

IPSOS UPDATE

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

July 2022

Ipsos Knowledge Centre

GAME CHANGERS



IPSOS UPDATE JULY 2022

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

Inflation continues to dominate global public concerns - and those of decision makers. Possible recessions in the USA and Europe now look more likely and we can see consumers cutting spend on discretionary items, and shifting to economy ranges - but so far not demanding big pay rises. The fact that pay rises are running well behind inflation virtually everywhere suggests consumer spending - and economic growth - are going to be more subdued than in 2021.

As the war in Ukraine wears on, our new World Refugee Day research finds 78% agreeing that people should be able to take refuge in other countries, including their own, to escape war or persecution. Attitudes have become more favourable since last year, suggesting that the Ukraine crisis has increased public openness to refugees and reversed some of the concerns generated by the pandemic. These latest findings underline why it is so important for us to always strive to understand people in all their complexities. It's a topic we explore in our new podcast, where we tackle the thorny issue of cognitive polyphasia. This is the fact that people use a number of different mental frameworks - sometimes conflicting - about the same thing simultaneously. For example, being worried about climate change and then booking a flight as usual for a holiday.

Talking about travel, our new Europ Assistance Holiday Barometer survey finds 72% of Europeans saying they are "really excited to travel", up 14 points on 2021 – and yes, more people *are* expecting to take a plane this year. But cost of living pressures are still not far from the surface. Concerns about prices have now replaced coronavirus as the main reason people give for not going away.

Meanwhile, our series of state of the nation reports on countries around the world continues. In our Consumers' Book of Pakistan, we present a guide to this often overlooked country of 230 million people, charting how its society and economy has changed over the last decade.

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

CONSUMER BOOK OF PAKISTAN

An all-in-one guide for marketers in Pakistan

To mark the 10th birthday of Ipsos in Pakistan, our Pakistan team has published the “Ipsos Consumer Book”. It highlights key shifts over time in the demographics and psychographics of the country.

WHAT WORRIES THE WORLD

Concern about inflation continues its steady rise

Our 27-country survey finds inflation is the number one worry globally for the third month in a row. Meanwhile, despite being the top global worry as recently as February 2022, Covid-19 is now in 10th place.

HOLIDAY BAROMETER 2022

Renewed interest in summer travel

The 21st edition of the Ipsos/Europ Assistance Holiday Barometer indicates a significant rebound in consumer intention to travel as concerns about Covid-19 decrease from last year.

WORLD REFUGEE DAY 2022

Global attitudes towards refugees

Our 28-country survey shows an increase in positivity towards refugees compared with 2021 findings. Globally, a majority support their country accepting refugees escaping war or violent conflict.

CONVERGENT COMMERCE ECOSYSTEMS

Integrating retail into consumers’ everyday lives

Shopping is no longer a place nor a linear journey, but a fluid set of activities across touchpoints and channels. We examine the growth of consumer, retailer, and brand commerce ecosystems.

DRIVING AUTHENTIC ENGAGEMENT IN LARGE ONLINE COMMUNITIES

We set out recommendations for achieving intimate consumer connections in communities with as many as 5,000 members and discuss the opportunities that this kind of engagement presents.

