podcasts from Ipsos teams around the world:

- **Global Trends**: Ipsos CEO Ben Page on the impact of the pandemic on society, politics, technology, medical science and racism.
- **Operational Angle**: We talk trust and creating lasting motivation among research participants.
- **Insight Out**: How to access the insights that lead to big change through the Ipsos community of experts.
- **The Rewired Consumer**: Ipsos and Tetra Pak experts discuss the latest food and beverage consumer trends.
- **Brand Strategy**: A conversation about predictive growth metrics and KPIs with Ipsos' Fiona Moss.
- **Customer Perspective**: Our guest from Capita talks about creating frictionless experiences.

Find all our Ipsos podcast series on the [hub page on Ipsos.com](#). To keep up with the new releases, please subscribe to our channel on [Spotify](#), [Apple](#), or [Google](#).

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POLL DIGEST

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

PERU: 57% say prospects for job seekers are worse today than they were six months ago; 9% say they are better.

UK: 75% of Britons say they have been closely following news about the cost of living, with the majority anticipating price rises.

SINGAPORE: 93% of employed adults in Singapore agree that their co-workers should be fully vaccinated against Covid-19.

FRANCE: The cost of living emerges as one of French voters' key concerns as the election campaign gathers momentum.

CHILE: When asked what emotion the ongoing constitutional process is generating, Chileans are most likely to say "hope".

UNITED STATES: 79% of employees say they feel a sense of belonging at work. Being treated fairly by their employer is key.

ITALY: The latest *Italy in Covid Times* report finds two in three Italians supporting a law to make vaccines mandatory.

KENYA: 90% of Kenyans report a loss of income during the pandemic compared to 77% across all African Union members.

GERMANY: During his first weeks of office, Germans are more satisfied with Chancellor Scholz than with the Federal Government.

CANADA: 66% of Canadians say they trust online consumer reviews/ratings of products and services when making a purchase.

INDIA: 71% of urban Indians say that the benefits of Artificial Intelligence outweigh its drawbacks.

Visit [ipsos.com](https://www.ipsos.com) and our local country sites for the latest polling research.

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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.

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