

# IPSOS UPDATE

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

October 2022

Ipsos Knowledge Centre

GAME CHANGERS



# IPSOS UPDATE OCTOBER 2022

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

Today's dynamic feels distinctly daunting, with governments, businesses and individuals grappling with a series of seemingly insoluble questions. Seven months in, the political and economic repercussions of the war in Ukraine are all too apparent, wherever we are in the world. Concerns about cost of living have now topped our *What Worries the World* league table for six months in a row. And climate change is rising up the agenda, at least in Western Europe. In the wake of summer heatwaves, 34% of French people say it's a major issue facing their country - the highest level we have recorded anywhere this year. At least health services around the world are, in the main, felt to be coping relatively well, even if 61% of people describe their country's system as "overstretched".

How can businesses weather the storm, and find the courage to grow? This month's selection provides some ideas and inspiration. We feature new analysis on how advertising can cut through a "sea of sameness" to communicate the sustainable attributes of your product or service. Meanwhile, our "Inside Inflation" series stresses the importance of building on those pre-existing memories to communicate both affordability and that unique brand value.

The cover of this month's edition features Indonesia, the subject of a special Ipsos Flair report profiling the world's 4<sup>th</sup>

most populated country. Indonesia will be hosting the world's leaders next month, as they gather in Bali for the G20 Summit. As our team notes, the motto of this year's G20 theme of "recover together, recover stronger" could also be applied to Indonesia itself, as could the three issues it is prioritising for its 2022 Presidency: creating a more resilient and inclusive global health system, digital transformation, and driving a transition to clean, sustainable energy.

The death of Queen Elizabeth II on 8 September, after 70 years on the throne, marked the end of an era in my home country, with the mourning period and funeral followed so closely by the world's media. Our review of the opinion polling evidence includes a special look at Canada, where a consensus about the country's future relationship with the British royal family is yet to emerge.

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](mailto:IKC@ipsos.com) with any comments or ideas.

**Ben Page, Ipsos CEO**



# IN THIS EDITION

## GLOBAL HEALTH SERVICE MONITOR 2022

Mental health overtakes cancer as a top concern

Our 34-country study examines the global public's perceptions of the largest healthcare problems in their country, as well as how able their healthcare service is to tackle them.

## SUSTAINABILITY AND ADVERTISING

Friends or foes?

Based on an analysis of 200 ads containing some sustainability messaging, we identify five key takeaways for creating successful, effective sustainability advertising.

## FLAIR INDONESIA

Connecting the dots

*Flair Indonesia* reflects on how the country has emerged from the Covid-19 pandemic, exploring how digitalisation and local brands have dominated Indonesian consumer preferences.

## SPOTLIGHT ON THE BRITISH ROYAL FAMILY

The latest polling following the death of Elizabeth II

We share recent polling on British attitudes towards King Charles III, the conflicted attitudes of Canadians towards the British monarchy, and look back on royal polling over the course of Elizabeth II's reign.

## WHAT WORRIES THE WORLD?

Worry about inflation rises for 14th consecutive month

Our 29-country tracker finds that the level of concern about inflation is now double the level it was at the start of this year. Meanwhile, concern about coronavirus drops to its joint-lowest level.

## CULTURAL INTELLIGENCE

How brands and communication travel across cultures

What do brands need to understand in order for their marketing efforts to successfully traverse international borders? We share our analysis of the dimensions of culture that are critical to take into account.

## GEN Z AND THE METAVERSE

The virtual frontier

In partnership with Nokia, we surveyed Gen Z participants in Brazil, Korea, UAE, the UK, and the US - via the metaverse - to understand the role they want to play in its future.

## INSIDE INFLATION: WHAT COMMS NEXT?

Brand communication during the cost-of-living crisis

In a new video series 'Inside Inflation', Ipsos experts draw on learnings from the pandemic to investigate how brands can communicate with consumers during a time of great strain.



**Cover photo:**  
Selamat Datang Monument,  
Jakarta, Indonesia.  
Read more about how Indonesia  
emerged from the Covid-19  
pandemic on [page 8](#).

