IPSOS UPDATE

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

August 2022

Ipsos Knowledge Centre

GAME CHANGERS

Ipsos

IPSOS UPDATE AUGUST 2022

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

Yet again we are living through one of the warmest years ever, with fires breaking out across Europe. Globally, 77% say they are already seeing the effects of climate change but only 39% say their government has a plan in place for how government, businesses and people are going to work together to tackle it. Despite this, inflation and the cost of living worries most people more. Our latest survey finds climate change only eighth out of 18 issues with just 16% who mention it as one of the most pressing issues facing their country, far behind the 38% who are worried about inflation. The list of countries where inflation is the top worry serves as a reminder, if one were needed, of the international dynamic of this crisis: Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Poland, South Korea, Turkey and the US.

Let's look at these issues in more detail. Our special report on inflation in the Middle East and North Africa finds 76% saying they have downgraded their lifestyle to accommodate the increase in prices. Meanwhile, as Ipsos' research programme on environmental issues continues, and in the wake of 40-degree temperatures in recent weeks, we profile two European countries: Switzerland (where older people are particularly concerned about how climate change is already affecting their country) and the UK (where we explore how to capitalise on the current sense of urgency to mobilise the behaviour change necessary to achieve net zero).

We also feature the second instalment of our *World Refugee Day* study, which again highlights how public perceptions are not always in tune with the reality of what's actually happening on the ground. When asked to select the three countries that hosted the most refugees in 2021, few can correctly identify Turkey, Colombia or the United States, which collectively host 25% of the world's internationally displaced people.

Finally we look at the role music plays in our daily lives. Eight in ten Americans say it's important for their mental health and 69% say it's part of their identity. Our special *What the Future* report looks at how we consume music. Today, radio is showing real resilience, remaining at the heart of the music discovery diet for so many people. Tomorrow brings new possibilities of course, including the prospect of attending virtual concerts. For now, at least, people are somewhat doubtful about their entertainment value.

Each of the articles here include links to help you explore the topic in more detail. Please get in touch 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, and most importantly, have a great summer break if you are in the northern hemisphere.

Ben Page, Ipsos CEO

IN THIS EDITION

VIEWS ON INFLATION IN MENA
Inflation now a top concern in the region

Inflation is a top concern for people across MENA, with a regional average of 94% saying that prices have increased over the past 12 months. We look at how consumers are responding.

WHAT WORRIES THE WORLD
Inflation a top worry for the fourth month in a row

Across 27 countries, almost four in ten now consider inflation to be a top issue facing their country. Meanwhile, worry about coronavirus has risen for the first time since December 2021.

NET ZERO LIVING
Translating attitudes into action

In partnership with the Centre for Climate Change and Social Transformation (CAST), we take a deep dive into attitudes towards net zero policies, and look at how to increase support and participation.

SUSTAINABILITY IN SWITZERLAND
What we know and how you can act

Climate change concern is high in Switzerland, but so is pessimism about making progress on tackling it. We explore what consumers are already doing, and what they are prepared to do in the future.

MEDIA AND NEWS SURVEY 2022
Media use and habits across the EU

Citizens' perceptions of the European Union and Parliament are influenced by what they see, hear and read. This report explores how people interact with the media across the 27 EU member states.

THE FUTURE OF MUSIC
How will tech influence the music of the future?

Technology is influencing music in every way, from how artists create it, to how fans interact, to how audiences view performances. We explore how we might experience music in the future.

UNTAPPED POTENTIAL
Entrepreneurialism in inflationary times

This 26-country survey shows large geographical differences in entrepreneurial activity and aspirations. It also highlights increases in entrepreneurialism among women and people of lower incomes.

ATTITUDES TOWARDS CORRUPTION IN THE EU
Perceived and experienced corruption in businesses

Across the 27 EU member states, a third of companies say that corruption is a problem when doing business. This report examines the perception of its prevalence and opinions on how to tackle it.

Cover photo:
Amman, Jordan.
Three-quarters of Jordanians are concerned about inflation today. See page four for more.

VIEWS ON INFLATION IN MENA

Inflation now a top concern in the region

In response to rising inflation, a regional average of 91% of consumers across MENA report buying, or planning to buy, necessities only. Large proportions also report that they have started, or plan to start, having more home cooked meals (89%), keeping track of spending habits (88%), or buying fewer items per shopping trip (85%).

A survey of six countries across MENA reveals that inflation is the largest concern in the region. 63% on average list it as a top concern today, rising to 76% in Jordan. This is 27 points higher than the issue that comes in second: unemployment (36%). Learn more about global worries on page five.

