IPSOS UPDATE

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

February 2023

Ipsos Knowledge Centre

GAME CHANGERS

Ipsos

IPSOS UPDATE FEBRUARY 2023

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

All is not lost! One of the big things I took away from the WEF Davos event was that, despite much talk of *polycrisis* – including a new normal (for now) of much higher inflation than the last decade and continued geopolitical uncertainties – there was a real energy around how to make the most of the opportunities available. This was illustrated by the strong and very visible presence of large American, Chinese and Indian businesses.

There are some parallels here with how people on the ground feel right now. Each month we track consumer sentiment on a wide range of issues across 30 countries. Of the G7 nations, the US is among the most positive on its prospects, with Europe and the UK much more cautious. Western countries are now often at a lower point than before the pandemic because of the cost-of-living crisis – Europe is the centre of global uncertainty. Sweden, for example, is now the most pessimistic we have ever measured. In contrast, in Asian countries the mood is "let's go", as China re-opens.

These twin themes of *polycrisis* and opportunities are at the centre of our new 50-country Ipsos Global Trends report. It illustrates the tensions and contradictions that shape our world today. Globally 76% say inequality is a problem - and 72% fear that their own government will not do enough to help them: 56% want a strong leader to take control to replace their current government. Populism is receding, but its underlying causes haven't gone away. Despite talk of de-globalisation, and re-shoring, and "friend-shoring" supply chains, it seems that globalisation is hard to kill. Across the world 66% currently still say "globalisation is good for my country".

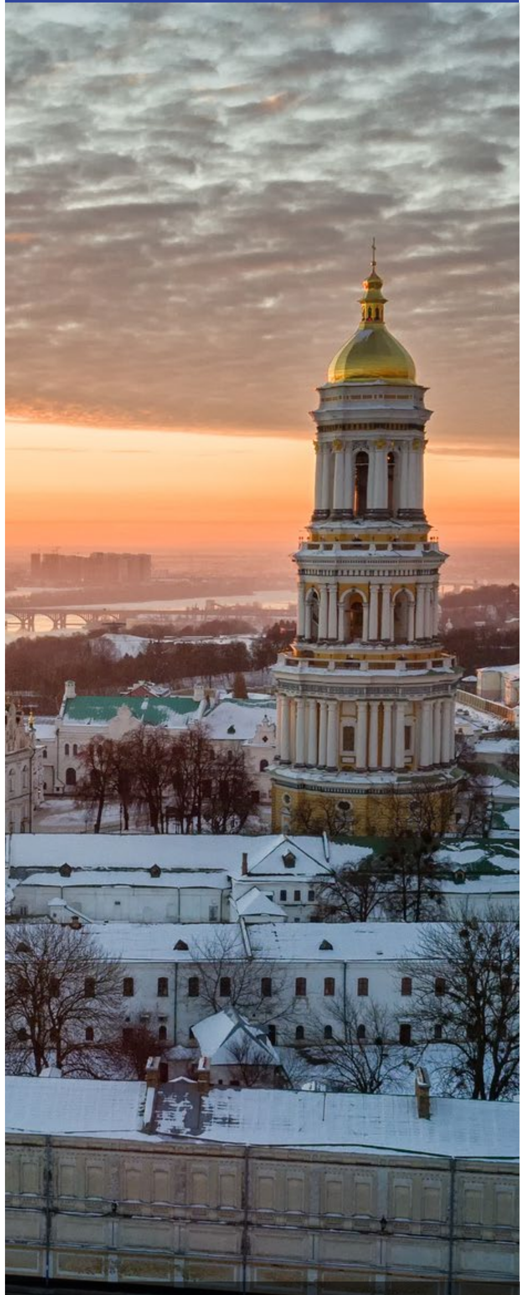
With February marking one year since the start of the war in Ukraine our latest research shows support for Ukraine remaining high globally. We are working in Ukraine itself assessing damage and the impacts on the population for global institutions, as well as tracking Ukrainian public sentiment: our latest Resilience Monitor shows 83% of Ukrainians saying they appreciate "personal visits of world leaders".

Our new Global Trustworthiness Index is more positive than many pundits might expect. Trust is not in a new crisis, with many industries actually showing increases in their trustworthiness scores. Pharmaceuticals has now overtaken tech as the most trusted sector globally. Our analysis shows that generational differences on trust are not as important as many people think, with attitudes not always mapping neatly on to conventional definitions.