BEYOND THE HYPE

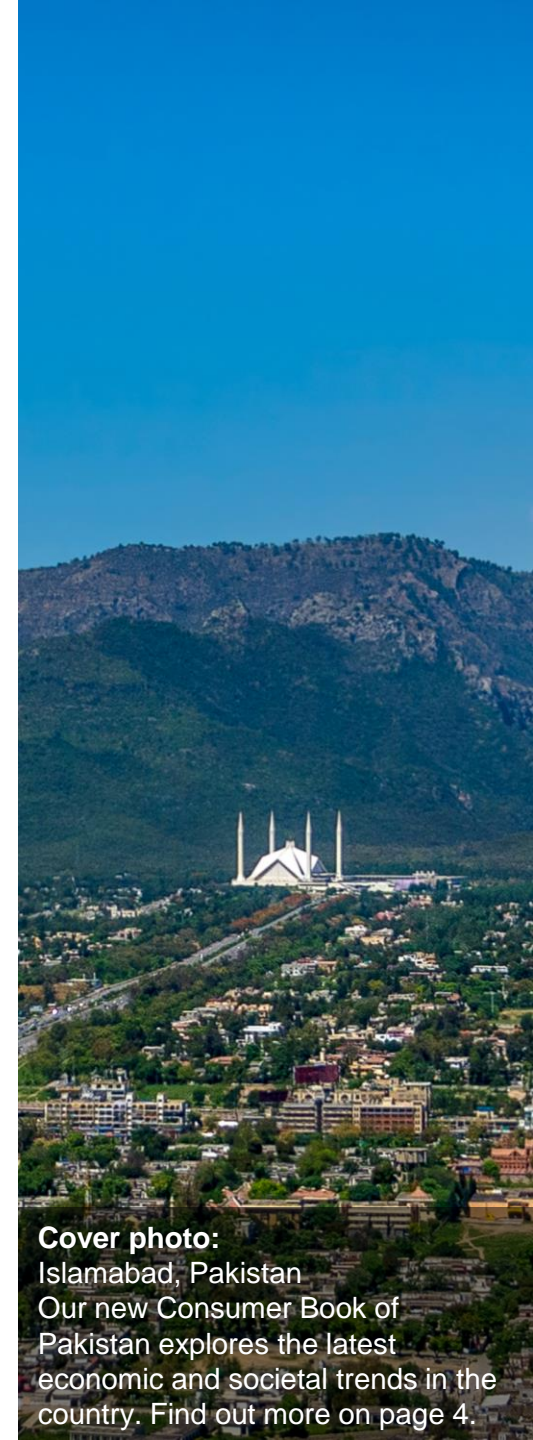
Innovation predictions in the era of machine learning

This paper presents the practical challenges involved in using artificial intelligence and machine learning to predict the potential success of new innovations.

SPOTLIGHT ON PODCASTS

The latest podcasts from around Ipsos

Listen to Global CEO Ben Page in conversation about “cognitive polyphasia”. Meanwhile, the authors of the “Future of Insights” white papers reflect on the transformation of organisations’ insights functions.



CONSUMER BOOK OF PAKISTAN

An all-in-one guide for marketers in Pakistan

In the last decade, Pakistan has witnessed numerous highs and lows. Having made the journey from feature phones to smartphones, dealing with economic, political, and social instabilities, and persevering through looming terrorism threats, energy crises, the country has most recently been dealing with a global pandemic.

The transformation in consumer behaviour and multimedia consumption during this period calls for a more advanced lens to analyse and synthesise these key trends. To mark the 10th birthday of Ipsos in Pakistan, our team has published the “Ipsos Consumer Book”. It highlights key shifts in the demographics and psychographics of this country of 230 million people, exploring behaviours towards 70+ categories, including food, home & personal care, durables, gadgets and services. The analysis includes the latest data when it comes to the reach and consumption frequency of different media

sources.