Nine in ten on average believe that prices have increased over the past 12 months (94%), ranging from 87% in Kuwait to 98% in Jordan and Morocco. As a result, eight in 10 report spending more today than they were 12 months ago.

More than seven in 10 have noticed increases in prices in food & beverage (88%), transportation (77%), fashion items (76%), home care items (73%), personal care items (72%) and travel expenses (also 72%).

Despite these measures, a majority worry about not being able to financially cover their daily expenses (80%) and three in four have already downgraded their way of living to accommodate the increase in prices (76%).

The key drivers of inflation in the region are believed to be wars and conflict (47%), an increase in global oil prices (42%), and Covid-19 (38%). Consumers don't expect prices to level out any time soon with one in three (32%) saying it could be three years before prices stabilise.

For more on the societal, economic and technological forces shaping MENA's future, watch the latest KEYS webinar.

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THREE-QUARTERS OF PEOPLE HAVE ALREADY DOWNGRADED THEIR WAY OF LIVING TO ACCOMMODATE INCREASES IN PRICES (76%). ”

WHAT WORRIES THE WORLD

Inflation is the top worry for the fourth month in a row

July's wave finds worry about inflation on the rise for the 12th consecutive month and it is now the top global concern in our tracker for the fourth month in a row.

A global country average of 38% of people now say inflation is a top issue facing their country today (+1 point vs. June 2022) and it is a top concern in 11 countries, one more than last month. Concern has increased the most since last month in South Korea (+12) and Spain (+11).

Our monthly *What Worries the World* survey explores what the public think 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.

Worry about inflation is followed by worry about poverty & social inequality (33%), crime & violence (26%), unemployment (26%), and financial or political corruption (23%), which round out the top five global worries.

This month sees worry about coronavirus rise for the first time since December 2021, with a two-point increase on June 2022's score up to 14%. The biggest month-on-month increases are in Germany (+9), Spain and Netherlands (both +8) and Mexico (+7). Coronavirus remains in tenth place in the global ranking of worries.

Concern about military conflict has seen a slight decrease this month, down one point to 10%. Four of the top five countries this month have seen a drop in concern compared with June.

A global average of 32% say the current economic situation in their country is good, down two points in July. The biggest month-on-month declines on this metric are in Hungary and South Korea (both -10).

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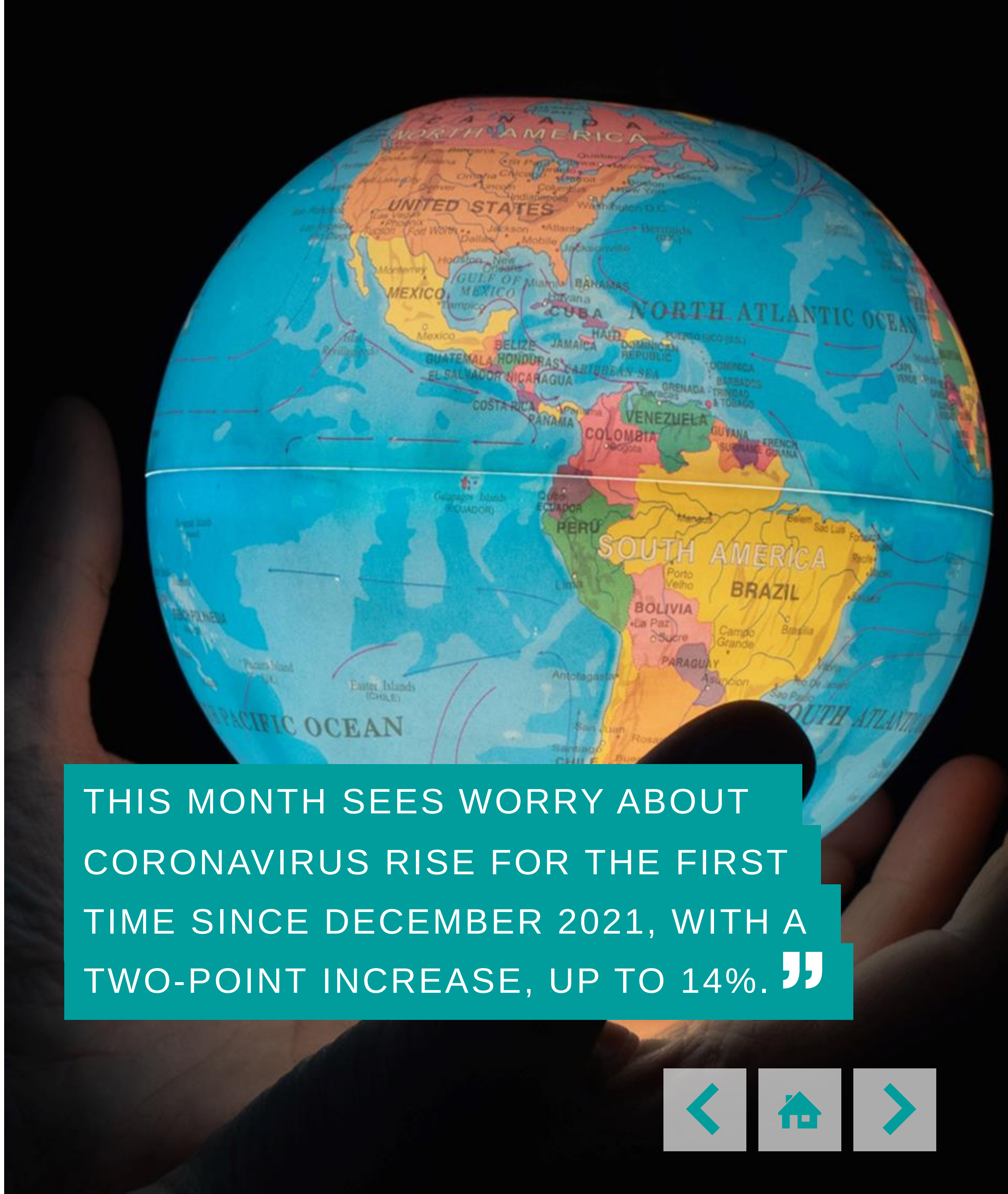

