

IPSOS UPDATE

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

September 2022

IPSOS UPDATE SEPTEMBER 2022

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

Governments and businesses continue to grapple with a dynamically uncertain environment, and consumer sentiment is very clearly on a downward path, with six of the world's largest economies – the US, Japan, Germany, UK, France and Italy - recording their lowest economic confidence levels in more than a year.

Central banks' forecasts on inflation are being revised upwards weekly and our new *Global Inflation Monitor* shows consumer anxiety in vivid detail. Across 28 countries, the median person is now using the phrase "just about getting by" to describe their current situation. They see little prospect of respite; 76% expect to see the cost of their food shopping increase over the coming six months. Global concern about inflation has now risen for 13 consecutive months, with poverty and unemployment occupying second and third places in the list of "problems facing my country". And while most European countries will get through what is coming, it is in Latin America, in Africa and in Asia that we may yet see some more dramatic effects in countries that rely heavily on both imported food and energy – events in Sri Lanka may be just the start.

With heatwaves around the world, this month we see double-digit increases in concern about climate change in Spain, the UK and France, each of which has experienced record-breaking temperatures this year. Our feature article shows 68% of people saying they are already seeing the effects of climate change in their country. And these observations are accompanied by support for

firm action: 8 in 10 say it's important that their country shifts away from fossil fuels to more climate-friendly and sustainable energy sources, although when it comes to *personal* action, support is more muted.

Who do we trust to take the lead in helping us all take the right steps to improve the environment? Ipsos' *Global Trustworthiness Index* reminds of the communications challenges our political leaders face: politicians have the dubious accolade of being "least trusted profession" in 24 out of 26 countries. Some of our leaders may feel the need to turn to their country's doctors, scientists and teachers to help get important messages across – they retain their positions as the three most trusted occupations.

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, we hope you have had a great summer break if you are in the northern hemisphere.

Ben Page, Ipsos CEO



IN THIS EDITION

GLOBAL INFLATION MONITOR

People expect prices to rise still further

Inflation is still the top concern among the public globally. This 28-country survey takes an in-depth look at the public's concerns, expectations, and perceptions of inflationary pressures.

SPOTLIGHT ON INFLATION IN THE US

The latest research during a 40-year inflationary high

We review some of the best polls, reports and thought leadership on the topic of inflation, from a country facing a level of inflation not seen for four decades.

WE'RE MORE THAN OUR SENSES

Taking product development to the next level

The principles of behavioural science have been insufficiently considered within product testing and development. We present a new framework for becoming more competitive in product design.

GLOBAL VIEWS ON ABORTION

A new 27-country study

Global support for the legal status of abortion in most, if not all, cases has slowly been increasing over the years. However, people in some countries are still firmly against the procedure.

WHAT WORRIES THE WORLD

Almost four in ten globally are worried about inflation

Inflation is the world's top concern for the fifth month in a row and has been increasing month-on-month for over a year now. Worry about climate change and Covid-19 has also grown since July.

MISFITS

How creativity in advertising sparks brand growth

Creativity is celebrated as the fuel of effective advertising, but it has a problem. *Misfits* argues that embracing the uncertainty of creativity when producing advertising is the most certain way to business returns.

WHO ARE THE LUXURY BUYERS?

The largest and most relevant segmentation to date

We present our new segmentation of the luxury buyers, based on the motivational and attitudinal responses from over 73,000 affluent individuals from over 40 countries.

GLOBAL TRUSTWORTHINESS INDEX 2022

Who does the world trust?

Doctors, scientists, and teachers are the three most-trusted professions for the fourth consecutive year. This international survey examines the country-level differences.



GLOBAL INFLATION MONITOR

People expect prices to rise still further

A new 28-country survey finds a widespread expectation that recent cost of living and inflationary pressures will continue.

Globally, more than seven in ten expect increases over the next six months in the cost of food shopping (76%), utilities (73%), other household shopping (72%) and motoring fuel (71%).

A global average of 30% say they are “just about getting by” financially, with 28% “doing alright”, and 19% “finding it quite difficult”. Three-quarters (75%) believe inflation is going to continue to rise over the next year, while two-fifths (40%) expect incomes to fall over the same period.

