

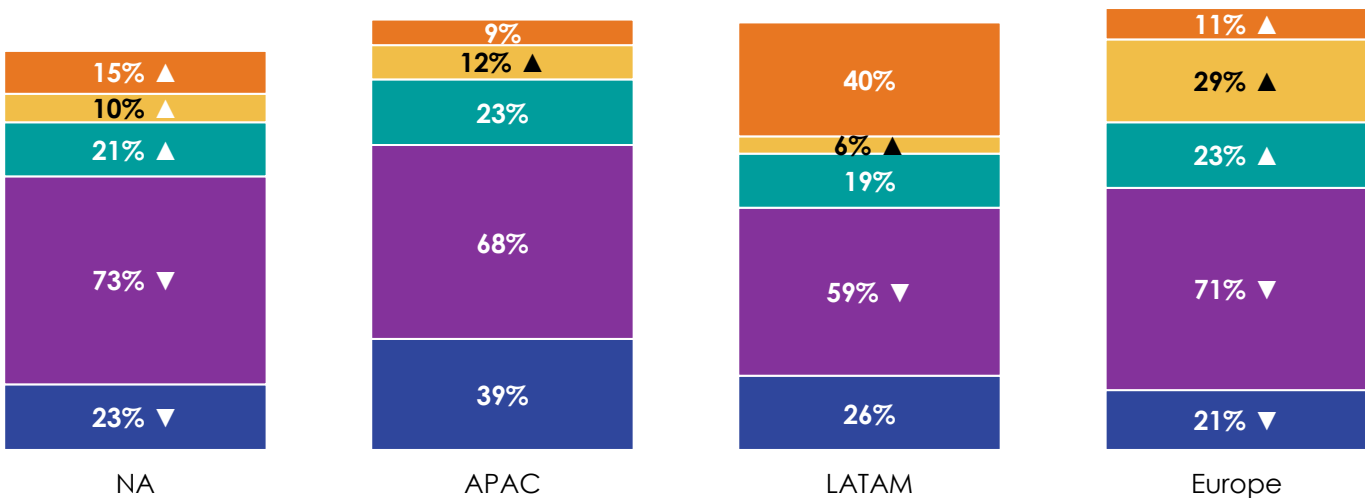
DID YOU KNOW?

Inflation is impacting consumer sentiment and holds the potential to dampen spending plans in Q4.

As pandemic worries recede in North America and Europe, citizens create headspace for a wider range of concerns

TOP CONCERNS – FIRST OR SECOND PRIORITIES BY GLOBAL REGIONS

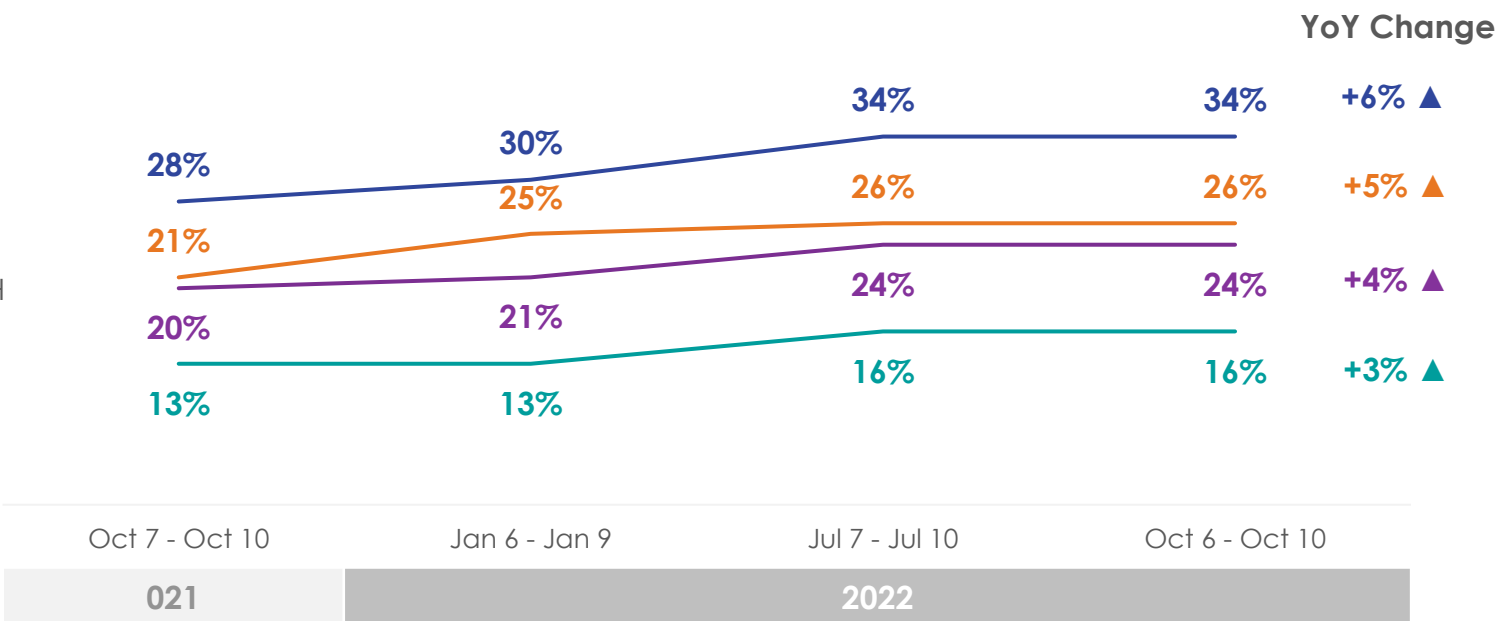
- COVID-19 / HEALTH (NET)
- ECONOMY / FINANCES (NET)
- ENVIRONMENT / CLIMATE
- CONFLICT IN UKRAINE
- CRIME AND VIOLENCE



Citizens globally are experiencing more financial setbacks compared to this time last year

FINANCIAL SETBACKS EXPERIENCED: ONE YEAR TREND

- DELAYING OR CANCELLING BIG PURCHASES
- USING SAVINGS TO PAY BILLS
- DELAYING PLANS TO INVEST
- MAKING SURE I HAVE ENOUGH MONEY FOR AN EMERGENCY FUND



▼ or ▲ indicate change vs. previous wave (statistically significant @ 95% C.I.)

For some, the current economic climate will have long-term implications

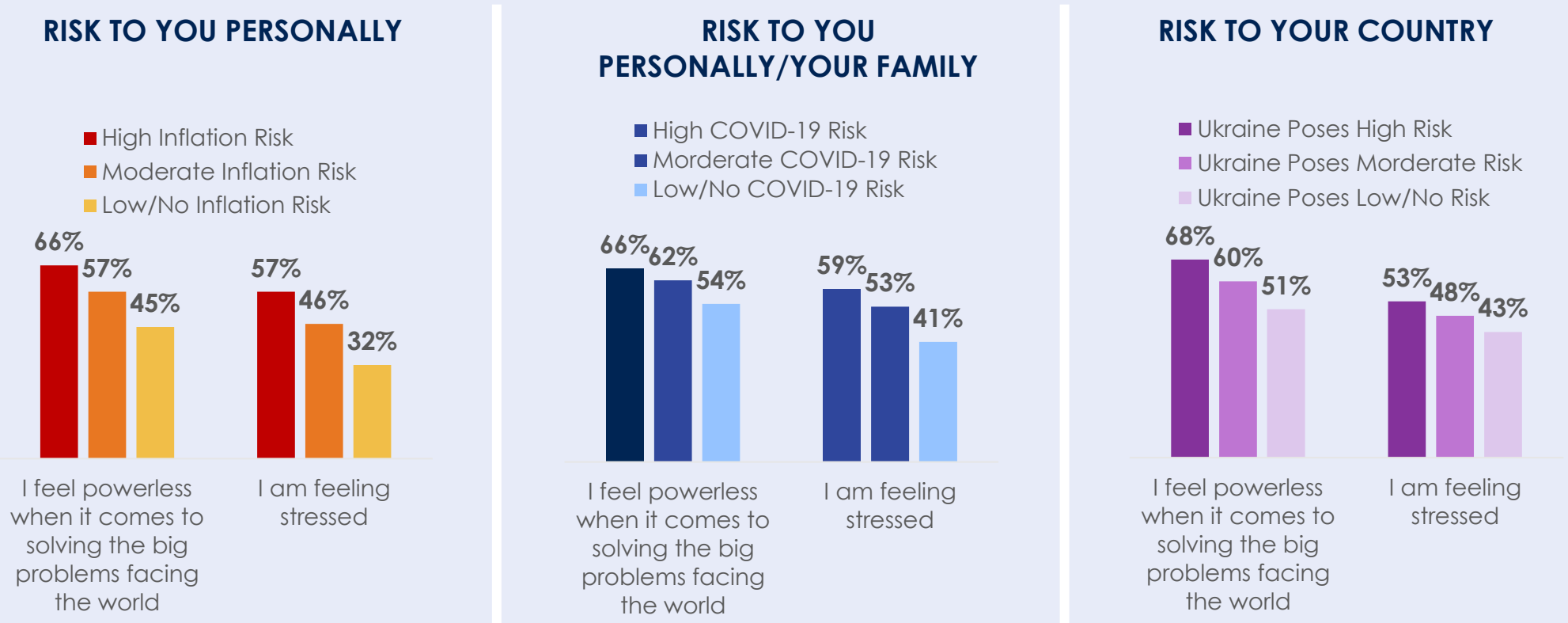


"We definitely don't have enough in our retirement accounts. At this rate we definitely won't have enough to retire."

- Vanessa, US

The environment in which consumers are shopping impacts overall morale and sentiment

CONSUMER SENTIMENT
TOP-2 BOX AGREEMENT

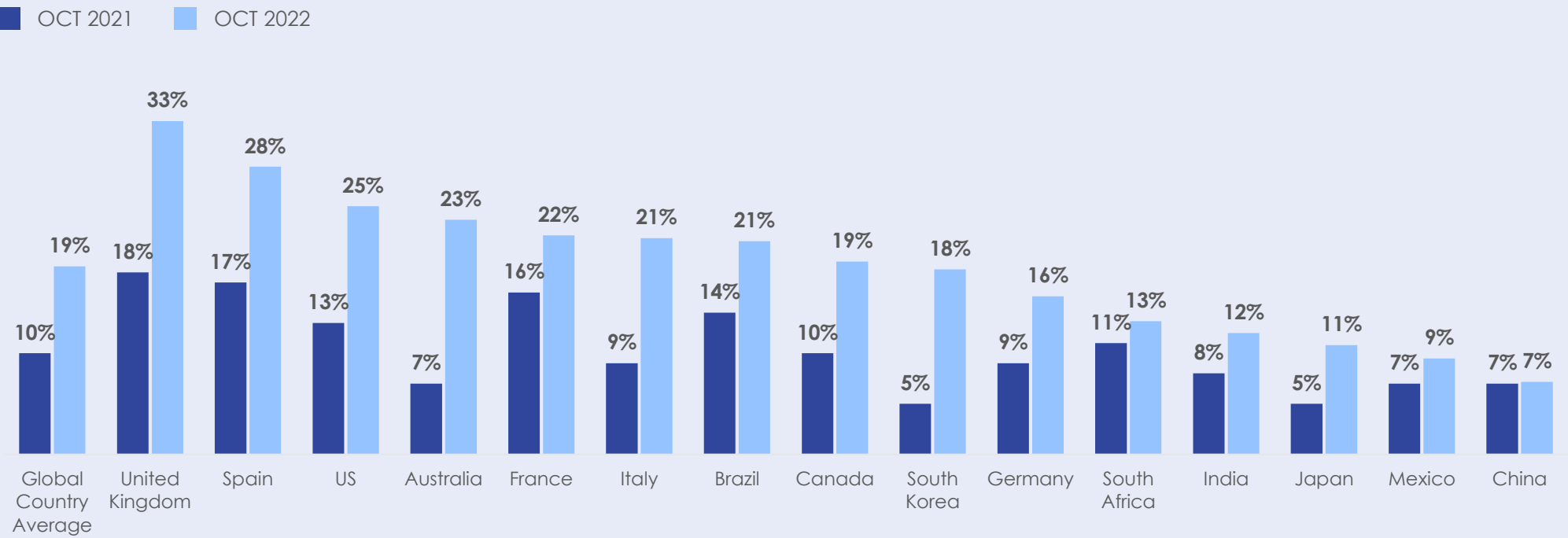


Consumers expect to cut back on their spending throughout Q4 and into the holidays



Travel is expected to rebound in 2023 even as consumers head cautiously into Q4

BOOKING A LEISURE TRIP/TRAVEL FOR NEXT YEAR
BY COUNTRY



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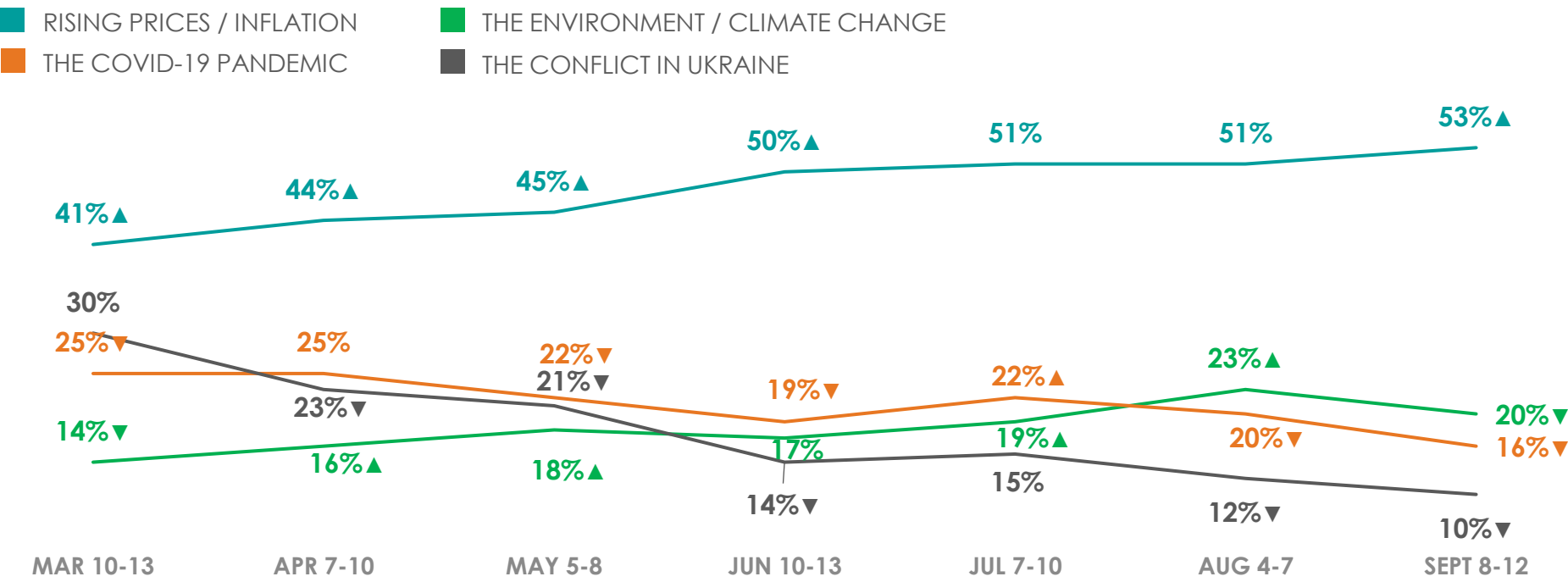


DID YOU KNOW?

Behavior change is a constant – whether driven by the pandemic or inflation. Many curtail discretionary spending while also leveraging supplemental sources of income.

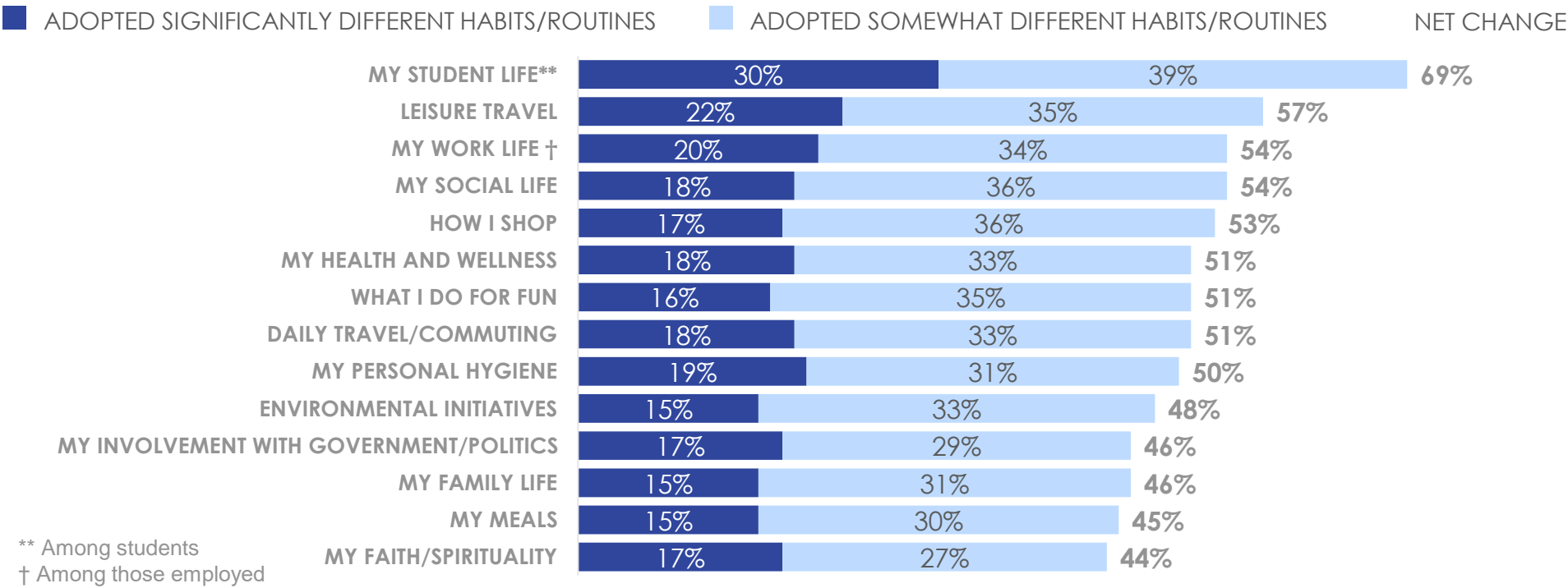
As pandemic concerns begin to fade, inflation continues to be the primary focus of consumers around the world

TOP CONCERNS – FIRST OR SECOND PRIORITIES



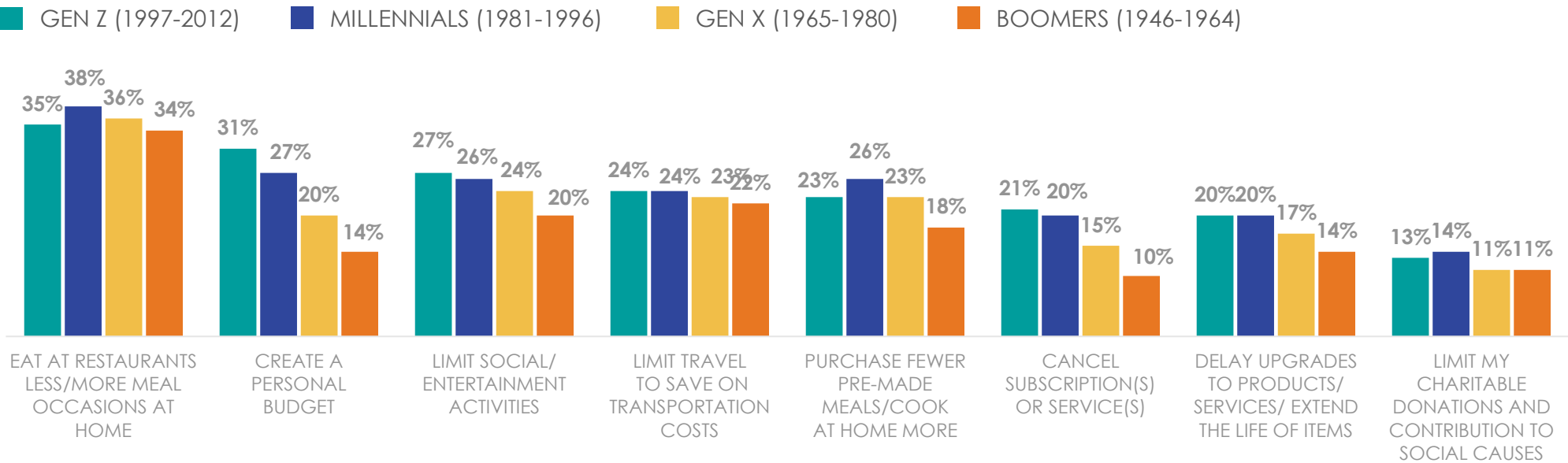
While a post-pandemic “return to normal” becomes increasingly common, a shift in habits and routines suggests more of an evolution of norms

