

IPSOS UPDATE

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

May 2022

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

With the war in Ukraine entering its third month, some 61% on average across 27 countries say the war poses a significant risk to their country. The mood so far is characterised by concern for the Ukrainian people and support for their own country to take in refugees, alongside a reluctance to get involved militarily.

Everywhere concerns about inflation are accelerating, with worries about rising prices increasing in almost every country. For the first time ever, inflation occupies first place globally in our *What Worries the World* survey. The recent French election provided a vivid illustration of the issues at hand, with living costs very much at the centre of the campaign. In this edition our team reflects on what they learned - for me a key fact was despite Macron winning by 58.5% to 41.5%, overall 46% of the French thought Marine Le Pen ran a good campaign - only 26% said the same of Macron; Le Pen had focused on the cost of living crisis.

Those looking for some more positive news can at least find some comfort in our latest Global Happiness research. We found 67% around the world describing themselves as "happy" (it's the Dutch and Australians who are most positive). This is actually higher than the level recorded in

mid-2019, some months before the pandemic, but still remains below 2011 levels. Staying healthy, being close to family and having a sense of purpose in our lives are out in front when people are asked what will bring them greatest happiness - more money less so.

The state of our planet is one factor which could impact on the future happiness of us all. Our Earth Day polling finds only 39% saying their government has a "clear plan" for tackling climate change – a reminder that there is no room for complacency, despite an 8-point increase on last year. And the latest in our *Perils of Perception* series finds that, when it comes to reducing greenhouse gases, we continue to over-estimate the impact of recycling and underplay the impact of reducing our car usage.

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, and please email IKC@ipsos.com with any comments or ideas.

Ben Page, Ipsos CEO



IN THIS EDITION

GLOBAL OPINIONS ON THE WAR IN UKRAINE

The world's response to Russia's invasion of Ukraine

Our 27-country study finds global unity in willingness to take in refugees and wariness of getting directly involved militarily, but diverging views on economic sanctions and other military support.

DRIVING COMPLIANCE AT THE FRONTLINE

For regulators and the regulated

We present new analysis and case studies to demonstrate the effectiveness of mystery shopping in assessing regulatory compliance in sectors including financial services, telecoms, and gambling.

THE FUTURE OF IDENTITY

Who are you? Answering the age-old question

Identity today is at the forefront of conversations in both positive and negative ways. We explore the forces influencing who we are and consider what brands should know about representing us in future.

FRENCH PRESIDENTIAL ELECTION 2022

Macron re-elected but abstention hits a 50-year high

Emmanuel Macron was comfortably re-elected as President of France on 24 April, yet 28% abstained from voting: a high not seen for 50 years. Our post-election analysis reviews the campaign.

WHAT WORRIES THE WORLD

Concern about inflation reaches record high

After making the top five for the first time last month, concern about inflation has continued to grow and it is now the number one concern globally. Meanwhile, Coronavirus falls to eighth place.

GLOBAL HAPPINESS 2022

Happiness levels on the upswing

Across 30 countries, two in three adults (67%) consider themselves "happy", but we see large differences on a country level. Our global study also examines where people say they find happiness.

EARTH DAY

Global attitudes towards climate change

In this year's Earth Day survey, people across 31 countries ask: what's the plan? Our study also explores perceptions of the most impactful ways individuals can combat climate change.

ANHOLT-IPSOS CITY BRANDS INDEX 2022

The world's most admired cities

London preserves its spot as the world's most admired city in the 2022 edition of the Anholt-Ipsos City Brands Index. Paris, Sydney, New York, and Rome round out the top five.



Cover photo:
Finke, Northern Territory, Australia.
Seven in ten Australians agree that
the country is already being affected
by climate change. See page nine
for more.

THE WAR IN UKRAINE

The world's response to Russia's invasion of Ukraine.

Across 27 countries surveyed, 70% of adults are following news stories about the Russian invasion of Ukraine closely, rising to 89% in Japan and 83% in Sweden. Majorities in each of the countries support welcoming refugees. 74% globally favour this, with highs of 89% in Sweden and 86% in the Netherlands.

On average, 82% say that the war in Ukraine poses a risk to the world as a whole, with 61% saying it poses a risk to their own country. Concern that one's country is facing significant risk is highest in Japan (87%), Poland (77%), South Korea (77%), and Sweden (75%).

Majorities agree that their country should support sovereign countries when they are attacked (70% globally), and that doing nothing in Ukraine will encourage Russia to take further military action elsewhere (68% globally). Despite this, on average, 72% say their country should not get

involved militarily: 68% say that military action in Ukraine will encourage attacks on other countries and only 17% support their country sending troops to Ukraine.

