IPSOS UPDATE

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

April 2022

Ipsos Knowledge Centre

GAME CHANGERS

Ipsos

IPSOS UPDATE APRIL 2022

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

We continue to focus on the tragic events unfolding in Ukraine, and share some early reactions from the public around the world. It may be too soon to consider the long term implications of the conflict – stock markets have already recovered – but we will be watching for impacts on the global economy, whether via soaring energy and food bills, changes to the international order, countries' economies, or choices facing businesses and individuals.

Energy supply and security is just one example of a topic that is likely to be front and centre. Despite concern about rising household bills, eight in 10 still think it's important their country shifts away from fossil fuels, even while inflation over takes concerns about Covid-19 globally, becoming the top concern in countries like UK, the US and Canada. It is at the heart of the debate in this month's French election campaign – you can read more on the French political scene in this edition.

The return of inflation puts pressure on companies too. In this issue we reflect on lessons from previous inflationary periods and explore some of the options for brands. These range from shrinking the product to completely rethinking a communications strategy, and offering more innovation as a solution to price pressures.

Meanwhile, Ipsos' annual research for International Women's Day brings with it some of the most striking findings of the last month. Around the world, almost half of those surveyed think things have "gone far enough" when it comes to giving women equal rights with men. Underneath these overall results, we find pronounced differences in outlook by country – a reminder of the need for us always to be alive to the dynamics of different contexts and cultures when interpreting research results - the world is not as homogenous as some western marketeers think it is!

Each of the articles here include links to help you explore the topic in more detail. Please get in touch directly 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:
The Élysée Palace, Paris; the official residence of the President of the French Republic.

INTERNATIONAL WOMEN’S DAY

A risk of progress on gender equality stalling.

In partnership with the Global Institute of Women’s Leadership at King’s College London, Ipsos conducted a 30-country survey on attitudes to gender equality and issues facing women and girls.

While the majority of people globally (55%) disagree with the statement that 'gender equality doesn't really exist', one in five (18%) still agree. We find that men are more likely to think that gender equality doesn’t exist, that feminism does more harm than good, that traditional masculinity is under threat, and that men have lost out due to feminism. Almost one in two (47%) think that things have gone far enough when it comes to giving women equal rights with men.

The proportion of people who would define themselves as a feminist has increased since 2019, from 33% to 40%, Among women we now record 47% describing themselves as a feminist while among men it’s 32%.

There has been a small increase in the proportion of people who think workplaces in their country treat men and women equally (44% vs. 41% in 2020), indicating some progress may have been made. However, men are more likely to agree than women (51% vs. 35%).

One in four (25%) also say that childcare or caring responsibilities have prevented them from applying for a job or promotion, or have caused them to leave or consider leaving a job. Women are far more likely to report being affected by this than men (31% vs 19%). *Read more on care responsibilities in this report from the UK .*

Our research is published in two parts. The first survey release explores gender bias/inequality and online harm, while the second includes views on how gender equality can be achieved, childcare, the workplace, and gender-based violence.

ALMOST ONE IN FIVE DISAGREE THAT GENDER EQUALITY EXISTS DESPITE EVIDENCE THAT IT HAS ONLY INCREASED SINCE THE PANDEMIC. ”

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INTERPERSONAL TRUST

Just three in ten say that most people can be trusted.

A new Ipsos survey finds that, on average, 30% of adults across 30 countries think that most people can be trusted. Interpersonal trust is highest in China and India, where 56% in each say that most people can be trusted, and lowest in Brazil, Malaysia, and Turkey, where fewer than 15% say so.

Our survey explores an individual's propensity to trust others across a variety of demographic factors. In most countries, males tend to be more trusting of other people than females are. Older generations also appear to hold higher levels of general trust, with this pattern most pronounced in Ireland, Spain, and South Korea.

People with a higher level of education tend to be more trusting of others (35% of those with a higher education degree vs. 26% with a lower education level). The same applies to married people vs. unmarried people (33% vs. 27%).

However, the biggest differentiator is across professional status: the managerial class (senior executives, decision-makers, and leaders in a company) tends to be significantly more trusting of people (11 percentage points higher than the average).

When looking at reported levels of trust in comparison to results from other Ipsos surveys, we find that levels of interpersonal trust are highly correlated with consumer confidence and with reported happiness.