THIS MONTH SEES WORRY ABOUT CORONAVIRUS RISE FOR THE FIRST TIME SINCE DECEMBER 2021, WITH A TWO-POINT INCREASE, UP TO 14%. ”

NET ZERO LIVING

Translating attitudes into action

Carried out in partnership with the Centre for Climate Change and Social Transformation (CAST), this report examines the UK public's attitudes towards climate change and explores how policymakers can increase support for, and participation in, sustainable policies.

Public concern about climate change has risen in recent years, reaching a record high in November 2021, as the UK hosted COP26 in Glasgow. But concern has not been matched by a corresponding switch to more sustainable lifestyles.

This report demonstrates that there is widespread support for a range of net zero policies which would have a transformative effect on our behaviours towards food, travel, heating our homes, and saving for retirement.

However, support drops sharply when potential lifestyle and cost implications are presented. Support can be increased by highlighting the co-benefits of net zero policies, such as enhanced air quality, job creation or health improvements.

According to the findings, policies concerning transport, energy and consumption are understood to be important priorities, but awareness of other areas, for instance concerning dietary changes, is lower.

This underlines the importance of further engagement with the UK public to raise awareness of the societal transformations needed to reach net zero. This includes engaging the public in both decision-making and policy-making, and also in the delivery of the action needed to reach net zero.

The report aims to provide insight for local and national policy and decision-makers, regarding the changes that the public are willing to make, the policies the public see as a priority and the different levels of support among different groups in society.

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SUPPORT FOR NET ZERO POLICIES DROPS SHARPLY WHEN POTENTIAL LIFESTYLE AND COST IMPLICATIONS ARE PRESENTED.”

SUSTAINABILITY IN SWITZERLAND

What we know and how you can act

A third of Swiss people believe that it's unlikely that Switzerland will make significant progress in reducing climate change over the next decade. To find out if this is a sign of pessimism or a representation of reality, we explored what consumers are already doing, and what they are prepared to do in the future.

A 30-country survey finds that Switzerland is one of the most concerned countries about climate change, with three-quarters of the Swiss population saying they are concerned about the impacts of climate change that are already being seen in other countries around the world (75%). This rises to 78% among people over 35.

The Swiss perceive combatting climate change as a shared responsibility between individuals, business and governments.

However, agreement is considerably less strong than in other countries. 64% of Swiss citizens say individuals have a responsibility, compared with a global average of 70%, and 56% say that governments are responsible, compared with 68% globally.

The Swiss are also more pessimistic than others about the effects of COP26. Only a third think it will have a positive impact on climate change around the world (34%), with only France (33%) and Belgium (30%) holding more pessimistic outlooks.

