

IPSOS UPDATE

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

March 2023

Ipsos Knowledge Centre

GAME CHANGERS



IPSOS UPDATE MARCH 2023

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

Welcome to the “Twitchy Twenties” – the post-pandemic era. Our latest [Ipsos Global Trends](#) explores this in depth – covering 50 markets from Argentina to Zambia – highlighting that although economic optimism is recovering in our [monthly tracking](#), the overall global mood remains fragile and uncertain.

Ipsos Global Trends includes a special look at the role of technology in our lives. Now, 71% of us say we “cannot imagine life without the internet”. But, at the same time, we are worried about what it all means for our futures: countries ranging from Japan to Sweden to South Africa all show a rise when it comes to fears that technological progress is destroying our lives. This comes as millions of us – including Ipsos - are evaluating the potential (and the risks) associated with Generative AI. Chat GPT reached one million users in just five days, making the iPhone’s 74 days and Instagram’s 90 days look positively slow by comparison.

If tech remains exciting, concern about inflation and cost of living is not going away – it’s been top of our [What Worries the World](#) survey for nearly a year now, and the level of

concern is double that of 12 months ago. Meanwhile, only 34% describe the state of the economy in their country as “good”, and in some places the mood is even more gloomy than that – notable examples being Britain (20%), South Africa (13%), and Argentina (7%), even if we are starting to see some growth in consumer confidence from a low base globally.

The Ukraine war and its implications, crises in many countries’ healthcare systems and the very real experience of climate change on the ground all remain key concerns. This reminds us of the need for empathy and understanding context when communicating with consumers and the public as our analysis of this year’s Super Bowl ads shows.

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.

Ben Page, Ipsos CEO



IN THIS EDITION

IPSOS GLOBAL TRENDS 2023

A new world disorder?

The world isn't in crisis, it's in *crises*. We share the results from our largest Global Trends survey ever and discuss the Macro Forces that will shape the next decade.

LOVE LIFE SATISFACTION

Love across the world

This 32-country study explores how satisfied people across the world are with their love lives, their relationship with their partner and their romantic or sex lives more generally.

WHAT WORRIES THE WORLD?

Cost of living concerns

Inflation remains the top global concern for the 11th month in a row and the number one worry for 15 countries. We also see small rises in worry about inequality, crime & violence, and corruption.

HYSTERICAL HEALTH

The cultural beliefs that shape women's healthcare

We explore how culturally-embedded beliefs about gender influence healthcare professionals' behaviours and what needs to change to potentially level the playing field.

SUSTAINABILITY ADVERTISING

The role of empathy and credibility

This paper demonstrates how successful sustainability advertising comes from integrating sustainability with brand benefit messaging, by blending empathy and believability.

THE FUTURE OF LOVE

How people and brands will navigate shifting norms

Shifting norms surrounding how and who people love and how they express it will affect brands and services across dating apps, housing, financial services, gifts, health & wellbeing and more.

SUPERBOWL LVII AD AWARDS

Ipsos rules over the advertising winners from the event

The Super Bowl isn't only the US sporting pinnacle of the season, but the advertising high point as well. We share Ipsos analysis on which ads were the top performers of the night.

A MONTH IN PODCASTS

The latest episodes from Ipsos

Listen in as our experts discuss the impacts of the transformation of the insights industry and how to collect accurate data about respondents' gender across cultures.



Cover photo:
Edinburgh, Scotland.
To learn about how cultural patterns and beliefs may be affecting women's healthcare experiences in the UK, see [page 10](#).
To find out about how Nicola Sturgeon's resignation may have affected the case for Scottish Independence, see [page 13](#).

GLOBAL TRENDS 2023

A new world disorder?

As we entered 2023, we emerged from a global pandemic only to find ourselves in a looming financial crisis, a climate crisis, a war waged by Russia on Ukraine – which is causing an energy crisis – and long-standing inequalities blooming into geopolitical crises around the world.

Despite crises on multiple fronts, globally, 74% of people agree that their government and public services will do too little to help people in the years ahead.

To understand the opportunities and challenges of this polycrisis era, Ipsos conducted its largest ever Global Trends survey, covering 50 markets, 87% of the global economy and 70% of the global population.

The 2023 Ipsos Global Trends report identifies six Macro Forces that will shape the next decade for societies, markets and people: societies in flux, tech-celeration,

inequalities and opportunities, environmental emergencies, political splintering, and well-rounded wellbeing. These forces and their constituent key themes will have far-reaching impacts within countries and across borders.