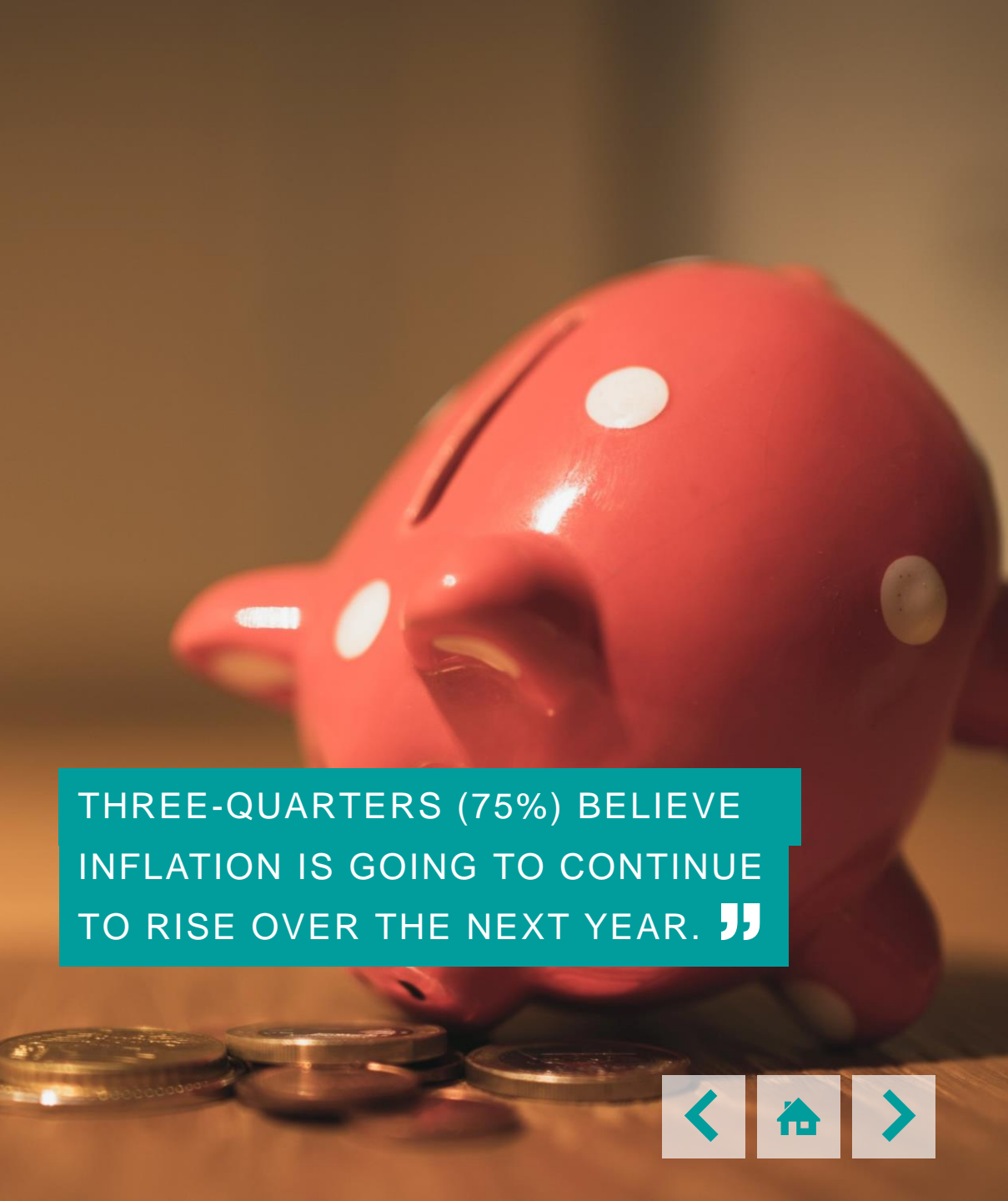
In response to the possibility of no longer being able to afford their normal lifestyle, people around the world are most likely to react by spending less on socialising (46%). This is followed by delaying large

purchases (44%) and spending less on holidays (37%).

A significant majority of the global public (76%) consider the state of the global economy to be the biggest contributor to rising prices.

Seven in ten attribute the recent rises to the Russian invasion of Ukraine and its consequences (72%) and the policies of their country’s government (70%).

Responses from Turkey paint a bleak picture of the local economic situation. A third (33%) are finding it “very” difficult financially - the highest among all countries surveyed - and 31% are finding it “quite” difficult. When asked about the cause of the rising cost of living, Turkey stands out: 86% of its public consider immigration into Turkey to be a key driver of recent price rises - the country’s most cited factor - compared to a global average of just 49%.