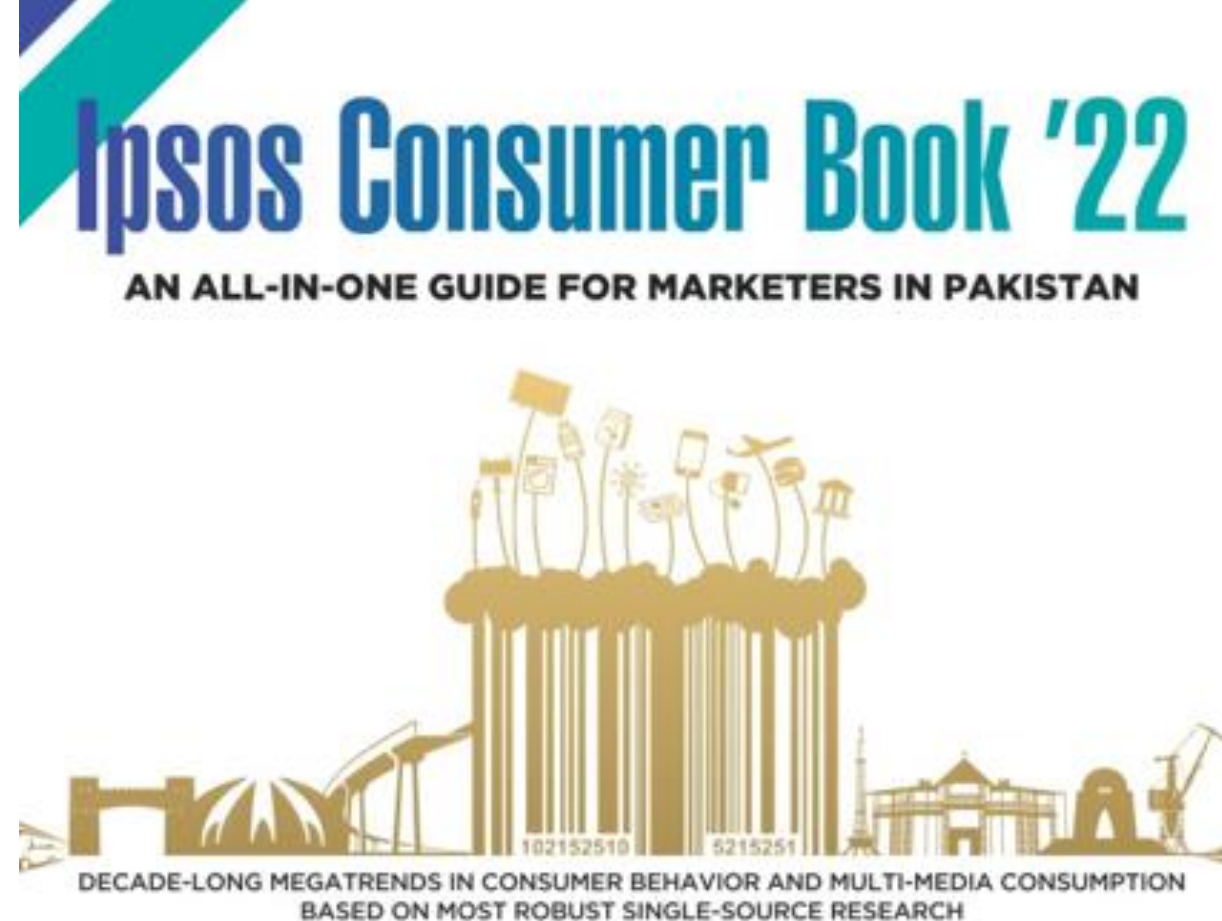
Among the findings:

- Rapid urbanisation and reduced agricultural activity have had an impact on Pakistan's traditional rural identity and character.
- Society is becoming more divided when it comes to mindsets. For example, Pakistani youth seem to aspire for modernity while preserving traditional cultural values.
- The uptake of 'healthier' categories and 'branded' products has increased, enabling local brands to strengthen and compete.
- An expanded leisure and retail sector is emerging, for example when it comes to outdoor dining, online shopping, ready-made clothing, and leisure travel.

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PAKISTANI YOUTH SEEM TO ASPIRE FOR MODERNITY WHILE PRESERVING TRADITIONAL CULTURAL VALUES.”



CONVERGENT COMMERCE ECOSYSTEMS

Integrating retail into consumers' everyday lives

In recent years we have seen the change from multichannel to omnichannel, and now to convergent commerce. Shopping is no longer a place nor a linear journey, but a fluid set of activities across touchpoints and channels.

Consumers now have entire ecosystems of go-to touchpoints, channels, brands and retailers. At the same time, internet and technology-based companies - and some retailers and brands - have developed centralised solution platforms and their own ecosystems, providing consumers with multiple interconnected, synergistic products and services enabling better integration into consumers' everyday lives.

Retailers and brands need to understand and integrate within consumers' commerce ecosystems and lives to develop their own seamless, personalised

ecosystems in order to become the customer's default go-to.

The advantages of an ecosystem for brands and retailers include expanded reach for more products and services, higher consumer loyalty, a higher return on advertising expenditure, and a stronger brand image established through product extensions and connections that use the mother brand and brand promise.