There are a few outliers when it comes to trust vs. happiness: France, and to a lesser extent Brazil, Malaysia, South Africa, and Poland, show higher levels of personal happiness than might be expected based on their relatively low levels of personal trust.

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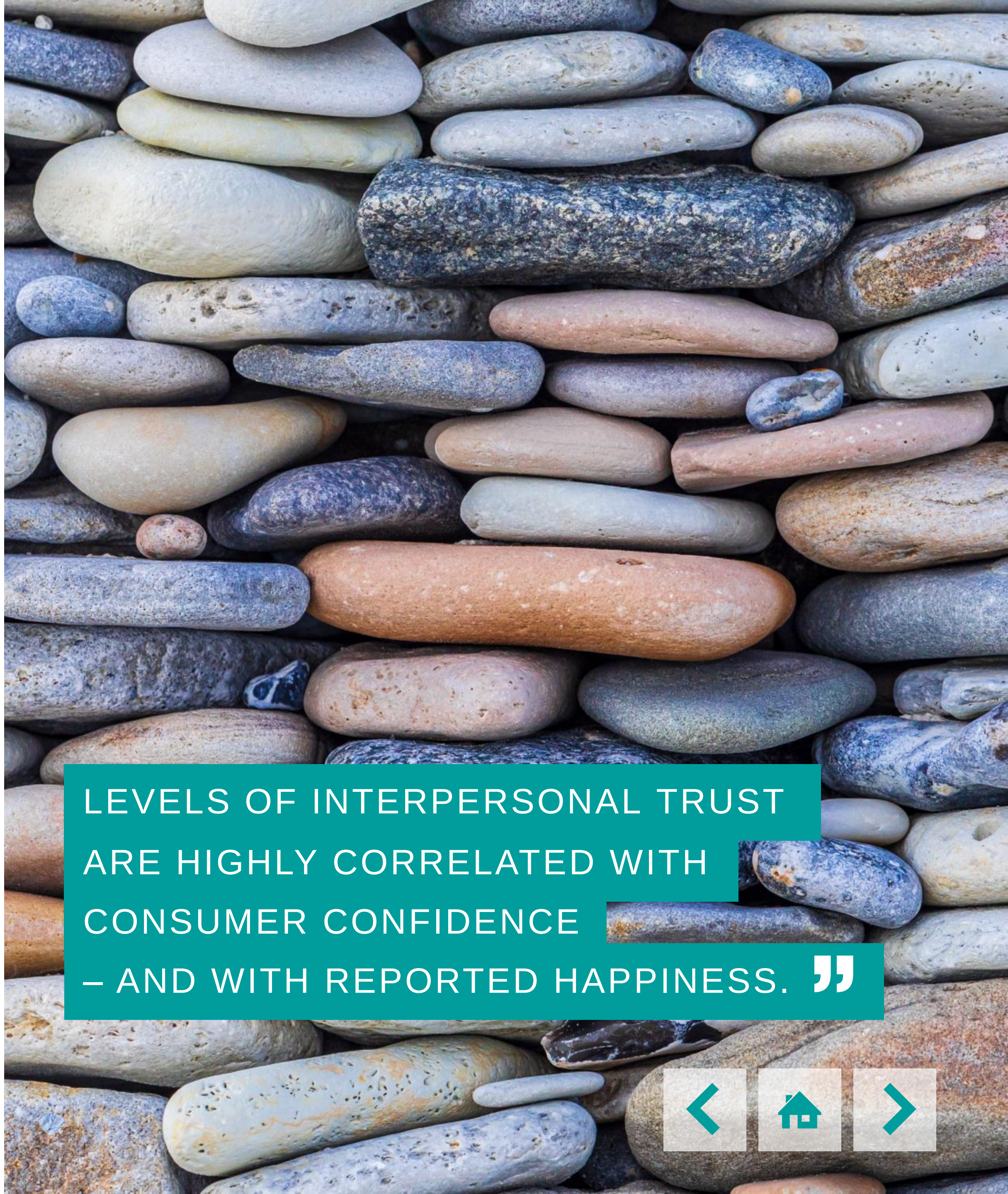

LEVELS OF INTERPERSONAL TRUST ARE HIGHLY CORRELATED WITH CONSUMER CONFIDENCE – AND WITH REPORTED HAPPINESS. ”

CHALLENGING THE STATUS QUO

What makes a new product succeed?

