

IPSOS UPDATE

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

June 2022

Ipsos Knowledge Centre

GAME CHANGERS



IPSOS UPDATE JUNE 2022

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

Things are moving fast. Inflation has replaced Covid as the number one public concern globally, and is rising every month. At Davos where I [spoke at a number of events](#) recently, the mood was fairly bleak.

The uncertainties of our current economic situation, which the return of war to Europe will only worsen, are all too clear to the public. Whichever country we live in, there's a near-consensus that the prices we pay for food, utilities and fuel are going to rise in the months ahead. Our new international study asks people to describe their current financial situation: "just about getting by" is the single largest group. My concern is that the public - when we asked them for the central banks - currently under-estimate how high inflation will rise. At present most are not saying they will demand a pay rise, triggering a 70s wage-price spiral - but this may change: we will be measuring this carefully.

With the Ukraine war entering its fourth month, new research finds most European citizens positive about how the EU has responded to the Russian invasion. Across the 27 member states, 89% say they have sympathy towards Ukraine, 71% see it as part of the European family and 66% say it should join the EU when it is ready.

As we try to look towards a better tomorrow, we feature new research on the role cycling can play in both our daily lives and in contributing to a more sustainable future for us all: 86% of us say it can play an important role in reducing carbon emissions. The good news is that 63% of us already know how to ride a bike. The not-so-good news is that 52% say that cycling in our local area is just "too dangerous".

Decarbonisation was another big topic at Davos - this edition includes new analysis of the online conversation around electric vehicles. Contrary to popular belief, the discussion centres more on their performance and speed than it does on their environmental benefits. We also take a look at a new study looking at how new technologies can change the role consumer goods play in our daily lives.

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

GLOBAL VIEWS OF INFLATION

One in four people are struggling financially

Our 11-country survey for the World Economic Forum finds high levels of concern about the rate of inflation as well as expectations that things will get worse before they get better.

AI MEETS CONSUMER INSIGHTS

Welcome to the era of AICI

The future of consumer understanding requires human *and* machine intelligence. This Ipsos Views paper sets out how human-machine teams can bring AI-enabled consumer intelligence to the enterprise.

THE EU'S RESPONSE TO WAR IN UKRAINE

EU citizens evaluate measures taken by the EU

Across the 27 EU member states, 88% approve of the EU welcoming people fleeing the war. There is also strong support for reducing EU dependency on Russian oil.

CYCLING ACROSS THE WORLD

Reducing carbon emissions and traffic

86% of people consider cycling to play an important role in the reduction of carbon emissions and in the reduction of traffic. Our 28-country survey explores participation rates in and barriers to cycling.

WHAT WORRIES THE WORLD?

Concern about inflation rises for tenth month in a row

May's edition of our 27-country tracker finds concern about inflation rising globally for the tenth consecutive month. In all countries surveyed, concern is higher now than in January 2022.

CONNECTED CPG

A winning formula for CPG in the tech-enabled age

Our latest Ipsos Views paper explores how we are navigating the new world with tech-enabled product innovations and sets out a framework for Connected CPG success.

WHAT THE FUTURE: FOOD

Stresses on our food systems

We explore how our food culture will evolve as hybrid work continues to change our food patterns, and how new innovations in tech and science offer new opportunities.

YOUTH AND DEMOCRACY IN EUROPE

2022: The European Year of Youth

The EU has declared 2022 the European Year of Youth, as a recognition of the sacrifices that young people have made during the pandemic. We explore young people's expectations of the EU.



Cover photo:
Perugia, Italy.
58% of Italians sense significant social tension in the country. Find out more in our deep dive into Italian society on page 12.

GLOBAL VIEWS OF INFLATION

One in four people are struggling financially

An 11-country survey for the World Economic Forum finds high levels of concerns about personal finance and negative expectations for the coming year.

One in four people globally say they are finding it difficult to manage financially (25%). This ranges from 16% of people in the US and in Germany up to 66% of people in Turkey. Meanwhile, one in two Poles say they are “just about getting by” (54%).

Majorities in all 11 countries expect the rate of inflation to rise over the next year. This view is particularly widespread in Great Britain and in France, held by 85% and 84% of people, respectively.

Turkey has a notably negative outlook. Over the next year, six in ten expect to see declines in their standard of living (61%) and their disposable income (63%) and eight in ten expect rises in the taxes they pay (81%).

In seven countries, a majority say they are concerned about their ability to pay their household bills, with concern especially high in Turkey (72%), Poland (62%) and Great Britain (60%).

