

IPSOS UPDATE

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

March 2022

IPSOS UPDATE MARCH 2022

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

March arrives with uncertainty all around us. War has returned to Europe, with immediate and longer-term consequences that none of us can predict with any degree of clarity. Covid-19 restrictions are starting to ease in many countries. But we are still some way off being able to talk brightly about the post-pandemic world. Just 7% of people say things feel “normal” right now.

One thing that is certain is the prospect of more inflation. Governments, companies and households are apprehensive. Our *What Worries the World* monitor finds public concern about rising prices on the rise in 25 out of 28 countries, and it has now overtaken healthcare in the ranking of important issues.

This month's edition features three state-of-the-nation reports that in different ways highlight the challenges facing economies and societies all around the world. We reflect on why Japan is lagging behind other countries when it comes to gender equality. Our report from the US explores the dynamics of an ageing population. And the new *Ipsos Flair* report on Brazil explores the fractures in society that have been thrown into even sharper focus.

Our Ipsos *Global Trends* analysis tells us that people in many countries “would like my country to be like it used to be”. And it was certainly striking to see that this year's successful Super Bowl ads, which we review here, show a real focus on nostalgia – alongside a strong cast of celebrities. It can often feel that the past offers a safe haven in today's a world of apparently ever-present change. But, [as we show in this video](#), change can sometimes be over-rated. In 1993, the average time workers had been in their post was 60 months. Almost three decades later, it's still 60 months. Something to monitor as we reflect on the current discourse about the “Great Resignation”; perhaps it will not be quite as great as some are suggesting.

As ever, 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 hope you find this edition useful. Please email your comments or ideas to: IKC@ipsos.com.

Ben Page, Ipsos CEO



IN THIS EDITION

OPINION POLLS

A continual improvement process

Our latest *Ipsos Views* paper explains the practice of political opinion polling across different countries and contexts, to enable the reader to evaluate the importance of opinion polls for themselves.

BRAZIL FLAIR 2022

Gaps and bridges

Finally, Covid-19 will not be the protagonist of 2022. But what issues are arising in its wake, and which will prove most important in this election year? Our Brazil team write on a range of themes.

WHAT WORRIES THE WORLD?

Explore the big issues facing countries today

The top five concerns according to our 28-country survey remain unchanged, with Covid-19 still top. But inflation now ranks sixth with almost one in four worldwide now saying it is a worry in their country.

VALENTINE'S DAY 2022

Love (and business) unlimited

Across the 28 countries we surveyed, a majority of adults in romantic relationships told us they planned to do something special with their loved one this Valentine's Day.

THE CONSUMER CONSCIOUSNESS GAP

Put people at the heart of your decisions

Consumer needs, wants, expectations, and preferences are changing rapidly while markets are fragmenting. To stay competitive, companies need to understand their customers better and faster.

THE DEVIL YOU KNOW

Gender inequality in Japan

An advanced nation in many ways, Japan lags far behind many others when it comes to gender inequality. Our article explores why it continues to uphold traditions that no longer benefit the country.

