

# IPSOS UPDATE

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

January 2023

Ipsos Knowledge Centre



GAME CHANGERS





# IPSOS UPDATE JANUARY 2023

Our round-up of research and thinking from Ipsos teams around the world.

Overall the year of 2022 confirmed beliefs that the 2020s will be a decade of crises, many of which feed back on each other to create a *polycrisis*. Inflation, geo-politics and the energy crisis have all surprised experts and governments alike over the last 18 months. As we go into 2023, I would warn against two things; perceptual lag and optimism bias.

While inflation may now have peaked, its effects will continue rippling through the economy, affecting consumers in a cumulative manner for some time. As a result, even as the underlying economy could improve in the second half of 2023, consumer confidence may remain very low, with perceptions lagging behind falling inflation, making western countries' politics stormy.

In 2021/22 consumers have consistently suffered from optimism bias in terms of how much inflation will affect their disposable income, and as a result the longer-than-expected duration of our current period of rising prices, and the transition to a permanently higher inflation world after the low inflation of 2008-2020 has the potential for more disruption.

Nevertheless, it is worth remembering some positives: overall while democracy remains under pressure, our Broken-System Index shows populism's impact is falling globally. We can see rising confidence in democracy in countries that had elections in 2022. China has abandoned their zero-Covid strategy, and although it may

face a stop-go unlock in 2023, it may also experience an economic surge as a curtailed spending rises. America remains incredibly resilient.

On climate change, we are late and slow on carbon reduction, but have made dramatic progress since 2010 – and people globally are ready to see business and governments do more. However, we can take nothing for granted and our new 30-country study finds that despite the growing presence of extreme weather events in the global public consciousness, climate scepticism has been consistently growing over the past three years.

Despite the huge challenges ahead, it is better to be alive in 2023 than 1973 in nearly every region of the world in terms of the overall level of poverty, and individual freedoms. We may not always feel this is the case though and our 36-country survey records a 10-year low in the proportion of people expecting next year to be a better year.

We do hope you find this edition useful - links to more information are throughout the text - please email [IKC@ipsos.com](mailto:IKC@ipsos.com) with any comments or ideas.

Wishing you all the best for 2023 – it will certainly be interesting!

**Ben Page, Ipsos CEO**



# IN THIS EDITION

## THE IPSOS ALMANAC

Responding to the events of 2022

We take a look back at the defining events of the past year and examine how people have reacted. Our global experts also take us on a guided tour of what 2022 has meant for their country.

## CX SERVICE DESIGN

Designing experiences that drive business success

We live in volatile times that are influencing customers' expectations, needs and opinions. We share case studies and a four-step framework for designing world-class customer experiences.

## BROKEN-SYSTEM SENTIMENT

A dampening of anti-establishment feeling

Broken-system sentiment has receded across many of the 28 countries surveyed, most notably in countries that have had major national elections in the past 18 months.

## IPSOS INDIA KNOWLEDGE REVIEW

Inclusivity: People, markets and culture

India is a vast and heterogenous country: how can researchers and brands better represent its people and consumers? We demonstrate the benefits of looking through the lens of inclusivity.

## GLOBAL CLIMATE OPINION OBSERVATORY

Stagnating environmental concerns

The 2022 edition of Obs'COP finds purchasing power is now the key priority at the global level. Meanwhile, climate change is *not* generating greater concern and climate scepticism is growing.

## INTERNATIONAL THREATS AND RESPONSES

Worry about possible worldwide conflict rises

Globally, 75% of people now consider nuclear and chemical attacks to be a real threat. We explore global citizens' perceptions of world threats, including confidence in their country's ability to respond.

## WOMEN'S FORUM BAROMETER

Perception versus reality

The third edition of the Women's Forum Barometer on Gender Equity compares the reality and perception of gender equity related to female leadership, across the G7 countries.

## GLOBAL PREDICTIONS 2023

Citizens struggle to be optimistic about the new year

Across 36 countries, expectations that the new year will be better than the last are at their lowest level for 10 years, with widespread concern about the state of the economy, the environment and world security.