Across the 11 countries surveyed, almost four in five people expect the cost of their food shopping to increase (79%). Concern about rising food prices is highest in Great Britain, where almost nine in ten expect an increase in costs (88%).

Three-quarters also expect rises in utility bills (77%), with expectation highest in Great Britain (89%) and France (85%).

In the event that rising prices meant they could no longer afford their current lifestyle, the public are mostly likely to say that they would spend less on socialising (44%), delay large purchase decisions (41%) and spend less on non-food household shopping (38%).

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MAJORITIES IN ALL 11 COUNTRIES EXPECT THE RATE OF INFLATION TO RISE OVER THE NEXT YEAR. ”



WHAT WORRIES THE WORLD

Concern about inflation rises for tenth month in a row

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

May's edition finds that concern about inflation has risen for the tenth month in a row and remains the top global worry. One in three globally say inflation is one of the major issues facing their country (34%), an increase of two points on last month.

Worry about rising prices has now risen steadily since last July 2021. Back then it was tenth out of 18 issues, between climate change and immigration control, with 12% citing it as an issue affecting their country. Since the start of the year the rise in concern has been quicker, with all 27 countries surveyed having a higher "worried about inflation" score this month than they did in January.

In May, the countries seeing the biggest increases in concern include Chile (+12), Poland (+9), and South Korea (+9). It was already the top worry in Argentina, Canada, Great Britain, Poland, Turkey and the US, and now Australia can be added to that list.

Completing the top five global concerns are poverty and social inequality (31%), crime & violence (27%), unemployment (27%), and financial or political corruption (24%).

Concern about coronavirus (16%) has fallen for the third month in a row, but the issue remains in eighth place. Japan continues to be the only country where the pandemic is the number one concern.

Military conflict between nations (14%) stays at 11th place in the rankings, but it has now become the top worry in Germany.



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AI MEETS CONSUMER INSIGHTS

Welcome to the era of AICI

Today's demands for greater speed and agility have put more pressure than ever on marketers and insights professionals, not only to keep up with consumer behaviour, but to stay ahead of it.

To help brands grapple with the enormous volume of consumer-generated data - and make better, faster business decisions - a new breed of AI-enabled consumer intelligence (AICI) solutions has come on the scene.

These solutions extend the value of consumer-generated data beyond just market research and customer insights teams, providing actionable insights throughout the business to users who include product and innovation teams - and even creative agency partners.

Unlike traditional social listening approaches, AICI platforms harness data from multiple sources (social, search, survey, and more) and apply advanced AI and data-mining algorithms to uncover predictive and prescriptive insights.