CHANGES TO HABITS AND ROUTINES AS A RESULT OF THE PANDEMIC



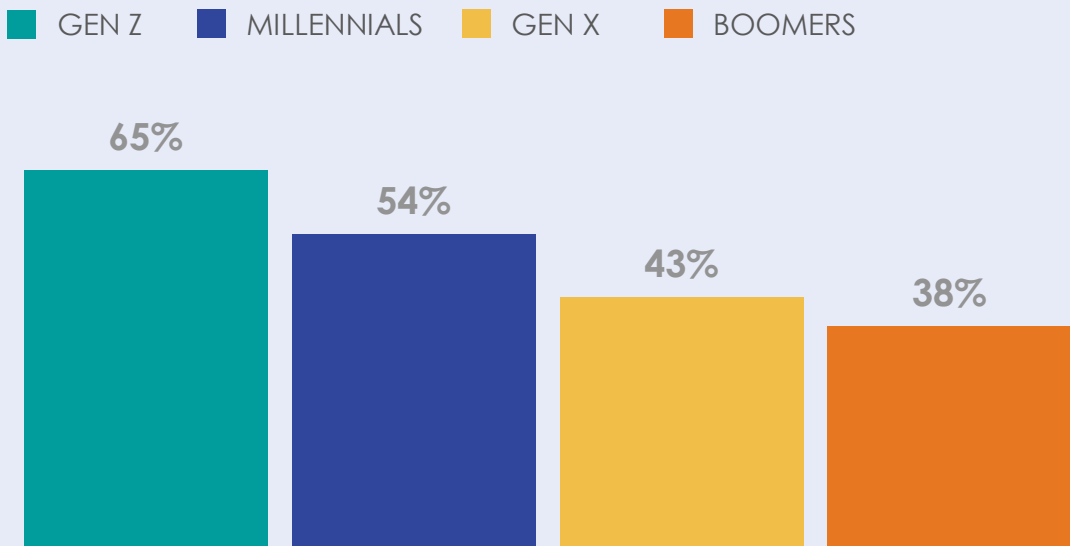
Gen Z and Millennials are more likely to take actions to manage the impact of rising prices

LIFESTYLE CHANGES TO MANAGE RISING PRICES



Half of workers have some other means of generating income; these ‘side hustles’ are much more common amongst younger generations

SIDE HUSTLES (OTHER WAYS OF MAKING MONEY), BY GENERATION
AMONG THOSE EMPLOYED

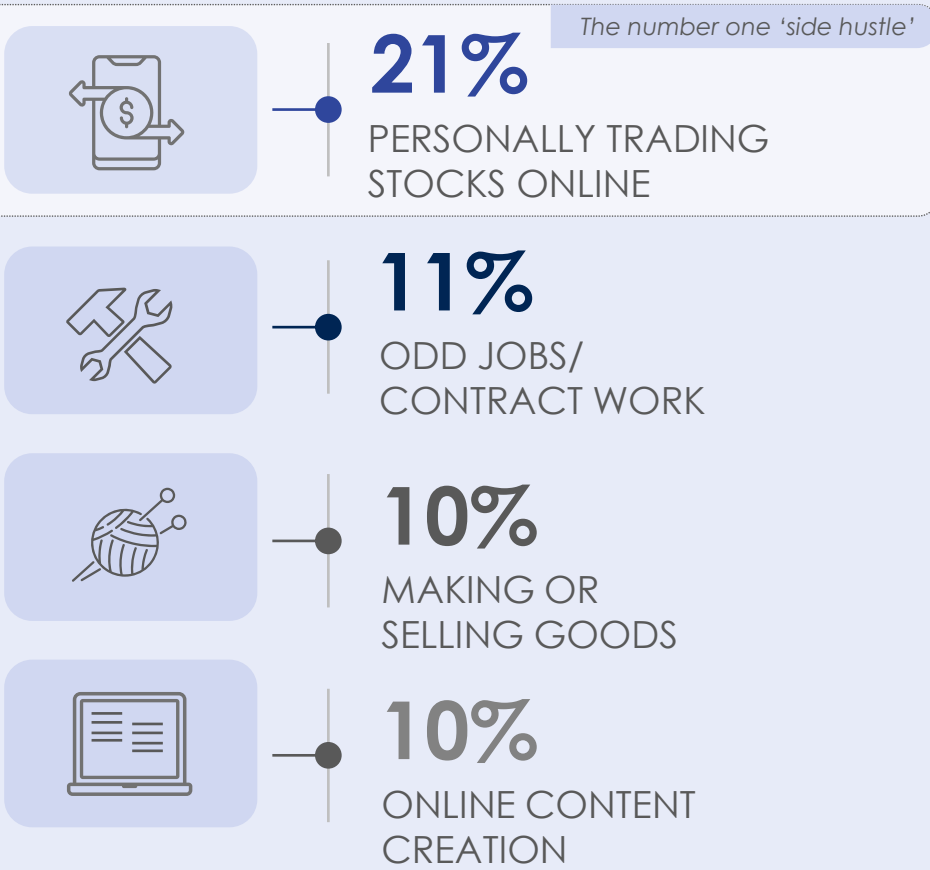
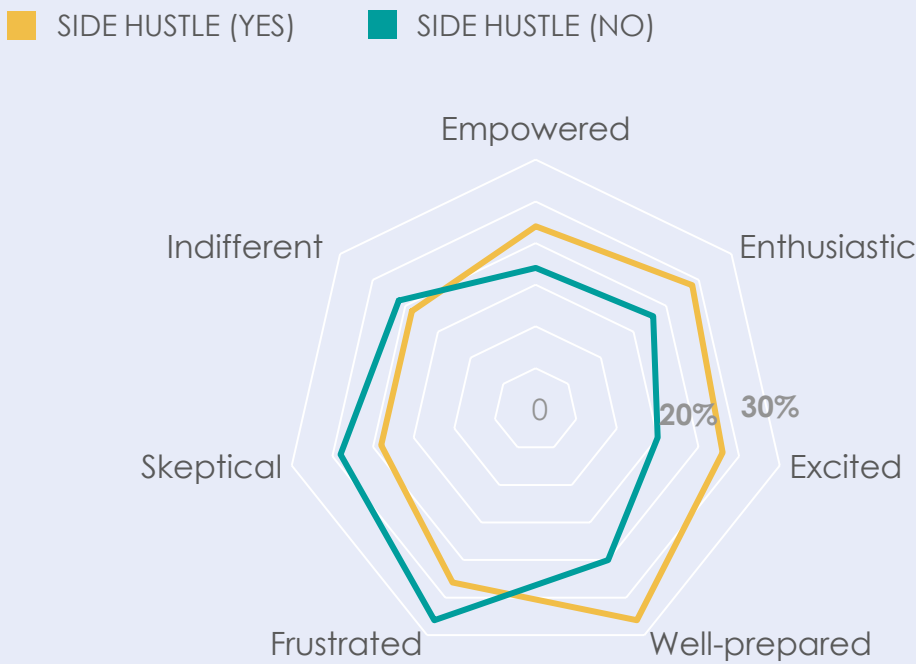


50%

Of all those employed have another means of making money

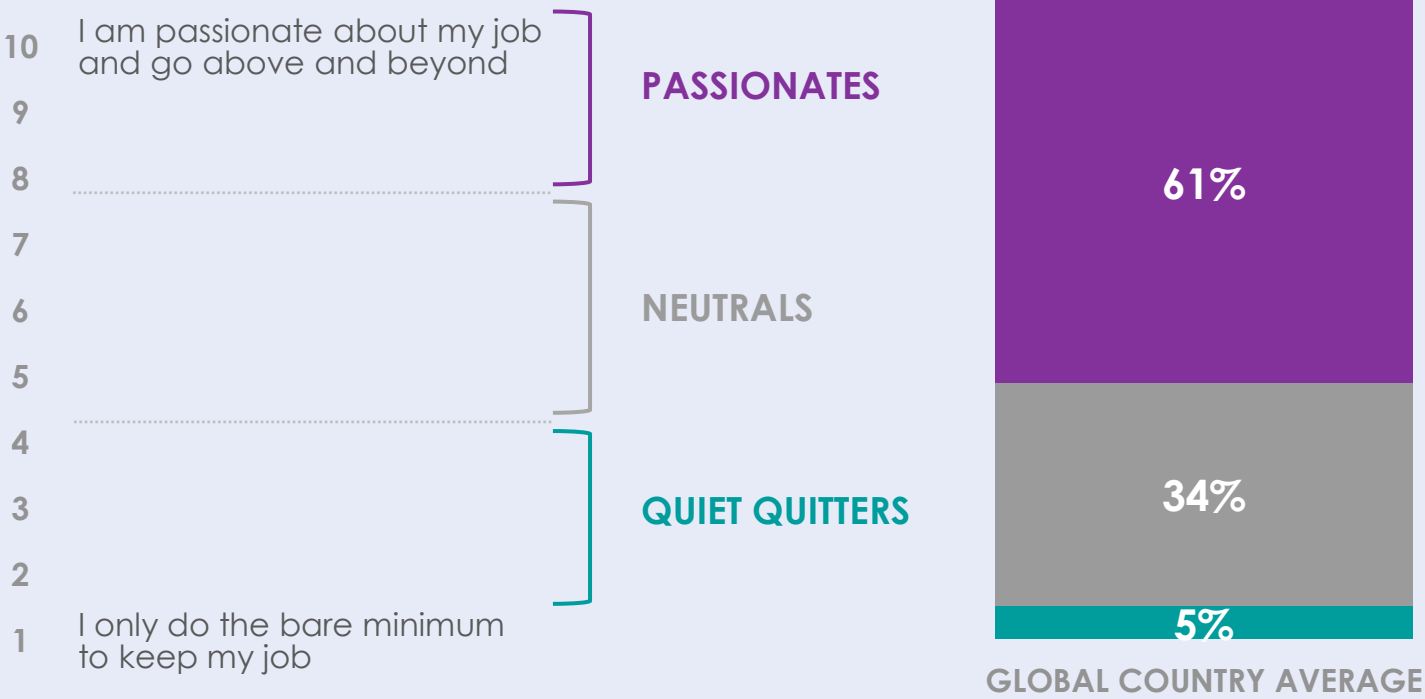
‘Side hustles’ help foster feelings of empowerment and enthusiasm, and allow people to feel more prepared

CURRENT STATE OF MIND, BY SIDE HUSTLERS VS. NOT



With more than half of employees passionate about their job, ‘Quiet Quitting’ seems to be an overblown trend

APPROACH TO WORK



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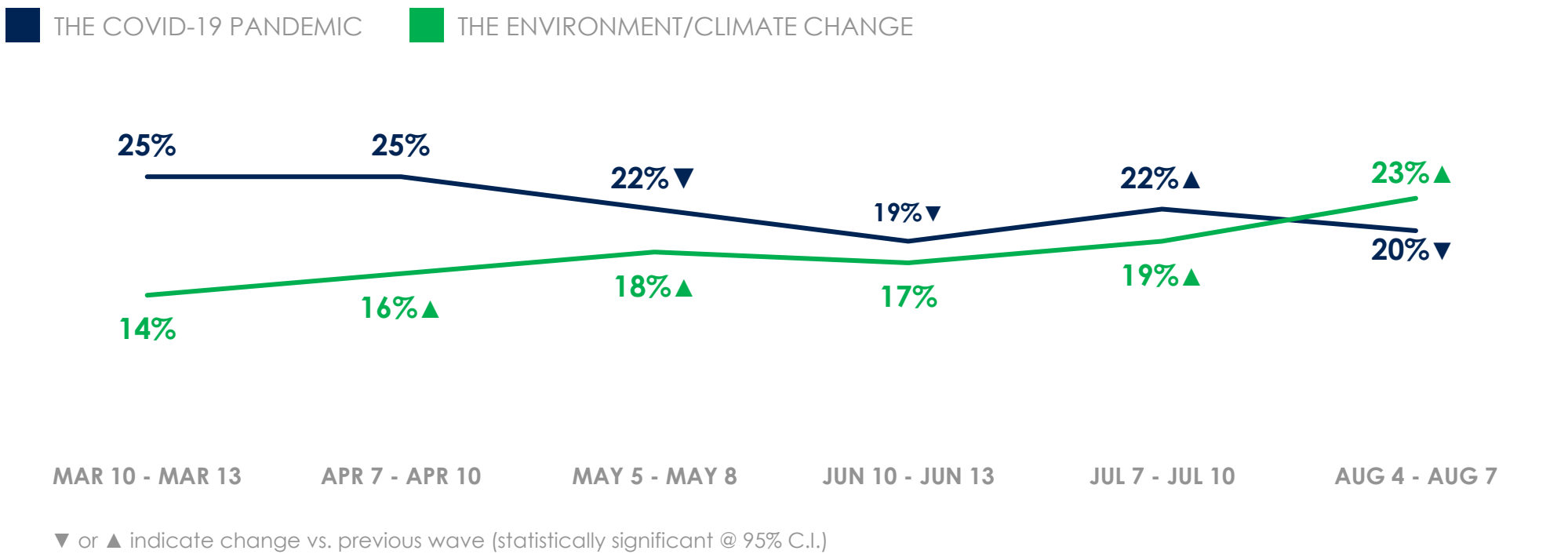
DID YOU KNOW?

As citizens become accustomed to rising prices and the long tail of the pandemic, their focus is shifting toward new and growing challenges related to climate and sustainability.



Environmental issues surpass COVID-19 as a global concern for the first time since the start of the pandemic

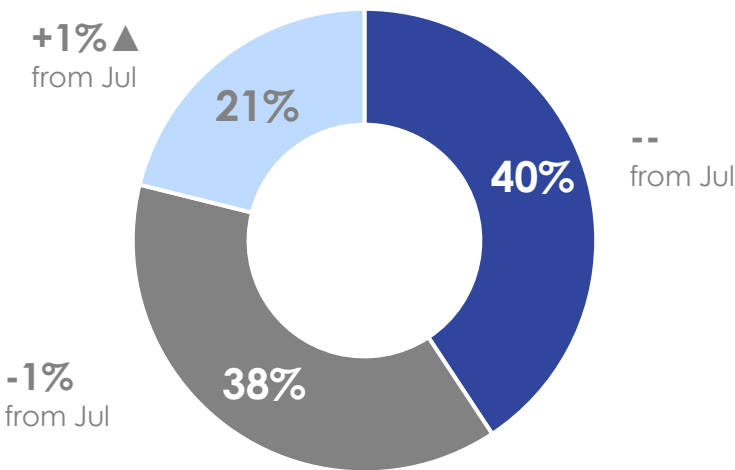
TOP CONCERNS – FIRST OR SECOND PRIORITIES



While concerns about inflation remain paramount, negative sentiments are stabilizing as consumers become accustomed to higher prices

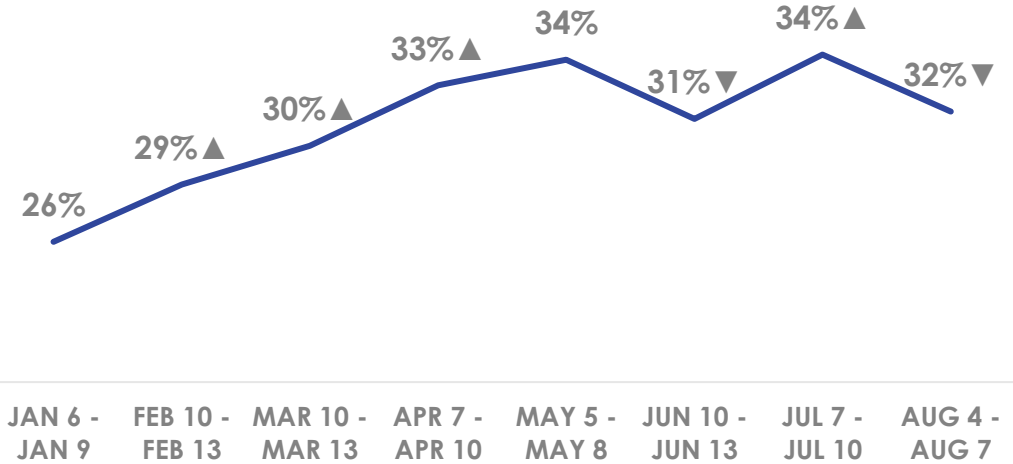
RISK OF INFLATION TO YOU PERSONALLY

- HIGH RISK SEGMENT
- MEDIUM RISK (VULNERABLE SEGMENT)
- LOW/NO RISK (INSULATED SEGMENT)



“PRICES FOR ITEMS WERE MUCH HIGHER THAN NORMAL” WHEN SHOPPING IN THE PAST 2 WEEKS

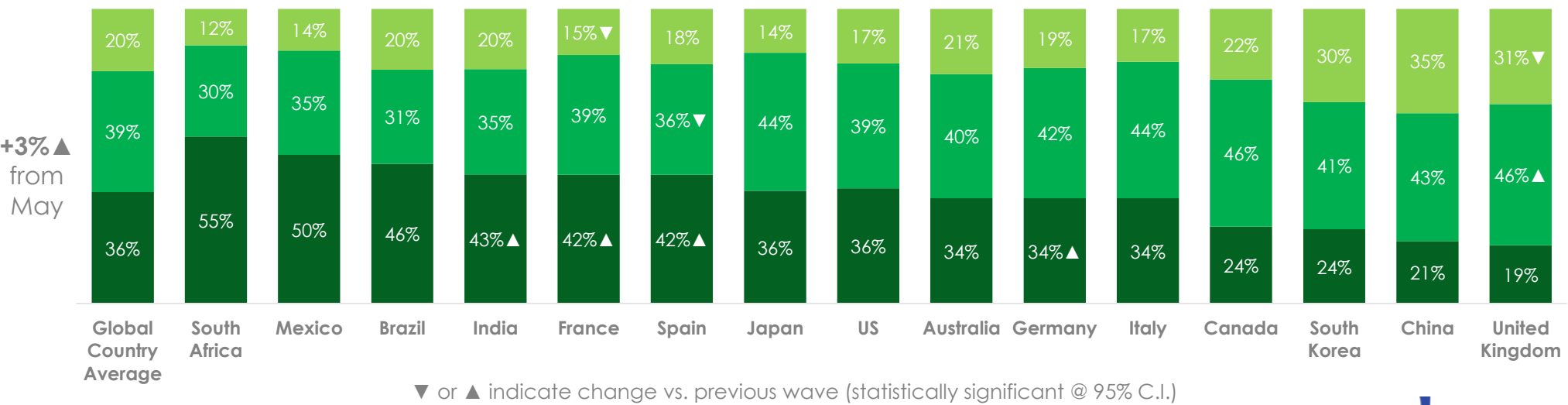
- PRICES FOR ITEMS WERE MUCH HIGHER THAN NORMAL



With recent natural disasters, more individuals are perceiving environmental issues as high risk to their respective countries – perhaps driving concern for the environment to top COVID-19 concern

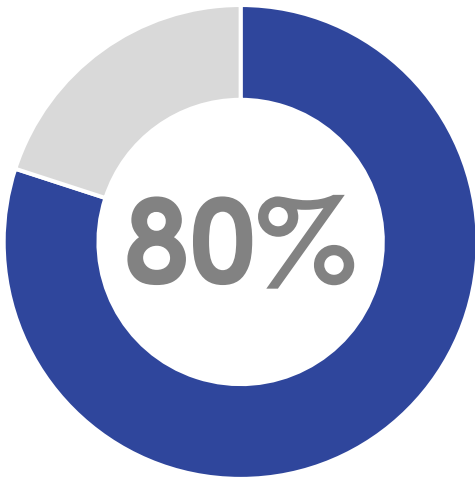
“WHAT LEVEL OF RISK DO NATURAL DISASTERS AND MAJOR CLIMATE EVENTS POSE TO YOUR COUNTRY?”