So how should countries respond? 66% globally trust that the economic sanctions placed on Russia by many countries are an effective tactic to help stop the war and 48% support putting additional economic sanctions in place. Globally, there is also more support than opposition for seizing the assets of Putin-affiliated oligarchs (46% are in favour) and banning fuel imports from Russia, despite the risk of price increases (40%).

The most divisive response is providing weapons such as guns and anti-tank equipment to the Ukrainian military, which globally 36% of people support compared with 38% who oppose. Support is high in the Netherlands (65%) and Great Britain (63%) but much lower in Peru (13%), Argentina (14%) and Hungary (15%).

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TO THE UKRAINIAN MILITARY. ”



WHAT WORRIES THE WORLD

Concern about inflation reaches record high

Our monthly *What Worries the World* survey explores what people think are the most important social and political issues across 27 countries, drawing on ten years of data to place the latest scores in context.

After making the top five for the first time last month, concern about inflation has continued to grow and it is now the number one concern globally, with one in three (32%) listing it as a top worry for their country. Coronavirus, which was the sixth biggest concern last month, has fallen to eighth (18%).

Rounding out the top five are worry about poverty & social inequality (31%), unemployment (29%), crime & violence (25%), and financial and political corruption (24%).

26 out of 27 countries saw a rise in concern about inflation over the last month, with the biggest month-on-month

increase in Spain (+21 to 34%).

New to this month's report is a spotlight on military conflict. Added to our list of worries as a result of the events in Ukraine. 14% globally choose it as a worry for their country, placing it 11th behind climate change. However, we see large geographical differences, with higher concern in European countries like Poland (38%) and Germany (35%) but much lower concern across Latin America.

While Coronavirus has dropped out of the global top five worries, it continues to concern almost one in two (47%) in Japan, where it also remains the number one concern. Concern has also stayed high in South Korea (45%) and Malaysia (41%).

Meanwhile, six in ten (63%) say things in their country are heading in the wrong direction.

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DRIVING COMPLIANCE AT THE FRONTLINE

A guide for regulators - and the regulated

The goal of regulators around the world is to ensure that the markets they regulate are functioning well, that the companies they oversee abide by the law, and that consumers do not suffer the consequences of malpractice. Meanwhile, it is mandatory for compliance teams to ensure their organisations comply with regulatory requirements – and prove it.

Over the course of the pandemic, the relationship between regulators and the regulated has been brought into sharp focus, as organisations have had to react to new legislation at speed and ensure that staff adapt and adhere to rapidly changing regulations.

If organisations do not perform in line with regulatory expectations and consumers suffer as a result, the commercial impact can be significant.

In this paper, our Channel Performance team present the Ipsos Compliance Mystery Shopping Framework which delivers realistic, robust and reliable data and lays the foundation for delivering actionable insights that drive change and commercial impact.

They also share new analysis and a series of case studies from sectors including financial services, telecoms, automotive, alcohol and gambling, to demonstrate the effectiveness of mystery shopping in assessing regulatory compliance.

This paper is recommended reading for any organisation – regulators and the regulated – interested in ensuring that frontline staff are adhering to regulatory standards and are treating customers fairly.

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GLOBAL HAPPINESS 2022

Happiness levels on the upswing

The 2022 edition of the Ipsos Global Happiness Survey finds that, around the world, happiness has increased by three points (up to 67%) since pre-pandemic levels in 2019. However, this still remains 10 points lower than it was in 2011.

Among 30 countries surveyed, happiness is most prevalent in the Netherlands and Australia, with 86% and 85%, respectively, describing themselves as “very” or “rather” happy. Prevalence of adults saying they are “not at all” happy is highest in Turkey (18%), Argentina (14%), and Hungary (13%).

In the Americas, Canada and the United States continue to have the highest proportion of people saying they are very or rather happy. Latin America, however, shows levels of significant volatility; Argentina (48%) and Chile (53%) have the lowest rates of happiness, both below the global average by more than 10 points.

Elsewhere, happiness in Turkey continues to decline. Over the last year, happiness has fallen by 17 points and in the last 10 years, the total decline is 45 points.

So, what makes people happy? For a majority, the greatest source of happiness is “my physical health and well-being” (54%), followed closely by “my mental health and well-being” (53%).

Compared to 2019, the sources seeing the greatest gains are “being forgiven” (+8), “finding someone to be with” (+7), “forgiving someone” (+6) and “spending time on social media” (+6).