THE FUTURE OF AGEING

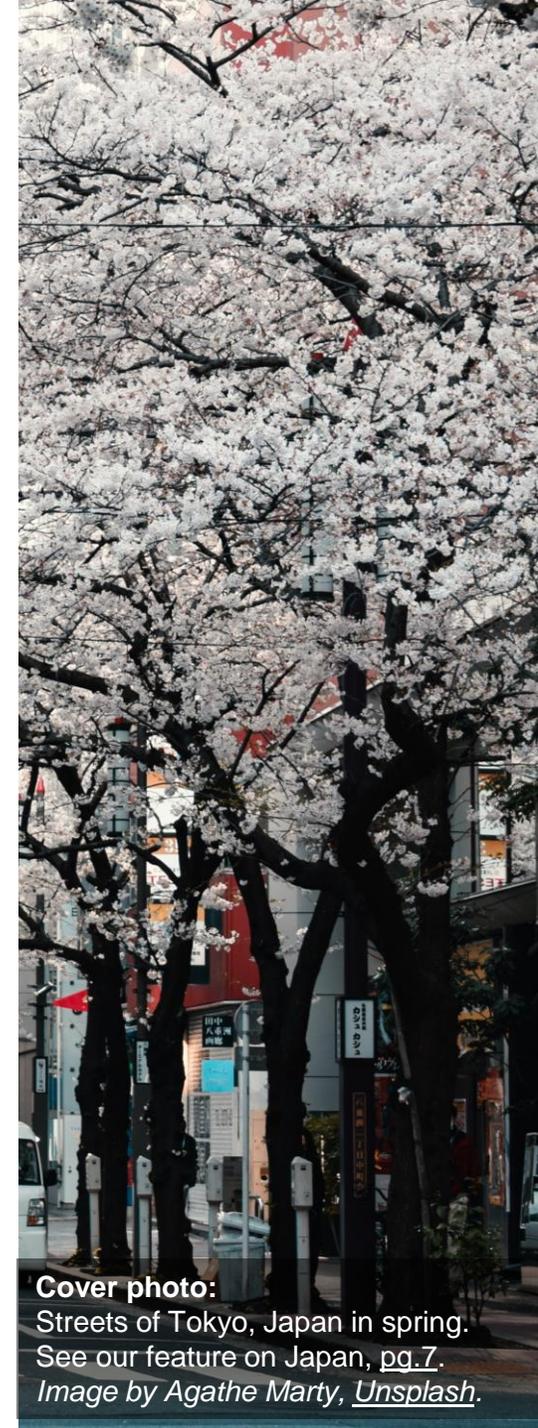
One thing is certain about ageing: we'll all do it

We may age more slowly and for longer in the future. How will the world change to enable these longer lives? We explore the decisions to be made across finance, housing, healthcare, and technology.

MARKETING DURING RAMADAN

The impact of interconnected communities.

Traditional community activities surrounding Ramadan have been reinvented in the past two years as people adjust their social interactions to adhere to a post-pandemic world.



OPINION POLLS

A continual improvement process.

Political opinion polls have come under a high level of scrutiny for decades, especially in the run-up to elections as we try to make sense of often changing and sometimes fragmenting political landscapes. Depending on how close they are to election outcomes, opinions of polls themselves can swing between criticism and praise. So, can we trust the polls?

This *Ipsos Views* paper tackles this question head on, presenting an overview of the academic literature on the topic and explaining the practice of polling in different countries and contexts. The aim being to enable the reader to evaluate opinion polls for themselves.

Polls play a positive role in democracies, delivering honest and independent measurement of public opinion. With recent election polling experiences in mind, this paper considers how the

practice of opinion polling is evolving in today's volatile environment.

It also examines the new methodologies and innovations in polling that Ipsos has adopted to improve the accuracy of its election predictions, as well as common challenges pollsters face and pitfalls to watch out for.

Political opinion polls remain the public face of the research industry, and an important source of information for the media, the public, and decision-makers. This means that there is a great responsibility to get them right.

This paper has been revised and updated ahead of the French Presidential elections taking place in April of this year. For more information, see the dedicated home page for all Ipsos coverage here: [Présidentielle 2022 | Ipsos](#).

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ONE OF THE ENDURING ROLES OF
POLLS REMAINS TO ENSURE THAT
THEY ARE TELLING THE STORY. ”



CLOSING THE CONSUMER CONSCIOUSNESS GAP

Put people at the heart of your decisions.

The insights world is going through a transformation. Consumer needs, wants, expectations, and preferences are changing rapidly, markets are fragmenting, and companies need to understand their customers better and faster to stay competitive.

Companies now have access to a wealth of behavioural and usage data, and insights teams are able to combine information from a range of when advising on where we should go next.

However, many are not yet taking advantage of the possibilities. Our survey of market insights professionals in the Netherlands finds 71% saying they have access to consumer data from many sources. But only one in three feel that data is well integrated into a single database. The risk is that they tend to stick to the basics.

It is essential for CMI's to have a broader view of everything that is available and to use it to enrich any piece of analysis so that business questions are answered in a broader and more holistic way. This is what we call "consumer consciousness" – read more on this in our [earlier paper](#).