The success of a new product depends not only on the product itself, but also on how strongly people cling to the incumbent.

There is an assumption that if an innovation has superior performance, attractive packaging, and adequate marketing support, it should succeed. But, while these are necessary conditions, they are not in themselves sufficient.

New products must first displace the existing choice – and this depends on whether consumers are willing to change from their status quo and switch brands.

A new Ipsos framework called SWITCH explains how consumers' resistance to change impacts their adoption of new products. There are two sets of opposing forces in our framework: one compels consumers to remain loyal to their existing products (STAY), while the other pushes consumers away from the status quo (GO).

The consumer drivers of STAY relate to switching costs, 'satisficing' (people using products that they feel are good enough), brand loyalty, and shopping habits. The drivers of GO involve a need for change and purchase frequency.

This paper demonstrates that often consumers fail to buy a new product not because of the product itself but because of the psychological forces at play in the mind of the consumer. It also presents recommendations for marketers on how to overcome these forces, encourage consumers to challenge the status quo and switch their product choices.

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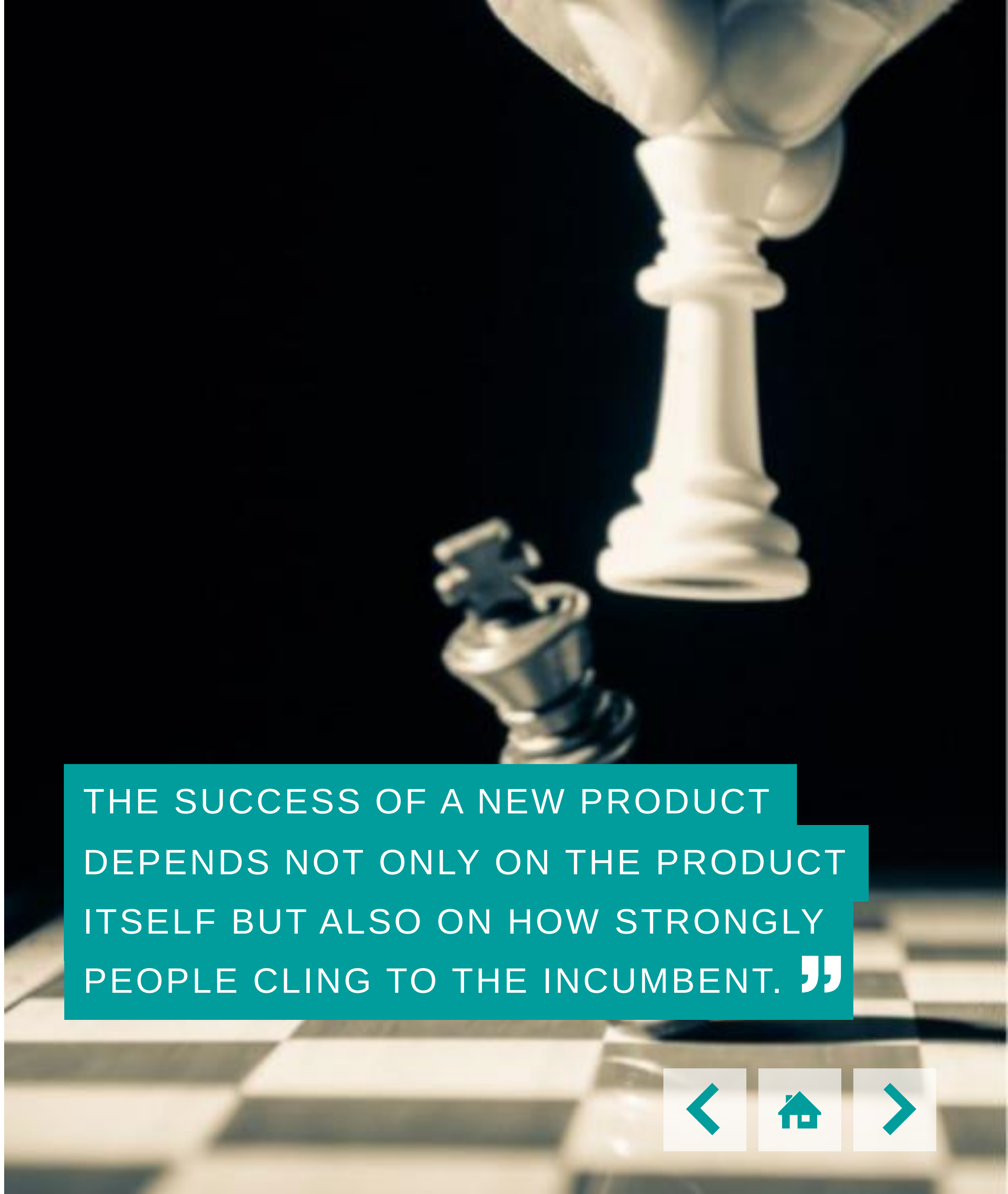