The report also explores how 12 global trends (which cover populism, brand-building, climate change, technology, data security, politics and social issues) have changed – or not changed – over time since 2013 and suggests ways to react and build resilience.

How will ageing populations, advances in AI and quantum computing, generational wealth disparities, a greener way of thinking, increasing geopolitical conflicts, and a growing mental health crisis, among other factors, affect the world over the coming years? Find out how organisations can help to solve the key challenges of the “Twitchy Twenties” in *Global Trends 2023*.

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“GLOBALLY, 74% AGREE THAT THEIR GOVERNMENT AND PUBLIC SERVICES WILL DO TOO LITTLE TO HELP PEOPLE IN THE YEARS AHEAD.”



SUSTAINABILITY ADVERTISING

How empathy and credibility can help you get it right

Based on the findings from seven video ads evaluated with Ipsos' Creative|Spark assessment tool, this paper illustrates what works when it comes to sustainability advertising – and why.

For many consumers, it is not enough for ads to proclaim a commitment to sustainability goals or principles. Ipsos research shows that success comes from integrating sustainability with brand benefit messaging, by blending empathy and believability.

Sustainability has become an important topic for consumers. Both awareness and the level of concern around climate change and the environment have been rising, and consumers are becoming more engaged and looking for solutions.

[Recent Ipsos research](#) on sustainability segmentation identified five key groups, characterised by their level of concern

about the environmental and their level of engagement with environmental issues. 60% of US consumers belong to segments where the key barriers to more sustainable choices are ease, cost and convenience. This presents opportunities for brands looking to communicate on sustainability.

The paper shares six key ways for brands to improve their empathy and credibility:

- Recognise the problem on the **human, everyday level**
- Focus on **small, achievable changes**
- Use **humour** to connect with consumers
- Ensure ads are **informative**
- Make product benefits **tangible** and **realistic**
- **Lean into the brand's equity** to tell their unique sustainability stories.

60% OF US CONSUMERS BELONG TO SEGMENTS WHERE THE KEY BARRIERS TO MORE SUSTAINABLE CHOICES ARE EASE, COST AND CONVENIENCE. ”

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LOVE LIFE SATISFACTION

Love across the world

How satisfied are people with their love life? This 32-country Global Advisor survey investigates love satisfaction across a range of demographics from around the world.

While Millennials are more likely to be satisfied with their romantic or sex life, Boomers are more likely to feel loved.

Across all the countries surveyed, nearly four-fifths (76%) say they feel loved, while 21% say they are not. 84% are satisfied with their relationship with their partner or spouse and just over three-fifths (63%) are satisfied with their romantic or sex life.

Additionally, those who are married or in a committed relationship are more likely to feel loved than those who are single (83% vs 70%).

The Dutch feel the most loved (90%) in our survey, followed by Indonesia (87%),

Argentina (84%), and China (84%). On the other side, the countries with the lowest scores are Japan (49%), South Korea (53%), and Belgium (64%).

Looking at further demographics we see little difference between incomes and education. Those with high incomes (87%) and higher education (86%) are only slightly more satisfied with their relationship than those at the lower end (both 80%, respectively).

At a global level, there is also no significant difference in love satisfaction between men and women. They are nearly equally likely to be satisfied with their spouse or partner if they have one (85% for men and 83% for women), with their romantic or sex life (63% for both), and with how much they feel loved (75% for men and 76% for women).

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FEELING LOVED IS MORE COMMON AMONG BOOMERS (80%) THAN IT IS AMONG GEN X (75%), MILLENNIALS (76%), AND GEN Z (76%) ”



THE FUTURE OF LOVE

How people and brands will navigate shifting norms

Technology and platforms are increasingly playing a role in shaping the future of love because of changes in the institutions that have historically shaped and defined love, from religion to government to financial structures. As people's relationships with those structures change, so will the way these institutions influence how and when people seek life partners (or not), how they live, and how they express their feelings and identities.

In the latest issue of [What the Future](#), our experts set out what businesses and institutions need to know about changing norms of love and how they will affect brands and services across dating apps, weddings, media, housing, financial services, insurance, food, consumer goods, gifts, jewellery, health and wellbeing, retail and more.

We explore how changing societal structures and institutions, technology, generational differences, financial

services, self love, and expression will all drive the future of love.