In this paper, we outline a strategy to build an organisation that puts the consumer at the heart, based on the latest developments in neuroscience and data science/analytics.

Only organisations that have a data-driven culture, that value insights, and that are willing to make business decisions based on data, will thrive in tomorrow's world. But they need to know how to use that data in a smart way. Not more data but better integrated insights is the key to success.

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THE VALUE OF INSIGHTS PROFESSIONALS IS THEIR UNDERSTANDING OF CONSUMER BEHAVIOURS AND THEIR ADDING A HUMAN INSIGHTS LAYER TO BEHAVIOURAL DATA. ”



BRAZIL FLAIR 2022

The issues arising in the wake of Covid, this election year.

In last year's edition of *Brazil Flair*, we wondered what the legacy of the pandemic was going to be. Today, with a clearer view of the accelerations and transformations taking place, we can see just how many issues need our attention in this new chapter for the country.

In "Gaps and Bridges", we look at where there are fractures in society and consider how to re-create links. The pandemic has led to many types of inequalities being redrawn more sharply in Brazil.

Brazilians are especially concerned about disparities in income and race, and both will be lasting issues as the country's economy slowly recovers, the collapsed consumer confidence restores, and expectations for authentic action on diversity and inclusion grows.

The negative emotional impact of the pandemic has become clear with Brazil

leading all global rankings for anxiety, loneliness, and unhealthy habits. In this vein, we explore new definitions of wellbeing and the connection between physical and mental health.

Social themes carry great importance and urgency in a county that harbours unresolved conflict and unmet needs – perhaps even more so in election year.

This edition of *Brazil Flair* affirms that people are the priority. And the perspectives put forward by our local experts help to enhance our understanding of what matters to them, and how organisations must act.

In their articles, Ipsos experts explore a wide range of topics including political polarisation, sustainability, cancel culture, new definitions of health, diversity and inclusion, and the man-machine relationship.

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2022 WILL AT LAST NOT HAVE COVID-19 AS ITS MAIN PROTAGONIST. OF COURSE, THE PANDEMIC IS NOT OVER, BUT LIFE HAS AN AIR OF RETURNING. ”



THE DEVIL YOU KNOW

Gender inequality in Japan.

An advanced society in so many ways, Japan lags far behind on gender equality compared to other industrialized nations and its Asian neighbours. The country sits in 120th place out of 153 countries with a gender equality gap of 34.4%, according to the World Economic Forum.

A lack of political empowerment and economic participation/opportunity are two key issues for Japan. Women earn only 44% of what men do at work and have little decision-making authority in business or politics. Progress on gender equality continues to fall vastly short of the Japanese government's stated intentions.

So, where is the outrage? We found that Japanese people are the least likely of 27 countries surveyed to agree that "achieving gender equality is important to me personally". It does not even appear to be a top priority for women – only 41% agree, vs. 31% of men.

In Japan, gender differences are considered natural and necessary. Many factors including issue framing, the cultural context, and social and institutional influences reinforce current practices and limit ideas of what men and women can do and be.

Enabling the whole population to achieve their full potential in a more gender-equal society can unleash enormous benefits for Japan; economically, societally, and individually. Especially when navigating the challenges of demographic, economic, technological, and geopolitical change.

This article explores how, in its approach to gender equality, by favouring the status quo ("the devil you know") Japan may be choosing to shrink rather than change, while creating missed opportunities for the country and its people.

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THE ASSUMPTIONS OF STRICT GENDER ROLES NO LONGER BENEFIT THE ECONOMIC AND SOCIETAL REALITIES OF JAPAN.”



WHAT WORRIES THE WORLD?

Concern about inflation continues to rise.

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

This wave shows that not much has changed during the first couple of months of 2022. Covid-19 remains the number one worry worldwide, mentioned by 33% (global country average). This is followed by Poverty/social inequality (31%), Unemployment (29%), Financial/political corruption (27%) and Crime and violence (26%).

The big change is the rise of inflation which overtakes Healthcare to become the sixth most worrying issue worldwide; 23% across all countries now select it, more than twice as many as a year ago. Great Britain sees the greatest increase in concern about inflation since last month (+12 points to 31%).