# GLOBAL HEALTH SERVICE MONITOR 2022

## Mental health overtakes cancer as a top concern

The *Ipsos Global Health Service Monitor* is an annual survey that explores what the global public think are the biggest health challenges today and how well-equipped their country's healthcare services are to tackle them. This year we expanded the number of countries surveyed to 34.

For the third consecutive year, coronavirus remains the biggest health concern facing people around the world (47%), down from 70% in 2021. Japan have it as their highest concern (mentioned by 73%), followed by Peru (66%).

Since 2021, there has been a five point increase in concern about mental health (36%), making it the second largest health concern globally. For the first time, it is ahead of cancer which is now third (on 34%). Sweden (63%), Chile (62%) and Ireland (58%) are the countries most likely to be worried about mental health.

Cancer remains a prominent concern globally, but concern is particularly high in Portugal where 79% list it as one of the biggest health problems facing their country today. The next most concerned country about cancer is Belgium, where 59% cite it as a main healthcare concern.

Public perceptions of healthcare services are still holding up well: half rate their country's services positively, and 53% believe they will receive the best treatment.

Despite this positivity though, only a third (a global country average of 33%) think their healthcare service will improve over the coming years and there is agreement that systems are overstretched (61%). Access to treatment and a lack of staff are considered the biggest challenges (both 42%).

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THERE HAS BEEN A FIVE POINT INCREASE IN CONCERN ABOUT MENTAL HEALTH (36%), MAKING IT THE SECOND LARGEST HEALTH CONCERN GLOBALLY. ”



# WHAT WORRIES THE WORLD

## Worry about inflation rises for 14<sup>th</sup> consecutive month

Four in ten (40%) globally say inflation is one of the biggest issues affecting their country, double the level of worry at the start of this year. Concern about inflation has now risen for 14 months in a row and it has now been the top global concern for six months.

This time last year, only 14% globally considered inflation a top concern. Now, more than one in two people select it as a top worry in seven countries. Concern has risen most since last month in Great Britain (+12pp) and Germany (+10) and inflation is now the number one concern in 12 out of 29 countries surveyed.

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

Climate change remains the seventh largest global worry (18%, +1pp on last

month). France is now the most concerned country globally, with over a third (34%) choosing it as an issue. Concern in France is up 2pp on August and up 12pp on July's figure. 34% is the highest level of concern for climate change we've seen for any country in 2022. It is also the first time a country other than Australia or Germany has been the most concerned about climate change since October 2021.

Concern about coronavirus has dropped again, down 4pp on last month's score and equalling the lowest level of concern recorded since Covid-19 was added to the survey in 2020. Great Britain and France have recorded their lowest ever scores for concern about the virus (both 7%).

Meanwhile, two in three people (67%) describe the economic situation in their country as "bad", rising to 93% in Argentina and 89% in South Korea.

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MORE THAN ONE IN TWO PEOPLE  
SELECT INFLATION AS A TOP WORRY  
IN SEVEN COUNTRIES. ”



# SUSTAINABILITY AND ADVERTISING

## Friends or foes?

Are sustainability and advertising fundamentally irreconcilable? Can brands ever balance growing their sales and market share with supporting a more sustainable future? How can brands find a sustainability message they can own?

These are some of the questions we answer in our most recent *Ipsos Views* paper. Using our experience of evaluating thousands of ads each year, we analysed what works (and what doesn't) when it comes to sustainability advertising.

We identify **five key takeaways** that we believe can help brands successfully change people's behaviour, while also helping to grow their sales and market share.

1. **Break through a sea of sameness:** Simply adding a sustainability claim

to your ads does not make them work better for your brand; ads must be executed in the right way in order to stand out.

2. **It is all about balance:** Ads that blend brand and sustainability messages perform much better; do not forget to include brand benefit messages in your ads.
3. **Make it easy:** Ads that offer a solution, pulling the consumer into a sustainable behaviour by making it easy for them, are the most effective.
4. **Face the issues:** Ads that start with the problem of sustainability head on outperform other ads in terms of effectiveness.
5. **Walk the talk:** Make sure that the claims in your ads are credible and that you are following through on them.