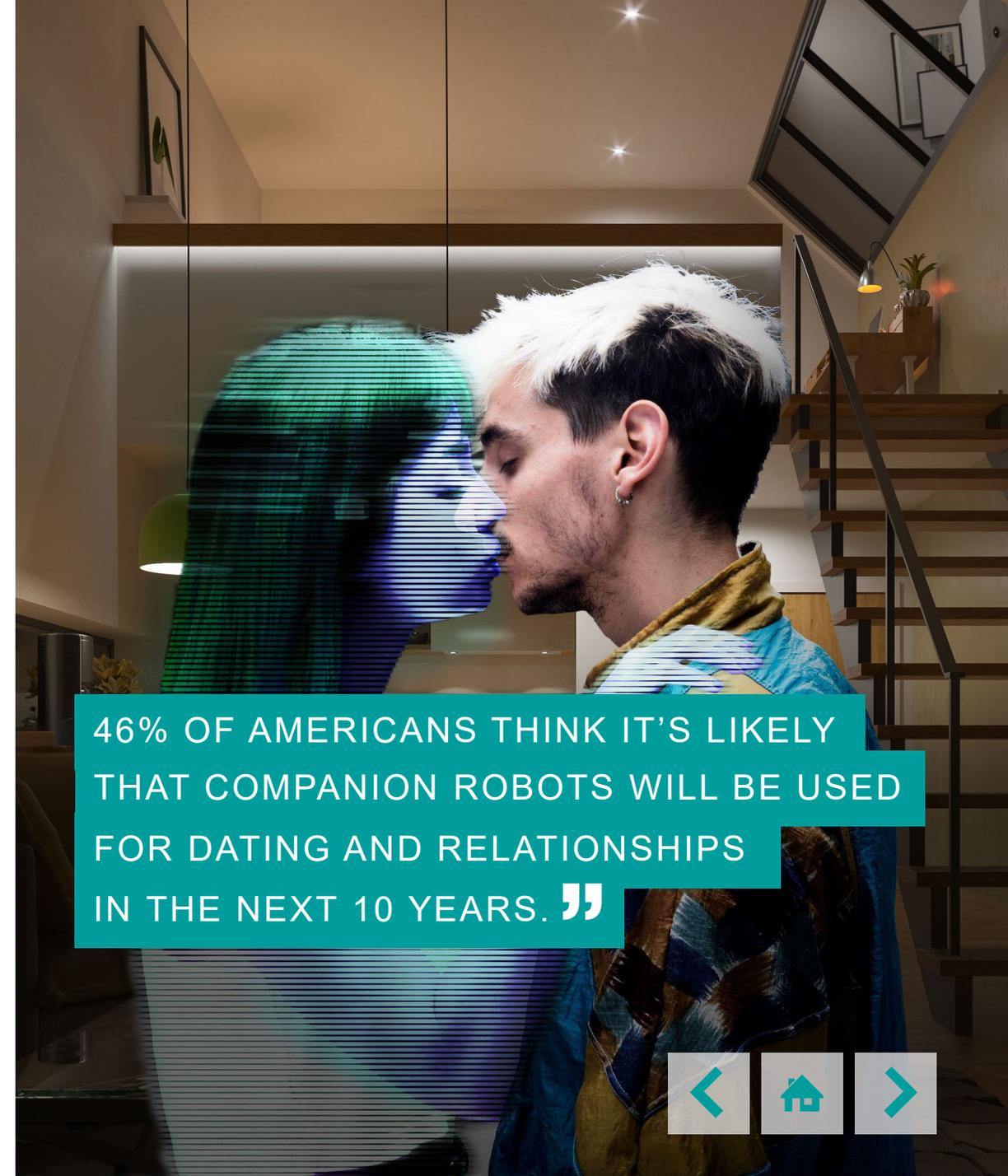
Key findings include:

- 11% of Americans in a relationship met their current spouse or partner through a dating app, rising to 16% among Gen Z and Millennials.
- 36% of Americans say the fear of being alone would likely make them stay in an unhappy relationship.
- On average globally, 30% of Gen Z think it'll be easier to find love over the next 10 years.
- 46% of Americans think it's likely that companion robots will be used for dating and relationships in the next 10 years.
- Three in five Americans agree that women tolerate less bad behaviour in relationships than they did 10 years ago.