- HIGH RISK
- MEDIUM RISK
- LOW/NO RISK

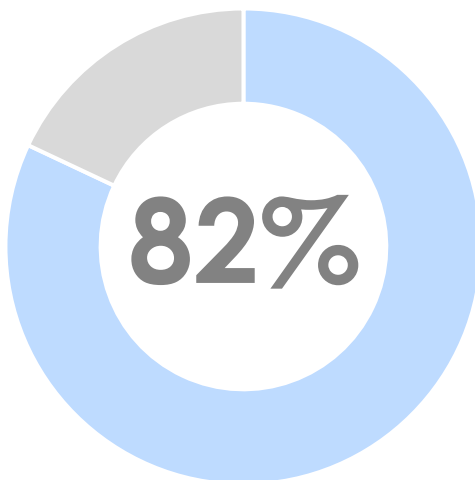


A clear consensus – humans are to blame for the growing number of adverse climate events, and the situation is likely to get worse

ENVIRONMENT BELIEFS:
THOSE WHO SELECTED 'TRUE'



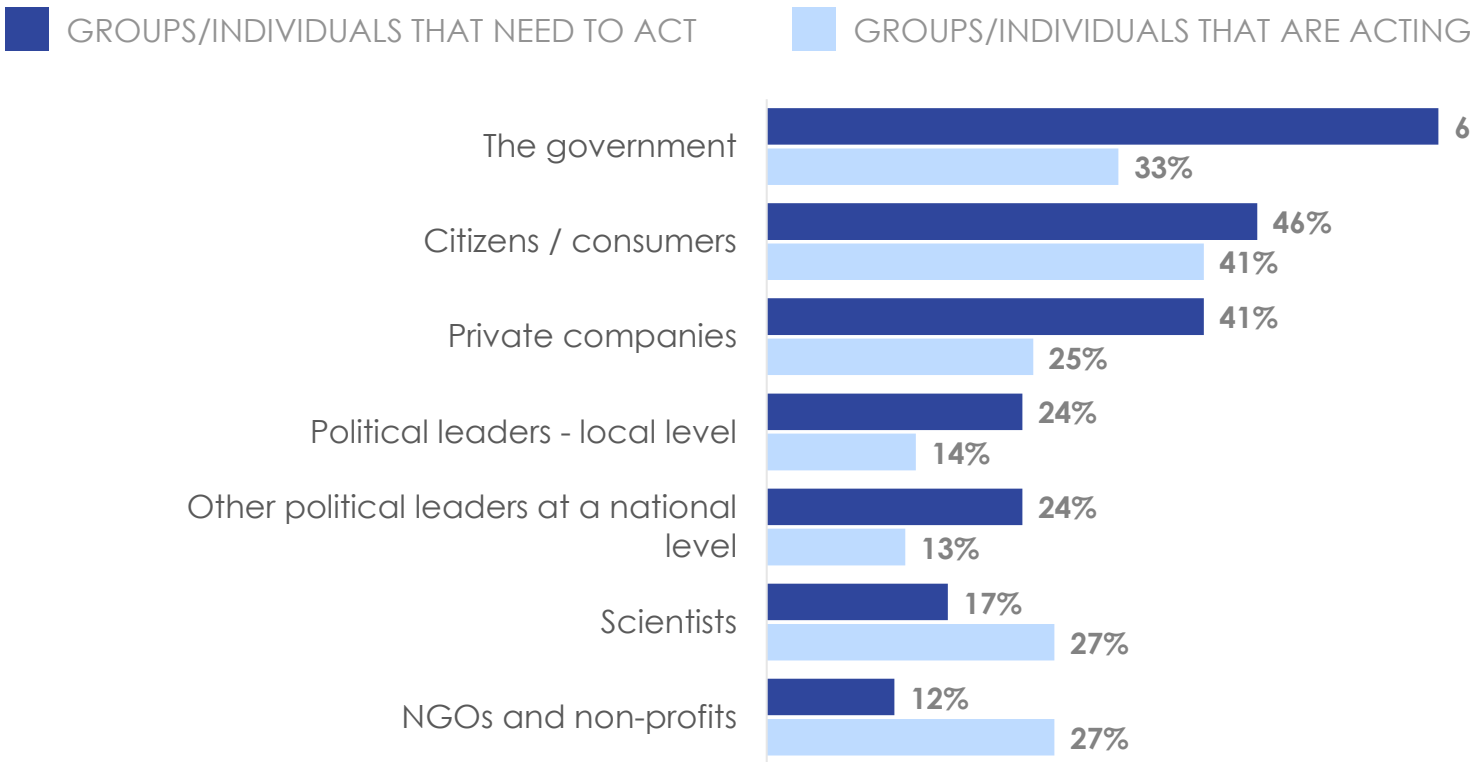
Our changing climate and resulting climate disasters are a result of human activity



Climate events like fires, floods, and storms will become more frequent and more severe in the future

Governments and companies are expected to act but are seen as taking insufficient action

WHO SHOULD BE TAKING ACTION TO IMPROVE ENVIRONMENT AND FIGHT CLIMATE CHANGE VS. WHO CURRENTLY IS



When it comes to the success of environmental initiatives, pessimism characterizes the views of some while others try to remain hopeful

SOME PARENTS CAN'T HELP BUT REMAIN HOPEFUL FOR THE FUTURE OF THEIR KIDS

Some think it is too late. I don't think so. Otherwise, it would be very hard to be a parent today.
- Muriel, France



No, we are not going to succeed [in saving the planet]. The planet will die, and we will die with it.
- Muriel's son, France

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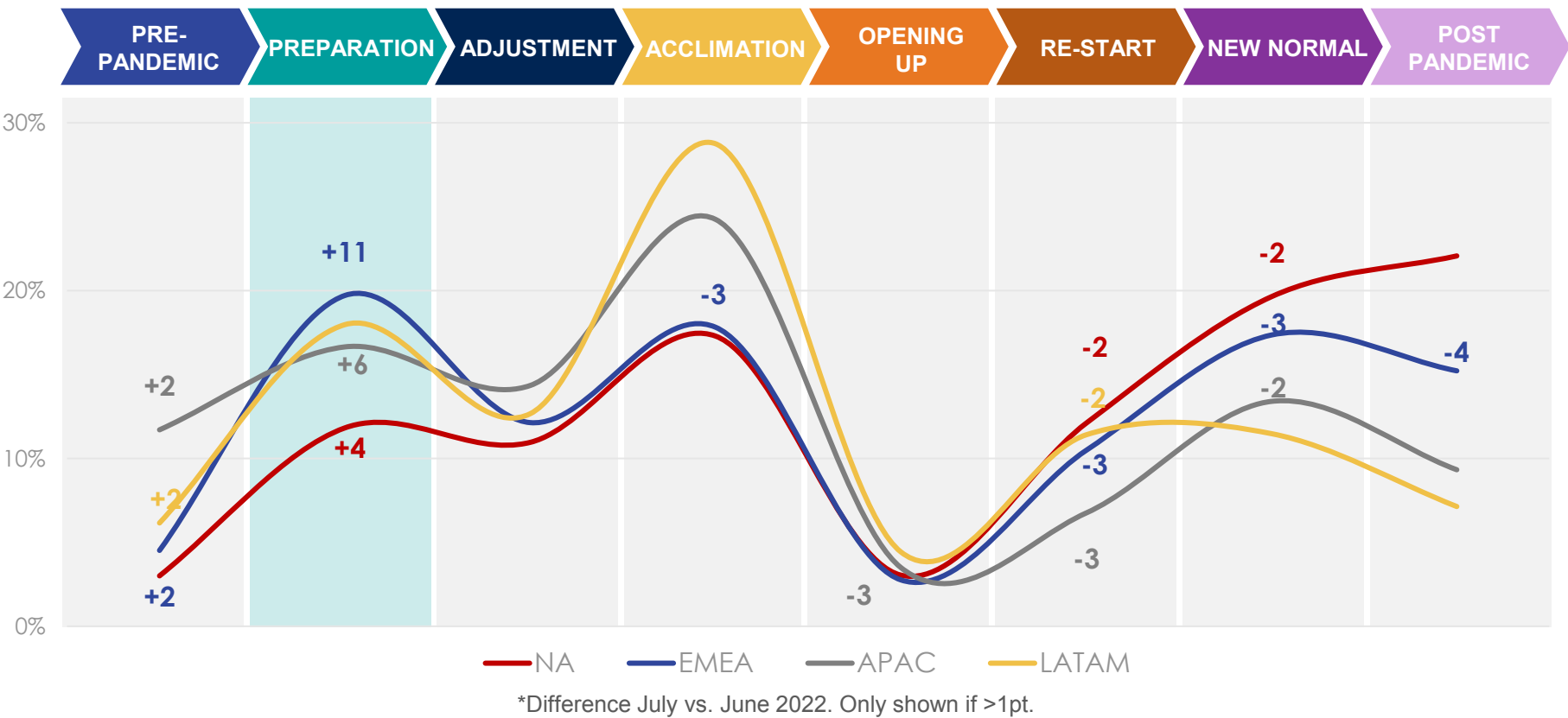


DID YOU KNOW?

The anticipated 'summer grace period' where citizens enjoy their post-pandemic freedom has been cut short as financial pressures mount and new variants of Omicron cause a rise in infections.

A major retreat in one month's time:
More citizens around the world are preparing for new restrictions to combat the rise in cases

“WHICH ONE OF THE FOLLOWING PHASES DO YOU FEEL BEST DESCRIBES YOUR CURRENT SITUATION REGARDING THE COVID-19 PANDEMIC?”



Despite rising COVID concerns, inflation remains the top priority;
in response, consumers search for ways to keep their budgets under control

TOP CONCERNS

51%

Rising Prices/
Inflation

22%

COVID-19
Pandemic

19%

Environment/
Climate Change

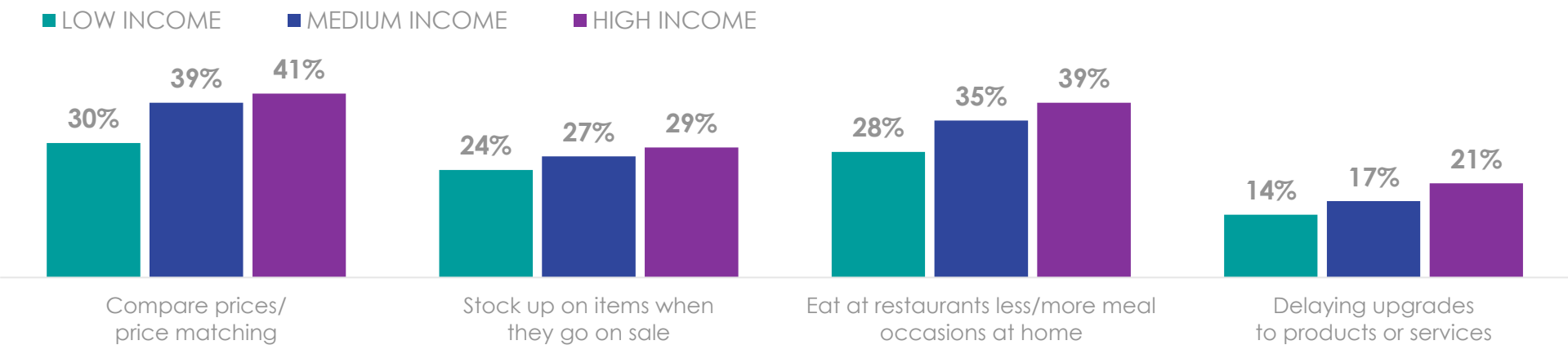
TOP SHOPPING MEASURES TO MANAGE RISING PRICES

Change from
June to July
2022

Compare prices/price matching	38%	▲+2%
Look for deals and coupons	37%	-1%
Hold off on buying certain items	28%	▲+2%
Stock up on items when they go on sale	27%	+1%
Shop at different stores that have more competitive prices	26%	▲+2%
Buy the store brand or 'generic' version of products	25%	▲+2%
Stop buying certain items altogether	22%	▲+3%
Switch to different brands that offer similar products	22%	▲+2%

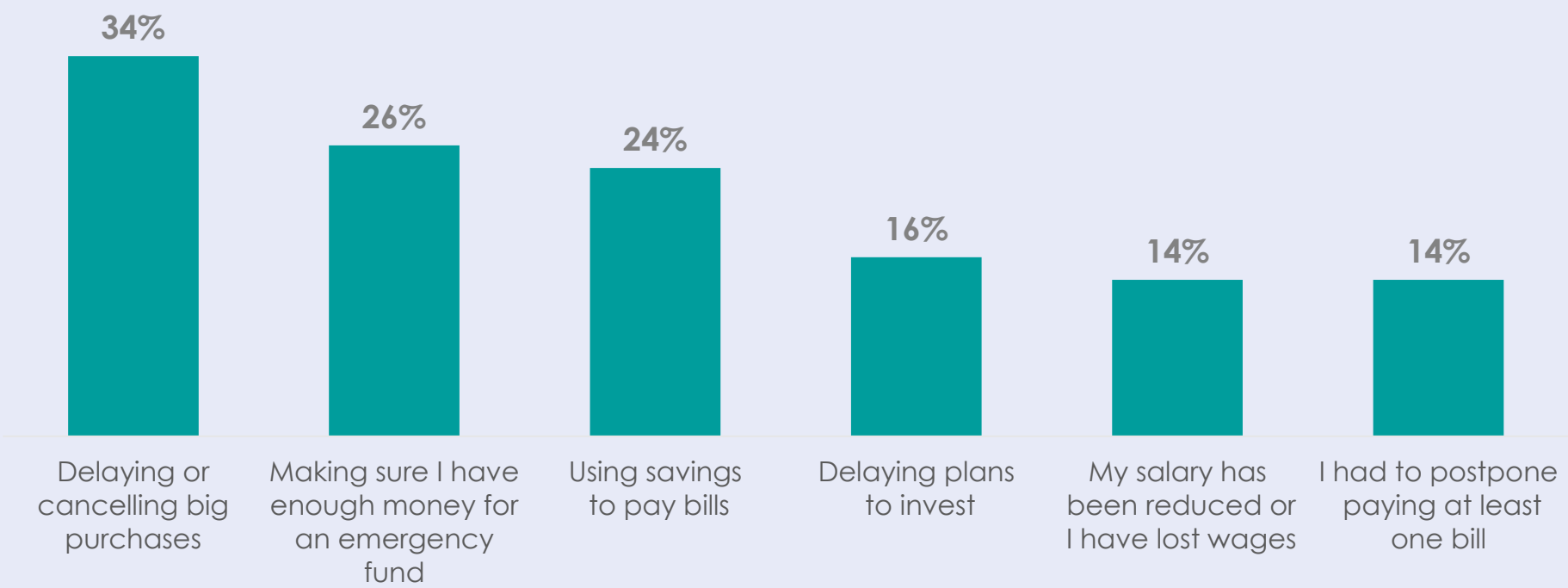
Amid prolonged financial pressures, even high-income households are scrutinizing prices and taking measures to limit spending

MEASURES MORE COMMONLY TAKEN BY HIGH-INCOME HOUSEHOLDS TO MANAGE RISING PRICES



A third of citizens are delaying or cancelling major purchases and a quarter are using savings to pay bills

FINANCIAL SETBACKS

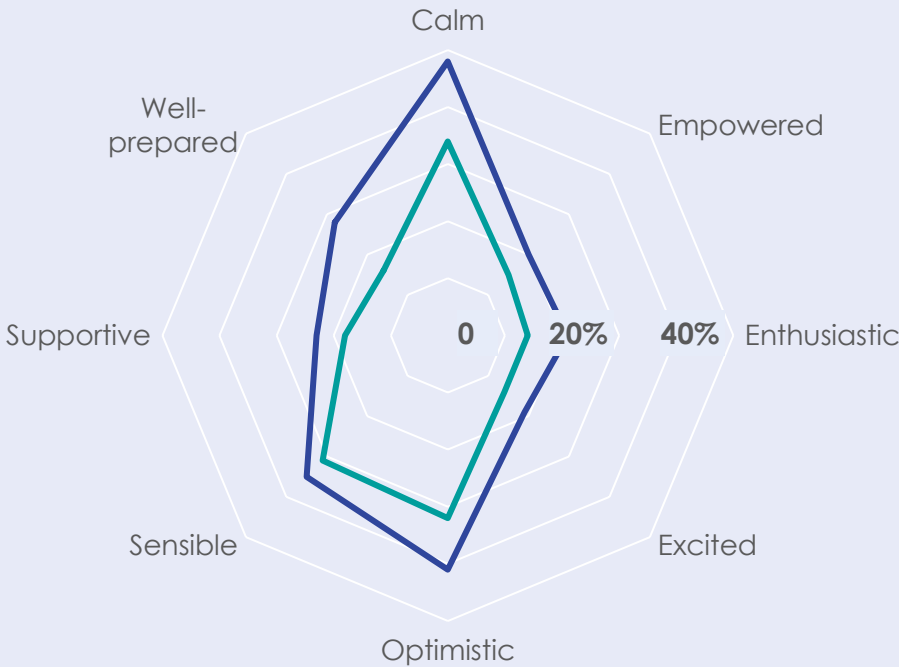


As savings are being depleted, we see more negative feelings and increased frustrations

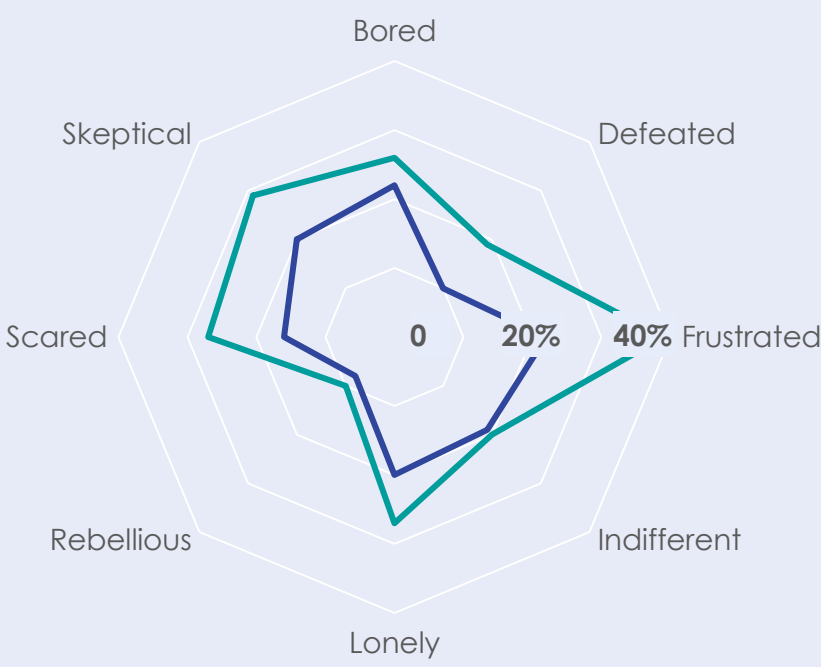
CENSYDIAM EMOTIONS

CURRENTLY SAVING MONEY NOT CURRENTLY SAVING

POSITIVE EMOTIONS

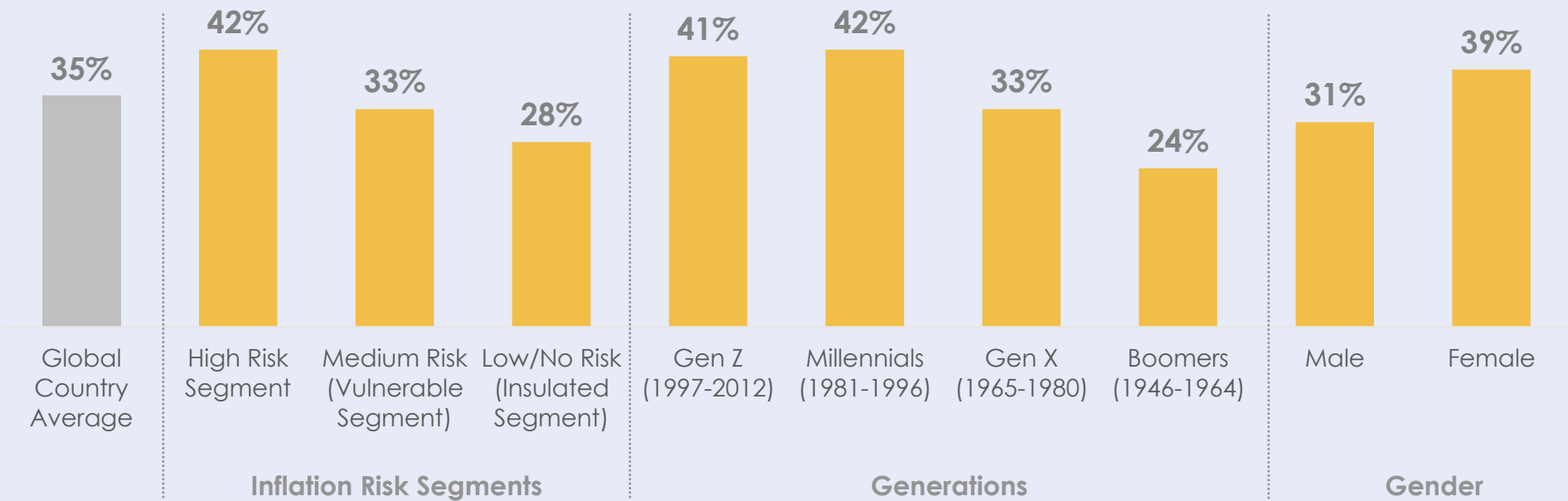


NEGATIVE EMOTIONS



Citizens facing inflation risk also have a greater need for wellness services – brands need to be empathetic towards these consumers

SUPPORT FOR MENTAL HEALTH AND WELL-BEING (INTERESTED IN HAVING ACCESS TO “MORE”)



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DID YOU KNOW?