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ADS THAT START WITH THE PROBLEM OF SUSTAINABILITY HEAD-ON OUTPERFORM OTHER ADS IN TERMS OF EFFECTIVENESS. ”



# CULTURAL INTELLIGENCE

## How brands and communication travel across cultures

How can an advert perform well in one country, but prove ineffective in another? Why would a global campaign from a US brand resonate in France, but miss the mark in the UK and Brazil? And what do brands need to understand in order for their marketing efforts to successfully traverse international borders?

There is a simple answer to these questions and to the challenge of brand communication travel: cultures.

Ipsos' Creative Excellence team conducted a meta-analysis of more than 1,200 ads that had been tested in at least two countries. Each ad's performance was compared to identify whether it performed identically in the two countries or not. The results? Only 31% of ads reached the same level of performance.

Ipsos studied various empirical models to identify the critical dimensions of culture

that offer the best chance of successful cultural transferability.

This paper unpacks our analysis to provide brands and marketers with:

- A **methodology** to better understand cultural transferability.
- **Frameworks and case studies** for understanding the cultural nuances of gender.
- **Frameworks and case studies** for understanding cultural transferability for women specifically, using Ipsos' 'Being Woman' study.
- **Practical advice** for activating femininity programmes in different cultures.
- **The Empathy Passport:** How brands can combine art, science, curation and ethnography to boost their cross-border marketing.

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THERE IS A SIMPLE ANSWER  
TO THE CHALLENGE OF  
BRAND AND COMMUNICATION  
TRAVEL: CULTURES. ”

# FLAIR INDONESIA

## Connecting the dots

Last year, in the midst of the Covid-19 crisis, we made a risky bet by titling the 2021 edition of Ipsos Flair in Indonesia: “Back to Growth”. And indeed, Indonesia is the ASEAN country that is doing the best, with growth of +3.7%. Meanwhile, the public deficit is lower than expected (4.6% of GDP vs. 5.7% in 2021).

On 1 December 2021, Indonesia took over the one-year presidency of the G20 and will host the G20 Summit in Bali in November 2022. The motto of the Indonesian presidency could apply to Indonesia itself - “Recover Together, Recover Stronger” - as could the three issues it is prioritising for its 2022 presidency: creating a more resilient and inclusive global health system; digital transformation; and driving a transition to clean, sustainable energy.

In the 2022 edition of *Flair Indonesia*, our experts delve into income disparities, regional disparities, and disparities in

access to technology, as well as other topics and points of tension.

However, they also examine how the country is narrowing these disparities by considering and adopting everything that accelerates development, strengthens regional and international influence, and promotes attractiveness for tourists and investors.

How is it possible to create growth in a context where inflation generates uncertainty, where environmental problems disrupt the agri-food chain, or where geopolitical tensions impact trade?

This edition of Ipsos Flair reflects how Indonesia emerged from the Covid-19 pandemic, how Indonesia anticipated inflation and the energy crisis, and how digitalisation and local brands began to dominate Indonesian consumer preferences.

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THE MOTTO OF THE INDONESIAN G20 PRESIDENCY COULD APPLY TO INDONESIA ITSELF – “RECOVER TOGETHER, RECOVER STRONGER”.



# GEN Z AND THE METAVERSE

## The virtual frontier

Born between 1996 and 2012, Generation Z are often defined not just by their values or societal context, but by the role of technology in their lives - it has shaped the ways they connect, communicate, and view the world - unlike any generation which came before, making them the first true digital natives.

As a generation they are coming of age, joining the workforce, and living through their most formative years, This, as well as their status as digital natives, primes them for a new technological leap forward: the metaverse, which many observers feel has the potential to be as disruptive to the ways we interact with people (and the world) as the internet was before it.

While there is not yet a standard definition of the metaverse, it can be identified by three key features:

- A persistent, immersive simulated world.