THE SUCCESS OF A NEW PRODUCT DEPENDS NOT ONLY ON THE PRODUCT ITSELF BUT ALSO ON HOW STRONGLY PEOPLE CLING TO THE INCUMBENT. ”

INNOVATION IN INFLATIONARY TIMES

A playbook for innovation leaders in the CPG industry.

Three in four consumers globally are concerned that price increases in 2022 will outpace their income growth. On the other side, leaders in the consumer goods sector have faced disruption to their innovation pipelines as they have had to tackle emerging priorities such as rising cost of goods, stock shortages, and rapidly-shifting consumer sentiments.

Innovation leaders face choices of completely redrawing their pipeline, launching inflation-resilient innovations, or renovating to reduce pricing vulnerability.

To be successful, marketers must understand the pricing landscape and decode the driving forces that determine the magnitude of impact their category and segment will face. By mapping out cross-elasticity across existing offers in their space, they can find the best competitive position in which to innovate.

Inflation-resilient innovation requires bringing differentiation into the space to reduce substitutability. Overlaying claims beyond the category's core cost-of-entry has proved effective overall, but the key is choosing the right claims that offer superior "permissibility to pay" and choosing brands with the right equity to carry those claims.

Marketers must also constantly adapt their pipeline based on changing consumer behaviour and attitudes while balancing value and premium innovations to protect profitability.

In "Innovating in Inflationary Times", we share what we have learned from the past periods of high inflation that have helped our clients navigate these difficult periods.

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THREE IN FOUR CONSUMERS GLOBALLY ARE CONCERNED THAT PRICE INCREASES IN 2022 WILL OUTPACE THEIR INCOME GROWTH. ”

SUSTAINABLE ENERGY

People around the world support shift away from fossil fuels.

A 30-country Ipsos survey for the World Economic Forum finds that a majority across the world expect their purchasing power to be impacted by rising energy prices. Although the public do not see a single clear cause for this, very few blame climate change policies. At the same time, there is agreement on the importance of moving away from fossil fuels and towards more sustainable energy sources.

When asked to think about what they pay for the energy they use in daily life (e.g. for transportation, heating or cooling the home, cooking, and powering appliances), more than one in two consumers globally (55%) expect price rises to affect their overall spending power. These expectations are consistent across demographics (with a slightly higher incidence among lower-income groups), but vary greatly across countries, from one-third in Switzerland and the Netherlands to over two-thirds in South Africa, Japan, and Turkey.

There is no unified view on what is causing these price increases. Volatility in the oil and gas markets is top (selected by 28% globally), followed by geopolitical tensions (25%), and insufficient supply (18%). Just 13% blame climate change policies for price increases.

Business decision-makers and, to a lesser extent, younger adults are the only demographic groups that are significantly more likely to blame climate change policies for energy price increases.

On average, more than four in five (84%) of those surveyed say it's important to them that their country shifts away from fossil fuels to more sustainable energy sources in the next five years. This message comes across more strongly from emerging markets.

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MORE THAN 8 IN 10 GLOBALLY SAY THAT IT IS IMPORTANT TO THEM THAT THEIR COUNTRY SHIFTS AWAY FROM FOSSIL FUELS IN THE NEXT FIVE YEARS.

THE FRENCH ELECTION 2022

Ipsos reflections ahead of Sunday 10th April.

Because of the health crisis, this year's French presidential campaign started very late – and the French people began to take an interest in it late as well.

So, what is the central issue for this election? In the immediate lead-up to the election, purchasing power has become the most worrying thing for French people, ahead of other important issues such as the health system, the environment, or immigration. As in other European countries, the surge in inflation over the past year is fuelling public fears about the rising cost of living.