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THREE-QUARTERS (75%) BELIEVE INFLATION IS GOING TO CONTINUE TO RISE OVER THE NEXT YEAR. ”



WHAT WORRIES THE WORLD

Inflation is the top concern for the fifth month in a row

Almost four in ten (39%) globally say inflation is one of the biggest issues affecting their country, up from 13% a year ago. Rising prices is top of 18 worries for the fifth month in a row.

Despite worry about inflation already being at record levels in our *What Worries the World* survey, 16 countries saw a further rise in concern about the issue this month. The biggest increases were in Saudi Arabia (+26pp), Mexico (+10pp), and Poland (+8pp). It is the number one concern in 11 countries: Argentina, Australia, Canada, France, Germany, Great Britain, Poland, Saudi Arabia, South Korea, Turkey, and the US.

Concerns about poverty & social inequality (31%), unemployment (27%), crime & violence (26%), and financial/political corruption (25%) complete the top five global worries.

Climate change has moved up to seventh on our list of global concerns. A global average of 17% say it's a top issue in their country. With Europe being hit with record temperatures this summer, we have seen double-digit increases in worry in Spain (+12pp), Great Britain (+11pp), and France (+10pp). Germany has seen a 6pp rise month-on-month.

Concern for coronavirus has risen for the second month in a row, with 16% globally considering it a top issue, up 2pp. Of the top 13 countries worried about Covid-19, nine of them have seen a rise in concern. The biggest increases in August have been in the three most concerned countries: Japan (+22pp), South Korea (+18pp), and Australia (+11pp). One in two in Japan (50%) consider the pandemic a key worry, the first time a country has had a level of concern over 50% since March.



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SPOTLIGHT ON INFLATION IN THE US

The latest research during a 40-year inflationary high

In response to a level of inflation not seen in the US for four decades, Ipsos US has released a series of polls, reports and points of view on inflation: from how the American public are perceiving rising prices to how brands can adapt and thrive. Here we spotlight some of the key publications from the US this month.

One in three (31%) Americans say they've been unable to fill their car with fuel, while over a third (36%) say they've been unable to pay for groceries. Meanwhile, 71% of parents say they expect inflation to affect back-to-school shopping. Read more [here](#) about how inflation is and isn't changing consumer behaviour.

In this ethnography [video](#), households in five states share their feelings about the impact of inflation on food prices and how they are adapting their grocery choices and

behaviours as a result.

Inflation is at a 40-year high, so what does this mean for customer expectations of brands? Our team finds that customers are demanding more meaningful and personalised experiences as price rises. Customers feel nearly double the amount of empathy (81%) towards smaller businesses than larger businesses (47%). Find out more about expectations [here](#).

Impulse purchases in the US have seen a sudden shift with over half of consumers making fewer in-store impulse buys. [This paper](#) lays out the facts and provides tools for brands to leverage a new way of impulse buying in an era of inflation.

For more on the Ipsos US coverage of inflation, head to the dedicated web page, linked below.

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CUSTOMERS FEEL NEARLY DOUBLE (81%)
THE AMOUNT OF EMPATHY
TOWARDS SMALLER BUSINESSES
THAN LARGER BUSINESSES (47%). ”



MISFITS

How creativity in advertising sparks brand growth

Creativity is celebrated as the fuel of effective advertising, but it has a problem, *Misfits* argues. It is an enigma of artistic work, with a range of definitions, and its pursuit invites uncertainty, with corporate boardrooms demanding certain, stable returns.

This new Ipsos book aims to move beyond this impasse by proposing a paradox. That embracing the uncertainty of creativity when producing advertising is the most certain way to achieve strong business returns in the short and longer-term.

Misfits seeks to make the case for this paradox by outlining a definition and shared language of what creativity means in advertising, not only from industry opinion, but also from regular people, the audience that advertising needs to influence.

With this language in hand, the publication draws on evidence identifying the relationship between the core elements of creativity and advertising effects.

A meta-analysis of thousands of ads, identifies the presence of creativity in advertising experiences and how they relate to end brand effects, framed in the *Misfits* of the world, to understand how thinking differently and not fitting in can lead to more effective business outcomes.