Some notable anomalies within the data pertain to Japan, who rank their physical and mental wellbeing as the 8th and 11th source of happiness respectively, and Brazil, who ranked “my relationship with my partner/spouse” in 20th, 14 places below the global average.

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HAPPINESS HAS INCREASED BY
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THE PRE-PANDEMIC 2019 SURVEY. **”**

THE FUTURE OF IDENTITY

Who are you? Answering the age-old question

Identity is used to draw together communities with common interests and values. It has also been accused of helping people to isolate themselves into online community bubbles of thought and ideas, and increasingly, this is happening in the physical world too.

The flipside of identity is anonymity, which has increasing value and scarcity in today's data-driven digital world where we can be uniquely identified by our face, our fingerprints, our heartbeat, our breath and our gait. As we move into more 3D virtual spaces, how will we express our avatar identities, and how many will we craft?

This month's edition of *What The Future* features articles on six macro forces driving the future of identity: society, politics, demographics, technology, security and media.

It also explores the tensions that will drive change. How will changing media

representation shape how we understand other identities? Will legislation and court rulings in America become less liberal and impact freedom of expression? Will virtual worlds allow us to become even more bubbled or will the bubble burst? Who will govern the metaverse?

Key findings include:

- One in four Gen Z adults (38%) agree that a person is either a man or a woman and not anything in between, ten percentage points less than the average American.
- 62% rate where they live as important in forming how they think of themselves.
- Political identity and religion are the two biggest factors determining who Americans identify with.
- 53% of Black and Hispanic Americans say they don't identify with people they see in popular culture.

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IN TERMS OF WHO WE IDENTIFY WITH
PARTY IDENTITY IS THE STRONGEST
SHORTCUT FOR US TO UNDERSTAND
WHO IS “LIKE US” OR “NOT LIKE US”. **”**



EARTH DAY 2022

A risk of progress on gender equality stalling.

To mark Earth Day 2022, Ipsos conducted a 31-country study on global attitudes and opinions towards climate change.

One in two say they have worried about climate change in the last two to three weeks, placing it mid-table in a list of concerns.

Almost seven in ten are concerned about the impacts that climate change is already having in their country (68%) and abroad (70%). While we see increases in the amount of people who think their government has a clear plan to act (+8 from 2021), this figure has still only reached 39%.

Globally, few can correctly identify actions which would have the most impact on reducing greenhouse gas emissions. People are most likely to say recycling is the best way to reduce emissions (49%); the evidence actually shows that this is the 60th most impactful action.

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The first part of the report explores the public's confidence in plans to combat climate change, including opinion on whether their country will make significant progress. The second part explores the behavioural changes that individuals are prepared to make, illustrating confusion about which changes would be most environmentally impactful.

Our Earth Day coverage includes the [Ipsos Climate Change Report 2022](#). Our Australia team finds that 83% of Australians are concerned about climate change and 70% agree that Australia is already seeing its impact. Australia also tops the rankings of the countries concerned about climate change in our latest edition of [What Worries the World](#).

Brands have a critical role in collaborating with governments and people to blunt climate change and create a more resilient tomorrow. Our new edition of [What The Future: Earth](#) provides a roadmap.



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CLIMATE CHANGE IN THE LAST
TWO TO THREE WEEKS. **”**

FRENCH ELECTION 2022

Macron re-elected but abstention hits a 50-year high

Emmanuel Macron was comfortably re-elected as President of France on 24 April, yet 28% abstained from voting: a high not seen for 50 years. Among abstainers and voters who cast a blank or invalid vote, the prevailing sentiments are rejection of the two final candidates and a weariness of voting for one candidate to block the other from winning.

An Ipsos survey conducted in partnership with Sopra Steria on the motivations for voting found that neither Macron nor Le Pen succeeded in convincing those beyond their first-round electorate. Many who voted for either candidate in the final round of the election did so to stop their opponent from winning (true of 42% of final-round voters for Macron and of 46% of final-round voters for Le Pen).

