

IPSOS UPDATE

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

July 2023

Ipsos Knowledge Centre

GAME CHANGERS



IPSOS UPDATE JULY 2023

What's going on? Our round-up of research and thinking from Ipsos teams around the world

As 2023 reaches its half-way point, Russia throws up more surprises, exacerbating the turbulent conditions we already find ourselves in as a result of an uncertain economic environment globally and the ongoing climate crisis – polycrisis remains a pretty accurate description of our prevailing context.

For consumers, rising prices have topped our What Worries the World index for 15 months now. Around the world, 49% say their country is in recession. Our research in the US, Britain and France finds barely three in ten saying their economy is in “good” shape. In Japan that figure stands at 15%, while in Argentina it is just 6%. Understanding specific country contexts is critical. Take a look at our new Ipsos Flair report on France, which provides a snapshot of how one country is adapting to a multitude of questions, all at once.

This uncertain backdrop puts real pressure on businesses to ensure they are as in tune as they can be with the realities of people's daily lives. As I write these notes, I'm at the Cannes Lions International Festival of Creativity. Much of the discussion this June centred on two letters: “AI”. The conversations ranged widely, with urgent questions around ethics and regulation accompanying debates around its ability to transform (or not) our business and working environments. Ipsos shares all these concerns while launching our own “Ipsos Facto” AI to help our teams globally learn and adapt in a secure environment.

With the power of technology and all the digital measurement techniques discussed at Cannes, we were reminded on more than one occasion that people don't always do what they say they will or indeed

buy the products they talk about. Getting closer to how people actually decide to do the things they do requires patience and curiosity. This is a theme we pick up on in our [new white paper](#), as we explore how traditional “human” skills like the Art of Asking Questions can power new opportunities if paired smartly with the power of Generative AI models.

The importance of brands having a true sense of purpose - being instrumental in providing value to the broader societies we live in - was another Cannes theme. We pick up on this with our new Ipsos Equalities Index covering the prevailing mood across 33 countries, as we examine how people define equality and assess progress from their own particular perspectives. This is joined by our World Refugee Day study, with 74% globally agreeing that people should be able to take refuge in other countries, including their own, in order to escape war or persecution. Results vary dramatically by country, reminding us that context is not just king, but “King Kong” when it comes to understanding people.

What are the key ingredients to making sense of today's polycrisis world? Time and time again we are reminded of the importance of really understanding the context, managing expectations and offering empathy. We hope that some of research presented here can make a difference to your own work – please do get in touch if you'd like to discuss anything in more detail.

Ben Page, Ipsos CEO



IN THIS EDITION

MORE EQUAL THAN OTHERS

How research can close the inequality gap

Inequality is a recognised problem that is a societal and economic drain. And yet, around the world, even in major economies, we see inequality widening.

WHAT THE FUTURE: GENDER

Understanding of gender is fluid. Will definitions be too?

The future of gender is in a state of flux. We examine how brands, business and policymakers can navigate changing norms around pronouns, policies and politics.

SPOTLIGHT ON GLOBAL SURVEYS

Public opinion from across the globe

We travel the globe to discover the latest public opinion around same-sex parenting, levels of support for people seeking refuge from war and disasters, perceptions of local crime and more.

REWIRING YOUR CX DNA

The foundations of a winning customer strategy

This paper acts as a guide for creating a successful customer strategy, whether that means starting from scratch, making fine-tuning adjustments or going back to the drawing board.

CONVERSATIONS WITH AI

How Gen AI and qualitative research will benefit each other

Generative AI could be an enabler to deliver faster, cheaper and better research results. We explore how to align with experts in the art of finding the question that can get the most out of AI solutions.

WHAT WORRIES THE WORLD?

Inflation the top concern for 15 months in a row

Once again rising prices is the number one issue, despite it dropping slightly this month. Meanwhile, South Africa's worry over unemployment reaches record high.

HOLIDAY BAROMETER

No concessions made over holiday plans

Despite high inflation, Europeans don't intend to make changes to their holiday plans, while nearly a third say they will continue to work in a new trend called "workation".

FLAIR FRANCE 2023

A crisis of crises

Our latest Ipsos Flair release shines a spotlight on France – a country, like many others, experiencing simultaneous and interdependent crises: geopolitical, economic, climate, refugees, social and identity-related.



MORE EQUAL THAN OTHERS

How research can close the inequality gap

From racial inequity to issues of gender, sexual orientation, social class, age, religion, neurodiversity, and disability, the idea that people are unequally treated in ways that impact financial outcomes, resources and ultimate success has become a recognised detriment to progress and growth of individuals, countries, and companies.

And yet, in spite of general agreement, we see that inequality is widening in many parts of the world, including most of the major markets. For instance, the racial wealth gap has widened again in the United States since the 1980s as capital gains have mainly benefited white households. It therefore makes sense to start addressing equity gaps in societies, because doing so can actually improve economic outcomes for businesses and even nations.

In order to take action it's important to recognise how inequality is perpetuated.

Upon examination, bias and inequality usually stems from an untruth or lie that plays out in both conscious and implicit ways. For example, contributions made by women are worth less than men, despite being proven wrong, still has an effect today.

While there are longstanding, deeply embedded historical and structural factors that explain how these inequalities came to be, individual agency is key to their persistence, and we must understand how bias becomes hardwired on an individual level in order to start unpacking the problem.

In this paper, we examine the impacts of inequality, organisational responsibility and the influence on broader stakeholders. It also lays out key advice that can be undertaken to start unearthing inequality within an organisation and expose unintended disparities.