Despite this, there is little-to-no change in individual actions that could limit individuals' contributions to climate change, such as reducing their meat consumption, with many feeling like they are already doing as much as they possibly can.

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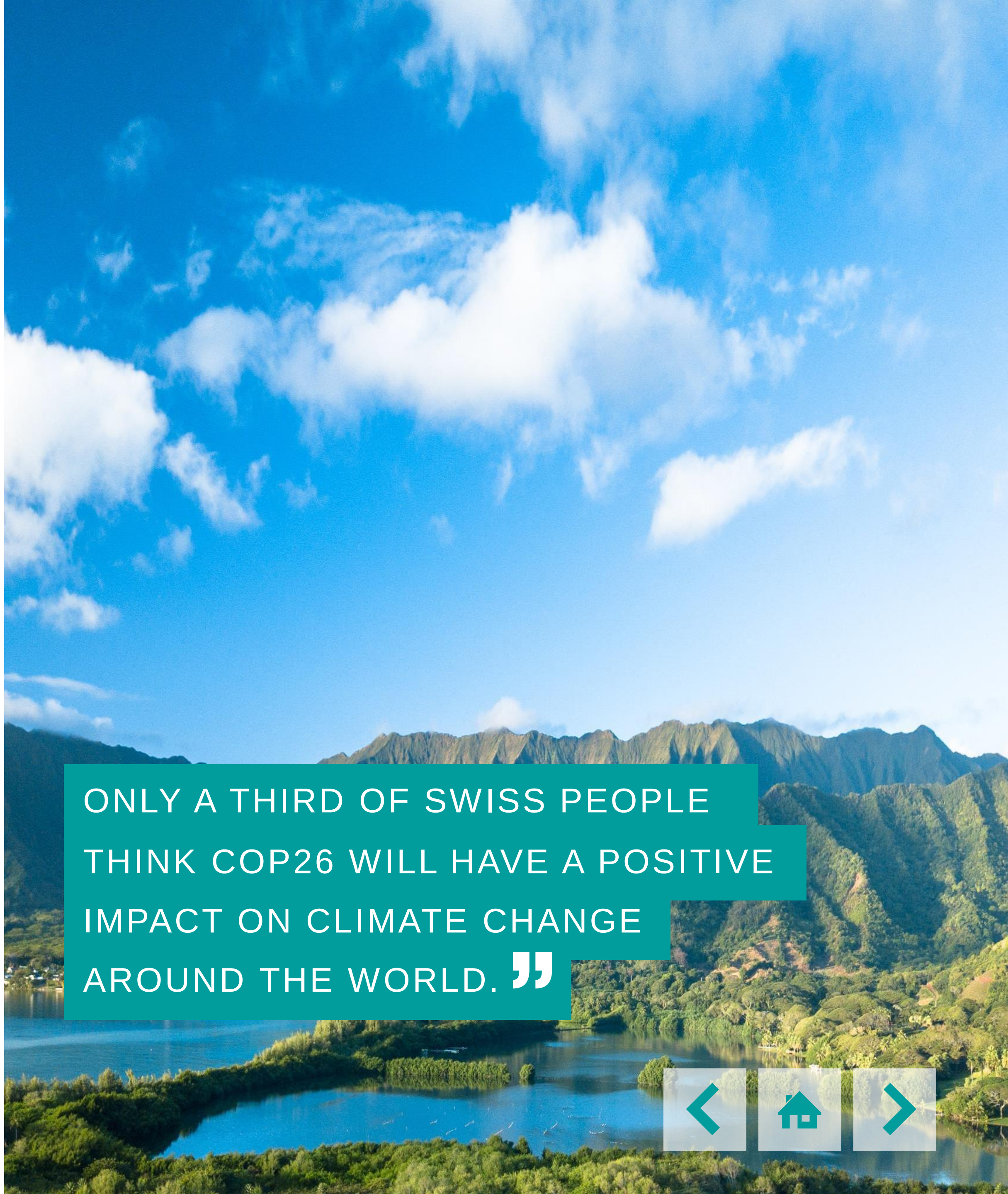

MEDIA AND NEWS SURVEY

Media use and habits across the EU

Citizens' perceptions of the European Union and Parliament are influenced by what they see, hear and read in a variety of forms of media. This report explores the media use and media habits of EU citizens across the 27 EU member states.

Seven in ten respondents say they have recently read, seen, or heard something about the European Union either in the press, on the internet, on the TV or radio (72%). Fewer say the same regarding the European Parliament (57%).