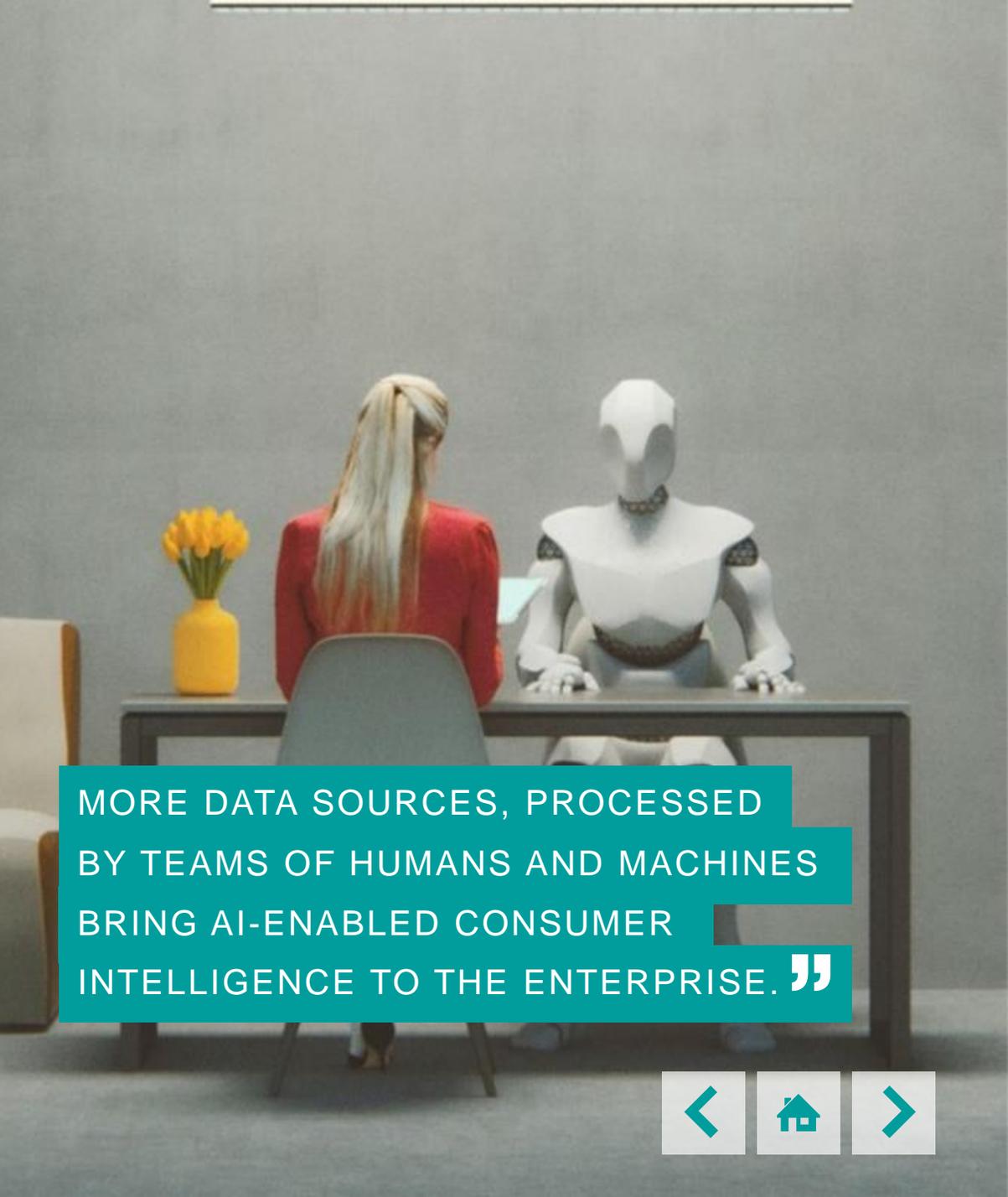
In this paper, we discuss how AI is bringing new solutions and new insights to enterprises and set out how joint human-machine intelligence teams can supercharge the speed, scale, and accuracy of consumer intelligence.

Individual organisations will need to pick their own path to AICI based on their particular focus, functional needs, and ultimately, their current digital and data maturity. This paper also provides guidance for brands looking to adopt and roll out AICI based on their current resources and insights aspirations.

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MORE DATA SOURCES, PROCESSED BY TEAMS OF HUMANS AND MACHINES BRING AI-ENABLED CONSUMER INTELLIGENCE TO THE ENTERPRISE. ”



CONNECTED CPG

Navigating the new world with tech-enabled product innovations

Consumer Packaged Goods (CPG) growth has faced challenges around saturation, fragmentation, commoditisation, and functional equivalence among brands. With new capabilities accessible through technology, marketers are increasingly integrating CPG products into digital experiences along the buying and usage process as new possibilities become available through technology.

The global pandemic and the ensuing societal disruption accelerated the adoption of technology. More time is spent on digital devices which offer completely new ways to discover and select products.

For several years Ipsos has been monitoring and facilitating the emergence of tech-enhanced CPG products, witnessing both success and failure. This paper explores what we're calling "Connected CPG": tech-enabled CPG

innovations with enhanced experience or business models, that aim to create a deeper connection with consumers.

In this paper we explore examples of tech-enabled innovations, including:

- Personalised vitamins that **provide confidence** through DNA testing
- Sustainable detergent subscriptions that are **convenient and foster a sense of purpose**
- Gamified toothbrushes that engage kids with augmented reality, **eliminating routine struggles** for parents and encouraging good brushing habits in kids

While many manufacturers recognise Connected CPG as source of growth and are innovating in the space, a consistent framework to measure performance and size the opportunity has been lacking.

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CONNECTED CPG REFERS TO
TECH-ENABLED CPG INNOVATIONS
WITH ENHANCED EXPERIENCE OR
BUSINESS MODELS. ”



THE EU'S RESPONSE TO WAR IN UKRAINE

EU citizens evaluate measures taken by the EU

A 27-country survey for the European Commission finds a broad consensus among EU citizens in all EU member states in favour of the EU's response to Russia's invasion of Ukraine.

The majority of Europeans think that since the war in Ukraine started, the EU has shown solidarity (79%), has been united (63%) and was fast (58%) in its reaction.

Across the 27 countries, 88% approve of the EU welcoming in people fleeing the war. This ranges from 75% in Bulgaria and 77% in both Czechia and Slovakia, to 95% in Croatia, Finland, and Malta, and 96% in Portugal.