Cover photo, from top to bottom, left to right:

Jaisalmer Fort; Kerala; Ganpati Festival; Qutb Minar; Munnar; Vidyasagar Setu; Kochi; Chhatrapati Shivaji Terminus; Mumbai Skyline; Holi Festival; India Gate; Dal Lake; Durga Puja; Victoria Memorial; Bengaluru; Red Fort.

Find out more about inclusivity in the heterogenous country of India on [page 10](#).

# THE IPSOS ALMANAC

## Responding to the events of 2022

2022 has been a year shaped by crises: war, inflation, energy, climate change... many of which amplify each other, creating a 'polycrisis'.

In our 2022-2023 Almanac, we take a month-by-month look at the defining events of the past year, examining how consumers and citizens have responded and reflecting on how these events may develop in the coming year.

In January, we saw **global Covid-19 cases hit 376 million**. We explore how global attitudes have changed over the past year and the lessons we've learnt from "Covid times".

February was defined by the **Russian invasion of Ukraine**, marking the return of war to Europe. We review the outpouring of public support for Ukrainian people, worry about the war expanding and fears about the financial fallout.

As we journey through our review of the year, we also pause to consider the **Antarctic heatwave** and what this indicates about the progression of climate change, **the year's elections** and the state of populism, the development of **inflation** and the cost of living crisis, as well as **Roe v Wade** and women's rights across the globe.

Our global experts also take us on a guided tour of what 2022 has meant for their country, setting out the issues that have shaped their year at a local level, and what to watch out for in the coming year.

We hear about the power of women in **Australia**, the fight against disinformation in the **Czech Republic**, uneven worry about inflation in **India**, the seconds that sealed the fate of Shinzo Abe and divided **Japan**, balancing hope and gloom in **Kenya** and strength, growth and stability in the **UAE**.

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# The Ipsos Almanac

2022 HAS BEEN A YEAR SHAPED BY CRISES: WAR, INFLATION, ENERGY, CLIMATE CHANGE... MANY OF WHICH AMPLIFY EACH OTHER CREATING A 'POLYCRISIS'.





# GLOBAL CLIMATE OPINION OBSERVATORY

## Stagnating environmental concerns

Obs'Cop is an annual barometer of public opinion on climate change in 30 countries, including the world's biggest emitters and representing two-thirds of the world's population, conducted by Ipsos on behalf of EDF.


The 2022 report finds the increase in the cost of living is a major concern on the global scale. On average globally, six in ten (62%) say inflation is a topic that worries them most, surging up 10pp from last year. In contrast, 40% say the same about the environment, down 1pp from 2021.

Individuals still want the environment to be prioritised over economic growth (48% vs. 38%) but the gap has narrowed over the last three years and this preference is less marked than in 2019 (53% vs. 34%).

Across 30 countries, 77% say they have already noticed the effects of climate change in their region, rising to 92% in Chile and Mexico and 91% in Colombia.

Meanwhile, climate scepticism has increased over the past three years (37%, + 6pts), with 28% of people claiming that climate change exists but is not linked to human activity. Climate scepticism is highest in fossil-fuel producing nations like Saudi Arabia (60%), Norway, Russia, USA (48% each) and the UAE (46%).

The sudden rises in the price of energy as a result of the war in Ukraine have also led to renewed support for non-renewables. Gas-fired power plants (+4pts) and coal-fired power plants (+6pts) have both seen an increase in support since last year, particularly in Europe.

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GAS-FIRED POWER PLANTS AND COAL-FIRED POWER PLANTS HAVE BOTH SEEN AN INCREASE IN SUPPORT SINCE LAST YEAR, PARTICULARLY IN EUROPE. ”

# CX SERVICE DESIGN

## Designing experiences that drive business success

We live in volatile times that are influencing customers' expectations, needs and opinions. Understanding and empathising with customers and the context of 'their world' needs to be at the heart of experience design.

In this white paper, Ipsos shares **best practice and service design guidelines for brands to create emotional attachment and drive the right behaviours**. This will in turn lead to increased retention, share of spend, advocacy, operational efficiency, and, ultimately, an improved Return on CX Investment: ROCXI.