The French people do not see that this important concern has been reflected in the media or in political campaigns of the candidates, who have been more focused on issues such as the pandemic. This might explain why only 67% of French people told us in the weeks running up to the election that they would definitely be voting – lower than in previous years.

The choice facing the French at election time is usually all about whether to renew or remove the outgoing president. But, being positioned at the centre of the political spectrum, Emmanuel Macron partly escapes the pendulum effect. Faced with a right-wing candidate, he will benefit from the vote of his own camp as well as that of some of the voters on the left – and vice versa.

An interesting feature this time round is that the desire to "fire the incumbent" does not seem to be as strong as in previous elections. Not only is Macron more popular than his predecessors, but the "yellow vests" movement has run out of steam, and the Ukraine crisis has reinforced his "sovereign" function. All this means that the campaign took place in a relatively favourable climate for an outgoing President – a first since 1988.

Find more on the election at:
www.ipsos.com/fr-fr

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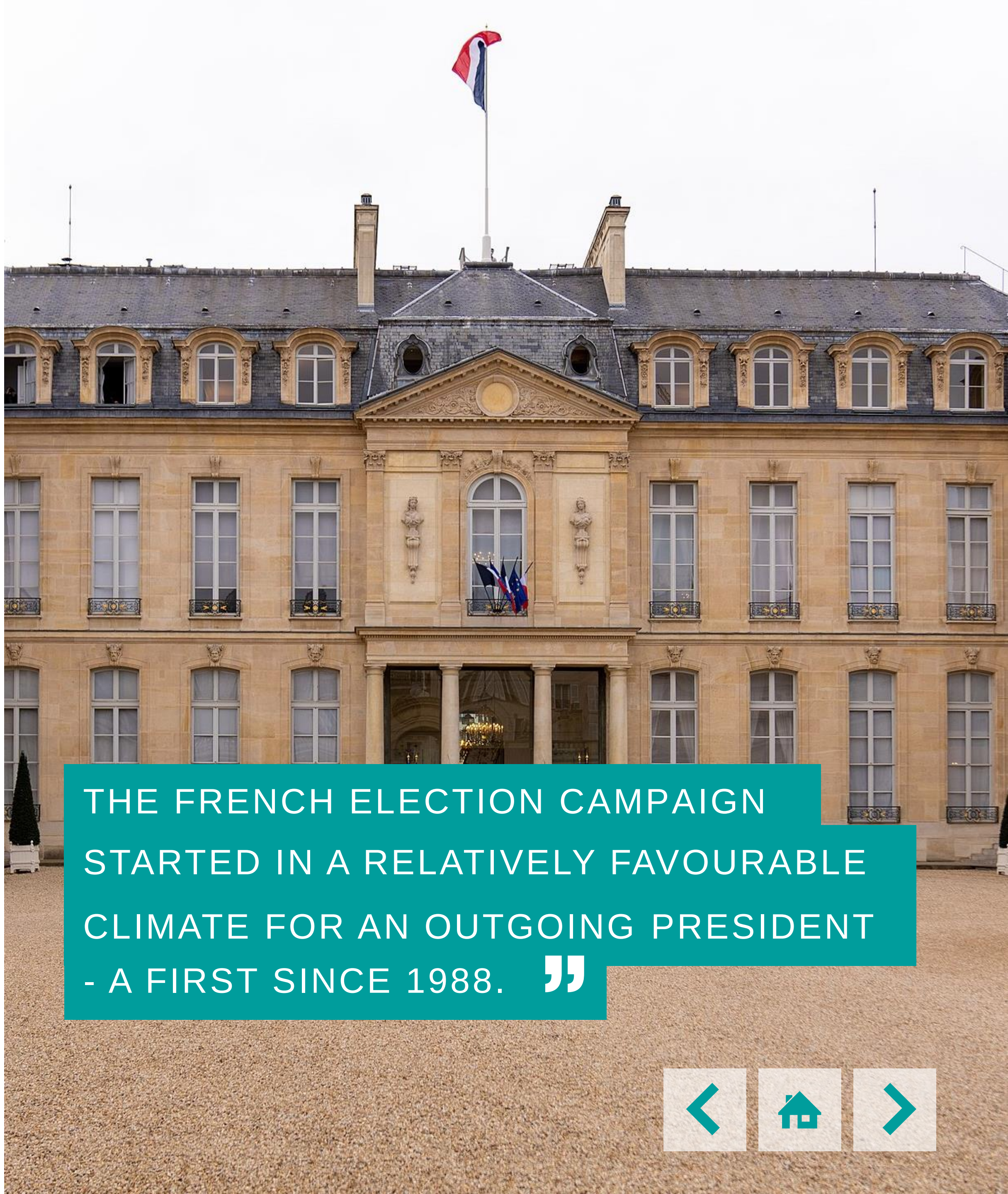