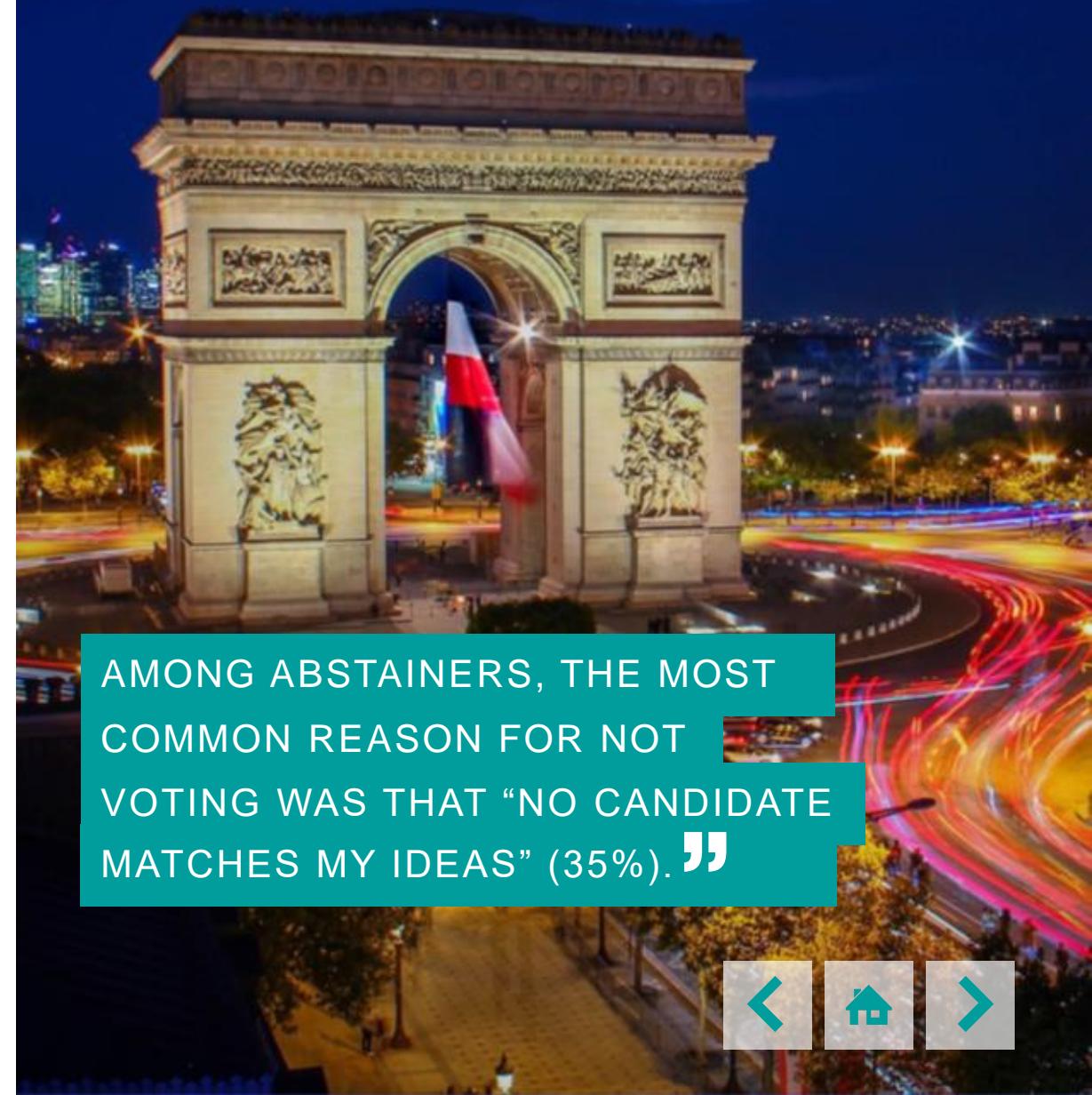
Among abstainers, the most common reason given for not voting was that “no candidate matches my ideas” (35%),

followed by “I am fed up of having to vote only to block a candidate” (25%).

Three-quarters of people (77%) fear “unrest and tension in the country over the next few months”, with fear particularly widespread among first-round voters for Zemmour (91%), Le Pen (89%), Mélenchon (84%) and even 58% of first-round voters for Macron.

Given this context, one in two French people (57%) would prefer the President to dedicate the first few months of the new five-year term to reunifying the country and bringing people together before turning to potentially divisive reforms that may lead to social unrest.

Looking ahead to the parliamentary elections in June, the buzzword for all parties is “alliance”. For each of the main political parties, a majority of supporters wish to join forces with politically close parties and present joint candidates.

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AMONG ABSTAINERS, THE MOST COMMON REASON FOR NOT VOTING WAS THAT “NO CANDIDATE MATCHES MY IDEAS” (35%).



CITY BRANDS INDEX 2022

The world's most admired cities

London preserves its spot as the world's most admired city in the 2022 edition of the Anholt-Ipsos City Brands Index, with Paris, Sydney, New York, and Rome rounding out the top five.