Through Ipsos research, we see that as inflation rises and the price of products and services increase, so do customers' expectations of the experience delivery. Now, perhaps more than ever before, there is a real need to understand how to design your experiences to meet changing customer needs.

Featuring several case studies, this paper sets out how Ipsos' Forces of CX can be employed in service design, demonstrates how to overcome key barriers, and shares a four-stage framework for designing world-class customer experiences.

### Key takeaways:

- To improve your Customer Experience you need to design experiences to communicate your brand promise across your customer journey, and **meet relational, emotional needs**; to go beyond meeting functional needs, to drive emotional attachment
- **Ipsos' Forces of CX** is a human-centric framework that ensures the design of experiences which truly deliver on customers' needs.
- Rise above company silos and **bring teams together** to align around the customer journey.

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NOW, PERHAPS MORE THAN EVER BEFORE,  
THERE IS A REAL NEED TO UNDERSTAND  
HOW TO DESIGN YOUR EXPERIENCES  
TO MEET CHANGING CUSTOMER NEEDS.”





# INTERNATIONAL THREATS AND RESPONSES

## Worry about possible worldwide conflict increases

Following the invasion of Ukraine, nuclear, biological or chemical attacks are now seen globally as the biggest threat facing the world, according to 33-country Ipsos survey for the Halifax International Security Forum. A global country average of 75% of people now consider this to be a real threat, up nine points from last year.

In a similar vein, three-quarters of people globally (73%) expect that in the next 25 years we could see a worldwide conflict involving superpowers similar to World War I and II. This is up 10 points on average globally but many countries have seen increases of more than 15 points: Italy (+19), Great Britain (+19), Belgium (+18), Germany (+17), South Korea (+17), France (+16) and Japan (+16).

However, only four in ten globally (44%) are confident that their government could provide appropriate levels of security,

were their country to become involved in an armed conflict with another nation in the next 12 months. This rises to 68% in India but falls to just 24% in Argentina.

More than eight in ten people surveyed (85%) agree that the world needs new international agreements and institutions that should be led by democratic countries. However, many are sceptical that world superpowers like Russia (44%), China (31%) and the US (19%) would comply.

Canada (81%) and Germany (75%) come out top as the countries expected to have a positive influence on world affairs. Meanwhile, Russia has suffered a drop in its reputation as a result of its invasion of Ukraine. In 2021, 45% of people expected Russia to have a positive influence on world affairs, this year that figure drops to just 29%.

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THREE-QUARTERS OF PEOPLE GLOBALLY (73%) EXPECT THAT IN THE NEXT 25 YEARS WE COULD SEE A WORLDWIDE CONFLICT SIMILAR TO WWI AND WWII. ”





# BROKEN-SYSTEM SENTIMENT

## A dampening of anti-establishment feeling

The 2022 edition of Ipsos' Broken-System Sentiment survey finds that, while majorities in most of the 28 countries surveyed think their country's political and economic system is broken, fewer people now agree with this than last year.