Other findings include:

- Japan is now the country most concerned about Covid-19 (+10 points to 56%), followed by South Korea (52%) and Australia (50%).
- 63% on average say that things in their country are heading in the wrong direction. This rises to 86% in Peru and 84% in Colombia.
- 63% also rate their country's economy as 'somewhat' or 'very' bad. This is highest in Argentina (89%). The perception of the economy as 'good' has dropped most since last month in Canada (-6), Chile (also -6) and France (-5 points).

As Covid-19 continues to lead in our issues tracker two years into the pandemic, another [Ipsos survey in 30 countries](#) finds that seven in 10 agree that we will 'never be able to fully stop the spread of Covid-19 and variants'.

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THE BIG CHANGE IS THE RISE OF INFLATION WHICH OVERTAKES HEALTHCARE TO BECOME THE SIXTH MOST WORRYING ISSUE. ”



THE FUTURE OF AGEING

One thing is certain about ageing: we'll all do it.

Our current population is getting older and fewer people are having children. At the same time, advances in science and technology allow us to live better for longer. These patterns will create several tensions as we age. Can we remain independent and age at home? How will we afford our care? Who will care for us as demand grows and caregivers decline? Will elders accept help from technology or even robots? How will we manage our appearance as we age? Opinions about these tensions won't be the only thing that impact the future, but they will shape how we respond. What happens if they shift?

In this issue of *What the Future* from our team in the US, we explore the latest data, discuss these questions and tensions with experts, and imagine what's next. Picking up where we left off in last month's [Wellness issue](#), we talk through the implications of how living well can lead to living longer. We gather

the views of experts from various organisations to understand the realities for people and business today and what this means for tomorrow.

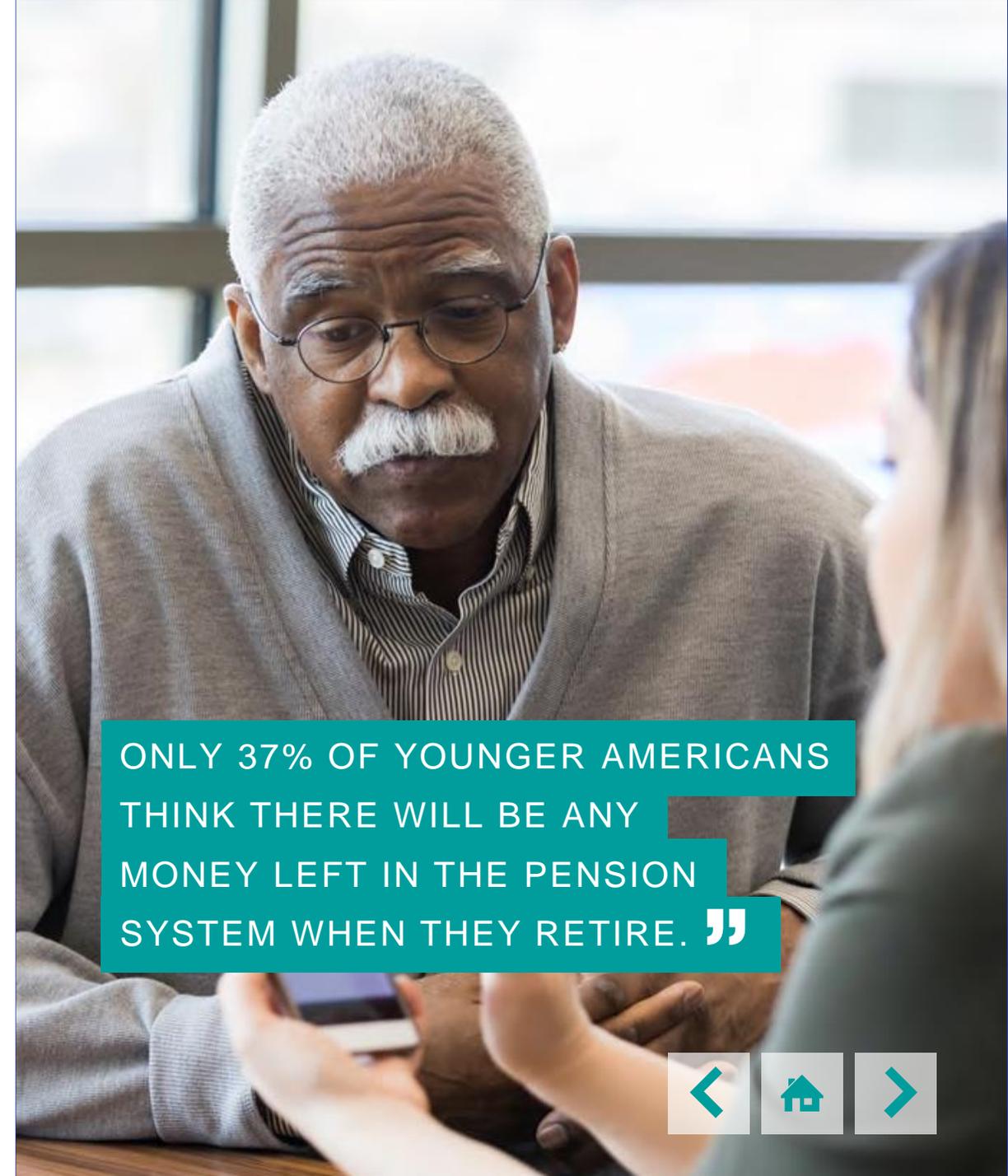
Key findings include:

- By 2034, older adults will outnumber children under age 18 for the first time in the US, and 12% of the labour force will be people aged 75+.
- Only 37% of younger Americans think there will be any money left in the pension system when they retire.
- 89% of Americans expect to be a caregiver to an elder family member in the future. However, 81% also say that, as they age, they would prefer to live independently.
- 66% of Americans have not moved house for age-related reasons.

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ONLY 37% OF YOUNGER AMERICANS
THINK THERE WILL BE ANY
MONEY LEFT IN THE PENSION
SYSTEM WHEN THEY RETIRE. ”



VALENTINE'S DAY 2022

Love (and business) unlimited.

Across 28 countries, more than half of all adults who are married, partnered, engaged, or involved in a romantic relationship planned to celebrate Valentine's Day this year. Possibly because of Covid-19, more people planned on having a romantic dinner at home (42%) than having a romantic night out (35%), at a restaurant, the cinema, or the theatre, for example.

The range of countries where people were most likely to celebrate Valentine's Day is both culturally and geographically diverse, with highest intention to celebrate recorded in the US (75%), South Africa (74%), Peru (69%), Chile (67%) and India (67%).

We also see higher intention to celebrate among younger adults, with 68% of people under 35 planning something special for the day, compared with 55% of 25-49 year-olds and 45% of 50-74 year-olds. Similarly, a higher proportion

of unmarried adults had plans to celebrate compared with married adults (61% vs. 52%).

The most common reasons given for not celebrating Valentine's Day, despite having a romantic partner, is that it is too much of a commercial or marketing event (47% on average globally), followed by "it is not part of my culture and traditions" (37% on average globally).