Television leads as the most popular primary source of news, with three-quarters of people accessing the news this way (75%). While online news platforms are the primary source of news for comparatively smaller proportion of people (43%), 88% of respondents get at least some news online via their smartphone, computer or laptop.

Over half of respondents use Facebook (67%), Whatsapp (61%) and Youtube (56%), with Instagram the most used platform among 15-24 year-olds. Across all age groups, at least four in ten use social media to follow the news and current events (44%-46%).

One in two EU citizens trust public TV and radio stations to give them truthful news (49%), making it the most trusted media source. Written press (including their online presence) follows, trusted by 39%.

One in ten respondents say that they have been exposed to disinformation "very often" over the past seven days. This proportion rises to 29% in Bulgaria and 20% in both Romania and Cyprus. An EU average of 63% feel confident that they can recognise disinformation when they encounter it, this rises to 81% in Ireland, 79% in Malta and 78% in Finland. Across the EU, confidence decreases with age and increases with level of education.

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63% OF RESPONDENTS FEEL CONFIDENT THAT THEY CAN RECOGNISE DISINFORMATION WHEN THEY ENCOUNTER IT. ”

THE FUTURE OF MUSIC

How will tech influence the music of the future?

Technology is influencing music in every way, from how artists create and promote it, to the ways fans discover and share it, to how audiences listen and view performances. Technology also is changing the ways brands leverage music in marketing and culture as talent incubators and impresarios. Yet what's not changing is the vital role music plays in our lives for entertainment or mental health.

The latest edition of *What the Future* explores how technology will shape the music industry of tomorrow, with guest articles from experts on live music, mixed reality, artist creativity, streaming and sponsorship.

Will people embrace virtual concerts with avatars of their favourite artists? What kinds of mixed reality shows will fans think are worth the in-person price? Will fans lean towards ad-supported music streaming or subscription services?

Key findings include:

- 54% of Americans attend at least one concert per year, including 69% of Millennials.
- Most virtual concert-goers would be willing to pay for more control over their experience, including eight in ten who would pay more for the ability to control the "view" from many angles (80%), and to be able to choose which songs the artist performed (also 80%).
- 64% of Americans aged 18-34 discover new music via social media.
- 80% of adults say that music plays an important role in their mental health.
- 46% of Gen Z and Millennial adults agree that attending a concert in virtual reality would give them a similar level of excitement to attending a concert in person.

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UNTAPPED POTENTIAL

Entrepreneurialism in inflationary times

Entrepreneurialism is the spawning ground for small businesses which can drive the health of economies. According to a 26-country survey, one in three people globally have previously started their own business (31%), with a similar proportion saying they hope to do so in the next two years (29%).

Entrepreneurialism is higher among men, those with a higher level of education and those of higher income. However, there have been notable increases in entrepreneurialism among women (+5), Gen Z/Millennials (+18), those of lower income (+7) and those with a lower or middle education (both +4), since 2018.

Entrepreneurial hopes and dreams vary widely country to country. More than one in two people say they have previously started their own business in Peru (54%), Colombia (54%) and Mexico (53%), but this proportion falls to fewer than one in ten in Japan (9%).

Almost three in ten new entrepreneurs who started a business in the past two years say they were motivated to do so by the pandemic. And compared with 2020, there is a nine percentage point increase in the number of entrepreneurs who say their most recent start up is still operating, two years on (58% vs. 49% in 2020).

Globally, government support is seen as the top factor in determining the success of a new business, cited by 56% of people on average. This is followed by interest rates (50%) and inflation (40%).

A global country average of 30% think that the government in their country does a good job in actively assisting entrepreneurs. But there is great variation between countries, with positivity much higher in China (70%), Poland (64%), and India (55%), but much lower in Argentina (18%), Peru (15%) and Japan (9%).

THERE HAVE BEEN NOTABLE INCREASES IN ENTREPRENEURIALISM AMONG WOMEN, GEN Z/MILLENNIALS, AND THOSE WITH A LOWER INCOME, SINCE 2018.

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ATTITUDES TOWARDS CORRUPTION IN THE EU

Perceived and experienced corruption in businesses

Corruption takes many forms, such as offering, giving, requesting, and accepting bribes, valuable gifts and important favours, as well as any abuse of power for private gain.

More than a third of EU companies say that corruption is a problem when doing business (34%), a decrease of six percentage points since 2019.