In the bottom half of the top five there have been some larger changes from the last edition. Washington D.C. moves into sixth place, up from 13th place in 2020, and Barcelona moves into seventh place after taking 14th place in 2020. Toronto, in eighth place, also moves up four places from 2020 and Tokyo takes ninth place after previously placing 16th. Berlin and San Francisco tie in tenth to complete the top ten cities.

The cities are evaluated based on six indices: their international status (Presence), physical appeal (Place), amenities (Prerequisites), warmth of their inhabitants (People), activities (Pulse), and their educational and business qualities (Potential).

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London's reputational strengths come from positive perceptions on the Presence, People, Pulse, and Potential indices. Globally, people have positive perceptions of London being a good place to get a higher education, ease of finding a job in the city, a city where you are likely to "fit in" and find people who understand and appreciate your culture, and having a good standard of public amenities – all categories where London is the top city in 2022.

Across all six indices, the top five places are occupied by cities in Europe, North America, and Asia Pacific, with no cities from Latin America, Africa or the Middle East.

There is some correlation between good performance in the CBI and top performing [Nation Brands Index \(NBI\)](#) nations, with eight countries from the top ten nations in the 2021 edition of NBI having at least one city in the top ten CBI.



LONDON'S REPUTATIONAL STRENGTHS
COME FROM POSITIVE PERCEPTIONS OF
ITS EDUCATION, EMPLOYMENT AND BEING
A PLACE YOU ARE LIKELY TO "FIT IN". **”**

SHORTCUTS

The Sustainability Imperative

This month's KEYS webinar 'The Sustainability Imperative' focused on People, Planet, Prosperity, as we reflected on how we can work together to create more sustainable lives, businesses and societies.

We take a look at the evolving the ESG (Environmental, Social, Governance) agenda, exploring how the language and landscape is changing in terms of how organisations tackle these issues. Our special focus on Southeast Asia found nine in ten people in the region saying that climate change is a "serious threat" to the economy and quality of life.

But often the carrot of "it's sustainable" is not enough to entice a public who feel that they are doing enough in the face of many competing priorities. We shared new analysis showing how brands can achieve success by positioning sustainability as a co-benefit to entice consumers. Our review of "The Sustainability Opportunity" showed how businesses can create unique value by re-thinking how their products and services are designed and by doing this in a holistic way.

[WATCH THE RECORDING](#)

The Data Behind Racism in Healthcare

Structural racism fosters and perpetuates the unequal care Black and Hispanic Americans receive in the US healthcare system.

From access to affordable healthcare and racism in patient experience to the gaps in clinicians and staff that look like the patients they are treating, the issues with racism in this arena are far and wide-reaching.

While these problems existed before the pandemic, the past two years (and counting) added new complications to the issues at hand. Trust in public health institutions has not fully recovered to pre-pandemic levels for Black and Hispanic Americans.

Finding ways to address these issues is essential in building back and fully recovering from the pandemic and addressing the systemic racism built into many parts of the healthcare system.

This paper sets out where the racial disparities appear in the healthcare system, in order to understand them properly and deliver fair care.

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Podcasts

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

- **Brands in Latin America:** We talk about brands in Latin America and consider how inflation is affecting consumer behaviour in the region.
- **The Role of Brands in an eCommerce World:** We look at the role of brands in the time of convergent commerce. How has this changed consumers' relationship to brands, and has it fundamentally impacted the consumer shopping journey for most categories?
- **Knowledge Panel:** Our guests discuss Ipsos' knowledge panel capabilities, our propriety probability-based access panel. Learn more about our knowledge panels in [the US](#) and [the UK](#).

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.

NORWAY: Six in ten mayors and municipal directors have experienced pressure towards or expectation of unethical behaviour.

NIGERIA: 85% of educated young Nigerians perceive the United Kingdom as an attractive and trusted country.

CHILE: Three out of four Chileans (76%) read some material every week, 82% would like to read more than they currently do.

ITALY: 57% of Italians have used homeopathy at least once, and 71% consider it at least partly valid.

MALAYSIA: Almost half of Malaysians are unsure or unlikely to continue taking vaccinations against COVID-19.

AUSTRIA: 91% of Austrians are already noticing the effects of inflation on their own everyday lives.

SLOVAKIA: 40% agree that Slovakia is part of an information war waged by the Russian Federation.

NETHERLANDS: 50% of young people invest money in sustainable investments, 44% invest in cryptocurrencies.

CANADA: 48% of young people from Quebec consider themselves more as Quebecers than Canadians.

BRAZIL: 43% of Brazilians list fuel prices as a top five obstacle to buying or changing their car.

SPAIN: One in three Spaniards (29%) are against the elimination of a mask mandate in indoor spaces.

Visit [Ipsos.com](https://www.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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