Spending persists amid fears of inflation, as consumers enjoy their post-pandemic freedom; many also head back to the office and rethink how they want to work.

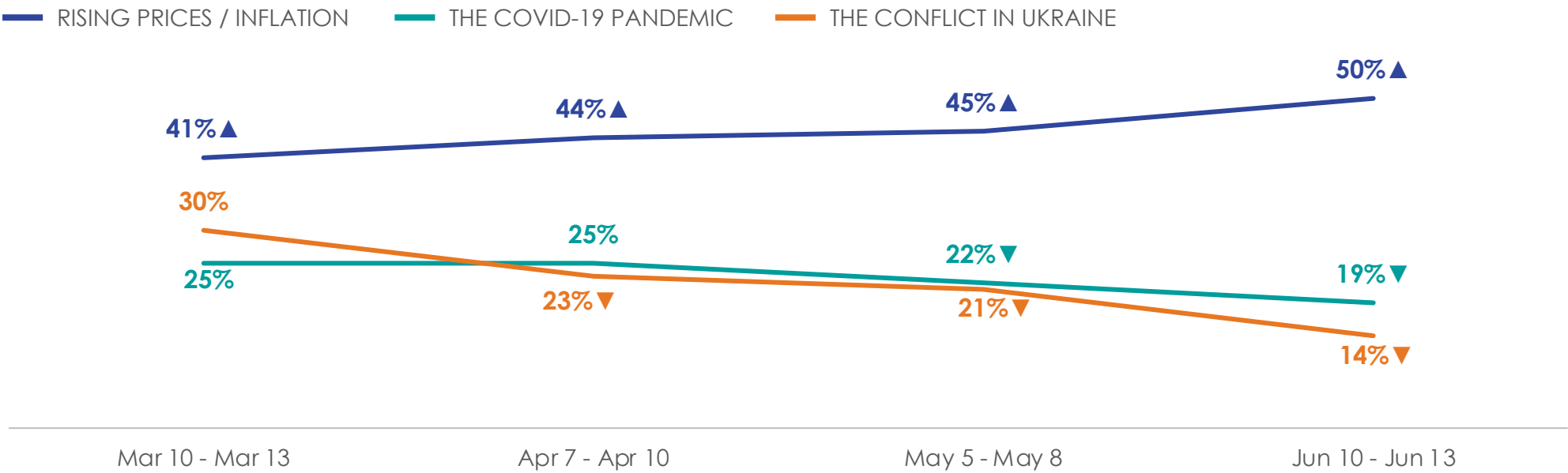


ESSENTIALS
SYNDICATED

June 2022

Rising prices and inflation continue to be a growing concern across the globe

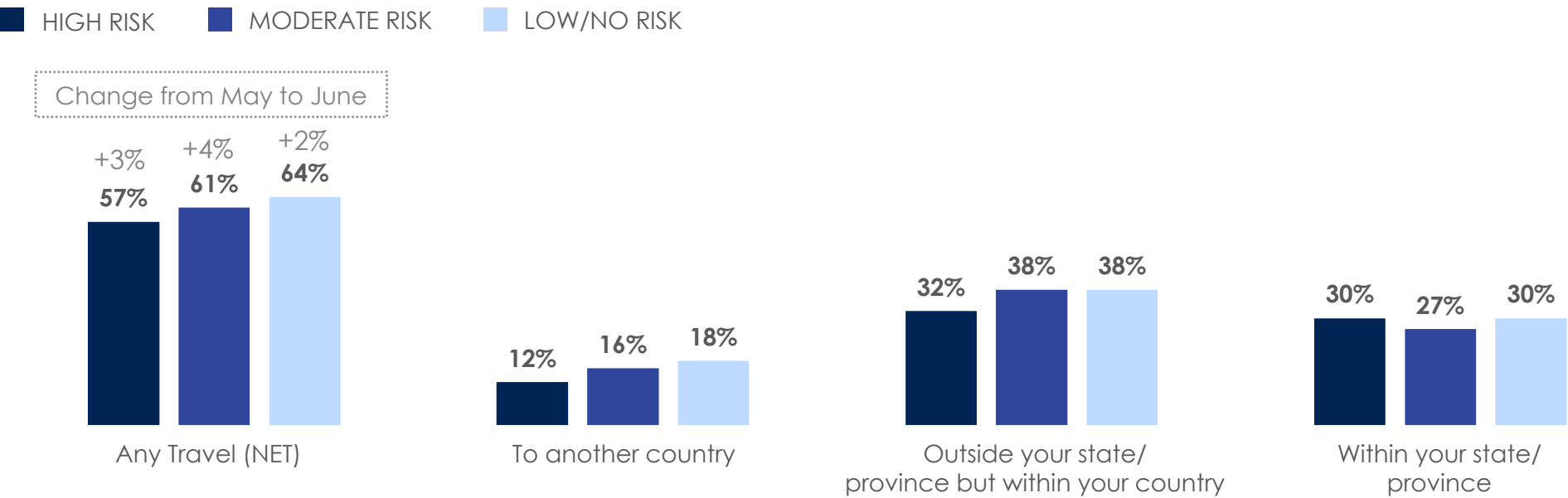
TOP CONCERNS – FIRST AND SECOND PRIORITIES



Inflation has yet to fully impact travel planning – trips are increasing, even among the most financially at-risk

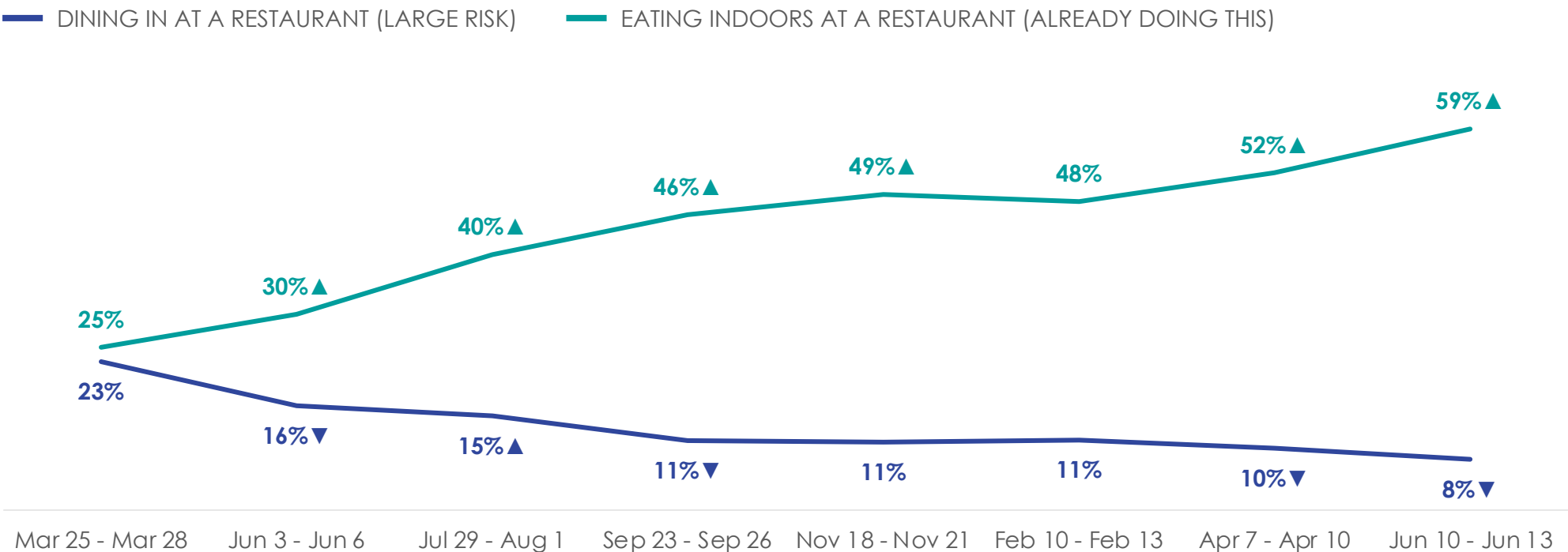
PLANS FOR LEISURE TRIPS IN THE NEXT 3 MONTHS, BY RISK OF INFLATION

THOSE WHO PERSONALLY FEEL RISING PRICES AND INFLATION POSE A...



Diners continue to head back to restaurants, despite increased concerns about inflation, as the fear of COVID-19 abates

Perceived Risk and Participation in Dining at a Restaurant

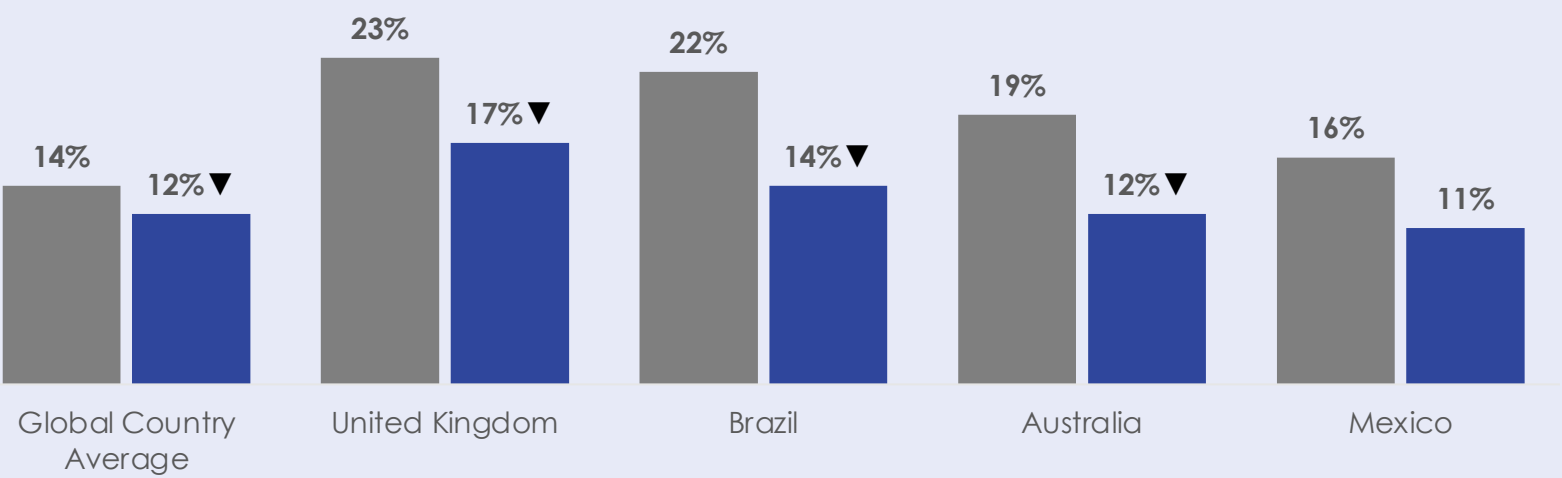


Slowly more and more employees are returning to the office

RETURN
TO OFFICE
trending in
JUNE

CURRENT WORK SITUATION – PRIMARILY WORKING FROM HOME
(BY THOSE WHO ARE EMPLOYED)

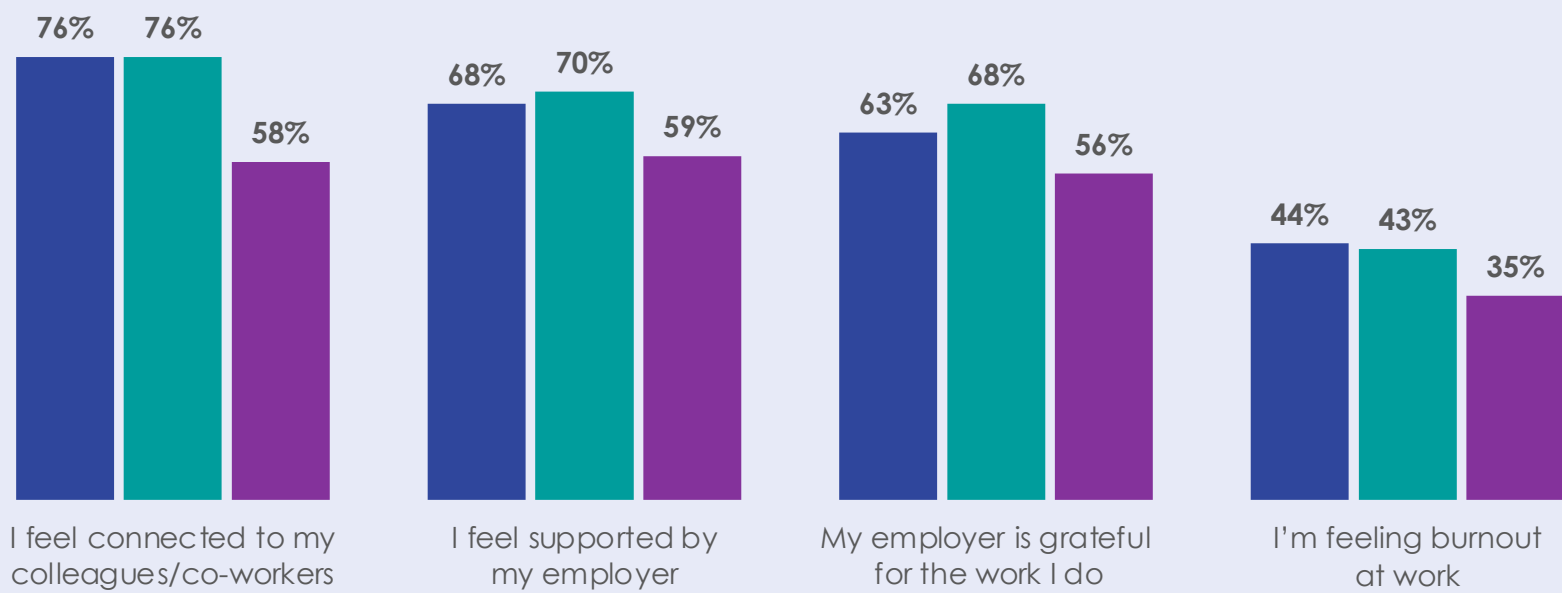
■ Mar 10 - Mar 13, 2022 ■ Jun 9 - Jun 12, 2022



Those working from home feel less connected, less supported, and less appreciated... but also less burnt out; despite the flexibility, over a third of all employees are still considering leaving their job

ATTITUDES TOWARDS WORK ENVIRONMENT
(TOP-2 BOX AGREEMENT)

■ PRIMARILY WORK IN OFFICE ■ SPLIT TIME BETWEEN HOME/OFFICE/OTHER LOCATIONS ■ PRIMARILY WORK FROM HOME

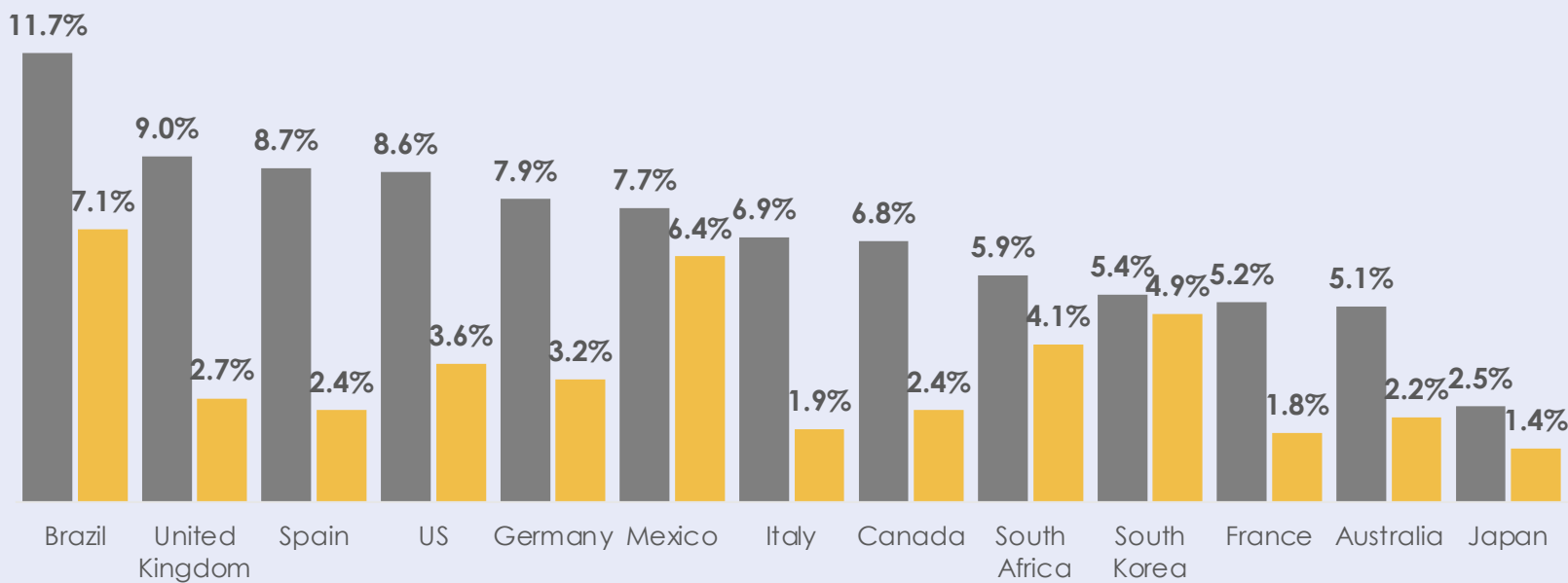


Likelihood to Leave Job in Next 12 Months (Top-2 Box)
36%

Some workers are feeling they're underpaid as wages are not keeping pace with inflation - increased pay is the number one employee-reported measure to help with retention

INFLATION RATE VS. AVERAGE SALARY INCREASE
(MEAN INCLUDING ZERO)

■ INFLATION RATE ■ AVERAGE SALARY INCREASE (MEAN – SELF-REPORTED)



#1
Action Employers Can Take to Retain Employees Who Are Likely to Leave

55%
Increase my pay

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DID YOU KNOW?