- It is experienced in the first-person or third person by large groups of simultaneous users.
- These users must share a strong sense of mutual presence - users are aware of each other, interact, and react to other users' actions.

In order to understand how Gen Z currently experiences the metaverse and their hopes and expectations for the metaverse in the future, Ipsos partnered with Nokia and surveyed Gen Z participants from within the metaverse, completing all interviewer-administered fieldwork in a virtual environment.

This demonstrated that the Gen Z we spoke to are drawn to the metaverse for various reasons - virtual experiences, social connection, status and glory, or even the chance to invest in future technologies, but what can ultimately united them is a desire for stability and escape.

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THE GEN Z WE SPOKE TO ARE DRAWN TO THE METAVERSE FOR VARIOUS REASONS - VIRTUAL EXPERIENCES, SOCIAL CONNECTION, STATUS AND GLORY... ”



# SPOTLIGHT ON THE BRITISH ROYAL FAMILY

A round-up of Ipsos polling and research on the Royal Family following the death of Queen Elizabeth II

## BRITISH VIEWS ON KING CHARLES

The first polling of the British public since the death of Queen Elizabeth II finds that six in ten Britons (61%) expect King Charles III to do a good job as king, up 12pp from 49% earlier in June. Only 13% now expect he will do a bad job, a decrease of 7pp.

Almost one in two people (47%) think it would be worse for Britain in the future if the monarchy were abolished, up 5pp from June 2022. Only one in five Britons (22%) think Britain would be better in the future without a monarchy.

Since March 2022, there has been an increase in confidence that Britain will still have a monarch in 10 years' time, up 5pp to 80%. However, people are less confident that it will still exist 20 years from now (74%) or 50 years from now (56%).

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## CONFLICTED CANADIANS

Canadians are very much split on their opinions when it comes to their relationship with the British monarchy. Just over half (54%) agree that now the reign of Queen Elizabeth II has ended, Canada should end its formal ties to the British monarchy.

A majority agree that the constitutional monarchy helps to define Canadian identity (55%) and that Canada's relationship with the monarchy is useful because it helps to differentiate Canada from the United States (60%).

However, 63% agree that the King and Royal Family should not have any formal role in Canadian society as the Royals are simply celebrities and nothing more. And 57% agree that the monarchy is too linked to the history of colonialism and slavery to have a place in today's Canadian society.

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## QUEEN ELIZABETH II 1926-2022

Historically, we could only judge the popularity of the Monarchy by the size and enthusiasm of the crowds that greeted them on public occasions. Of course, big crowds can be deceptive – they say nothing about the people that have stayed at home.

However, since the first UK polls about support for the Monarchy were commissioned in the 1960s, we have seen consistently high support for the Queen and a belief that she was personally doing a good job in her role.

At its peak, support for the Queen was almost unanimous, with 90% of people in 2012 satisfied with how she was doing her job. Even among those who said that they would prefer to abolish the Monarchy, only a minority were dissatisfied with the Queen herself.

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# INSIDE INFLATION WHAT COMMS NEXT?

This new video series from Ipsos explores how brands can communicate during the cost of living crisis

With four in ten globally worried about rising prices, 'Inside Inflation: What Comms Next' investigates brand communication during this time of great strain for consumers.

Taking real world examples, our new video series looks at what strategies brands are using and what are the dos and don'ts to get it right.

The first episode in this series starts by looking back at the Covid pandemic, seeing what worked for brands and what consumers expected from them.

One of the key lessons from the coronavirus crisis was staying close to people. One brand who really highlighted this was Dove with its 'Courage is Beautiful' campaign, showcasing the power of empathy and supporting health

workers wearing masks at the height of pandemic.

Another example of this, but in a very different way, is Guinness with its #LookslikeGuinness campaign. To celebrate the reopening of the pubs and the ending of lockdowns in the UK, Guinness got people feeling nostalgic by showing objects from everyday life that looked like the iconic black and white pint.

These brands were successful because they developed campaigns that built upon their existing brand memories.