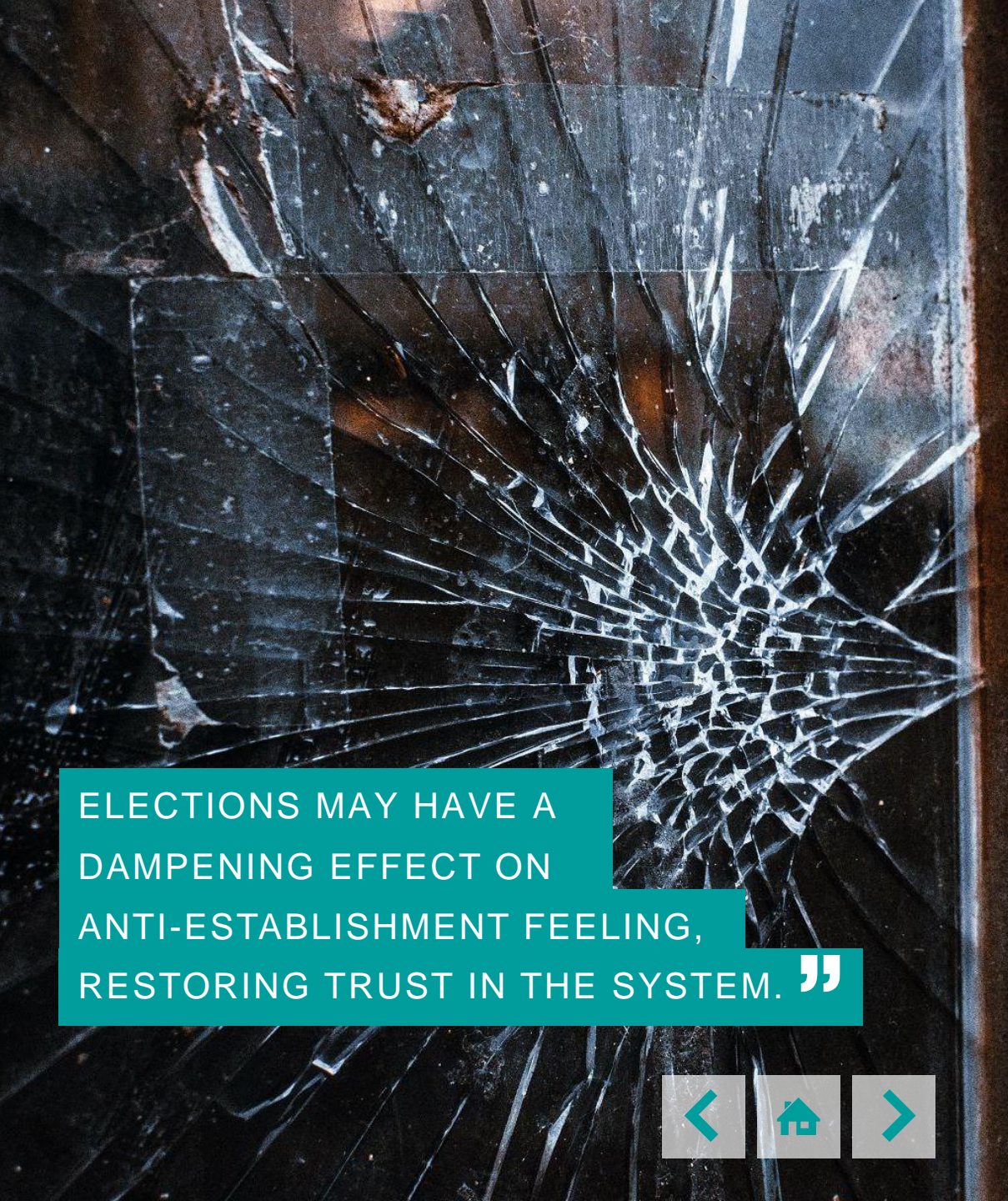
Anti-establishment feeling is measured using Ipsos' Broken-System Index, a peer-reviewed composite metric based on the level of agreement or disagreement with five statements. On average across the 28 countries surveyed, more than six in ten people agree that their country's economy is rigged to advantage the rich and powerful (64%), and that traditional parties and politicians don't care about people like them (63%).

Close to six in ten agree that their country needs a strong leader to take the country back from the rich and powerful and that experts don't understand the lives of ordinary people (both 59%). Almost half

(45%) think their country needs a strong leader who is willing to break the rules.

Trend data suggests that elections may have a dampening effect on anti-establishment feeling, restoring trust in the system. Only four countries registered an uptick in their index score from last year (Turkey, Great Britain, Netherlands and Belgium) - none of which underwent a general or presidential election.

In contrast, of the 20 countries whose index score has dropped from last year, 17 had a major national election in the past eighteen months. Additionally, in the six countries where the Broken-System Index score has dropped most - Chile, Colombia, South Korea, Italy, Brazil, and Peru - these elections brought about a new head of government belonging to a different political party to the previous head of government.

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# WOMEN'S FORUM BAROMETER

## Perception versus reality

The third edition of the Women's Forum Barometer on Gender Equity compares the reality and perception of gender equity related to female leadership, across the G7 countries.