Inflation is the dominant concern for consumers around the world, forcing them to make lifestyle changes and trade-offs.

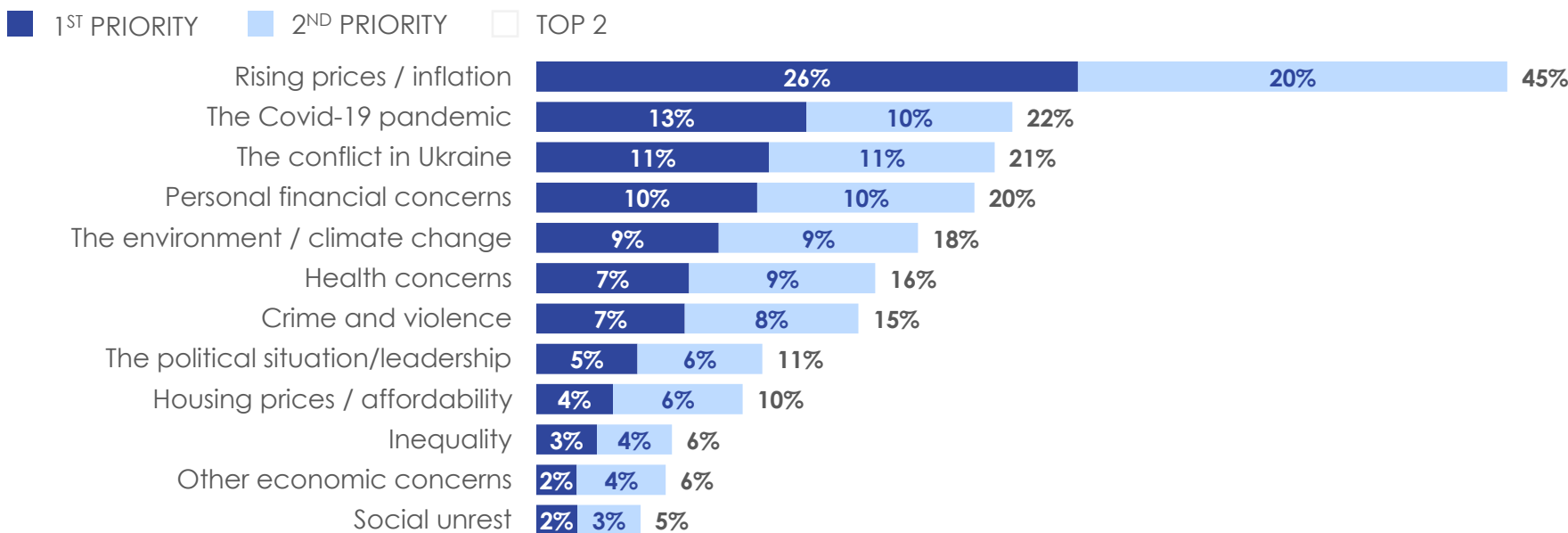


ESSENTIALS
SYNDICATED

May 2022

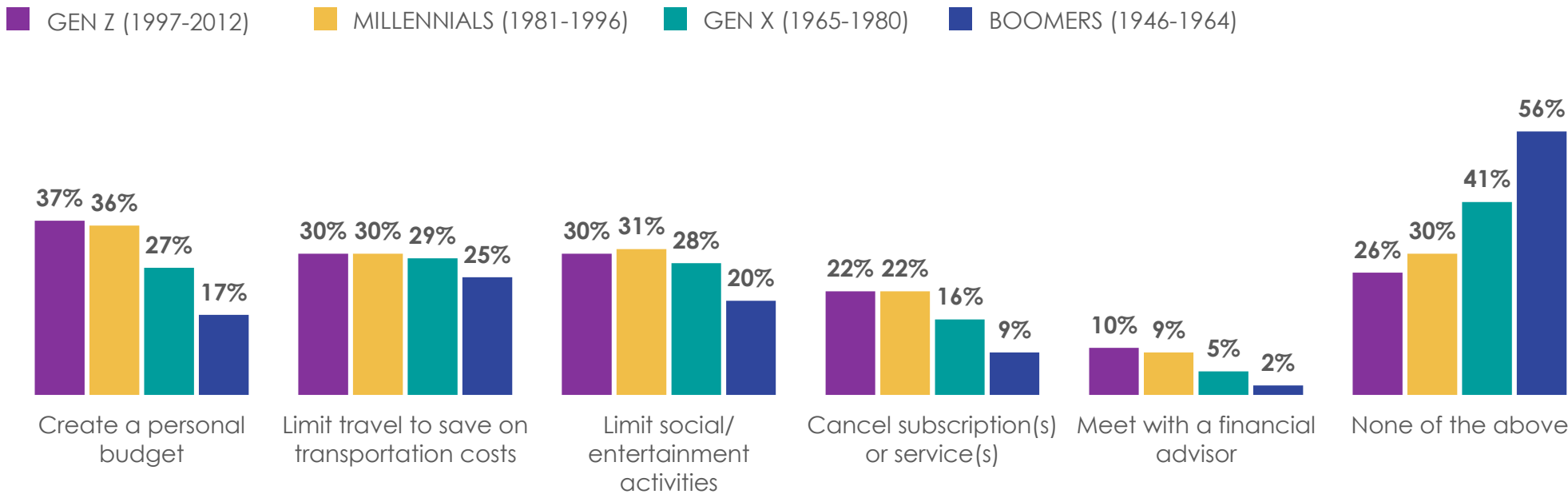
Concern with rising prices and inflation dominates the narrative on a global level – much more so than the pandemic, the conflict in Ukraine or the environment

TOP CONCERNS – FIRST AND SECOND PRIORITIES



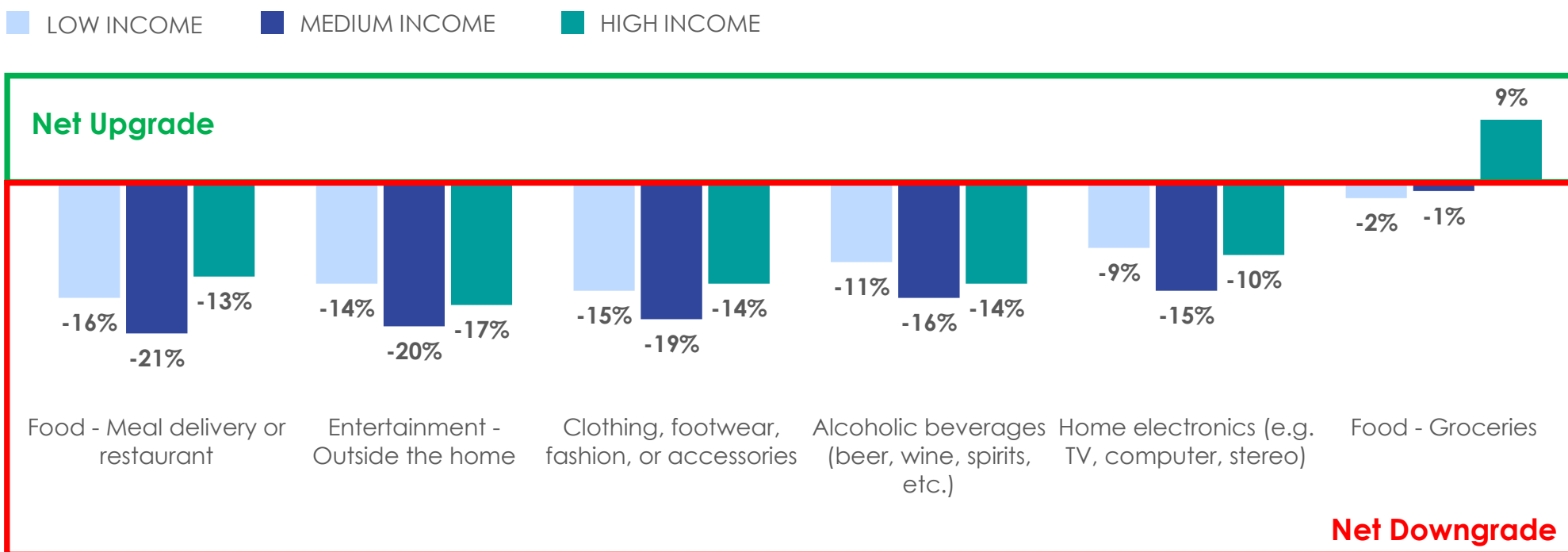
Gen Z and Millennials are being more proactive in making lifestyle changes to manage the impact of inflation

CHANGES MADE TO MANAGE IMPACT OF INFLATION (BY GENERATION)



Shoppers are scaling back on their discretionary spending; less affluent households are even forced to downgrade on the essentials

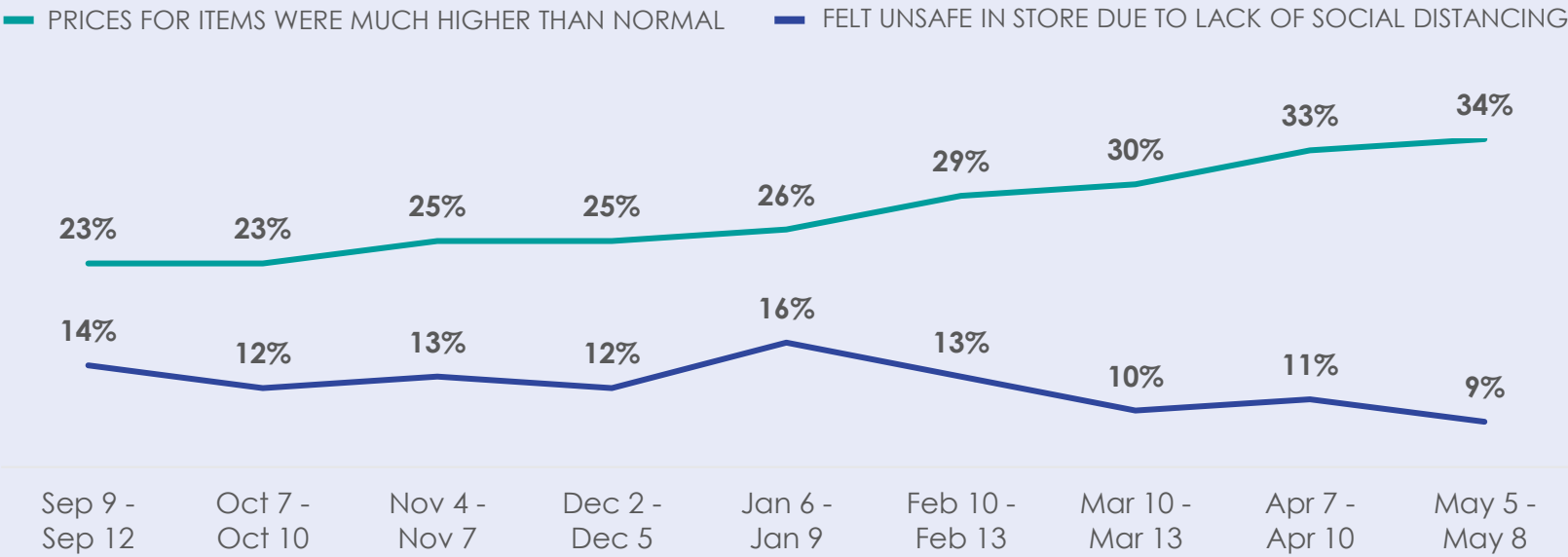
EXPECTED SHIFTS IN SPENDING IN THE NEXT MONTH: (NET SPEND MORE/UPGRADE VS. SPEND LESS/DOWNGRADE)



Rising prices are increasingly more challenging to consumers than pandemic safety issues when shopping

SHOPPING CHALLENGES trending in MAY

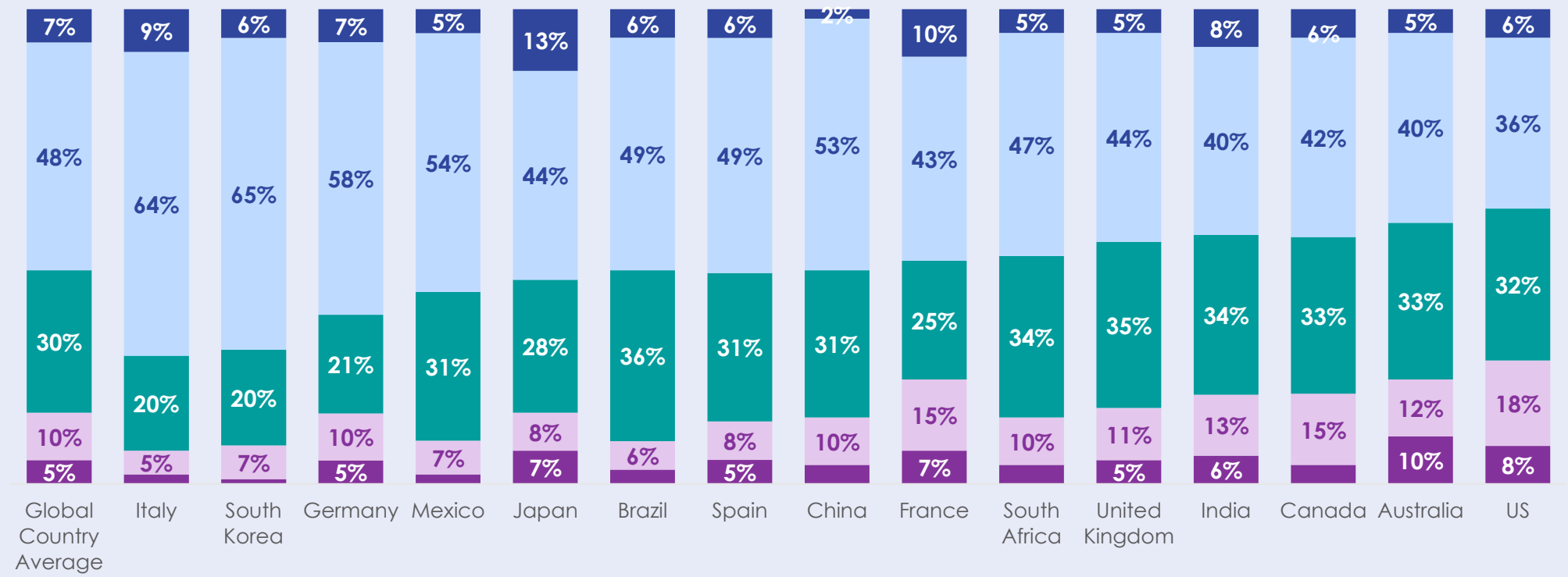
SHOPPING CHALLENGES (PAST 2 WEEKS)



On the sustainability front, countries across the world feel the risk to the environment is reaching a critical stage which necessitates immediate action

BELIEFS ABOUT CURRENT STATE OF ENVIRONMENT

- IT'S TOO LATE TO PREVENT ENVIRONMENTAL COLLAPSE
- THE ENVIRONMENT IS AT A CRITICAL STAGE – THE WORLD MUST ACT NOW
- THE ENVIRONMENT IS AT RISK, BUT THERE IS STILL TIME TO ACT
- THE ENVIRONMENT IS A CONCERN, BUT IT'S LARGELY OVERBLOWN
- THE ENVIRONMENT IS NOT A CONCERN



However, even Activists – who are most passionate about saving the environment – don't have the environment as their top concern as it's overshadowed by inflation

TOP CONCERNS – FIRST AND SECOND PRIORITIES

CONSUMER SEGMENTS BASED ON INCREASING PASSION FOR SAVING THE ENVIRONMENT					
	DISENGAGED DENIALISTS	SKEPTICS	CONFLICTED CONTRIBUTORS	PRAGMATISTS	ACTIVISTS
#1	Rising Prices/ Inflation (40%)	Rising Prices/ Inflation (40%)	Rising Prices/ Inflation (55%)	Rising Prices/ Inflation (49%)	Rising Prices/ Inflation (41%)
#2	COVID-19 Pandemic (22%)	COVID-19 Pandemic (28%)	Personal Financial Concerns (26%)	Conflict in Ukraine (25%)	The Environment/ Climate Change (27%)
#3	Personal Financial Concerns (20%)	Conflict in Ukraine (21%)	Conflict in Ukraine (19%)	COVID-19 Pandemic (24%)	Conflict in Ukraine (24%)

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DID YOU KNOW?

The world is now battling a three-headed monster – rising prices, COVID, and the conflict in Ukraine all threaten to take a bite out of consumer confidence and limit our ability to return to what we might imagine to be a “normal” situation.



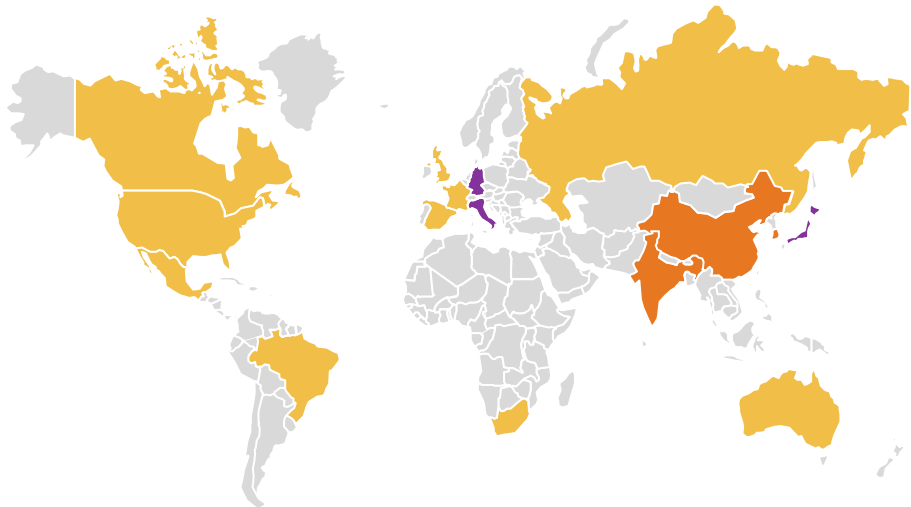
ESSENTIALS
SYNDICATED

April 2022

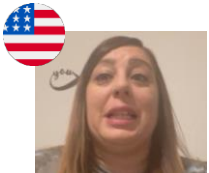
Inflation is a top concern across most of the world, but priorities differ based on proximity to conflict and pandemic response plans

TOP CONCERNS – FIRST OR SECOND PRIORITIES

■ RISING PRICES / INFLATION ■ COVID-19 PANDEMIC ■ CONFLICT IN UKRAINE



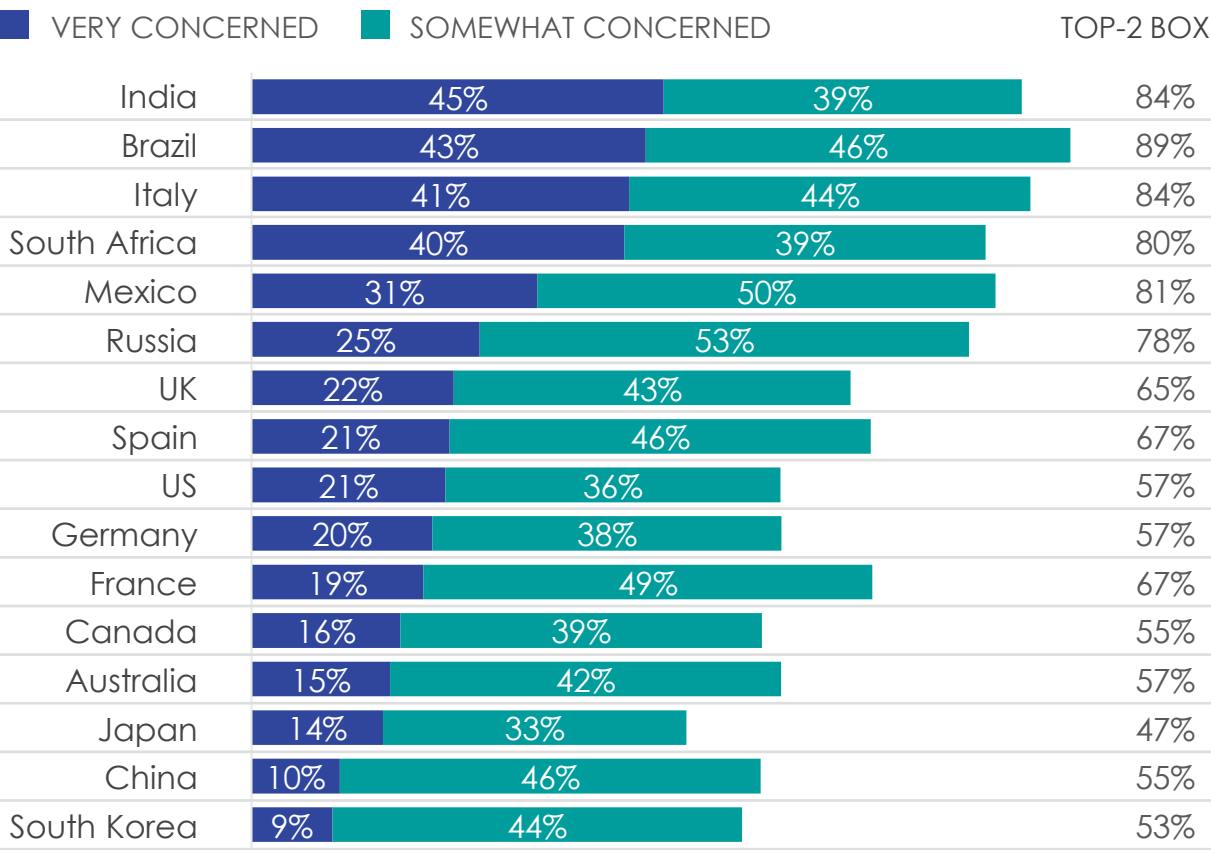
Getting COVID has just totally thrown a bomb into my life. There are no restrictions now! So everyone is getting it. It's like 1-in-10 people have it at the moment.