Turning to inflation, hosts Laurent Dumouchel and Aurélie Jacquemin find brands are playing defence with their communications. Find out more in 'Inside Inflation: What Comms Next?'

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## INSIDE INFLATION WHAT COMMS NEXT?

THESE BRANDS WERE SUCCESSFUL  
BECAUSE THEY DEVELOPED CAMPAIGNS  
THAT BUILT UPON THEIR EXISTING  
BRAND MEMORIES. ”



# SHORTCUTS

## Cybersecurity skills shortages

Ipsos in Jordan and Iraq partnered with the UK-Gulf Women in Cybersecurity Fellowship to research the cybersecurity skills shortages across the GCC.

The report provides a baseline understanding of the current state of cybersecurity in the GCC, highlighting the key approaches needed to enhance national efforts to address the gaps, particularly by prioritising skills training and developing capacity-building programs.

Three categories of skill shortages are identified: transferable soft skills, foundational technical skills, and specialised, technical skills.

The research also finds that women are underrepresented, making up 24% of the overall cybersecurity workforce in the GCC, suggesting that encouraging more women into the field could address this skills gap. A report from the UK earlier this year, found women similarly underrepresented, making up 22% of the UK cyber sector workforce. [Read more about the UK report here.](#)

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## Climate Change: Future expectations

A new 34-country survey by Ipsos in partnership with the World Economic Forum finds that one in three people (34%) say it is likely they and their families will be displaced from their home as a result of climate change in the next 25 years. Almost one in two say they expect this in Malaysia and Brazil (49%) but the highest scores are seen in India (65%) and Turkey (64%).

More than half surveyed (56%) say climate change has already had a severe effect where they live. This rises to three-quarters of people in Mexico (75%), Hungary and Turkey (both 74%). In contrast, only one in four Swedes (25%) have noticed severe effects of climate change.

When asked to look into the near future, the facts are even more startling: a global country average of 71% expect climate change to have a severe effect where they live over the next 10 years. This ranges from more than one in two people in Malaysia (52%) and China (55%) up to more than eight in ten in Portugal (88%), Mexico (86%) and Hungary (86%).

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## Ipsos CX Global Voices 2022

27% of CX professionals admit that the experiences their organizations are delivering to customers are generally worse than promised.

Hear from our global CX experts, as they unpick what's going on and what that might mean for you.

In this webinar, we share the results of our 2022 Ipsos research among 1,000+ CX professionals, from over 65 markets. We delve into:

- The current state of play, how that's changed and what the future holds;
- Levels of CX maturity - who's ahead of the curve and who's lagging
- CX challenges, including those relating to omnichannel delivery, data integration and the metaverse
- The top priorities for CX practitioners across the world - where there's still work to be done *and* the opportunities that lie ahead.

[WATCH THE RECORDING](#)



# POLL DIGEST

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

**NORWAY:** Almost 7 in 10 people (68%) believe that drug addicts need help instead of punishment.

**PAKISTAN:** Only 7% of Pakistanis believe that September's floods were caused by climate change.

**TURKEY:** While 93% of Turks use the internet, 66% agree that the internet makes people asocial, distancing them from others.

**FRANCE:** 65% of people know at least one person facing poverty, an increase of 10 percentage points within one year.

**SINGAPORE:** 52% of Singaporeans say that contracting Covid-19 changed their outlook on life.

**ITALY:** 40% of Italians think that the Russia-Ukraine conflict will not end before the end of the year.

**UK:** Only 8% of 15-16 year-olds think they will not be affected by climate change in their lifetime.

**GERMANY:** 61% of Germans are in favour of the legalisation of cannabis, with support highest among 18-39-year-olds.

**CANADA:** 58% agree that that Justin Trudeau should hold a referendum on the future of the monarchy in Canada.

**PERU:** 12% say they have given a bribe, gift or improper payment in the last 12 months, which represents over 2 million people.

**AUSTRIA:** More than one in two Austrians (58%) think the war in Ukraine is a main factor contributing to the high inflation rate.

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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