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46% OF AMERICANS THINK IT'S LIKELY THAT COMPANION ROBOTS WILL BE USED FOR DATING AND RELATIONSHIPS IN THE NEXT 10 YEARS. ”



WHAT WORRIES THE WORLD?

Cost of living concerns

Inflation is the number one concern globally for the 11th month in a row, with 43% across 29 countries selecting it as a top issue facing their country.

Poverty & social inequality (32%) and crime & violence (27%) follow as the second and third largest global worries.

Worry about unemployment is fourth on our list of concerns at 27%. Concern remains highest in South Africa, where 69% consider it a top worry. This is the highest level of worry for this issue that the country has ever recorded. South Africa has been the most concerned country about jobs and unemployment since April 2021, during which time the level concern has not fallen below 60%.

Worry about financial or political corruption (25%) completes the top five global worries.

After last month's slight rise in worry about coronavirus, concern about the pandemic has fallen to its lowest recorded level since it was added to the survey in April 2020: just 9% now consider Covid-19 a top worry. Concern remains highest in Asia, with all eight Asia-Pacific countries included in our survey making up the top eight most worried countries.

Meanwhile, 38% of people feel their country is headed in the right direction. Singapore, a new country in What Worries the World this month, has the highest number of people who think the country is headed in the right direction (79%).

Brazil has seen the biggest increase in their right direction score this month, up 8pp to 56%. This is the highest score for Brazil and the first time more Brazilians think their country is headed in the right direction than the wrong one.



ALL EIGHT ASIA-PACIFIC COUNTRIES INCLUDED IN OUR SURVEY MAKE UP THE TOP EIGHT COUNTRIES MOST WORRIED ABOUT CORONAVIRUS.”

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SUPER BOWL LVII AD AWARDS

Ipsos rules over the advertising winners from the event

The Super Bowl isn't only the US sporting pinnacle of the season, but the advertising high point as well. Brands break down barriers to make sure their commercial leaves a mark with US consumers.

This year was defined by celebrity cameos, references to movies and TV shows, and musical hijacking, while tearjerkers and purpose-focused ads took a back seat.

Ipsos analysed the ads through both traditional and cutting-edge methods – from surveys to social listening to live communities – to determine the top eight commercials from the Super Bowl.

Winners included Popcorners, with its use of the “Breaking Bad” style and characters which will keep people talking

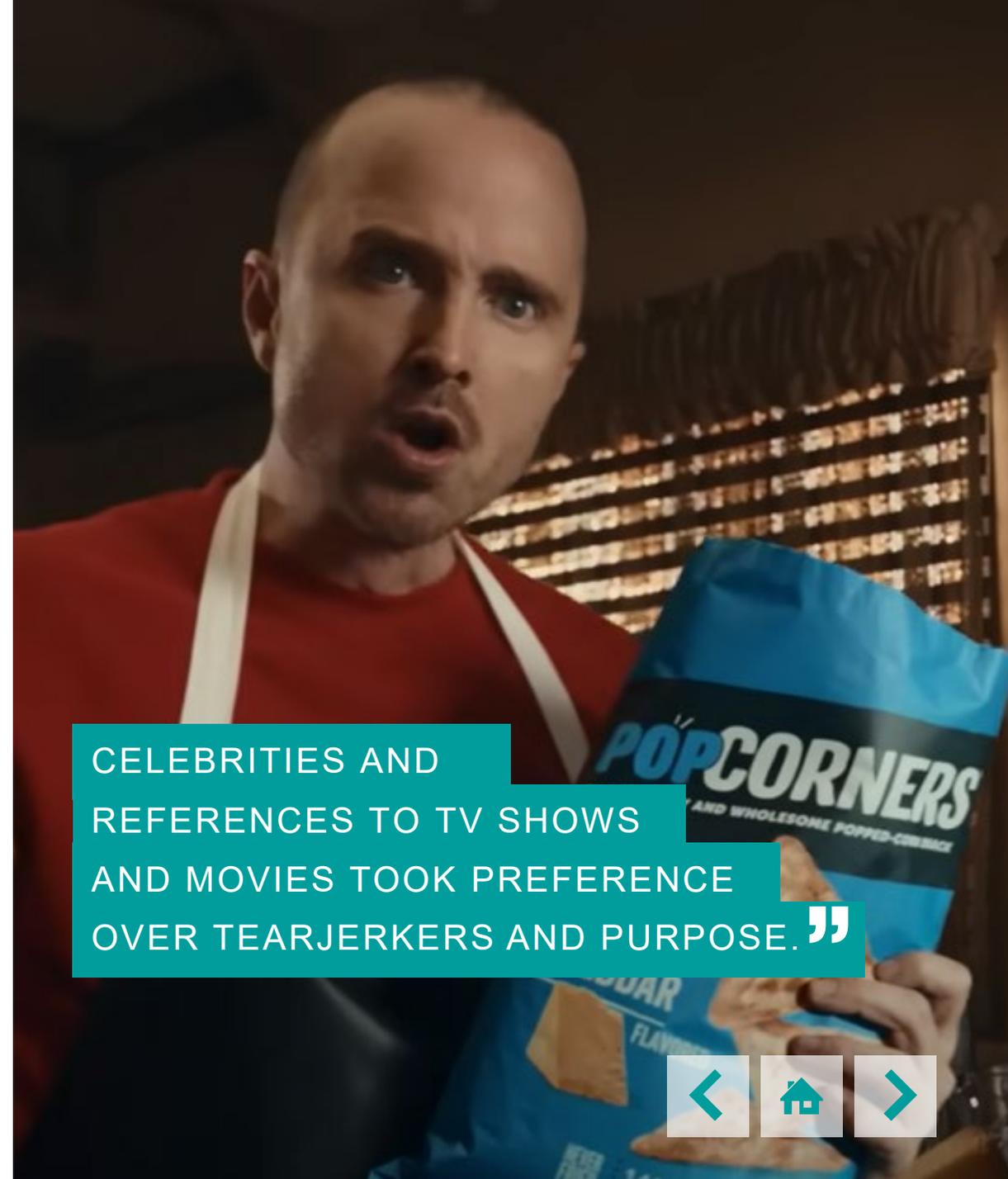
long after the Super Bowl's final whistle. The ad has the highest sales potential of any Super Bowl commercial over the last years with a Creative Effect Index of 216 – far above the average of 70 to 130.