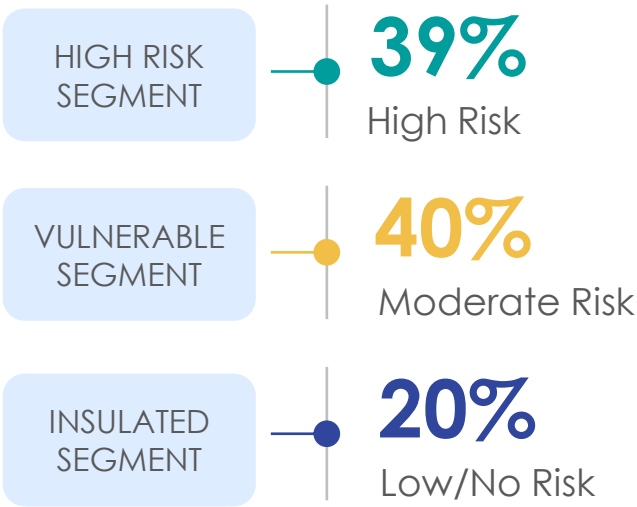
Inflation is seriously insane. Gas prices are almost \$5 a gallon...The biggest stress of my life is money.

Most consumers are concerned about paying bills – and 8 in 10 feel the risk of inflation is moderate to high

CONCERN FOR ABILITY TO PAY BILLS, BY COUNTRY



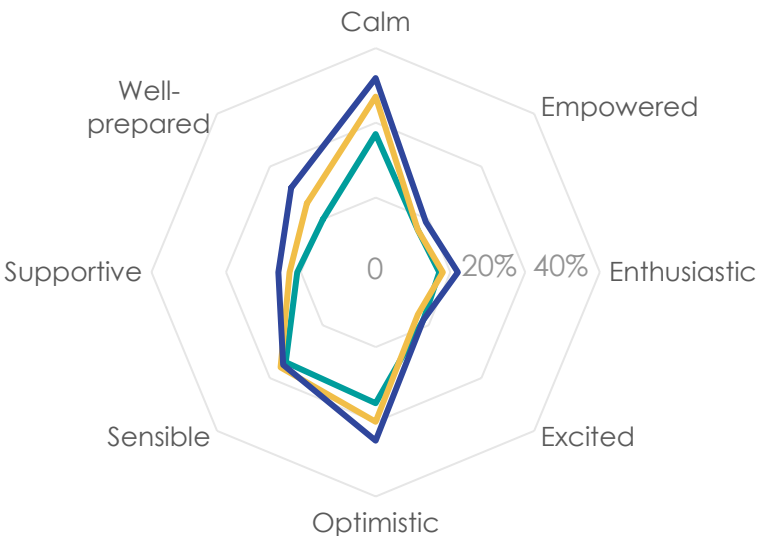
THOSE WHO PERSONALLY FEEL RISING PRICES AND INFLATION POSE A...



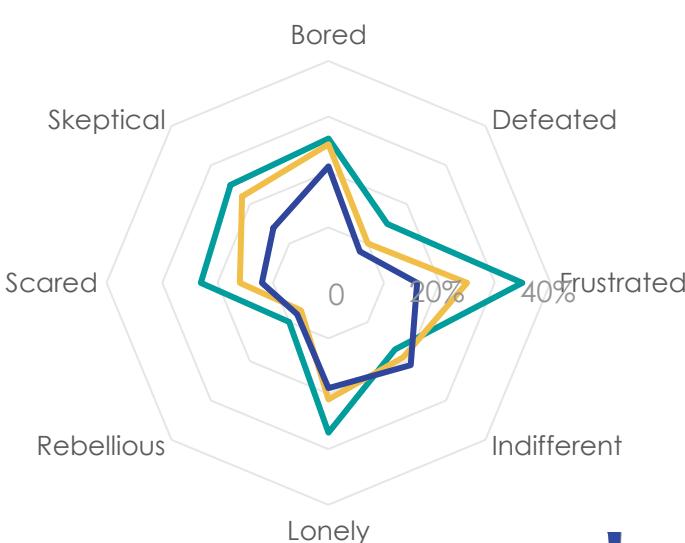
Consumer well-being can be tied to the stress from inflation – those who are at high risk are much more likely to have a negative outlook

■ HIGH RISK SEGMENT ■ VULNERABLE SEGMENT ■ INSULATED SEGMENT

Positive Emotions

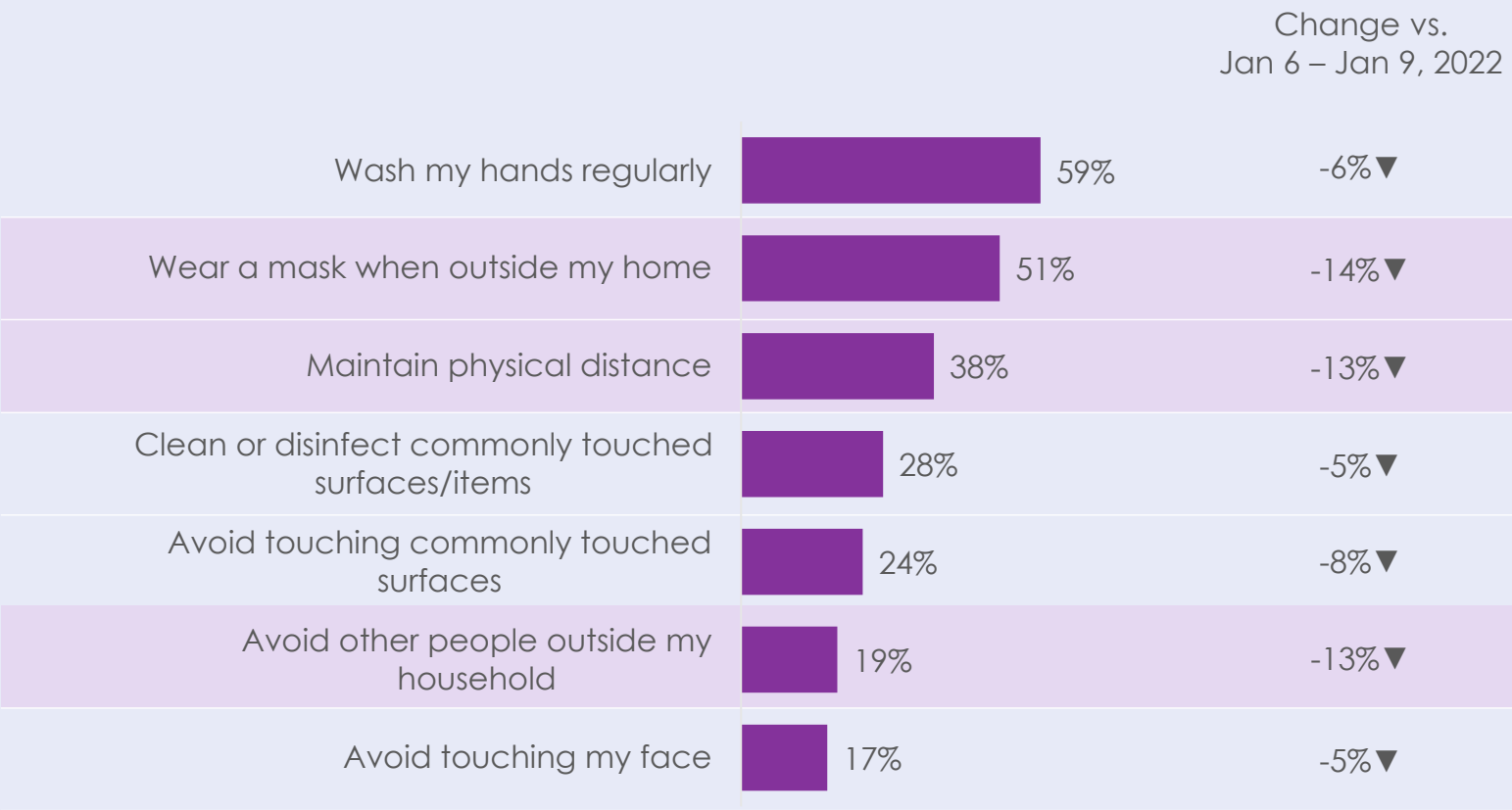


Negative Emotions



Many countries have eased COVID-19 restrictions and citizens are embracing the change

TOP MEASURES TAKEN TO STAY PROTECTED (PAST 4 WEEKS)



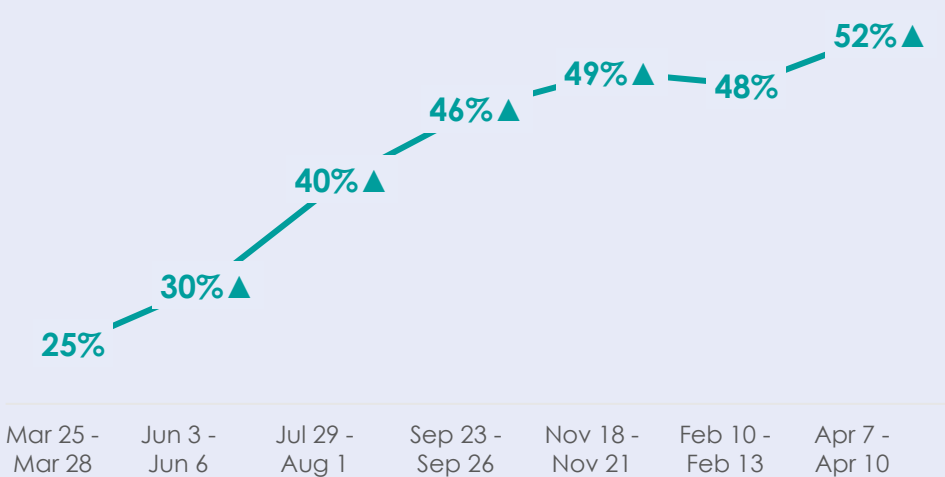
PARTICIPATION
IN ACTIVITIES
trending in
APRIL

Consumers are resuming travel and heading back to restaurants

CURRENT PARTICIPATION IN TRAVEL ACTIVITIES



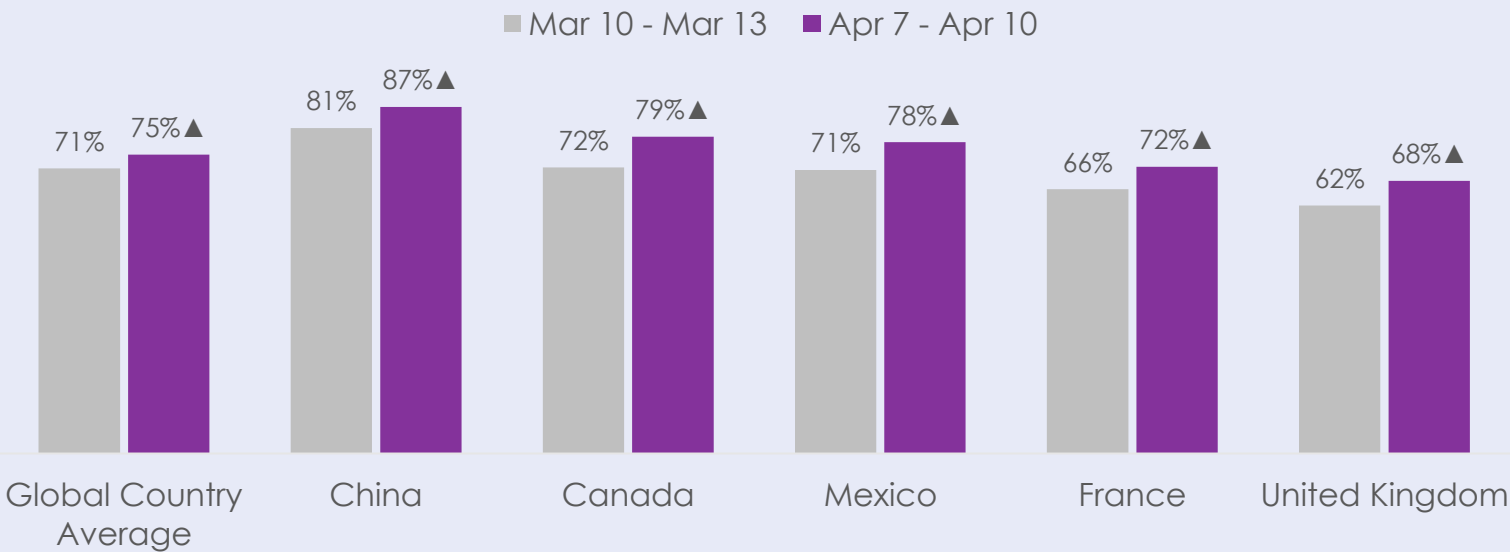
CURRENTLY DINING INDOORS AT A RESTAURANT



▼ or ▲ indicate change vs. previous wave (statistically significant @ 95% C.I.)

Still, with restrictions easing and fewer taking preventative measures, citizens are increasingly worried about new COVID variants

“I’M WORRIED THAT NEW COVID-19 VARIANTS WILL DELAY THINGS GETTING BACK TO NORMAL” (TOP-2 BOX AGREEMENT)



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DID YOU KNOW?

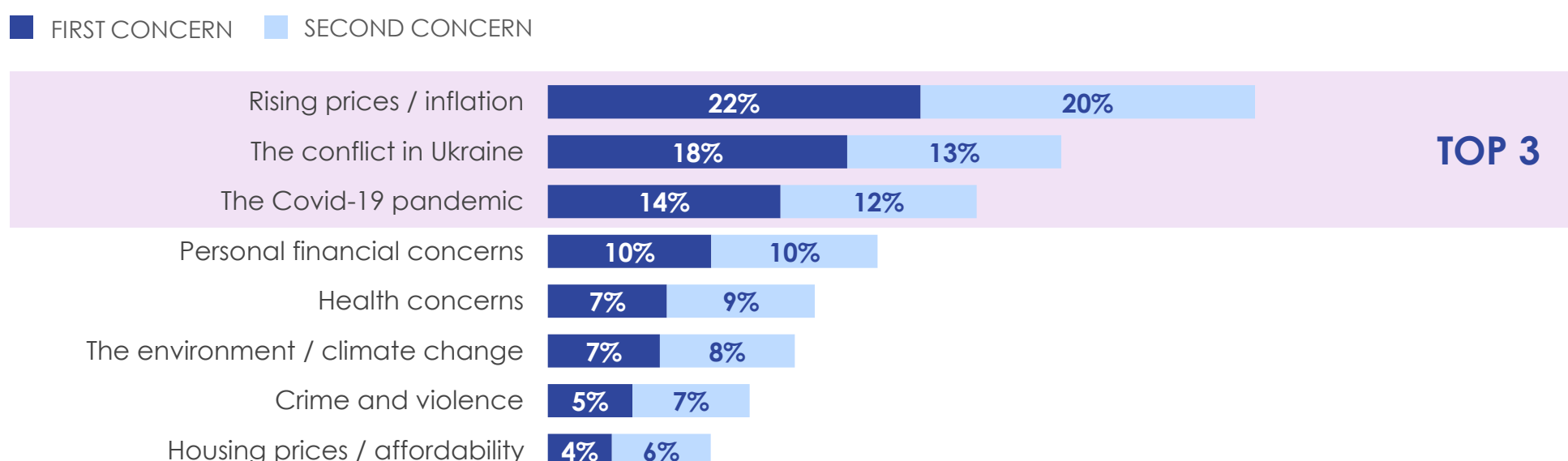
Beyond the pandemic, citizens react and adapt to global issues impacting their lives – from rising prices to the conflict in Ukraine .