This is a topic we pick up on in our new report: *Generation Z – do they exist and what influences them* delves into the extent to which Gen Z exists, explores the challenges this cohort faces and looks at how their behaviours and values differ on an array of topics such as finance, politics and their overall worldview. It marks the first release in a new Ipsos series on generations and demographic change. In the year which sees China's population fall for the first time in 60 years, the changing population dynamics of countries around the world are a subject we all need to stay close to.

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

IN THIS EDITION



Cover photo:
Kyiv, Ukraine.
Find out about global opinion on the war in Ukraine on page 7.

GENERATION Z

Do they exist and what influences them?

Half of Generation Z in the UK would prefer to have grown up when their parents were children, a new Ipsos report has found.

Generation Z – Do they exist and what influences them provides a comprehensive outline of what we know currently about Generation Z in the UK based on long-term and high-quality data sources to track changing attitudes and values over time.

In terms of how this generation are perceived by the rest of society, they are more likely to be seen as self-centred, financially insecure, not prepared to work hard to get ahead and too easily offended by things other people say. Meanwhile Millennials are perceived to value their career over a good work-life balance and Baby Boomers are seen to have the greatest influence over the government and having benefitted most from spending on public services.

Other key findings include:

- Generation Z are not the "greenest generation" – instead there has been a sharp rise in environmental concerns across all generations. However, they are perceived as such by the British public and we find that Gen Z and Millennials are far more likely to feel guilty about their impact on the environment than older groups.
- They are the most changeable in their attitudes from whether God exists to which supermarket they like to use.
- They have the most liberal values – they are less in favour of censorship or long sentences for criminals compared with Millennials when they were the same age.
- Generation Z appear more financially optimistic than Millennials when they were the same age.

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KEEPING THE DREAM RELEVANT

Rethinking how to deliver the luxury experience

What has been the impact for luxury brands of emerging from a pandemic straight into a period of inflationary highs? What obstacles does the new ‘post-pandemic’ world pose?

In this white paper we explore how luxury brands can stay successful given new challenges.

Three trends had begun to emerge before the pandemic, which have in turn been accelerated by the pandemic itself:

- Digital has become a fundamental aspect of luxury.
- Touchpoint ecosystems have become more complex.
- There is a pressing need for luxury brands to integrate their digital, human, and brick-and-mortar assets.

To stay successful, brands must refocus on their experience strategy, ensuring that they deliver a **consistent, distinctive, aspirational experience** across the entire customer journey and at each touchpoint.

To continue meeting people’s esteem and self-actualisation needs, empathy is essential for brands to **understand the dreams and aspirations** not only of its customers, but also of the broader market.

The paradigm has also changed: customers are no longer adapting themselves to the brand universe, instead, they expect brands to address their evolving aspirations. **Customer-centricity** is more important than ever – a new realisation for an industry that has historically prided itself in being product (or creation) centric.

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> CUSTOMER-CENTRICITY IS MORE IMPORTANT THAN EVER – A NEW REALISATION FOR AN INDUSTRY THAT HAS HISTORICALLY PRIDED ITSELF IN BEING PRODUCT OR CREATION CENTRIC. ”

INSIDE INFLATION
WHAT COMMS NEXT

Time for to play offensively

In 2022, marketers first reacted to the cost-of-living crisis by playing defensively and communicating their brands' affordability.

But inflation has risen still further and is now the top concern of people around the world: it's time for offensive strategies.

In the second episode of our video series "Inside Inflation: What Comms Next", hosts Laurent Dumouchel and Aurélie Jacquemin share tips and tactics for communicating with consumers impacted by current economic pressures, highlighting real world examples of brands who are getting it right.

Brands can play offensively during a time of budgetary constraints by creating additional value, moving the focus beyond functional needs to meet consumers' human, emotional needs.

There are three key ways that brands can become more relevant during tough inflationary times:

1. **Identify who you are talking to.** Some brands have experienced success by targeting specific generations and speaking to what is relevant to them specifically.
2. **Move beyond price.** Communicate with consumers on what's relevant to them in both the short *and* the long-term.
3. **Strike the right tone.** Ads have to be relevant to how people think and feel.

Watch episode two for recommendations on how brands can achieve relevancy at these three different levels.

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THE WORLD'S RESPONSE TO WAR IN UKRAINE

Public opinion one year in

As the war in Ukraine nears the one-year mark, nearly two-thirds (64%) of adults across 28 countries still report closely following news about it.

A new Ipsos survey finds that people around the world feel the conflict has not changed much since the weeks following the country's invasion and that citizens of most western nations remain steadfast in their support of Ukraine.