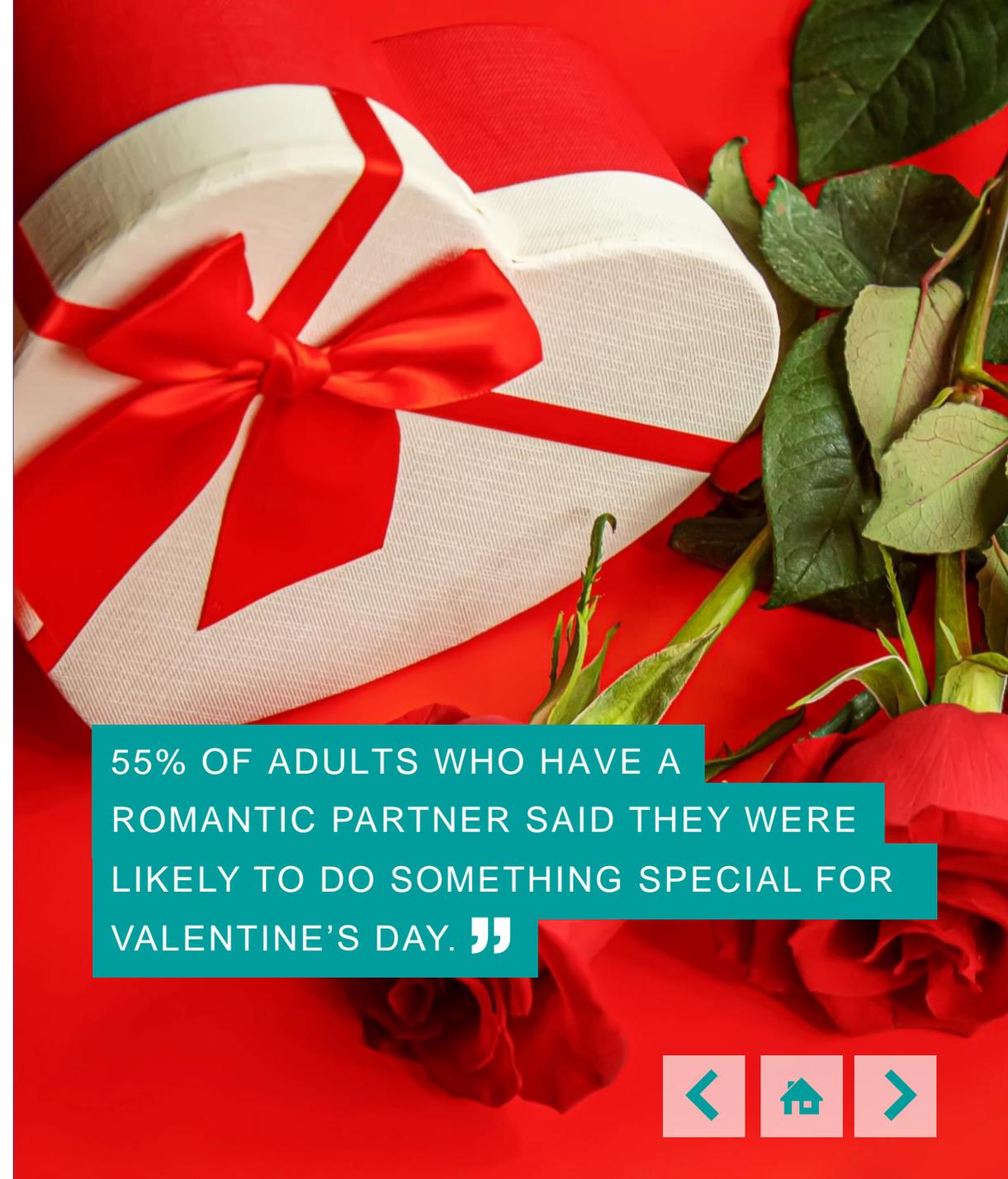
The survey also finds that the vast majority of adults (89% on average globally) are satisfied with their relationship. This is highest in the US (94%), followed by Argentina, China and Mexico (93%).

Relationship satisfaction is lowest in Japan (75%), meaning that the range in overall satisfaction is relatively small – only 19 percentage points.

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55% OF ADULTS WHO HAVE A ROMANTIC PARTNER SAID THEY WERE LIKELY TO DO SOMETHING SPECIAL FOR VALENTINE'S DAY. ”



EMPOWERING MARKETERS DURING #RAMADAN

The impact of interconnected communities.

Traditional community activities surrounding Ramadan have been reinvented in the past two years as people adjust their social interactions to adhere to a post-pandemic world, accelerating the pre-existing trend of the digitisation of communities.

Our research across the UAE, KSA, Egypt and Turkey reveals interesting insights about the Holy Month and how people's attitudes, lifestyles and behaviours are changing.

Digital platforms play a pivotal role during Ramadan by delivering authentic and relevant bite-sized content. Platforms such as TikTok, with communities at their heart, have been successful in adapting to rapidly changing behaviours – such as the exponential growth in user-generated content over the past two years.

Our analysis of public social data found that potential impressions from Ramadan-related content on TikTok grew from 60 million in 2019, to 4.2 billion 2021.