ESSENTIALS
SYNDICATED

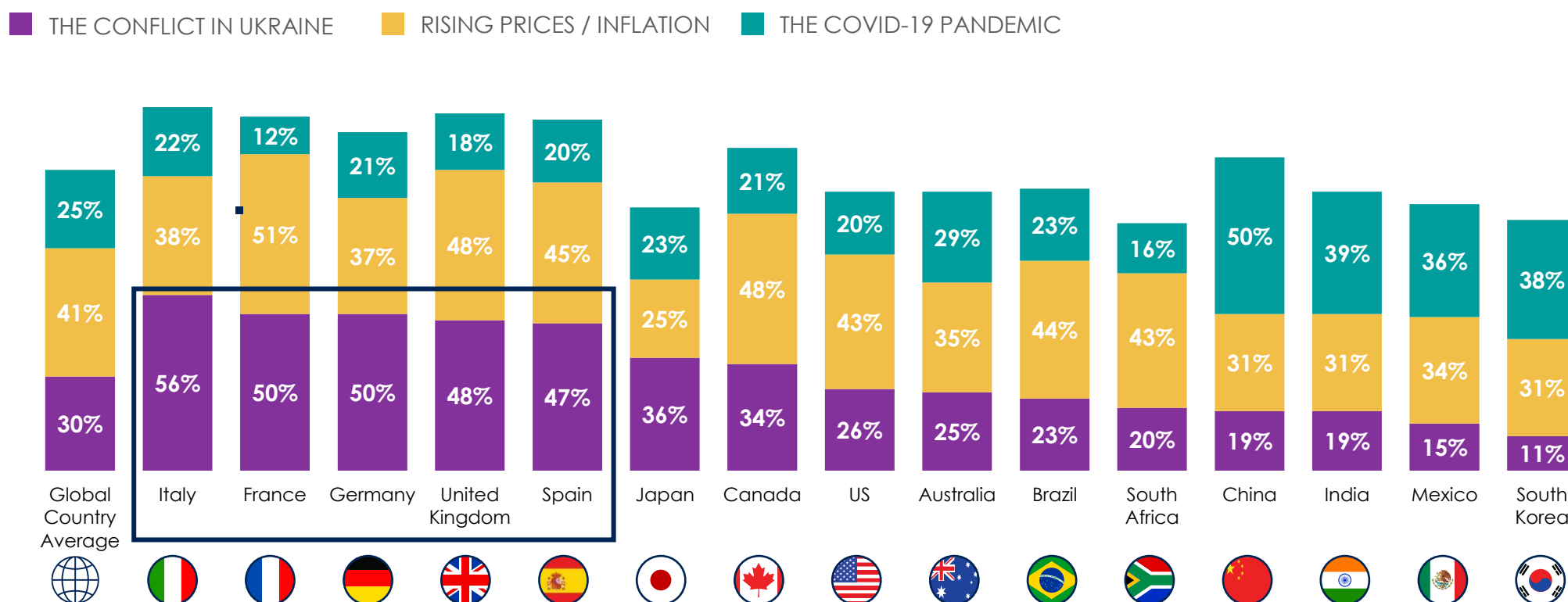
March 2022

Inflation continues to be the top concern, followed closely by the conflict in Ukraine



The conflict in Ukraine hits closer to home – quite literally – for European countries

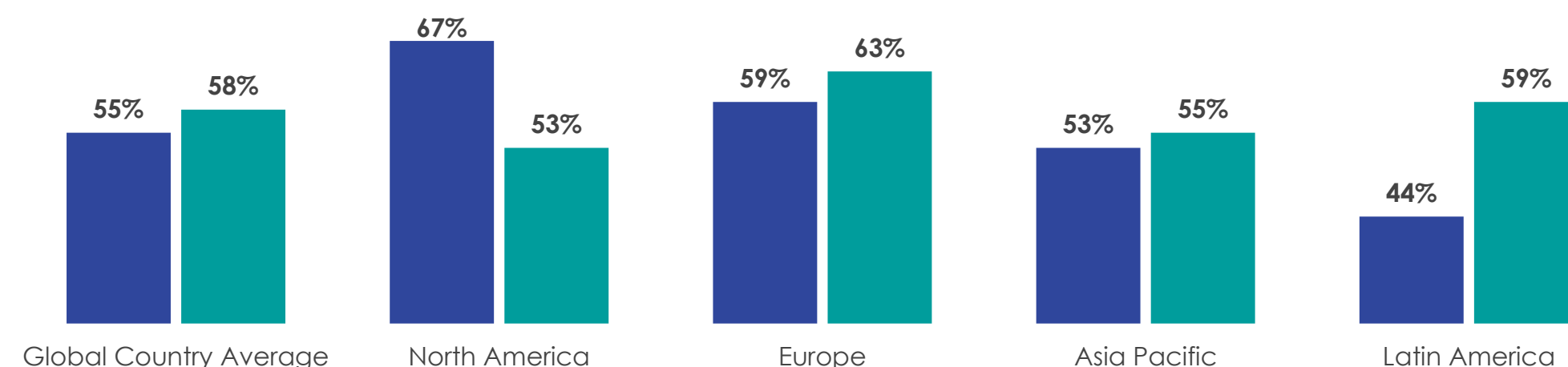
TOP CONCERN



The Ukraine conflict has led the world to be more diligent with their spending and cautious of which companies they support

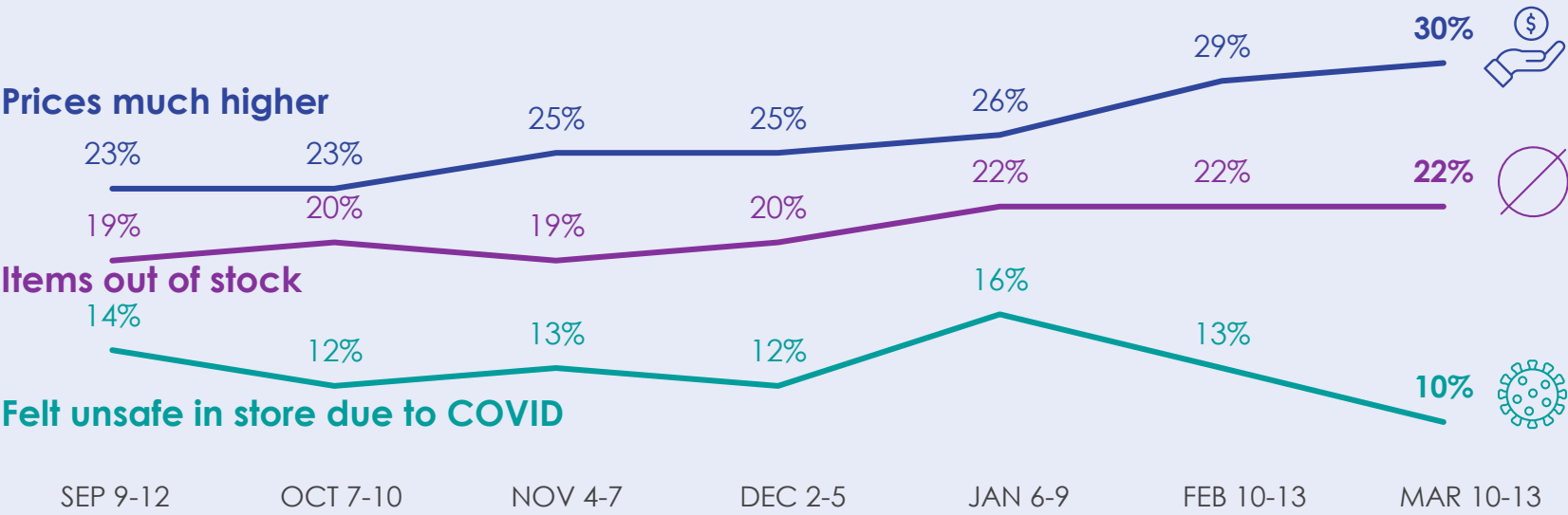
“TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH EACH OF THE FOLLOWING?”
(TOP-2 BOX AGREEMENT)

- I will **not buy** from any **companies** that **work with or in Russia**
- I'm being more **careful** with my **spending** when I shop because of the **conflict in Ukraine**



The top challenge for shoppers is that prices are much higher than anticipated

INFLATION
trending in
MARCH



With rising prices and global unrest, consumers are planning to spend less across most categories

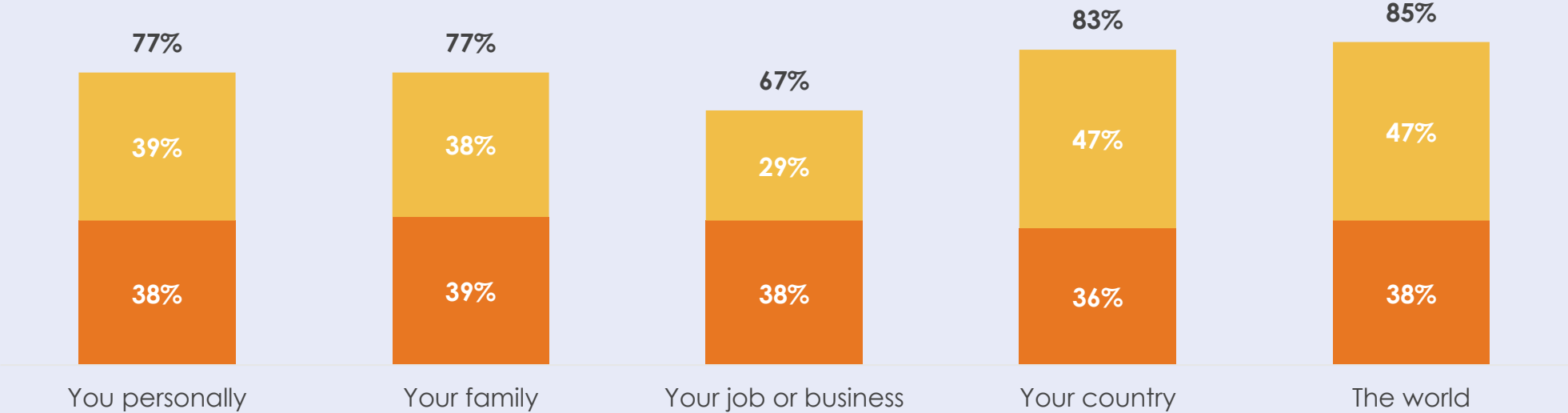
PURCHASE DOWNGRADES AND UPGRADES EXPECTED IN THE NEXT MONTH

	SPEND LESS	SPEND MORE	
Food - Groceries	10%	23%	+13%
Food - Meal delivery or restaurant	20%	15%	-5%
Clothing, footwear, fashion	20%	13%	-7%
Entertainment - Inside the home	14%	13%	-1%
Financial investments	13%	13%	-
Home or Home Improvements	15%	13%	-2%
Travel or Vacation	18%	13%	-5%
Automobile	13%	13%	-
Personal care or Beauty products	14%	12%	-2%
Entertainment - Outside the home	20%	12%	-8%
Telecommunications	11%	12%	+1%
Charitable donations	13%	11%	-2%
Pets and pet supplies	9%	11%	+2%
Home electronics	16%	10%	-6%
Home appliances	15%	10%	-5%
Alcoholic beverages	18%	9%	-9%
Exercise products or services	14%	9%	-5%

The impact of inflation is hitting us most at a national and global level

LEVEL OF RISK RISING PRICES AND INFLATION HAVE ON EACH OF THE FOLLOWING

MODERATE RISK HIGH RISK HIGH/MODERATE RISK



Ipsos Essentials monitors how people across the globe navigate the new rules of engagement and the resulting impact on our state of mind, state of wallet, and future intentions. Each month Ipsos surveys consumers in 16 countries, including: Australia, Brazil, Canada, China, France, Germany, Italy, Mexico, Spain, India, Japan, Russia, South Africa, South Korea, the UK and the US.

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DID YOU KNOW?

February 2022 marks two years since Ipsos first began the *Essentials* global tracker. Today, the world views COVID-19 as less of a threat and are ready to move on, amid dropping confidence in institutions and rising concerns about inflation and prices. In fact, inflation now surpasses the coronavirus as the top concern among global citizens.

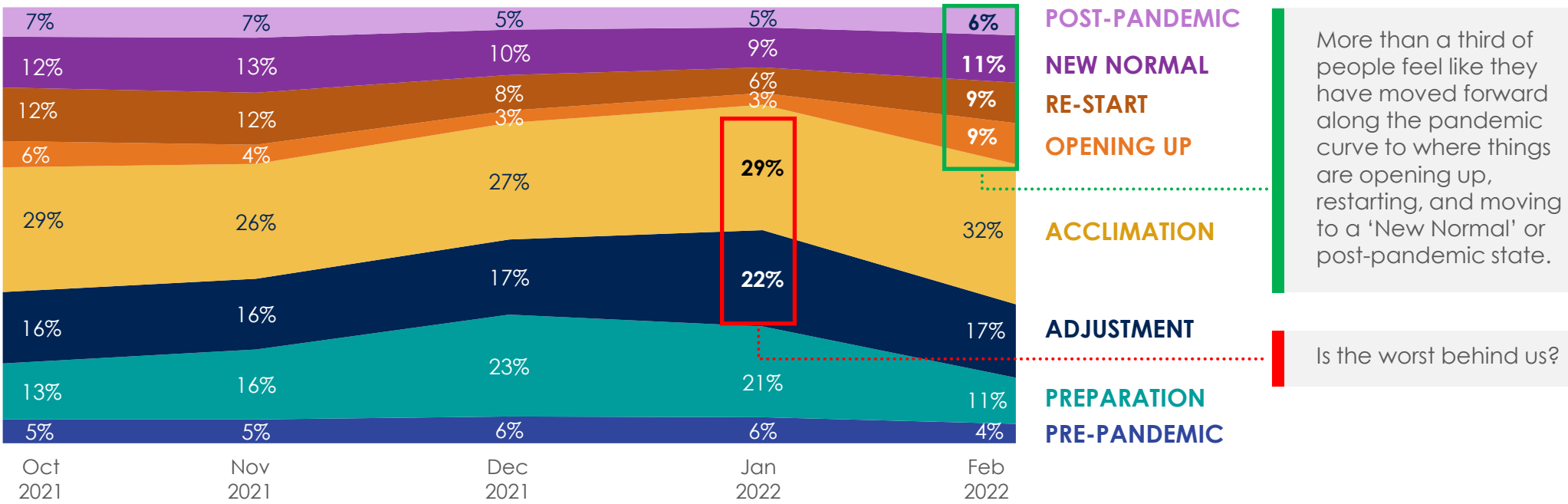


ESSENTIALS
SYNDICATED

February 2022

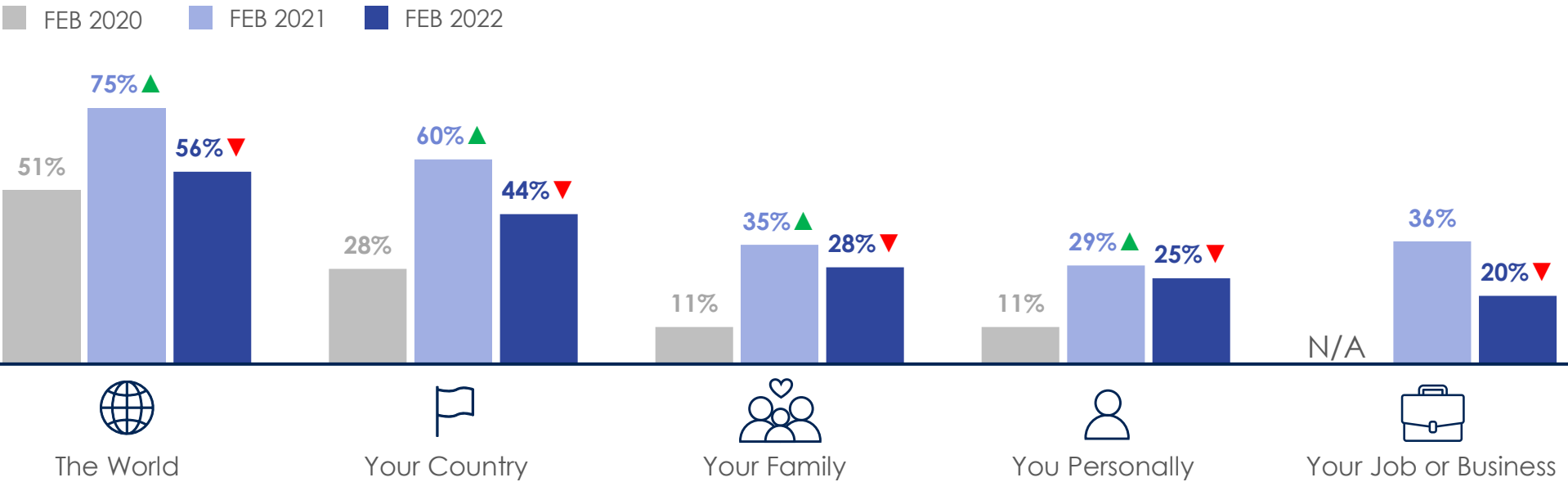
February 2022 posts the largest one-month global bounce back since the beginning of the pandemic

WHICH OF THE FOLLOWING PHASES BEST DESCRIBES YOUR CURRENT SITUATION REGARDING THE COVID-19 PANDEMIC?



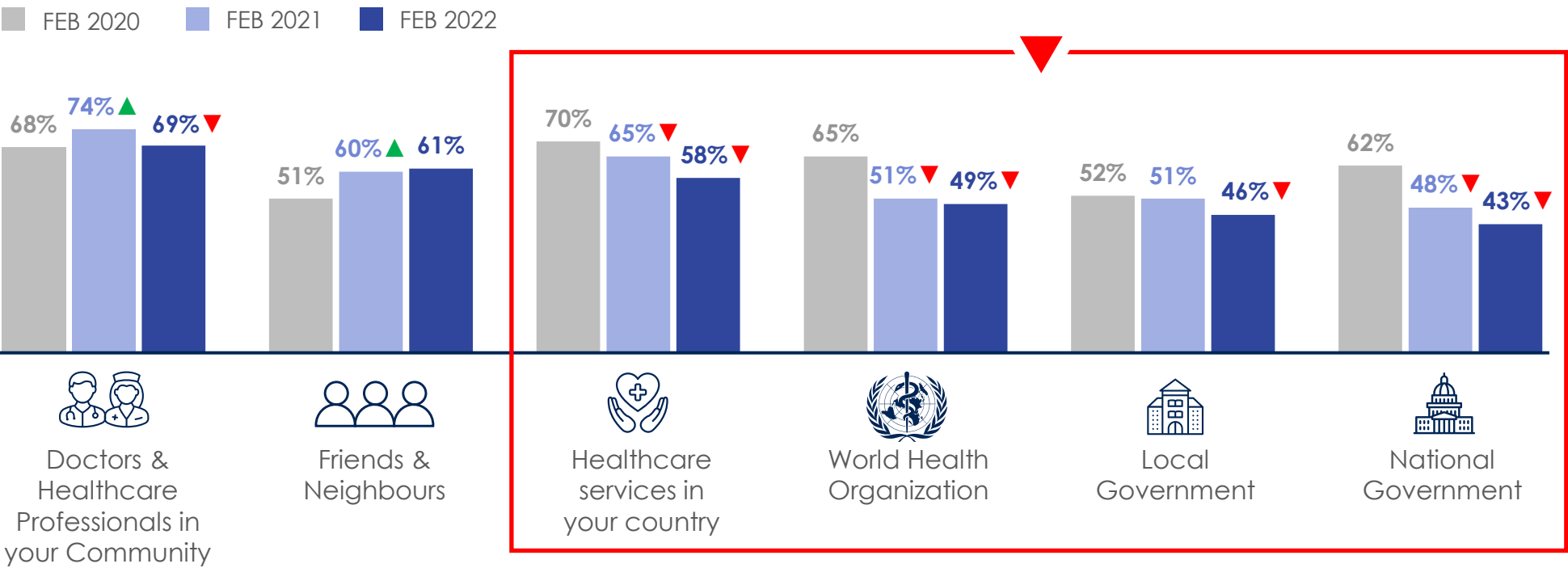
After a tumultuous 2021, COVID-19 is seen as much less of a threat now

WHAT LEVEL OF THREAT DO YOU THINK THE CORONAVIRUS POSES TO EACH OF THE FOLLOWING? (% VERY HIGH + HIGH THREAT)



Citizen confidence in institutions continues to decline, whether global, national or local

HOW CONFIDENT ARE YOU THE FOLLOWING ARE PREPARED AND CAN EFFECTIVELY DEAL WITH THE CORONAVIRUS? (% VERY + SOMEWHAT CONFIDENT)



Consumerism has a profound impact on the world; some of us are motivated to reduce our carbon footprint while others have competing priorities



CONSUMER SEGMENTATION* BASED ON ENVIRONMENTAL CONCERNS

















ACTIVISTS 17%	PRAGMATISTS 29%	CONFLICTED CONTRIBUTORS 18%	SKEPTICS 16%	DISENGAGED DENIALISTS 19%
Younger and more likely female. Believe environment is at a critical stage and the world must act now. Will compromise lifestyle for environment.	Older & affluent. Concerned about the environment and will take action through low-cost, home-oriented actions. Will compromise if necessary.	Concerned about the environment but their financial situation takes precedence.	Think concern for climate change is overblown. See many barriers to action on climate change, believing that it is inconvenient, expensive and not a priority.	Environment is either not a concern, not immediate, or largely overblown. Less inclined to take environmental action nor believe companies should act.