The other brands that scored a touchdown at the Super Bowl include Dunkin' Donuts. The brand from Boston paired with one of city's most well known faces, Ben Affleck, who Ipsos Online Community participants recognised as a legitimate Dunkin' drinker. Ipsos data found Jennifer Lopez's inclusion tapped into both nostalgia and pop culture. This resulted in the highest volume of social mentions by total conversation volume during the game and Affleck being the most discussed celebrity cameo in Synthesio's AI-enabled consumer intelligence data. Tubi, GM and Netflix, Disney, and Google, joined the Kansas City Chiefs as winners on the night.

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CELEBRITIES AND REFERENCES TO TV SHOWS AND MOVIES TOOK PREFERENCE OVER TEARJERKERS AND PURPOSE.”



HYSTERICAL HEALTH

Unpicking the cultural beliefs shaping women's healthcare

Women are more likely to be emotional when experiencing a health issue and more likely to come forward with mild symptoms than men, according to British healthcare professionals (HCPs).

Meanwhile, men are perceived to only visit a doctor when experiencing severe symptoms.

These statistics feature in a new paper from Ipsos exploring the cultural beliefs shaping women's healthcare.

It highlights how an engrained legacy of cultural assumptions about what it means to be a woman, in particular a woman from an ethnic minority background, may contribute to underdiagnosis and undertreatment, and how these beliefs are often so embedded that they may sometimes be difficult to see.

The paper draws on both qualitative and quantitative research methods, including polling of HCPs and the general public in the UK, interviews with HCPs, ethnographic research, as well as interviews with eight health experts.

It also highlights the importance of acknowledging the fact that those in other social groups may also experience challenges, including the trans and non-binary community and men.

In the survey of UK adults who had spoken to a doctor, while 32% of women felt they had not been fully listened to in their last doctor's appointment, this also applied to 39% of men - demonstrating wider issues than gender alone. These issues, along with a standalone focus on ethnicity, race and health deserve a degree of focus and urgency to which this report, with its broader remit on gender, cannot do justice.

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CULTURAL ASSUMPTIONS ABOUT WHAT IT MEANS TO BE A WOMAN MAY CONTRIBUTE TO UNDERDIAGNOSIS AND UNDERTREATMENT. ”



A MONTH IN PODCASTS



FUTURE OF INSIGHTS

Join Jennifer Hubber (Head of the Ipsos Global Client Organisation) in conversation with Seth Minsk (Global Lead, Consumer Experience Insights at Sanofi) as she hears how the transformation of the insights industry is presenting new challenges and opportunities to one of our key research partners.