A large majority of respondents (73%) believe that there is an inequality between women and men in terms of social, political, and/or economic rights in their country. Despite women becoming increasingly involved in politics, female ministers still represent only 36.8% of ministers across the G7.

Almost seven in ten (67%) believe that gender inequality in the workplace is an issue, with a 15-point difference between women's and men's opinion (74% of women agree vs. 59% of men). Six in ten across the G7 (62%) believe that in general women have fewer opportunities to succeed than men with equal

competency (70% of women agree vs. 53% of men).

Caring responsibilities seem to account in part for this: four in ten women say they have previously worked part-time for one or more years to take care of someone (41% vs. 24% of working men).

However, there is hope for the future, as 17 proposed measures for improving gender equity in relation to business, technology and health receive majority support.

Most widely-supported is the obligation to include information in the package inserts of medicines on the differentiated impacts on women and men, alongside the implementation of a strategy to eliminate harmful side effects of medicines that specifically affect women, such as antidepressants or contraception (80%).

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17 PROPOSED MEASURES FOR IMPROVING  
GENDER EQUITY IN RELATION  
TO BUSINESS, TECHNOLOGY AND  
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# IPSOS INDIA KNOWLEDGE REVIEW 2022

## Inclusivity: Our latest thinking on people, markets and culture

India is a huge country and on track to become the world's most populous one this year. It is also incredibly diverse, with 22 different official languages, a growing number of billionaires, extensive poverty, and a stark divide between its urban and rural societies.

This poses many challenges for those who wish to represent Indian consumers or the Indian public. How can insights professionals design their research to fairly represent the voice of India?

The new Ipsos India Knowledge Review discusses the many challenges of carrying out research in such a vast and heterogeneous country, providing guidance on conducting multi-cultural research through the lens of inclusivity, addressing differences in cultures and contexts in research design and

implementation. It also shares the benefits for brands in embracing inclusivity.

In 'Unstereotyping for Inclusivity' we explore the stereotypes that are prevalent in Indian advertising today, as well as groups of society who are noticeable through omission (e.g. people with disabilities, LGBT+ people) and demonstrate the potential dividends to be earned from 'unstereotyping'. This topic is explored further with in 'Women in Advertising & the Media'.

This comprehensive report also addresses the growing visibility of LGBTQ+ citizens of India, how researchers can classify participants where there is a greater recognition of the diversity of genders with which people identify, and looks into the great digital divide.

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HOW CAN INSIGHTS  
PROFESSIONALS DESIGN THEIR  
RESEARCH TO FAIRLY REPRESENT  
THE VOICE OF INDIA? ”





# GLOBAL PREDICTIONS 2023

## Citizens struggle to be optimistic about the new year

The 2023 Ipsos Global Predictions survey finds uncertainty among citizens around the world about what the short-term and long-term future will bring.

Marked by Covid-19, war in Ukraine, inflation and a cost of living crisis and an increasingly pressing climate crisis, many people across the 36 countries surveyed thought that 2022 was a bad year for them and their family (56%) and for their country (73%). However, these figures are down from 58% and 77% respectively in 2021 and down from 70% and 90% in 2020.


Despite this slight improvement, pessimism extends into the coming year. Only 65% of people globally expect 2023 to be a better year than 2022, down 12 points from last year and the lowest figure recorded for 10 years. Only 45% think the global economy will be stronger, down 16 points from last year and another 10-year low, with 79% saying prices in their

country will increase faster than people's incomes.

It is clear to see that worry about the economy is front and centre in people's minds; three-quarters say they expect inflation will likely worsen (75%) and interest rates will rise (74%) in 2023.

In relation to the natural environment, expectations are little better. Across 36 countries, 65% say it's likely that there will be more extreme weather events in their country, up 5 points from last year. More than one in two (57%) also expect 2023 to be the hottest year on record, a figure that rises to 72% in Spain and 71% in Chile.

Concern about world security has also increased; nearly one in two people (48%) think that in 2023 nuclear weapons will be used in a conflict somewhere in the world, up 14 points from last year.