EU citizens are much more divided over the EU financing the purchase and supply of military equipment to Ukraine. While

67% support this on average across the 27 member states, there are large differences in approval between countries. More than eight in ten approve of this measure in Finland (90%), Estonia (87%), Poland (86%), Lithuania (84%) and Portugal (83%), but approval drops to three in ten in Bulgaria (30%) and in Cyprus (31%).

An average of 66% people across EU countries agree that Ukraine should join the EU when it is ready. More than half agree with this in all countries except Bulgaria (where 47% agree).

More than eight in ten agree that the EU should reduce its dependency on Russian gas and oil as soon as possible (85%) and that the war in Ukraine makes it more urgent for EU member states to invest in renewable energy (84%).

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EU CITIZENS ARE MUCH MORE DIVIDED OVER THE EU FINANCING THE PURCHASE AND SUPPLY OF MILITARY EQUIPMENT TO UKRAINE.”



WHAT THE FUTURE: FOOD

Stresses on our food systems

The latest edition of *What the Future* discusses how hybrid working is shaping how we consume food, how science and tech are changing how we cultivate and prepare food, and how globalisation is diversifying our food culture.

An increasingly global world has led to a growing number of people who like to try food from other cultures and parts of the world. But flying ingredients globally carries a high environmental price. On the other hand, climate change has already begun to impact our ability to grow certain crops. What does this mean in a world where supply chains are already stretched thin?

In this issue, we explore food innovations with the potential to ease some of these stresses on our food systems. One popular solution is indoor farming, which makes it possible to grow crops previously unsuited to the environment, all while using less energy, land, and water than

traditional 'outdoor' farm. Another is synthetically growing ingredients – including meat - in a lab. This provides the same nutritional profile without the same environmental cost.

But certain tensions remain which will determine how effective these innovations are allowed to be. A majority of Americans want to eat what they want, despite the environmental cost; only one in three say they currently try to limit items that have a negative impact (32%). Three-quarters of people in the US only trust foods that are naturally occurring (73%). This poses a potential barrier to synthesising ingredients in a lab that are otherwise difficult or costly to grow sustainably in nature.

In the coming years, will food become harder and more expensive to grow? Or will we embrace new innovations and, in turn, make a serious dent in the impact of our food system on climate change?

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A MAJORITY OF AMERICANS WANT TO EAT WHAT THEY WANT, DESPITE THE ENVIRONMENTAL COST. ”



CYCLING ACROSS THE WORLD

Reducing carbon emissions and traffic

On average, eight out of ten people globally consider that cycling plays an important role in the reduction of carbon emission (86%) and in the reduction of traffic (80%) according to a new 28-country survey.

Despite this, only 14% say that they use a bicycle more than any other mode of transport for a 2-km or 1-mile distance. This is highest in the Netherlands (45%) and China (33%) but drops to just 4% of people in Canada. Instead 37% of people globally choose to walk as their primary mode of transport for this distance, with 25% using their own automobile.

Compared with cycling for short distances, riding a bicycle for exercise is significantly more popular, an activity engaged in by a global average of 28% of people. Poland (61%) takes the lead as the country with the most people who cycle for exercise, with China and India scoring joint second (45%).

The survey reveals that for many people around the world, concern about safety is a barrier for cycling. 52% globally say that cycling from one place to another is too dangerous. This opinion is notably more widespread in Latin America than elsewhere; 70% of people agree in both Chile and Colombia, 68% agree in both Mexico and Peru.

Only 14% in the Netherlands say that cycling is too dangerous, perhaps as a result of the quality of their cycling infrastructure. 81% in the Netherlands say that the cycling infrastructure in their area, such as dedicated bicycle lanes is excellent. This compares to a global average of 48%.

Overall, the survey also shows a global desire for cycling infrastructure to be improved, with 64% on average saying that new road and traffic infrastructure projects in their area should prioritise bicycles over automobiles.

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52% GLOBALLY SAY THAT CYCLING FROM ONE PLACE TO ANOTHER IS TOO DANGEROUS.”



YOUTH AND DEMOCRACY IN EUROPE

2022: The European Year of Youth

The EU has declared 2022 the European Year of Youth, as a recognition of the sacrifices that young people have made during the COVID-19 pandemic. On behalf of the European Commission, Ipsos conducted a survey of 15-30-year-olds in each of the 27 EU member states.

The survey revealed that young people's top expectation for the European Year of Youth is for society and decision-makers to listen more to youth's opinions and needs (33%). Young people consider voting in local, national or EU elections (39%) and engaging in social media (30%) to be the two most effective actions for getting their voices heard.