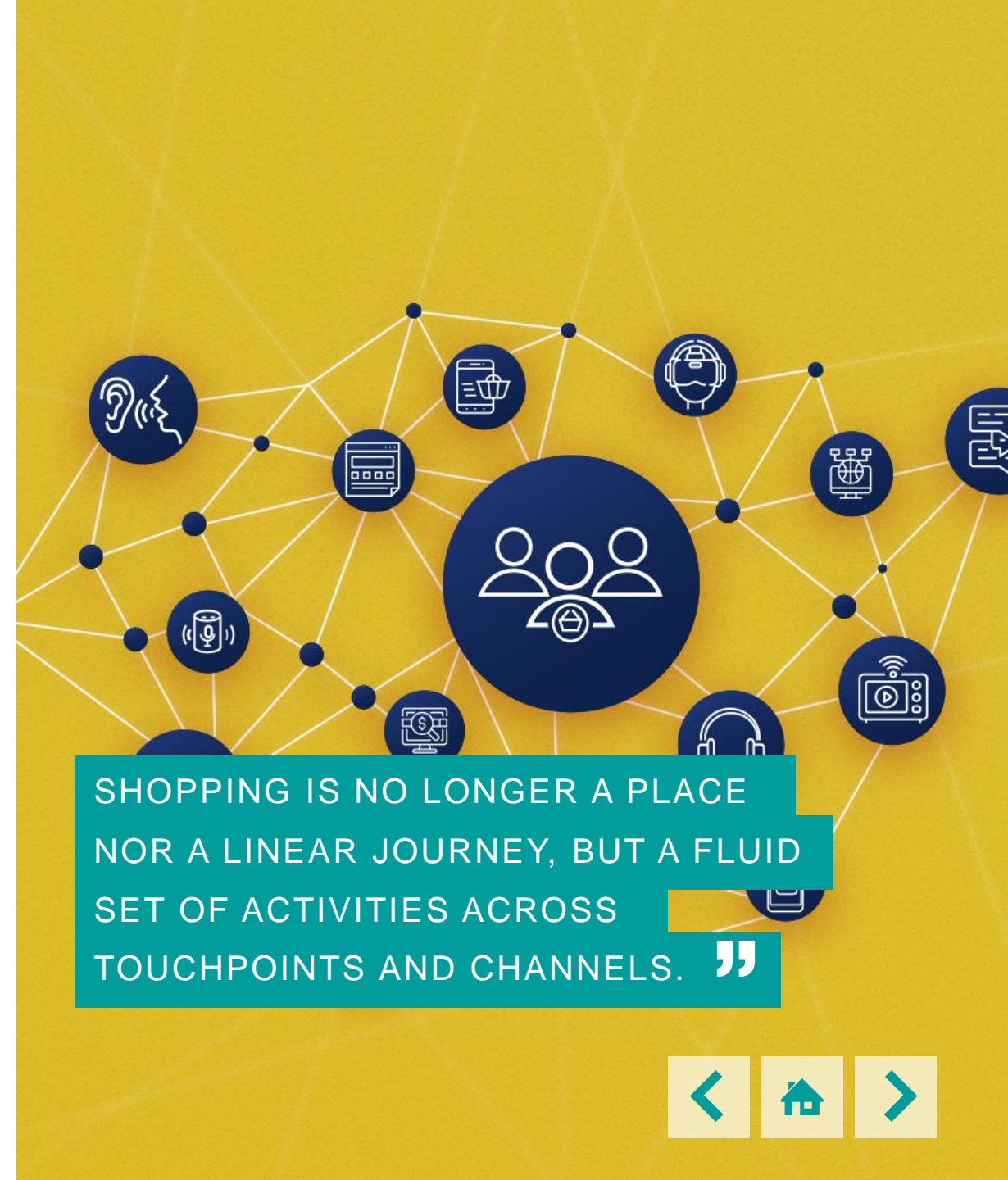
In *Beyond Omnichannel to Convergent Commerce Ecosystems* we explore the evolution of consumer, retailer and brand commerce ecosystems and the opportunities they provide. We also explore what growing ecosystems mean for businesses that are aiming to develop meaningful customer connections. You can also learn more by [watching the accompanying videos](#).