*More than 40 variables were used to help define the consumer groups. Global Base: 10,530

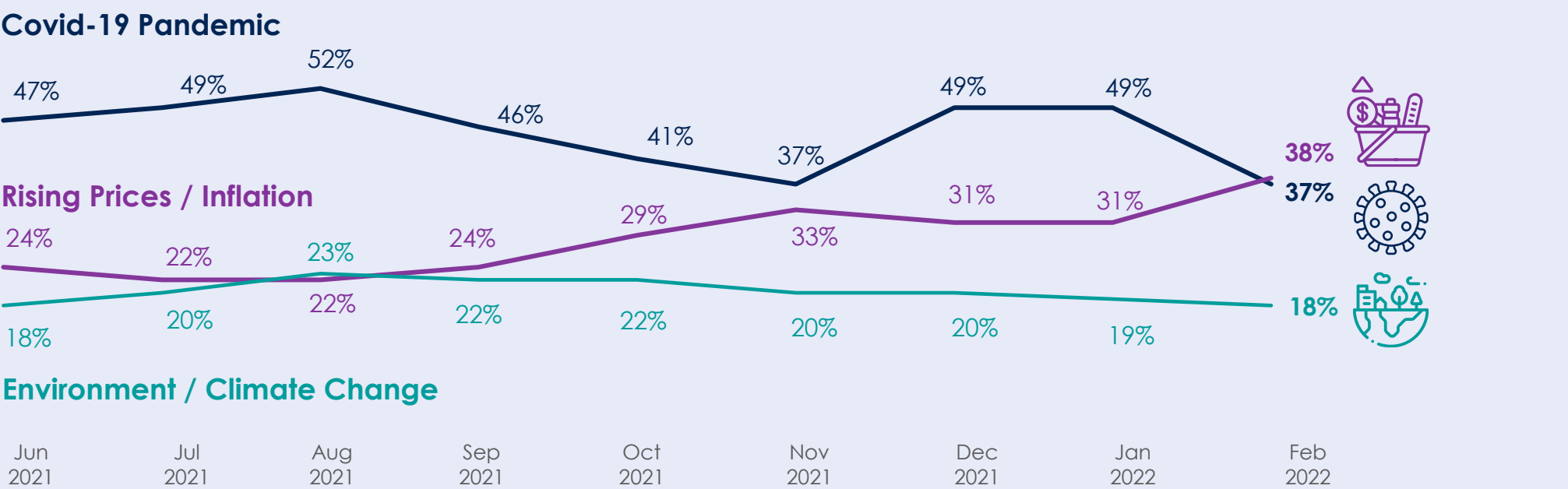
Inflation, the pandemic, and personal finances are amongst the competing priorities taking precedence over the environment

TOP CONCERNS | BY GROUP

■ ■ ■ *Index 120 or higher relative to Global Country Average

	ACTIVISTS	PRAGMATISTS	CONFLICTED CONTRIBUTORS	SKEPTICS	DISENGAGED DENIALISTS
#1	The Environment 35%* 	COVID-19 41% 	Inflation 49%* 	COVID-19 49%* 	COVID-19 32% 
#2	COVID-19 32% 	Inflation 40% 	COVID-19 30% 	Inflation 37% 	Inflation 31% 
#3	Inflation 28% 	Health concerns 21%  The Environment 21% 	Personal Finances 29%* 	Health concerns 21% 	Personal Finances 22% 

In February 2022, inflation surpassed the pandemic as the top concern among global citizens



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DID YOU KNOW?

Almost 2 years after the WHO declared COVID a global pandemic, citizens are increasingly feeling like things are out of control, and many governments have introduced new restrictions. Globally, citizens have moved from anxiety to annoyance, and we are all eager for things to open up. The Ipsos team predicts the public mood will remain volatile in 2022 as we increasingly learn to live with COVID.



ESSENTIALS
SYNDICATED

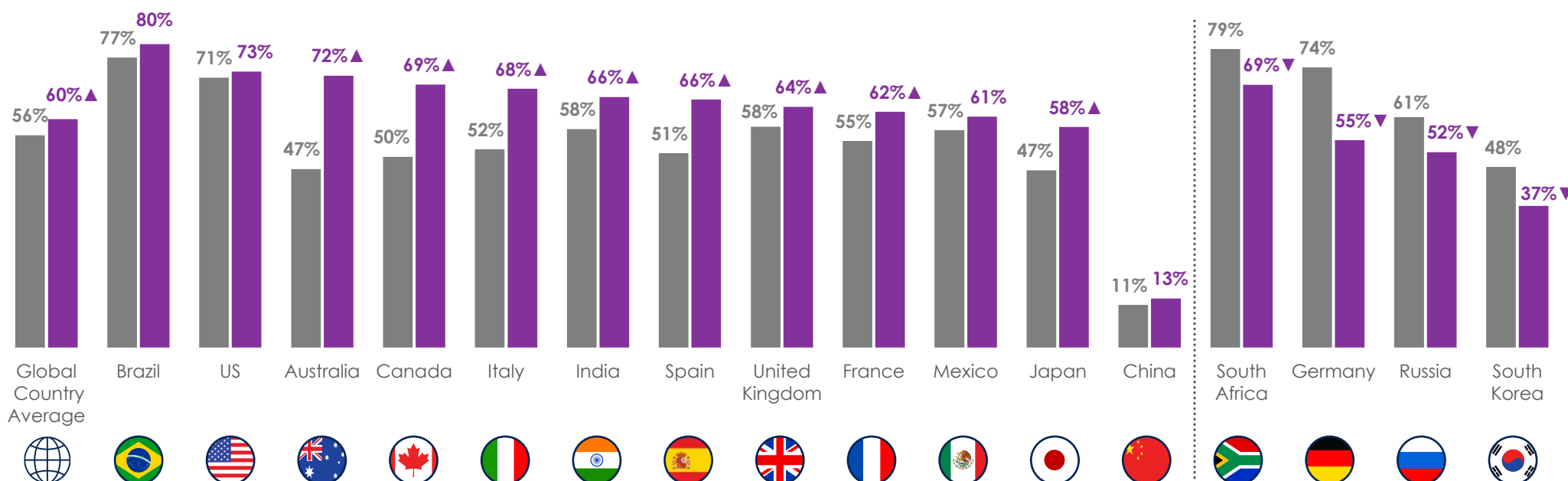
January 2022

In most countries surveyed, the perception of things being out of control has increased since December

"I FEEL LIKE THINGS IN MY COUNTRY ARE OUT OF CONTROL RIGHT NOW"

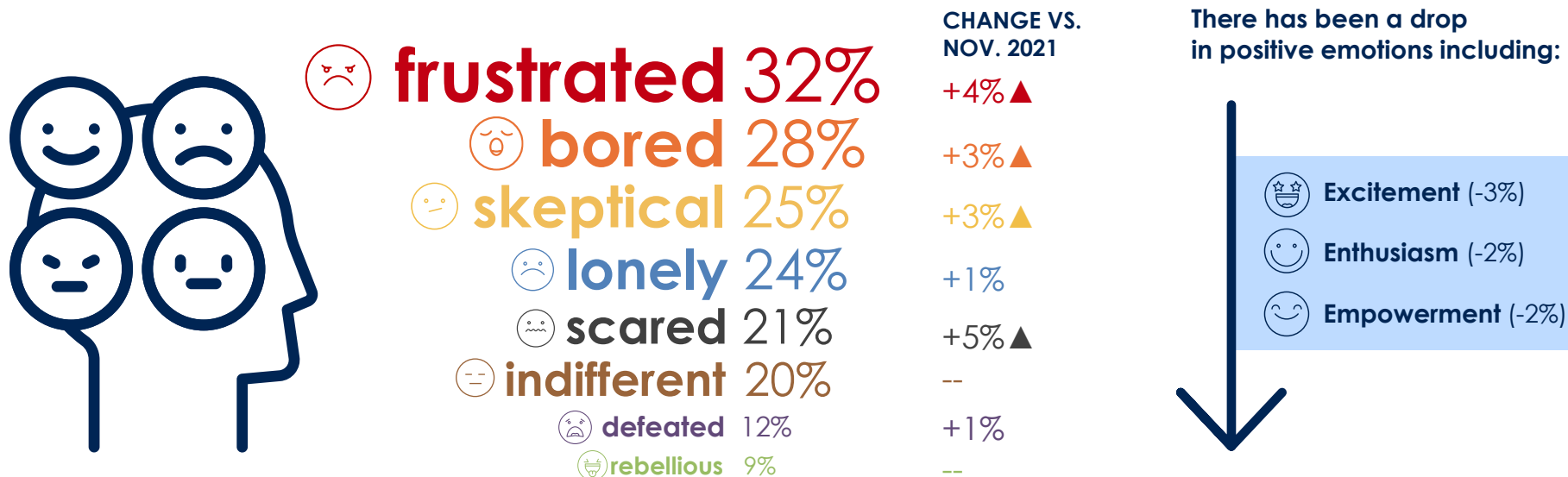
(TOP-2 BOX AGREEMENT)

■ December 2021 ■ January 2022



A spike in frustration, boredom, skepticism and fear is felt across the globe

WHICH OF THESE WORDS DESCRIBE YOUR STATE OF MIND RIGHT NOW?

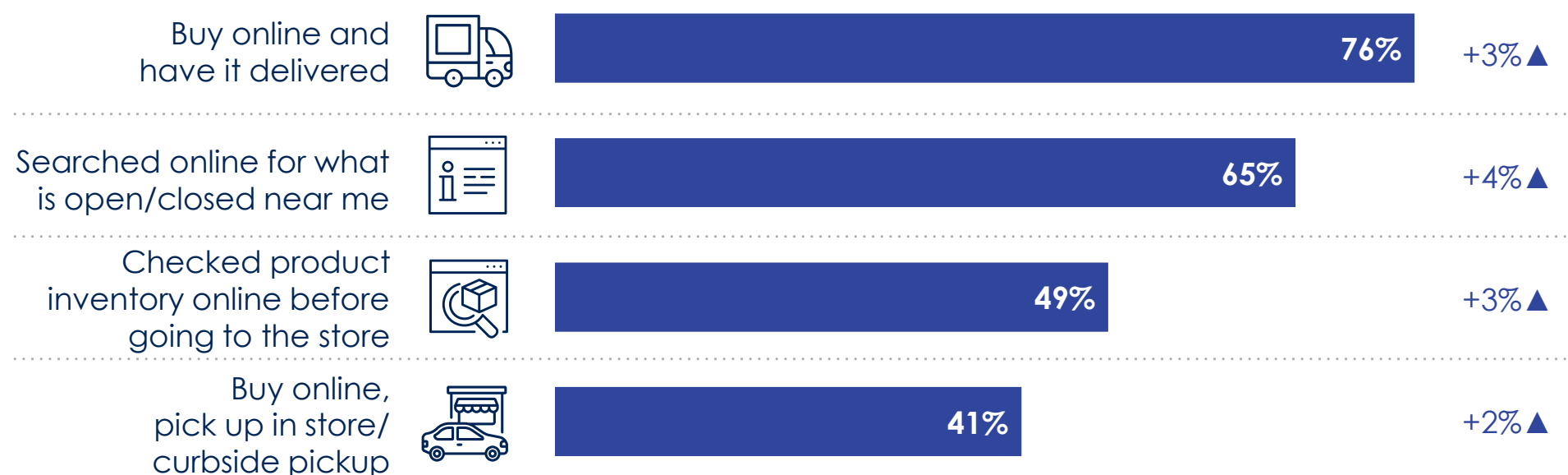


With the risk posed by Omicron, shoppers are increasingly participating in Online-to-Offline activities

REPORTED PARTICIPATION IN OMNICHANNEL ACTIVITIES

PAST 4 WEEKS

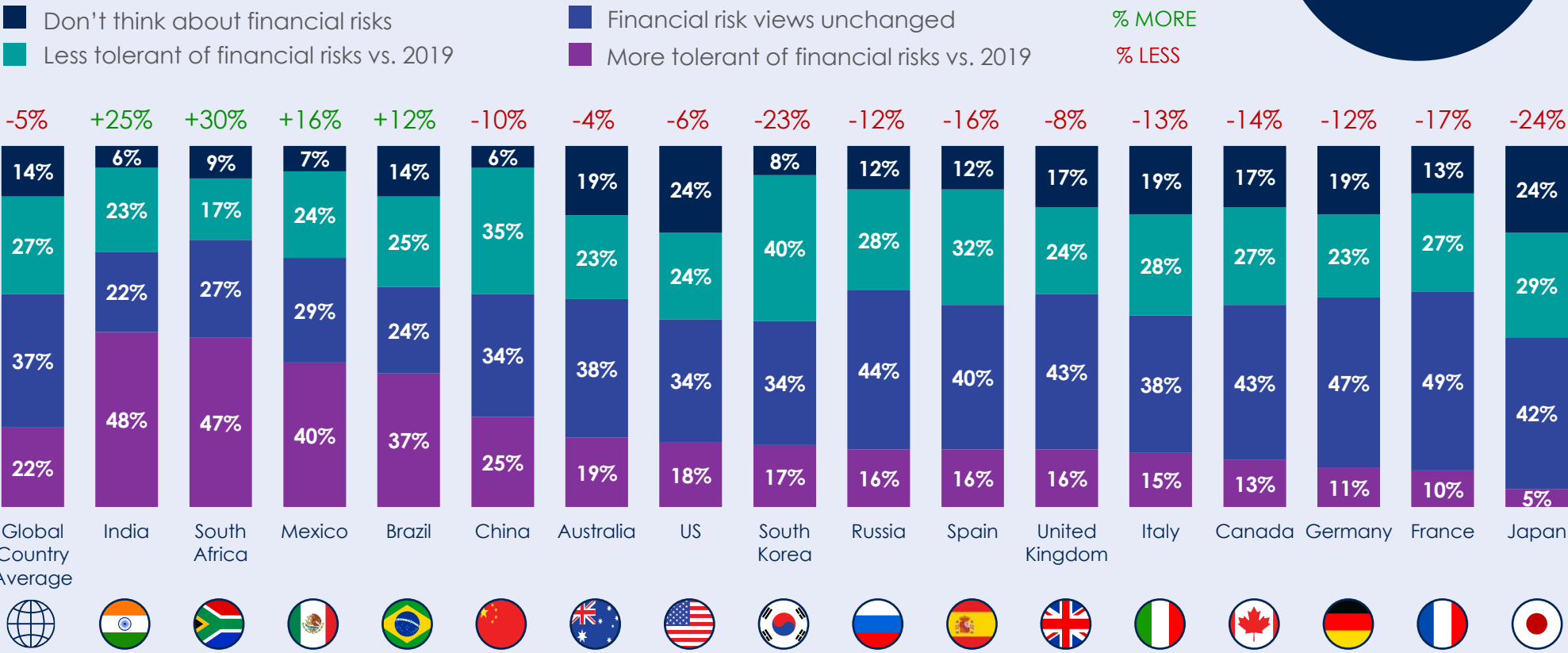
CHANGE VS.
NOV. 2021



Countries hardest hit financially throughout the pandemic have gained the most tolerance for financial risk

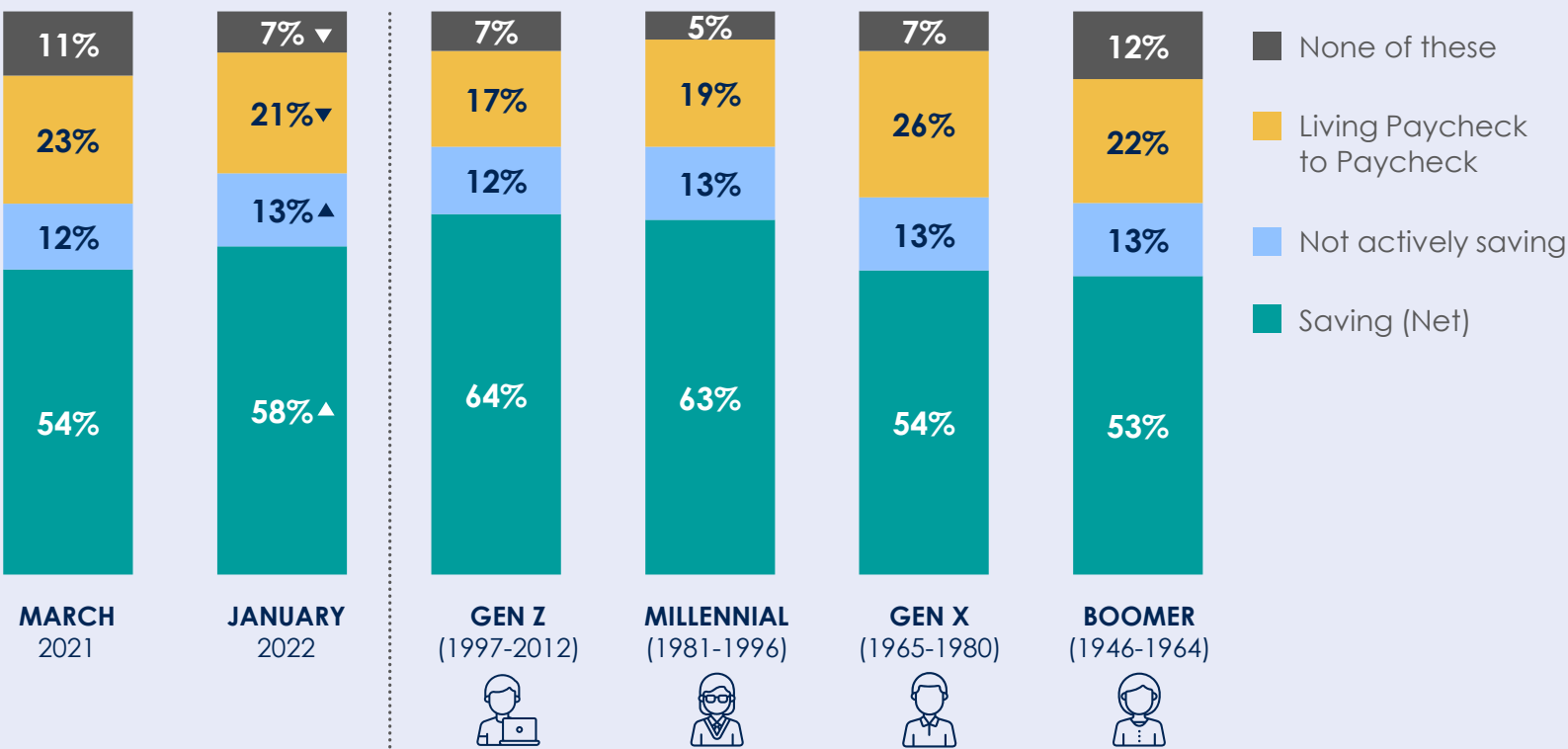
PERSONAL FINANCES trending in JANUARY

ATTITUDES TOWARDS FINANCIAL RISK



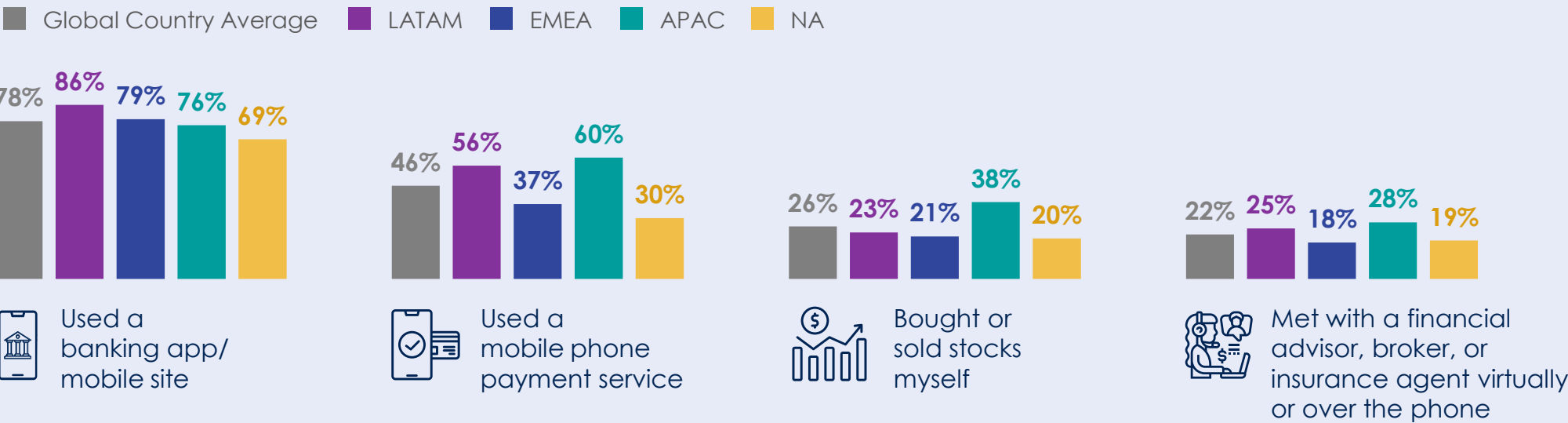
Amid COVID unpredictability, citizens have fewer ways to spend; savings are at their highest since March 2021

CURRENT FINANCIAL SAVINGS PLAN



LATAM and APAC have the highest adoption of digital financial activities

CURRENT PARTICIPATION IN DIGITAL FINANCIAL ACTIVITIES (PAST 4 WEEKS)



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