THE FRENCH ELECTION CAMPAIGN STARTED IN A RELATIVELY FAVOURABLE CLIMATE FOR AN OUTGOING PRESIDENT - A FIRST SINCE 1988. ”

COVID-19: TWO YEARS ON

What did we learn from pandemic times?

For the first time in two years, Coronavirus has lost its place among the most worrying issues facing people around the world. Hospitalisations and deaths are falling in many countries and government policies are now tilting towards a new “living with Covid” phase.

We also find ourselves at a watershed moment with the outbreak of conflict in Ukraine. We are aware that the implications of this new crisis are only just starting to play out, with consequences perhaps even more far-reaching than the pandemic – even if it is too early to say with much precision what they might be.

That said, two years into the unprecedented upheavals instigated by a global pandemic, now feels like a good moment to take stock and think about what we have learned during this period. What can we say about what the whole experience tells us about individuals, economies and societies?

This report presents reflections on some of the big themes that came to the fore in our research for businesses and governments around the world.

Firstly, we were struck by individuals’ adaptivity and resilience in dealing with the obstacles put in front of them. However, we note that there are limits to this – and that today, thrown into sharper focus because of the pandemic, mental health is now as important a consideration as physical health.

Our other themes include the unpredictability of consumer desires, the widening of inequalities among populations, the importance of taking culture and communities into account, public trust, expectations of the state, and possibilities for building a more sustainable future.

Also read our UK report on two years of life under lockdown.

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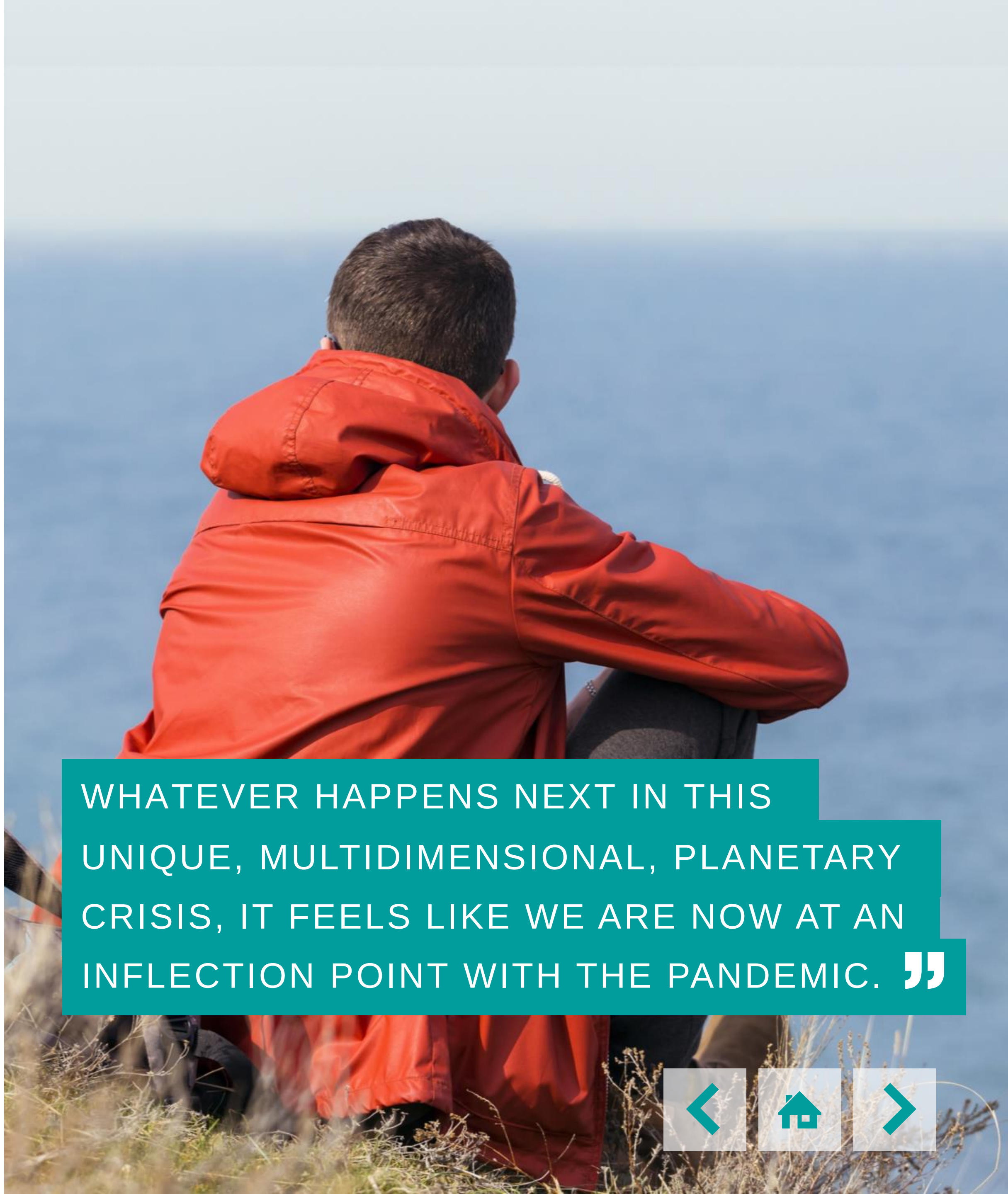