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SHOPPING IS NO LONGER A PLACE
NOR A LINEAR JOURNEY, BUT A FLUID
SET OF ACTIVITIES ACROSS
TOUCHPOINTS AND CHANNELS. ”



WHAT WORRIES THE WORLD

Concern about inflation continues its steady rise

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.

This month's edition finds concern about inflation continuing to rise, now worrying almost four in ten people globally (37%). It has now spent three consecutive months as the world's top worry and is the number one concern in 10 countries, three more than last month. Concern has increased most in Malaysia (+15) and in South Africa (+9).

Completing the top five global worries are poverty & social inequality (31%), unemployment (28%), crime & violence (27%), and financial/political corruption (24%).


Concern about Covid-19 has continued to decline, and despite being the top global

concern as recently as February 2022, this month it has fallen to 10th place. Only 12% of people globally list it as a top issue facing their country, the lowest score recorded since it was added to the survey in April 2020 when it registered 63%.

In stark contrast to the start of the year, when it was the top concern in 11 countries, this month for the first time since its introduction, Covid-19 is not a number one concern in any of the 27 countries surveyed.

Concern about military conflict between nations has also fallen, down three points from last month, now worrying 11% globally. However, three in 10 people list it as a top issue facing their country in Poland (33%) and Germany (31%).

Meanwhile, 64% of people believe their country is heading in the wrong direction, a proportion that rises to 92% in Peru.

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THIS MONTH, FOR THE FIRST TIME
SINCE ITS INTRODUCTION COVID-19 IS
NOT A NUMBER ONE CONCERN IN ANY OF
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DRIVING ENGAGEMENT IN LARGE ONLINE COMMUNITIES

Enabling qualitative insights at scale

Ipsos online communities offer the unique ability to move seamlessly between qual and quant research and address a range of learning objectives all in one place, with speed and simplicity.

Ipsos manages communities in a wide range of sizes, from as few as 50 members, to as many as 5,000 or more, because we know that one size does not fit all. A question we sometimes get is: “how is it possible to achieve intimate consumer connections, and ensure value to our clients, even in very large communities?”

In this paper, we set out three recommendations for driving authentic engagement and demonstrate how these have allowed us at Ipsos to build intimate connections in even very large online communities:

- **Recruit the right respondents.** Applying a quality filter during the screening process enables the selection of members who are expressive and articulate. This ensures a vibrant, dynamic and healthy space for rich, consumer-focused insights.
- **Tap into intrinsic motivations.** Moving beyond transactional relationships and developing an understanding of respondents’ intrinsic motivations is key to making community experiences more satisfying and encourages members to contribute meaningfully to community activities.
- **Apply analytical models.** Text analysis and modelling can be used to uncover deep insights and emotions, delivering empathy at scale.

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HOW IS IT POSSIBLE TO ACHIEVE
INTIMATE CONSUMER CONNECTIONS, AND
ENSURE VALUE TO OUR CLIENTS, EVEN
IN VERY LARGE COMMUNITIES? ”



HOLIDAY BAROMETER 2022

Renewed interest in summer travel

After two years of travel restrictions in response to the pandemic, international interest and intention to holiday abroad has rebounded, according to a 15-country survey conducted by Ipsos on behalf of Europ Assistance.

71% of Europeans say they intend to travel this summer, up 14 points compared with 2021 and higher than pre-pandemic levels. The largest year-on-year increases are in Spain (+20 to 78%), Germany (+19 to 61%), Belgium (+18 to 71%) and in the United Kingdom (+18 to 68%).

Covid-19 has had less of an impact on travellers' holiday plans than last year. In Europe, the US, Canada and Australia, fewer than one in four cite fear of coronavirus as the main reason why they decided not to go on a summer trip this year. Instead, affordability and intention to save money have become the main barriers.