Six in ten EU companies think the problem of corruption is widespread in their country (63%). Nine in ten companies say this in Croatia (93%), Cyprus and Italy (both 92%) and in Greece (90%). On the other end of the scale, just one in five (18%) say this in Denmark.

Across the 27 member states, favouring friends and/or family members in business is seen as the most widespread form of corruption in their country (48%), followed by favouring friends and/or family members in public institutions (46%).

Eight in ten companies in the EU agree that too close ties between business and politics in their country leads to corruption (79%). Meanwhile, seven in 10 agree that favouritism and corruption hamper business competition (70%).

When it comes to tackling corruption, one in two companies think it is likely that individuals and businesses engaging in corrupt practices would face charges and go to court (52%). This rises to 72% in Denmark and 71% in Estonia, but falls to just 22% in Bulgaria.

The survey also examines patronage and nepotism, opinions about law enforcement and corruption in public procurement.

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SIX IN TEN COMPANIES IN THE EU THE PROBLEM OF CORRUPTION IS WIDESPREAD IN THEIR COUNTRY (63%). ”

SHORTCUTS

Refugee Day 2022 – Part Two

This 28-country survey examines the perceptions and awareness of issues surrounding refugees, against the backdrop of the ongoing war in Ukraine and the changing climate.

The survey illuminates the public's misperception of their country's contribution to hosting refugees. A third of people globally incorrectly believe that their country is one of the biggest hosts of refugees (33%), with few correctly identifying the highest-hosting countries (Turkey, the US and Colombia). A global average of 15% know that Turkey is in the top three.

Globally, a majority support hosting refugees from Ukraine (54%), with minorities supporting this in just eight of the 28 countries surveyed. However, support for hosting refugees from other countries is notably lower.

Opinion on who should take responsibility for hosting refugees is divided: one-third say all countries are responsible (33%), while three in ten say the wealthiest countries hold the greatest responsibility (30%).

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Ipsos Podcasts

Catch up on the best Ipsos podcasts from the past month.

Educated Conjecture, S1E25: Featuring Darrell Bricker, Global CEO, Ipsos Public Affairs, this episode discusses precarious public confidence and concerns about the delivery of public services.

Educated Conjecture, S1E24: Featuring Simon Atkinson, Chief Knowledge Officer at Ipsos, this episode focuses on how Ipsos manages years of wide-ranging knowledge and how beliefs, attitudes and issue concerns have changed pre- and post-pandemic.

Understanding the Drivers of Infant Immunisation: This six-part mini-series shares insights from three years of research to understand the drivers and barriers to complete infant immunisation.

The Future of Face-to-Face Research: In the inaugural podcast from Ipsos's UK Survey Research Methods Centre we explore what's now and next for face-to-face research.

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Evidently Better

The pandemic had a huge impact on the way policies and decisions have been made by government and across public services, and it has remodelled the way we gather and use evidence to improve policymaking.

Evidently Better identifies several learnings from the pandemic, based on the practical experience of the Ipsos Public Affairs team, as well as the input from clients in making policy and using evidence.

The report identifies several features of a productive, contemporary evidence initiative or system and shares a new framework and two scorecards, designed to aid critical thinking about what matters, what works and how things can be improved.

The framework contains 22 potential features of evidence-enabled policymaking, designed with two main applications in mind: firstly, how to best design tactical policymaking and evidence collection; and secondly, the strategic improvement of policy and associated evidence systems.

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POLL DIGEST

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

NORWAY: One in two Norwegians do not believe in God (51%), with disbelief rising to 66% among 25–39-year-olds.

US: One in three Americans support making fertilised eggs legal persons with the same rights as children and adults (32%).

CZECH REPUBLIC: 56% of Czechs say someone around them has changed their attitudes or behaviour due to misinformation.

ITALY: 68% of Italians think the development of a circular economy and renewable energy would help counteract the increase in bills.

UK: Financial reasons and the cost of living are the most common reasons why Brits will not travel abroad this year (46%).

KENYA: Mobile phone ownership in Kenya has increased 16 percentage points from 2015, up to 95%.

AUSTRALIA: 56% of Australians are concerned about the cost of living. This is the second highest level for any issue monitored.

SWEDEN: A third of households feel that their personal finances have declined in the last quarter (33%).

MALAYSIA: 55% of Malaysians have used a non-cash option to make a payment in the last three months.

NEW ZEALAND: 81% of New Zealanders are concerned about the impacts of climate change already being seen in other countries.

CANADA: Two-thirds of Canadians say they would personally take a Covid-19 booster shot without hesitation (66%).

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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