UKRAINE POLLING

International attitudes to the conflict in Ukraine.

Ipsos polling finds that war and conflict has become the second biggest issue facing Americans, after the economy. War in Ukraine is also the second most influential issue in the French election campaign, behind purchasing power. Meanwhile, Britain's March Issues Index sees defence and foreign affairs become the third biggest issue facing the country, up 26 points since the last (pre-invasion) month.

In the US, 62% say that America should give some, but not all, of the support Ukraine needs in order to avoid a larger military conflict between itself and Russia. 17% favour giving Ukraine all the support it wants, even if it risks wider conflict. At the five-week mark, 55% of Americans say they support sending more troops to NATO allies in Eastern Europe.

In Italy, opinions are split about whether the war will spread: 25% think it will remain contained in Russia and Ukraine, 29% think it will extend within the limits of Eastern Europe, and 24% believe the conflict could develop into a world war.

In Germany, 76% are concerned that their country's military will have to participate in combat operations if the conflict expands.

In response to the conflict, 51% of Britons support putting an end to buying Russian oil and gas – even if it personally costs them an extra £1,000 a year. Support rises as costs decrease, with 74% supporting the proposal at a cost of £100 a year. Also on the energy issue, 69% of Canadians agree that their country should be a global supplier of oil and natural gas in times of crisis.

More than half of the British public (56%) think that the country is not doing enough to support Ukrainian refugees. Elsewhere, 83% of the French public support welcoming them..

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OUR ROUND-UP OF THE LATEST IPSOS POLLING SHOWS WHAT PEOPLE IN THE US, UK, FRANCE, GERMANY & ITALY THINK ABOUT THE CONFLICT IN UKRAINE. ”

SPOTLIGHT ON WOMEN

A round-up of research on gender inequality for International Women's Day.

COVID-19 IMPACTS IN THE EU

On behalf of the European Parliament, Ipsos surveyed women from the 27 European Union member states on the impact of the Covid-19 pandemic.

Key findings include:

- When tackling gender-related issues, women would most like to see the European Parliament tackle trafficking and sexual exploitation of women and children, as well as mental and physical violence against women (both 47%).
- Almost eight in ten (77%) women think that Covid-19 has led to an increase in violence against women in their country.
- 44% also agree that the pandemic has had a negative impact on their work-life balance.

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WOMEN IN THE WORKPLACE

Ipsos conducted an 8-country study exploring the workplace landscape and attitudes towards gender inequities in the workforce.

A majority in all eight countries surveyed believe that the gender pay gap is real (68%). However, 55% agree that women have the same opportunities for advancement as men.

49% also agree that women make less money than men because they work in less highly-paid fields.

Opinion differs markedly between countries, with agreement about the existence of the gender pay gap reaching 78% and 77% in Japan and France respectively, compared with just 55% in Nigeria and 49% in Turkey.