In Thailand, fear of Covid-19 remains a main obstacle to summer travel, cited by 34% as the main reason why they've decided not to go on a trip. However, this is greatly reduced from last year, down 23 points, with a greater proportion of people saying that they chose not to go on holiday in order to save money (37%).

The seaside remains the most popular holiday destination for Europeans, Americans, Australians and Thais. However, the decrease in concern about Covid-19 has led to a boost in the popularity of city holidays among Americans (+9), Thais (+8) and Europeans (+5).

When will we be able to travel under "normal conditions" again and without the necessity of masks or tests? For four in 10 Poles, this kind of travel is already possible, but 16% of Australians and 15% of French people think this will never be possible again.

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71% OF EUROPEANS SAY THEY INTEND TO TRAVEL THIS SUMMER, UP 14 POINTS COMPARED WITH 2021 AND HIGHER THAN PRE-PANDEMIC LEVELS. ”



BEYOND THE HYPE

Innovation predictions in the era of machine learning

The use of artificial intelligence (AI) has been booming in recent years. Programs such as voice and facial recognition are embedded in cell phones, televisions, cars, and other consumer products (e.g., Amazon Alexa). Algorithms power robots to perform tasks and help us to choose gifts and to find places of interest.

Against this backdrop, we are also starting to see how AI will similarly revolutionise market research, leading to faster, cheaper, and better outcomes.


In this paper, we discuss how AI and machine learning (ML) can be applied to predict the success of new innovations.

Predictive models use statistics, machine learning and algorithms to make predictions about the likelihood of future outcomes based on historical and/or current data.

The nature of the data used for training predictive analytic models is vital. The advances made in AI/ML are in weak or narrow AI where algorithms solve single tasks. AI developed to play chess, for image recognition or for speech recognition are developed using very different sets of training data.

This narrowness also applies to models used for predicting innovation success. A model trained on successful innovations in the US should not be used to predict innovation success in another market, e.g. China, where different factors are at play.

This paper presents the practical challenges involved in training an AI/ML model to predict the potential success of new innovations and illustrates the predictive model that Ipsos has developed in order to address these challenges.

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A MODEL TRAINED ON SUCCESSFUL INNOVATIONS IN THE US SHOULD NOT BE USED TO PREDICT INNOVATION SUCCESS IN ANOTHER MARKET. ”