This publication looks at what misfits, like David Bowie, Zelda, and Star Wars, can teach us about creativity. With the addition of data-fuelled observations, it looks to explore what creativity really means in advertising and the role it plays in delivering end business effects.

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CREATIVITY IS CELEBRATED
AS THE FUEL OF EFFECTIVE
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WE'RE MORE THAN OUR SENSES

Taking product development to the next level

Product testing has too often been limited to focusing on the product's characteristics that are just connected to our senses. Which doesn't always provide accurate market predictions for success. This is where behavioural science comes into play.

Behavioural science shows that by testing a product not only with sensory cues but also with category beliefs or expectations and within the broader context, brands can deliver products that encompass the total product experience. This paper introduces a **product testing-centred framework** that provides an understanding of product testing processes and results.

For the best results, it's important to understand the three forces that influence how a consumer experiences a product:

- The **sensory** inputs we get from

using a product (taste, touch, smell, appearance, and sound). These can be very influential to our beliefs and can impact the final evaluation.

- The **knowledge** we have of a product (e.g., branding, categories, or ingredients). A consumer's knowledge of a product or category can modify the sensory input from products.
- The **context** in which a product is used. This may make some needs more important than others and influence evaluation.

Once a consumer experiences the three forces, they can be encouraged to break from the status quo and purchase a new product. Ideally, these forces are addressed by teams simultaneously, resulting in a holistic product development, and testing approach.

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THE TOTAL PRODUCT EXPERIENCE
IS DRIVEN BY MORE THAN JUST
OUR SENSORY SIGNALS.”



WHO ARE THE LUXURY BUYERS?

The largest and most relevant segmentation to date

In order to better understand luxury consumers, Ipsos has developed the largest and most relevant segmentation of luxury purchases to date.

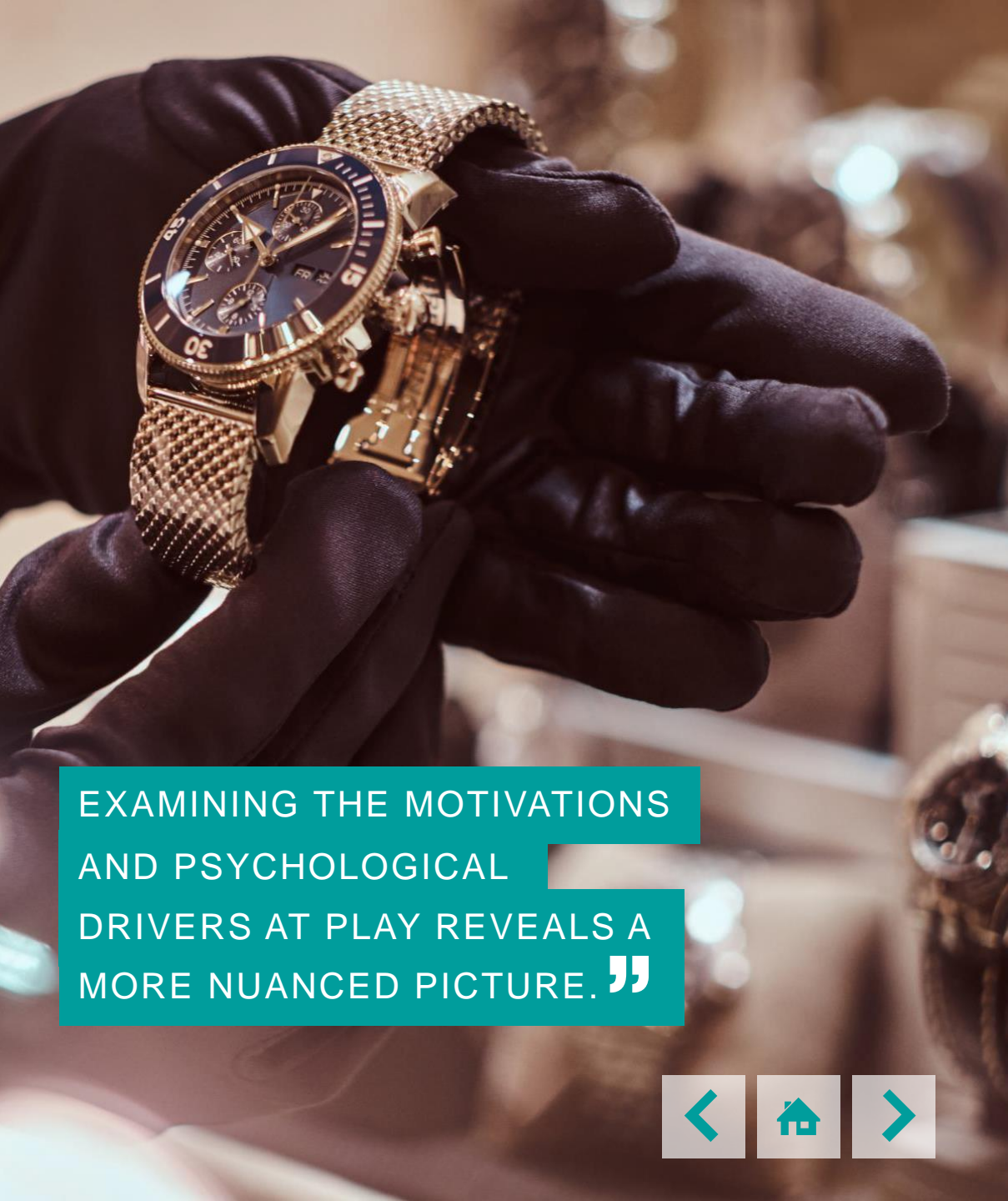
Luxury brands find themselves in a complex landscape of online and offline marketing funnels, cross-platform advertising, influencer marketing, and even VR buying experiences. In a world where whatever you want is just a few clicks away, it is more important than ever for advertisers to tailor their brand messages and advertising according to the wants and needs of their target audience.