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AN INTERNATIONAL WOMEN'S DAY CONVERSATION

Ipsos in the UK and the Global Institute for Women's Leadership hosted a conversation between two former prime ministers: Julia Gilllard, the first woman to serve as prime minister of Australia, and Theresa May, the second woman prime minister of the UK.

Kelly Beaver, CEO Ipsos in the UK, begins the discussion by presenting the key findings and insights from the Ipsos IWD2022 report.

The two former prime ministers discuss their experiences in politics, how gender stereotypes influence people's view of what constitutes a good leader, the barriers they faced, and how to improve gender equality and women's representation. You can also listen to the podcast recording.

WATCH THE RECORDING

SHORTCUTS

Consumer confidence

Ipsos's Global Consumer Confidence tracker found that the war in Ukraine has tempered any optimism brought on by the lifting of Covid-restrictions in many parts of the world. The latest survey (conducted between 18th February – 4th March) finds no significant change in the Consumer Confidence Index for most of the 23 countries vs. last month: Six show no meaningful change (less than 1.5 points) since February. Five countries (Israel, Belgium, Japan, Canada, and Sweden) show significant drops. Only Saudi Arabia and Hungary record significant gains.

Two years after the WHO declared a global pandemic, nine countries show a National Index significantly lower than at the beginning of 2020 while the same number enjoy a significantly higher one.

Five countries show a significant drop from last month in their 'Expectations Index', which reflects consumers' outlook about their future financial situation, local economy, and jobs: Italy, Germany, Belgium, Israel, and Sweden. Saudi Arabia is the only country showing a significant uptick in expectations.

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The future of healthcare

Elsevier Health's 'Clinician of the Future' report explores global trends and changes that will impact the future of healthcare. The findings are based on Ipsos research with nearly 3,000 clinicians from 111 countries. We asked them what healthcare will look like in 10 years' time and how we can address the challenges to come.

More than half of clinicians around the world (56%) agreed patients have become more empowered to manage their own conditions over the last decade.

Despite the increase in the use of technology and remote consulting, 82% of clinicians agreed that soft skills such as listening and being empathetic have become increasingly important in the last decade.

Yet, clinicians shared that they are pressed for time: only half (51%) felt that the time they have to spend with patients is sufficient to give them good care.

Looking ahead, 77% expect real-time patient analytics to be critical to personalised care in the future.

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KEYS webinar

"The Inclusion Imperative" is the title of our latest global webinar, in which we explored how we can understand the world around us in all its complexity and diversity, and how to build a more nuanced and empathetic understanding of individuals' needs and aspirations.

Our guest speakers spoke about the challenge for researchers, who need to keep a critical eye on the prevailing assumptions underpinning market research practices. There are also potential tensions, for example getting the balance right between inclusion and representativity.

We also considered how organisations can tune in to the voices of under-represented people, reflecting on lessons from a turbulent period, and with a particular focus on the American experience.

Our team in India shared the complexities of building a real understanding of people as citizens, consumers and customers, drawing on our work from one of the most diverse countries in the world.

WATCH THE RECORDING

POLL DIGEST

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

CANADA: Nearly half (45%) of parents say that their child is playing no sports due to the pandemic.

FRANCE: Four in ten single French people say that they feel out of place because of their relationship status.

HONG KONG: Concern about Covid-19 is up 18 percentage points since December 2021 – from 23% to 41%.

UK: Almost half (46%) intend to cut their intake of animal products. 58% already use plant-based meat alternatives in their diet.

AUSTRALIA: Our issues index shows cost of living (44%) and petrol prices (24%) are both at their highest levels of concern in a decade.

USA: 48% of Americans say that combatting misinformation is the biggest challenge that news outlets face.

PERU: 81% of businesses in Peru now have a website, compared to 68% in 2019. 22% also use WhatsApp as a sales channel.

GERMANY: Almost one in two (45%) would be interested in crypto currency if their normal bank offered it.

TURKEY: A study on gender inequality finds that 7 in 10 Turkish women cannot participate in work without permission from their partner.

IRAQ: 20% of Iraqis have a bank account. Of those who do, half have opened their first account in the last three years.

PHILIPPINES: 96% of Filipinos agree that climate change is a serious threat, compared to an average of 87% across South East Asia.

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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