WORLD REFUGEE DAY 2022

Global attitudes towards refugees

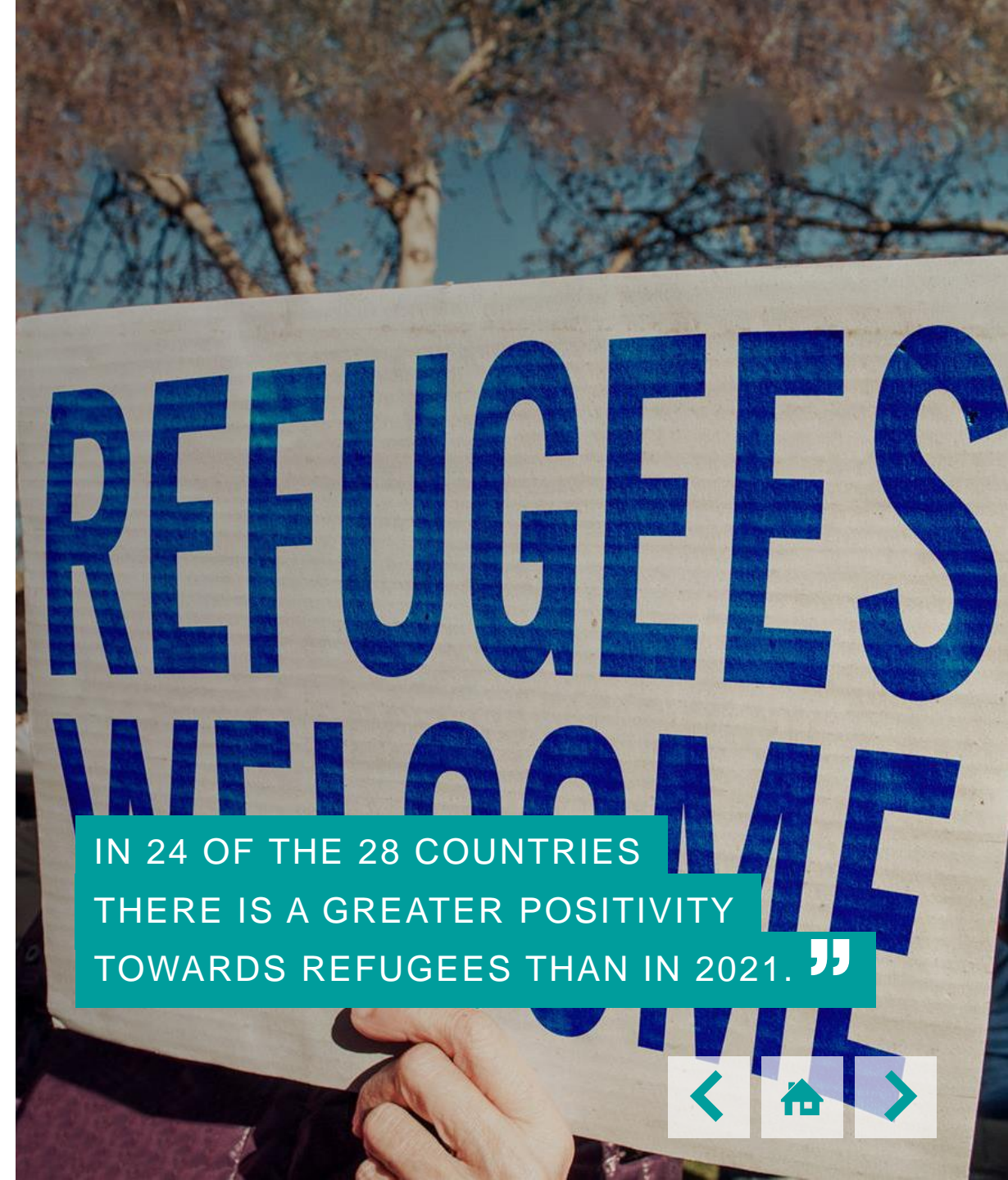
78% of people globally agree that people should be able to take refuge in other countries, including their own, to escape war or persecution, according to a 28-country survey.

In 24 of the 28 countries surveyed there is greater positivity towards refugees than in 2021, suggesting that the Ukraine crisis has created a halo effect around refugees. Turkey (-4) and Chile (-2) are notable exceptions to this.

Half of the people surveyed are sceptical that refugees are coming to their country to seek refuge (54%), believing instead that they are migrating for economic reasons, or to take advantage of their country's welfare system. While this is a significant proportion, rather fewer people believe this than in 2021 (62%). Seven in 10 people remain sceptical this year in Peru (74%), Turkey (73%), Chile (71%) and India (70%).

Across the countries surveyed, a majority support accepting refugees escaping war or a violent conflict (64%) or escaping natural disasters or the effects of climate change (55%). However, one in four oppose accepting those seeking refuge due to their political opinion (24%), their religion (23%) or their sexual orientation or gender identity (23%).

Globally, people tend to hold nuanced views around the advantages and disadvantages of allowing asylum seekers to work while waiting for a decision on their asylum claim. A global average of 60% believe that this would allow those seeking asylum to learn the local language and integrate, while 48% believe that giving asylum seekers the right to work could attract people without a genuine asylum claim to come to their country. Notably, 35% agree with both of these claims.

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IN 24 OF THE 28 COUNTRIES
THERE IS A GREATER POSITIVITY
TOWARDS REFUGEES THAN IN 2021. ”



SPOTLIGHT ON PODCASTS

The latest podcasts from around Ipsos



ONE MIND, MANY TRUTHS

People often hold conflicting ideas about the same thing, at the same time. What does this mean for market research?

The latest *Ipsos Views* podcast features Global CEO, Ben Page, exploring the term “cognitive polyphasia”: the ability to accommodate conflicting ideas about the same thing at the same time without experiencing cognitive dissonance. You can also [read the transcript](#).