[LISTEN HERE](#)



PEOPLE, PLANET, PROSPERITY

Leah McTiernan speaks to Trixie Cartwright (Global Lead for Diversity & Inclusion at Ipsos Total Operations), on how to collect accurate data about respondents' gender across cultures that have very different views on the issue and the key things that researchers need to take into account.

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CUSTOMER PERSPECTIVE

Sybil Nicolson (Insights Executive for Transport for London) and Kristian Green (Director in Ipsos' UK Channel Performance – Mystery Shopping team) dive into TfL's large-scale, long-term Mystery Shopping programme: London Underground Customer Care Monitor (CCM).

They explain the research and logistical challenges associated with such a major initiative, and how TfL puts this to work to drive positive change across the organisation and improvements for customers.

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SHORTCUTS

Canada's Inconvenient Truths

The world finally seems ready to embark on the energy transition called for by Al Gore in his 2006 film 'An Inconvenient Truth'. But almost 20 years on, what do Canadians understand (and what don't they understand) about the energy transition process necessary to fight climate change, who will pay for it, and the lifestyle and behaviour changes that will be required?

The scale of the energy transition required for Canada to reach “net zero” carbon emissions by 2050, in economic, environmental, and social terms, is far beyond anything ever achieved, particularly in a short timeframe of less than 30 years.

To understand the state of public opinion, Ipsos conducted one of the largest global studies on energy issues. The Canada findings reveal a series of “inconvenient truths”, covering energy security, energy affordability, preparation for an energy transition and its associated costs, that stand in the way of Canada's objective to achieve net zero.

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Consumer Confidence

Ipsos is introducing major enhancements to its consumer confidence reporting. The monthly Global Consumer Confidence Index now spans 32 countries with the addition of Chile, Colombia, Peru, Indonesia, Malaysia, the Netherlands, Singapore, Thailand, and the United Arab Emirates.

With the addition of these nine countries, the tracker now covers 84% of the global economy. Additionally, changes to the methodology mean that the survey now captures the sentiment of a much broader swath of the Indian consumer market.

Two of the nine countries added this month, the UAE and Indonesia, are placed among the top five in consumer optimism, in the #2 and #4 spots respectively. The other three are China still at the #1 spot, Saudi Arabia at #3, and India at #5.

This month's report also contains trend data of the 32 countries included in the survey, dating back to 2010.

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Building Trust in Leaders

Globally, only 23% of people trust business leaders to tell the truth, and this has changed very little since 2018. But with trust having a significant impact on work outcomes, this is something leaders can't afford to ignore. Stress is 74% lower and productivity is 50% higher in companies with high levels of trust compared to low-trust companies.

This report shares three key areas for leaders and managers in the workplace to focus on in order to build trust.

- **Empathy** - Active listening, seeking out alternative perspectives and taking a personal interest are all good places to start.
- **Authenticity** - Perceptions of authenticity are built through self awareness, how transparently leaders communicate and how consistently they show up at work.
- **Visibility** - Focus on channels that enable two-way interactivity.

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POLL DIGEST

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

UKRAINE: 65% of refugees hope to return to Ukraine one day, 5% say they have no plan to return.

SCOTLAND: A majority think that Nicola Sturgeon's resignation will have a negative impact on the case for Scottish independence.

NORWAY: 35% of 18-29 year olds state that they are eating less meat to reduce their carbon footprint.

FRANCE: 55% of French people think that it's too expensive to eat a healthy diet.

TURKEY: 27% of people living outside the provinces hit by the February earthquakes say their home is not earthquake-resistant.

ITALY: Almost two-thirds of Italians say the worst of the pandemic is now over. Only 6% say the worst is still to come.

CZECH REPUBLIC: 11% of Czechs eat alternatives to meat or meat products at least once a week.

HUNGARY: Almost half of Hungarians think that they exercise less than they need to (49%).

AUSTRALIA: 63% of Australians are worried about the cost of living, the highest level of concern recorded for any issue since 2010.

IRELAND: Almost eight in ten adults listen to the radio every weekday, nine in ten listen at least once a week.

US: 34% of Americans agree that the 2020 US Presidential election was stolen from Donald Trump.

Visit [ipsos.com](https://www.ipsos.com) and our local country sites for the latest polling and research.

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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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