Traditionally, luxury segmentations have not gone beyond economic and demographic segments. But examining the motivations and psychological drivers at play reveals a more nuanced picture.

The Ipsos *Global Affluent Survey* provided us with a database of over 73,000 affluent individuals from over 40 countries. Examining their motivations and attitudes towards luxury goods revealed six segments.

From the **Fashionistas**, spontaneous and impulsive trendsetters who buy luxury to show off, to the **Classics**, who like to purchase timeless pieces from brands with heritage, a good reputation and a story, each segment is driven by different factors.

This segmentation helps brands understand the motivations driving their target audience, how communications should be adapted for each segment and explores the types of media best for reaching them.

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EXAMINING THE MOTIVATIONS
AND PSYCHOLOGICAL
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GLOBAL VIEWS ON ABORTION

A new 27-country study

Abortion is a sensitive subject no matter where you are in the world. This has been particularly pertinent in the US after the overturning of *Roe v Wade*. What has Ipsos' in-depth 27 country survey found?

On average, three-fifths (59%) of those surveyed across 27 countries say abortion should be legal in all or most cases, with 26% saying it should be illegal in all or most cases. Only in Colombia, India, Malaysia, and Peru is support for the legal status of abortion weaker than its opposition.

Opinions vary depending on circumstances. A global average of 80% think abortion should be legal if the pregnancy threatens the woman's life or health, 76% if the pregnancy is the result of rape, and 67% if the baby is likely to be born with disabilities or health problems. If the pregnancy is within the first six weeks, 62% agree abortion should be legal but at 20 weeks, consensus drops

to 27%. Disapproval of the legal status of abortion at 20 weeks rises to 75% in Peru.

Looking at demographics we find that, on average, support for abortion in all or most cases is higher among women than men, and among those with a university-level education compared to those without.

The suggestion of punishment for illegal abortions produces some interesting results, with nearly a third (32%) on average saying the woman should be penalised. There is stronger support for penalising the person who performs the procedure (44%) and for someone who helps to arrange it (42%).

A gender gap emerges here too, with support for penalisation higher among men than among women.

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ONLY IN COLOMBIA, INDIA, MALAYSIA
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LEGAL STATUS OF ABORTION
WEAKER THAN ITS OPPOSITION.”



GLOBAL TRUSTWORTHINESS INDEX 2022

Who does the world trust?

The 2022 edition of the *Ipsos Global Trustworthiness Index* highlights the perceptions of professions across 28 countries. This year, doctors emerge as the most trustworthy (59%), followed by scientists at 57%, and then teachers at just over half (52%).

Towards the bottom of list we find that, on average globally, just over one in ten (12%) people trust politicians in general, making them the least trustworthy. In the same vein, government ministers are ranked second lowest at 16%. Advertising executives aren't far behind, with fewer than one in five considering them trustworthy (18%).