Communities are at the heart of people's Ramadan experiences, making these platforms a powerful tool for marketers. The pandemic has had a significant impact on the cultural manifestations of Ramadan, and it is important for brands to reflect on this in their communication.

This research illustrates how Interconnected online communities are becoming increasingly influential in the purchase decision-making process as users turn to eCommerce to make purchases. In turn, this empowers marketers to engage with audiences at critical phases of the purchase journey with an ability to collapse the funnel.

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INTERCONNECTED ONLINE
COMMUNITIES ARE BECOMING
INCREASINGLY INFLUENTIAL IN
PURCHASE DECISIONS. ”



SHORTCUTS

Plastic pollution

Three-quarters of people across 28 countries agree that single-use plastic should be banned as soon as possible, according to an Ipsos survey in conjunction with Plastic Free July.

Latin American and BRIC (Brazil, Russia, India, and China) countries show highest levels of agreement with banning single-use plastic (88% and 80% respectively), while North America has the lowest (61%).

The countries where people would most like to see a ban on single-use plastics are Colombia (89%), Chile and Mexico (both 88%), and Argentina and China (both 84%), while the lowest levels are in Japan (37%), the United States (55%) and Canada (66%).

On average, 88% across all countries believe it is either essential, very important or fairly important to have an international treaty to combat plastic pollution.

Clear majorities of consumers in every country and a global average of 82% also agree they prefer products that use as little plastic packaging as possible.

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Super Bowl advertising

Ipsos in the US combined four different data sources to provide a fast, agile and accurate look at the performance of Super Bowl commercials. It revealed 14 of the most successful ads across categories including best tearjerker and most inclusive. This year saw a return to a more light-hearted advertising tone, coupled with strong nostalgia references and a ton of celebrities. [See the winners here.](#)

We continue the theme of success in advertising in the white paper [“How to Stop Wasting Money on ‘Efficient’ Digital Advertising”](#).

Even 27 years after digital advertising first appeared in 1994, there remains a lot of confusion about what makes these ads successful. Yet the importance of getting it right continues to grow.

This paper presents research and case studies that illustrate the creative levers that deliver in-market effects. It also provides guidance on when creative testing is most valuable.

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KEYS webinar

Our latest KEYS webinar “A Better Life?” places the spotlight on the new dimensions of health and wellness and considers how organisations can play a positive role in improving our wellbeing.

The backdrop is stark. Through one global public health crisis, another is being revealed. Levels of reported anxiety are as high as ever, with women and young people hit hardest. Around the world, 79% now say that our mental health is as important as our physical health.

In this KEYS webinar, we took a step back to consider what the pandemic is telling us about our new routines and ask, are we OK?

We also shared new data on the dynamics of what people are saying online about how they feel, how their routines are changing and who they look to for support.

Finally, we looked to the future and what we can expect to come next. We explored how new technologies can empower better lives – provided they can overcome some very real barriers and challenges.

[WATCH THE RECORDING](#)



POLL DIGEST

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

CANADA: 88% of Canadians agree that the country needs more competition because it's too easy for big business to take advantage.

FRANCE: 41% say that they have been victims of cyber violence and 31% of parents say that their child has been a victim.

IRELAND: A large majority (80%) of Irish adults listen to the radio every weekday, tuning in for four hours a day, on average.

SINGAPORE: 39% say that they have gained weight since the start of the pandemic – rising to 59% among young adults (aged 18-24).

PAKISTAN: 70% consider the current pace of Covid-19 vaccination to be good, while one in 10 remain unaware of the campaign itself.

NEW ZEALAND: 51% are happy with the current balance between restrictions and freedom following the arrival of Omicron.

ITALY: A vast majority are worried about rising prices, with 93% concerned about rising electricity bills and 91% about gas bills.

ROMANIA: 96% of adults connected to the internet have heard of cryptocurrency and 84% say they want to buy in.

TURKEY: 40% of people think that we have moved past the hard times of the pandemic, but 43% expect tough times ahead.

QATAR: 94% of Qatar's banked population said that they have used digital banking, with mobile banking being the preferred channel.

UK: Half of Britons (47%) have considered quitting their job or actively looked or applied for another job in the last three months.

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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