Large majorities of citizens in every nation agree that their country must support other sovereign countries when they are attacked (70% on average globally, down 1 point on average in countries surveyed in March-April 2022). This is highest in Indonesia (84%), Great Britain and India (both 81%).

However, globally, people feel that their country should avoid getting involved militarily in the conflict in Ukraine (71%, down 1 point). This feeling is greatest in Hungary and Malaysia (both 85%), and Thailand and Turkey (both 81%).

Two-thirds (66%) globally believe their country should take in Ukrainian refugees. However, support varies across countries. Support is highest in Great Britain (81%) and the Netherlands (80%). Meanwhile, Indonesia (44%) and Singapore (47%) show lower levels of support.

More than one in two (53%) feel paying more fuel and gas due to sanctions is worthwhile to defend another sovereign country. Yet again, support varies across the 28 markets. Support is highest in South Korea (72%) and lowest in Chile (34%).

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TWO-THIRDS (66%) GLOBALLY BELIEVE THEIR COUNTRY SHOULD TAKE IN UKRAINIAN REFUGEES. ”

BRAZILIAN INVASION OF CONGRESS

Attitudes to the events of 8 January

Four out of five (81%) Brazilians disapprove of the invasion of government buildings by anti-democratic protestors on 8 January, with three in four saying (73%) they totally disapprove. One in ten (9%) fully approve of the invasion, while the same figure approve in part of what transpired.

Brazilians see former President Jair Bolsonaro as playing a key part in causing the insurrection in the nation's capital. Seven in ten people (70%) hold him responsible for the events, including 47% who say he is 'fully' responsible. Almost two-thirds (63%) of Brazilians say their opinion of Bolsonaro has got worse since 8 January. Conversely, 43% say their opinion of President Lula has improved.

However, few think the days of political violence are behind Brazil. Seven in ten (70%) believe new violent events will take place, with only 23% believing this is end of violence.

When asked how they feel about the future of the country the top three responses are concern (61%), shame (36%), and fear (34%). Meanwhile, a third (33%) say they are optimistic.

Within Brazil there is a high degree of distrust towards public institutions. More people do not trust than trust political parties, National Congress and the Federal Government. Those who trust the Federal Supreme Court and the Armed Forces are part of a slim majority.

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WHAT THE FUTURE: PLAY

Not all just fun and games

The latest edition of *What the Future* focuses on the broad topic of Play. Perhaps often overlooked, play has far reaching implications across many sectors from food and beverage, sports, streaming, toys, to retail and more. Additionally, experts from Best Buy, Little Leagues International and Gamewright join to discuss the future of players and fans.

The future of play therefore needs to be taken more seriously, especially when considering how forces like technology or climate change might drive change.

Improving technology can rapidly change how we approach playing games. For instance, video game development has advanced dramatically and the industry has grown substantially. We'd therefore expect to see more people preferring to play online than in person. However, 73% of respondents say they prefer playing in person compared to virtual or online spaces. We've also seen an explosion in the popularity for esports in recent years, in some cases with sport arenas filled to watch gaming tournaments, illustrating the desire to share the experience in person.

How might climate change alter our play behaviour? Questions are being raised about whether the Tour de France can keep to its July schedule. Will some games become unplayable in the future? Will we have to redesign equipment for a new environment? 43% of Gen Z and Millennials believe that in the next five years outdoor sports will require new equipment.

What about genetics? The desire to win at sports has pushed athletes and innovators to create cutting-edge technology. And with the rise of CRISPR gene-editing, could we see genetically modified Olympians in the future?

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WHAT WORRIES THE WORLD?

Inflation remains the top worry for 10th month in a row

Inflation concern remains level from December and is still the top global worry for the 10th month in a row, with four in ten choosing it as a main issue affecting their country – further indication that we may have hit peak worry back in November.

This month's score is however 20pp greater than the start of the last calendar year and 31pp greater than January 2021. While Turkey (60%) has experienced a sharp rise of 8pp, Argentina (69%) and Poland (67%) remain most concerned, both up 4pp.