Both doctors and scientists saw boosts in trust in 2021, reaching 64% and 61%, respectively. However, these numbers have declined over the year with doctors

falling to 59% (down six points) and scientists dropping to 57% (down eight points).

At a country level we see some startling figures for doctors. Trust in doctors has fallen by 21 percentage points in Hungary, since last year. Similarly, trust has fallen by 16 points in Poland. There are now four countries where less than half of the public consider doctors to be trustworthy: South Korea, Japan, Hungary and Poland. In 2021 this was true in only one country, South Korea.

Teachers remain firmly in third position for the fourth year, with China giving them the highest rating (66%) followed by Brazil (64%) and Chile (63%). Japan, South Korea, and Poland are again the least trusting (17%, 31%, and 34%).

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THERE ARE NOW FOUR COUNTRIES WHERE LESS THAN HALF OF THE PUBLIC CONSIDER DOCTORS TO BE TRUSTWORTHY. ”



SHORTCUTS

Pride in Britain

Ipsos' political researchers have been finding out what makes this tiny island nation proud. To not much surprise, the National Health Service (NHS) sits firmly at number one, with 55% saying it makes them proud. This, however, is down seven percentage points from April 2022.

Britain's history is second, with a third (33%) being proud. This is particularly pertinent with middle to older-aged people, Conservatives and Leave voters.

The Royal Family sits third with 28% - down three points from April – and the armed forces at 24%. Culture & arts and democracy have both seen increases of three and two points, respectively.

Brits' positive traits were also ranked, humour standing the test of time at 47%. Good manners is at 38% followed by a belief that Britain is a friendly nation at 33%.

Conversely, 41% think the nation's ignorance of other cultures is its number one worst characteristic.

[READ MORE](#)

Payment Methods in Peru

In order to understand the dynamics of payment behaviours, Ipsos in Peru conducted research into the attitudes of Peruvians towards different means of making payments.

Cash is the most-used payment option in Peru, with a majority using it as their sole method of making purchases or payments (56%), and 89% using it among other payment options.

A third of Peruvians pay using a debit card (33%), most commonly because it allows them to pay more quickly (75%) and because they want to use less cash (68%).

Only 8% of people say they use mobile payments, doing so because it is more convenient. However, 56% of all respondents say they are willing to use mobile payments in the coming months.

The research shows an opportunity for the growth of other payment options, with 68% saying they would use more options if they knew how to use them correctly.

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Data Dive: Climate Change

With record-breaking heat waves emerging across the world, Ipsos' global polling asks for the public's views on the 'climate emergency', who is responsible and what should be done now.

From 31 countries surveyed, concern is spreading with 68% of those surveyed saying they are worried about the impacts of climate change being seen in their country.

Following this, 84% surveyed across 30 countries said it's very, or somewhat, important that their country transitions from fossil fuels to greener and sustainable energy sources.

70% of people, on average, agree individuals should be acting now or they'll be failing future generations; similarly, 68% agree that if businesses and governments don't act now they'll be failing customers and citizens.

However, when asked about changing their meat-eating habits, only around two-fifths (41%) say they would eat less meat or replace it with an alternative.

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POLL DIGEST

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

NORWAY: Close to one in two Norwegians (47%) do some form of exercise at least three days a week.

US: Only one in five Americans say that the abortion issue would not affect their choice of candidate in the upcoming midterm elections.

CZECH REPUBLIC: 58% of people think that schools pay little or no attention to finance in their educational plans.

IRELAND: Eight in ten Irish adults listen to the radio every weekday, with an average listening time of four hours a day.

UK: Half of Britons are in favour of a general election being held this year, once the new Prime Minister is in place (51%).

THAILAND: 95% of Thais say they have been impacted by rising prices, including 55% who say they have been “very” impacted.

HUNGARY: Making living environments greener is seen as the first and most important task to improve air quality in cities.

NETHERLANDS: 46% of Dutch people think that events like Pride Amsterdam are necessary to combat LGBT discrimination.

NETHERLANDS: 18% of Dutch people on low incomes who are reducing their spending due to inflation, do so by skipping meals.

DENMARK: Healthcare (36%) and climate change (34%) are seen as the biggest overall concerns in Denmark.

AUSTRIA: One in ten air travellers have been affected by unexpected flight cancellations over the last three months.

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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