The EU offers various initiatives to get young people more involved in European politics. However, the survey shows that these initiatives are known by fewer than one in five people under 30 years old.

The EU also funds programmes aimed at supporting young people to stay in another EU country. By far the most well-known is Erasmus+ for students (18+ year-olds), which 50% of the young people surveyed were aware of.

In total, 39% of young people have at some point in their life participated in a professional, volunteering, learning or sporting activity in another EU country.

Beyond the European Year of Youth, young people primarily expect the EU to preserve peace, reinforce international security and promote international cooperation (37%), to increase job opportunities for young people (33%), to fight poverty and economic and social inequalities (32%), and to promote environmentally friendly policy and fight climate change (31%).

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YOUNG PEOPLE'S TOP EXPECTATION FOR THE EUROPEAN YEAR OF YOUTH IS FOR SOCIETY AND DECISION-MAKERS TO LISTEN MORE TO YOUTH'S OPINIONS AND NEEDS. ”



SHORTCUTS

Online opinion of Electric Vehicles

The automotive industry is currently in the middle of one of the most significant disruptions in history: electrification. Global trends in sustainability and climate consciousness have brought conversations about electric vehicles (EVs) to the fore, but not all consumers are sold on their practicality or benefits.

To understand how the EV trend is evolving and who the audience segment really is, we collected and analysed more than 14 million online mentions over a six month period, using Synthesio's AI-enabled consumer intelligence platform.

Online conversations related to EVs have increased by 27% in the US and by 20% in Europe over the last six months, but the majority of online conversations focus on high prices, charging inconveniences and battery issues.

Despite global support for a shift away from fossil fuels as energy prices rise, we also found that consumers were more interested in EVs' performance and speed than their environmental or economic benefits.

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Italy Flair 2022: Ten things to know

The 2022 edition of *Italy Flair* finds the country in a complex flow of advances and setbacks. Italy is gripped by the uncertainty of a transition period, during which its history and past achievements are crumbling but have yet to be overcome or set aside, while fresh approaches are struggling to emerge.

Ten key themes from this year's edition include:

- **Economic adversity.** 52% of Italians said their economic situation became worse in 2021 and things look set to remain tough.
- **Simmering tensions.** 65% of Italians think it likely that there will be new forms of protest against "wealthy and privileged people" in the near future.
- **Eagerness to be eco-friendly.** For seven in ten Italians, it is essential to join the fight against climate change together with efforts to defend communities.

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Africa Day 2022: CSR in the new world

In pre-Covid times, Corporate Social Responsibility (CSR) was often used to bring about and support a competitive advantage for a company. However, this was often a "tick-box exercise" with a focus on deriving benefits quickly. In a world with a lingering Covid-19 pandemic, climate change, economic and political uncertainty and high inflation, CSR deserves more attention and a rethink.

The 2021 Ipsos Global Trends study established that Africans feel very strongly about the role businesses play in tackling social issues. Eight in ten people agreed that business leaders have a responsibility to speak out about social and political issues facing their country in Nigeria (87%), South Africa (84%) and Kenya (84%).

At Ipsos, our CSR programmes incorporate three critical elements – social, societal and environmental. We monitor the longer-term influence of our programmes closely, allowing us to measure our progress and providing a basis for improvement. For Africa Day 2022, we take a closer look at Ipsos CSR programmes in sub-Saharan Africa.

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POLL DIGEST

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

NORWAY: One in four Norwegians say they believe Norway should become a member of the EU (24%).

TURKEY: Three in ten people think that Covid-19 poses a serious danger to Turkey (31%), 45 points down from January 2022.

CANADA: Nearly all Canadians over 45 want to age at home, but only 12% say they can afford the cost of a personal support worker.

USA: Three in four Americans agree that America has more mass shootings than any other developed country (73%).

FRANCE: 48% of French people made at least one donation to charity in 2021, rising to 80% among those on high incomes.

GERMANY: 60% of Germans still dream of owning their own home, a figure that rises to 74% among 16-24 year olds.

AUSTRALIA: Only one in two Australians are satisfied with their current standard of living (56%), dropping to 50% among women.

UK: 86% of Britons are satisfied with how the Queen does her job; 66% want her to remain Queen for as long as possible.

DENMARK: 40% of Danes cite climate change as a challenge for their country. For 17%, it's the biggest issue facing Denmark.

ITALY: One in four Italian women have been asked if they plan to have children during a job interview (28%).

NETHERLANDS: Less than half of the Dutch population have confidence in King Willem-Alexander (47%).

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.

Please email IKC@ipsos.com with any comments, including ideas for future content.

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