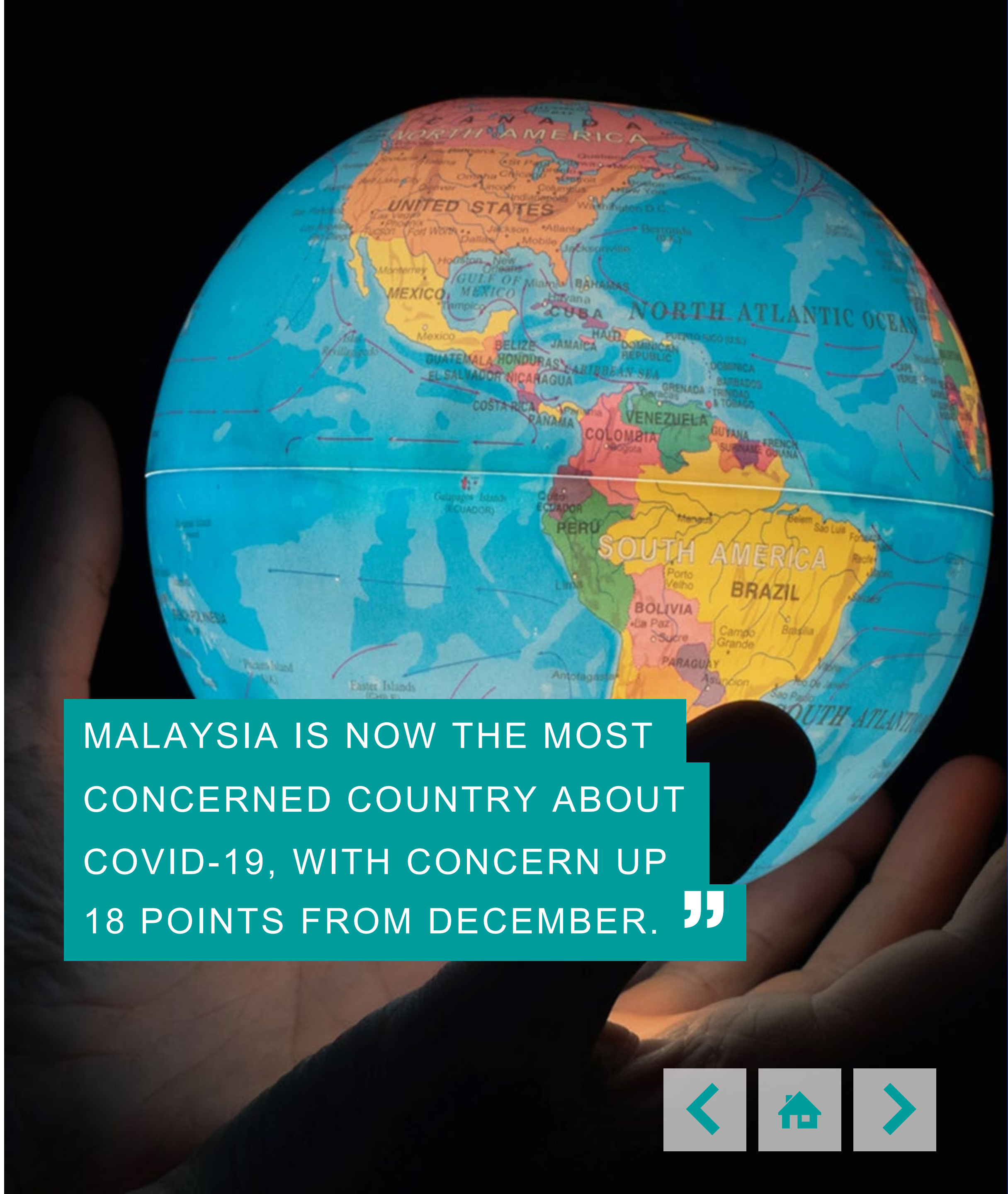
This month, 12 nations have inflation as their single biggest concern. Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Poland, Saudi Arabia, the US, Turkey and – new this month – Hungary.

Concern for coronavirus has increased (+2pp) to 13%, moving up one rank to 10th out of 18 issues. This is the highest concern for the pandemic since August 2022.

Japan (33%) had previously been the most concerned nation about Covid-19 but despite a 2pp increase this month, Malaysia is now top after surging +18pp since December. Covid-19 is now Malaysia's third biggest worry. Concern has increased among other countries in the region too, up 11pp in India (26%) and up 5pp in South Korea (21%).

Climate change once again remains steady at 16%, no change from December and only +1pp from January 2022. Australia is the most concerned country this month (32%), where it is the third largest concern.

On average globally, the proportion of people who think their country is moving in the right direction has continued to grow and now stands at 40%.