[LISTEN HERE](#)



FUTURE OF INSIGHTS

Hear Chris Bonsi and Brigitte Biteau, two of the authors of the *Ipsos Views* "Future of Insights" white papers, in conversation about how the insight function is transforming and how our clients and partners can get more value from it.

You can read the three white papers [here](#).

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Getting it right: The Brand Strategy Podcast



GETTING IT RIGHT

The latest episode of Getting It Right: The Brand Strategy Podcast examines the role of social data and AI.

Hosts Douwe Rademaker and Chris Murphy are joined by Allen Bonde, CMO at Synthesio, an Ipsos Company, to discuss how social data, consumer intelligence and AI can help build brands. To learn more, read Allen's [recent paper on the topic](#).

[LISTEN HERE](#)

SHORTCUTS

Public Attitudes to Early Childhood

New research conducted by Ipsos UK on behalf of The Royal Foundation Centre for Early Childhood explores public perceptions of early childhood.

The key findings include:

- 91% agree that the early years are important in shaping a person's future life, but only 17% recognise the unique importance of the 0 – 5 period relative to other age brackets.
- Seven in 10 Britons think the early years should be more of a priority for society.
- Parents are more likely to seek support for their child's physical wellbeing than for their social and emotional development.

To support this cause, Ipsos UK's CEO, Kelly Beaver MBE, presented the findings of the research to influential Ministers and civil servants including Health Secretary Sajid Javid and Minister for Families Will Quince, alongside officials from the Health and Social Care and Education departments.

[READ MORE](#)

Trust in News 2022: Canada

The 2022 edition of the *Trust in News* report examines trust in the media, news sources consumed and the reaction to how the media has covered major news events in Canada.

This year's study finds that trust in traditional news media has continued to decline. 58% of Canadians now say that they trust traditional news media, down 8 points from 2021 and down 14 points from 2019. 12% do not trust traditional news media "at all".

The mainstream media's coverage of issues like inflation and the rising cost of living and the Russian invasion of Ukraine has had a positive impact on trust.

Almost four in 10 Canadians think the news is focusing too much on politics (37%) and on LGBTQ2S+ issues (also 37%), while one in three think that more coverage should be given to the economy and inflation (33%).

The study also covers perceptions of local news and diverse voices in the news media.

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Europeans and Responsible Driving

82% of European drivers admit to having taken their eyes off the road for more than 2 seconds, according to the 12th edition of the VINCI *Autoroutes Responsible Driving Barometer*.

The survey of 11 European countries examines the behaviours and perceptions of Europeans behind the wheel.

Europeans perceive inattention to be the main cause of fatal road accidents on the roads (51%), followed by driving under the influence of alcohol or narcotics and speeding (both 47%).

Unchanged from last year, 97% of Europeans mention at least one positive adjective when describing their own driving behaviour, while 79% mention at least one negative adjective when describing the driving behaviours of others.

The survey also covers dangerous driving behaviour and electric vehicles.

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POLL DIGEST

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

NORWAY: 46% of people are 'very' or 'quite' satisfied with their appearance, a proportion which has fallen over the past ten years.

US: 55% of Americans believe that abortion should be legal, 29% in most cases and 26% in all cases.

SOUTH AFRICA: Only one in three adults agree that all South Africans have equal rights.

MALAYSIA: 46% of people have made a purchase on an e-commerce platform in the past six months.

UK: Nearly half of Britons think that Brexit has made their daily lives worse (45%), a third say that it has made little difference (34%).

CZECH REPUBLIC: Almost six out of ten customers would pay extra for a sustainable or socially responsible product.

NEW ZEALAND: 56% of New Zealanders rate inflation and the cost of living as one of the top three issues facing the country today.

PAKISTAN: Only one in five people agree that raising fuel prices is inevitable and good for the country.

SINGAPORE: 45% of people say they are more accepting of same-sex relationships than they were three years ago.

TURKEY: Only 14% of renters say they would find a home within their budget if they were forced to move today.

NETHERLANDS: Just one in three doctors expect digitalisation to lead to less waiting time in the waiting room for the patient.

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.

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