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ONLY 65% OF PEOPLE GLOBALLY EXPECT 2023 TO BE A BETTER YEAR THAN 2022, DOWN 12 POINTS FROM LAST YEAR AND THE LOWEST FIGURE RECORDED FOR 10 YEARS.”



# SHORTCUTS

## Trust in the Internet

Global trust in the Internet has dropped significantly since 2019, according to a 20-country survey conducted on behalf of The New Institute.

On average, only 63% of Internet users say they trust the Internet, down 11 points from 2019, with decreases in almost all countries included in the 2019 survey. The only exception is Japan, where trust has actually increased by 7 points.

The major concern among those surveyed is privacy; eight in ten (79%) express worry about their privacy online, while only half (50%) agree that online security is sufficient.

Many feel that Internet governance is lacking, with just over half (57%) agreeing that it is effectively governed. As a result, users are calling for new regulations to strengthen privacy and to have better control. There is greatest support for introducing policies to protect user privacy (65%), protect individuals' data (65%), and provide cybersecurity (63%).

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## Podcasts Round-Up

**The Ipsos Almanac**: Featuring our Global CEO Ben Page and Ipsos experts from around the globe, our end-of-year podcast discusses the defining themes of 2022 and considers the possible implications for 2023.

**People, Planet, Prosperity – Episode 3**: Dr Pippa Bailey (Head of Ipsos Climate Change & Sustainability Practice) speaks to John O'Brien MBE (Founder of Anthropy) who shares his vision for inspiring change by bringing together senior leaders from all different sectors of business, government, and non-profit.

**Eliminating Gender-Based Violence**: As part of our support for the [16 Days of Activism against Gender-Based Violence](#) we gathered Ipsos voices from around the world to reflect on our research and to share their own personal experience.

**What's Next in UX?** We speak to Thomas Carpenter, UX Research Manager at John Deere, who shares his experience on designing successful automation and explains how it's possible to create emotional connections with an automated system.

[LISTEN HERE](#)

## LGBT Consumer Values in China

Carried out in partnership with Ipsos, the BlueCity 2022 LGBT Consumption Behaviour in China and Trend Insights Report investigates the mindset, values, lifestyles and consumption behaviours of today's Chinese LGBT consumers.

Pragmatism and smart consumption values permeate the LGBT community. The top three factors influencing purchase decisions are the product price (50%), the product content & quality (39%) and word-of-mouth (37%).

However, a brand's stance on LGBT issues also plays an important role and LGBT consumers pay close attention to whether brands are being authentic. More than one in two respondents say that brands should not engage in "queerbaiting" (56%) and that they dislike marketing that overemphasizes or deliberately employs "LGBT stereotypes" (51%).

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# POLL DIGEST

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

**FRANCE:** Three in ten French people (32%) have previously decided against applying for a job because of their level of English.

**CZECH REPUBLIC:** 54% of organisations say the economic crisis has a significant impact on their ability to address sustainability issues.

**AUSTRALIA:** A majority of Australians (58%) agree that there should be a referendum on the future of the monarchy in Australia.

**UK:** 83% of Brits think that social media companies should have a duty to protect children who use their platforms.

**CHILE:** Only 18% of Chileans agree that consumers should make an effort to pay a bit more for sustainable products.

**HONG KONG:** 69% of people who claim to be familiar with the metaverse can correctly describe it.

**GERMANY:** Half of employees (49%) say they feel that sustainability is important to their company.

**US:** 22% of Americans aged 18-45 say that climate change has made them reconsider their decision to have children.

**IRELAND:** 66% in the Republic of Ireland would vote for a united Ireland. In Northern Ireland this figure stands at 27%.

**CANADA:** 54% of Canadian consumers say they are willing to receive digital advertising through audio streaming apps.

**PAKISTAN:** 55% of Pakistanis personally know someone who has lost their job as a result of the current economic situation.

Visit [ipsos.com](https://www.ipsos.com) and our local country sites for the latest polling and 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](mailto:IKC@ipsos.com) with any comments, including ideas for future content.

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