MALAYSIA IS NOW THE MOST CONCERNED COUNTRY ABOUT COVID-19, WITH CONCERN UP 18 POINTS FROM DECEMBER. ”

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IPSOS TRUSTWORTHINESS MONITOR

Global trust is on the rise across almost all sectors

The pharma sector is now the most trusted industry, according to the *Ipsos Trustworthiness Monitor.*

The impact of coronavirus, and the development of new vaccines to take us out of the pandemic, has seen pharmaceutical companies move ahead of tech to become the most trustworthy sector. One in three (34%) trust pharma, just ahead of 33% for tech and the food & drinks industry. Social media companies and governments are seen as the least trustworthy (both 22%).

New industries added to this year's report, include retail (31% trustworthy) and CPG (28%).

As highlighted in previous years' reports, there is no evidence that there has been a widespread decline in the level of trust. In fact, since Ipsos started tracking this topic in 2019, levels of trust in nearly all sectors have risen. Only the tech sector has seen a decline in trustworthiness during this time (down from 39%), while all other industries have seen trust increase.

The key drivers of trust – government competence, motivation and values, leadership, responsibility, reliability and transparency – are all stronger than in 2019.

In other findings, only three in ten trust business leaders to tell the truth. However, scepticism about business leaders behaving ethically and being a force for good is more prevalent in Europe and North America than it is in many countries, including India, China, Saudi Arabia and Japan.

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SHORTCUTS

KEYS: The Year Ahead

It is tradition to start a new year with a sense of reflection and optimism. But events of the last few years – coming together in today's *polycrisis* environment – are making many of us feel more uncertain about the period ahead.

In the first **KEYS webinar** of 2023, we share ideas and perspectives to help us prepare for whatever the new year may bring. Listen in as we discuss:

- How to **anticipate changes** and disruption and how people react to shocks as they happen.
- The slow and steady **rise of trustworthiness** across sectors and industries.
- **What the metaverse is right now** and how you can be a part of it.

Sign up for our next webinar on **23 February: Great Expectations.**

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Luxury and Convergent Commerce

In November, Ipsos gathered experts from various industries representing the Luxury sector for a closed-door guided discussion.

The following prompt questions led to an exciting discussion:

- Customer journeys are more complex, expectations are more complex – how do you go about designing the customer journey and touchpoint ecosystem in your industry?
- How do you expand your touchpoint ecosystem without devaluing?
- What is the weight of generations in deciding where to focus as you develop the journey?
- How do you go about defining a role for a channel?
- How will brand narratives need to evolve as customer journeys become more complex?

In this follow-up paper, we share three key learnings we gained from this discussion.

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Royal Polling

New polling reveals that the Prince and Princess of Wales remain among the most popular members of the British royal family, with six in ten holding a favourable opinion towards them in Australia and in the UK.

In the US, opinions surrounding the impact of abolishing the monarchy vary depending on perceptions of certain royals. Americans who favour Prince Harry and Meghan Markle are more likely to say that abolishing the monarchy would be better for the future of Britain. Meanwhile, those who favour King Charles III, Prince William or Princess Catherine are less likely to be in favour of abolition.

In Australia, six in ten (59%) are confident that King Charles III will do a good job in his role as monarch. This is a 24 point drop from the 83% who said the same about Queen Elizabeth II. A majority (58%) in Australia now agree that the Prime Minister should hold a referendum on the future of the British monarchy in Australia.

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POLL DIGEST

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

NETHERLANDS: Four in in ten Dutch people (40%) think that apologies for the history of slavery are a good thing.

UK: Four in five Brits (79%) think it's important to have trade unions to protect workers' interests.

GERMANY: More than one in two Germans (55%) are in favour of legalising doctor-assisted suicide.

CANADA: 22% of Canadians say they are completely out of money and unable to pay more for household necessities.

FRANCE: 83% of French think a ban on the use of private jets for personal reasons is acceptable to accelerate ecological transition.

CHILE: Nine in ten Chileans (93%) believe that economic groups have too much influence on political decisions.

NORWAY: Close to six in ten Norwegians (57%) are satisfied with their own lives; two in ten (20%) are dissatisfied.

US: 66% of Americans agree that Supreme Court justices are guided more by their politics than an impartial reading of the law.

UKRAINE: 73% of Ukrainians believe there is a sufficient level of support from other countries in receiving Ukrainian refugees.

HONG KONG: Covid-19 remains the top concern for Hong Kong residents; 23% claim it's the main challenge facing the territory.

CZECH REPUBLIC: 28% of residents of family homes are considering buying solar panels for their home.

Visit 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 with any comments, including ideas for future content.

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