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INEQUALITY ROBS US OF THE BEST THINKING AND DIVERSE APPROACHES TO SOLVING PROBLEMS. ”



CONVERSATIONS WITH AI

How Gen AI and qualitative research will benefit each other

For researchers, AI can generate human-like responses and accelerate ideation, insight discovery and concept testing. But AI's claims aren't always factually correct, so human judgement is still needed to query AI, train models, and apply outputs.

Despite these limitations, *Conversations with AI* explores how Generative AI can be a powerful enabler to achieve faster, cheaper, better research.

The key is asking insightful questions. Just as understanding how to engage different people with probes and follow-ups is an essential human skill in qualitative research today, understanding how to build on past prompts and the effect of order on different platforms translates directly to the AI world.

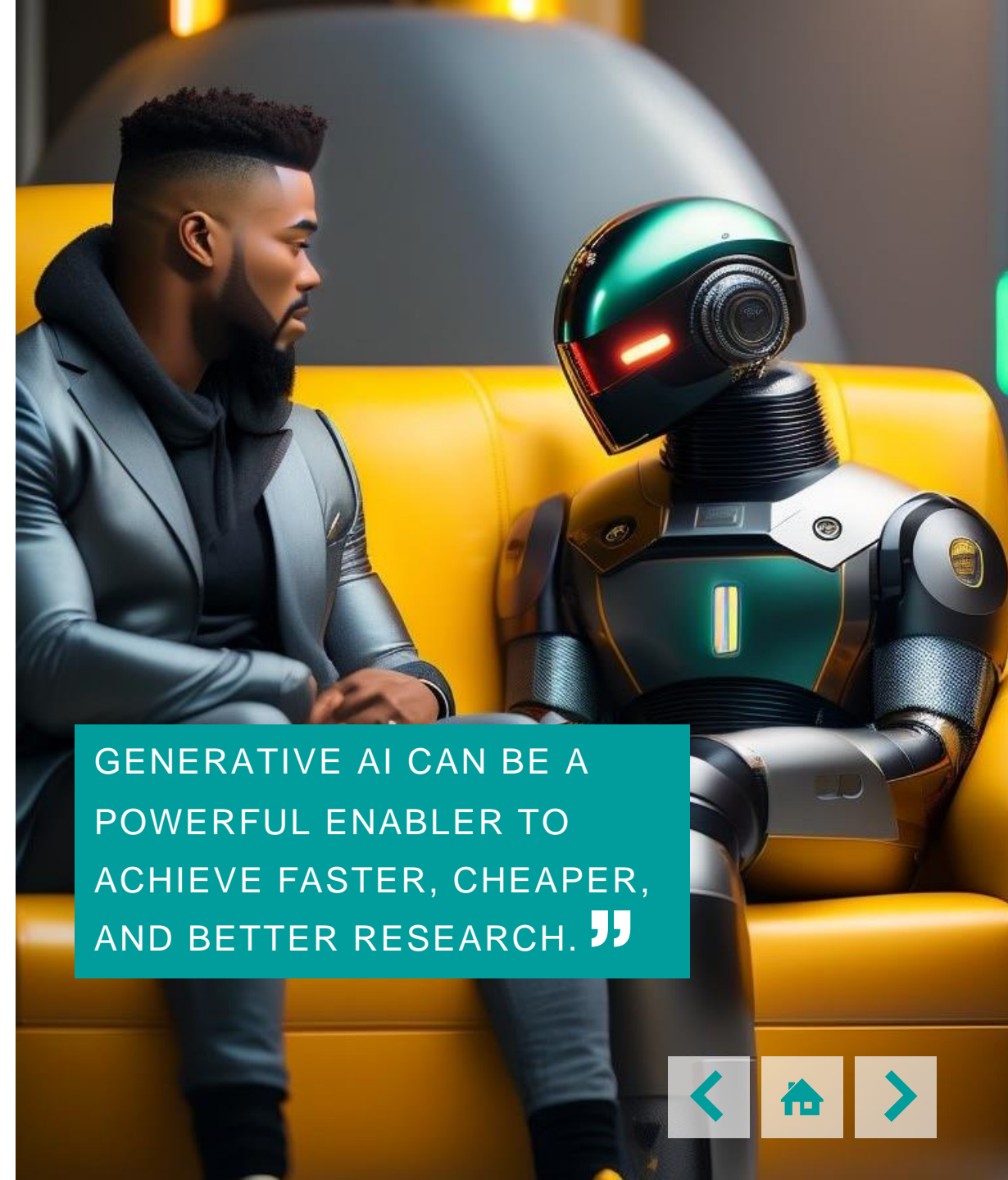
Creating quality prompts is an art that requires substantive domain knowledge, an understanding of the nature of

questions, alongside knowledge of the different AI platforms.

This paper outlines the new scientific approach of Iterative Sciences, the combination of prompt engineering with domain knowledge, high quality data, and AI models trained on research frameworks.

Also new this month on Generative AI is [Great Power, Great Responsibility](#), an *Ipsos Views* podcast which looks at potential of this new technology.

In the podcast, Michel Guidi, Ipsos Chief Operating Officer, and Rich Timpone, Head of the Ipsos Science Organisation, discuss the opportunities of Generative AI for the insight industry, set out a framework for understanding the potential of the technology, and describe what Ipsos is doing to take advantage of AI.

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GENERATIVE AI CAN BE A
POWERFUL ENABLER TO
ACHIEVE FASTER, CHEAPER,
AND BETTER RESEARCH. ”



WHAT THE FUTURE: GENDER

Understanding of gender is fluid. Will definitions be too?

While the long-term vector of gender rights is towards equality and expansion, trends don't always move in a direct line, in one direction.


The future of gender is in a state of flux, with generational and cultural shifts in media, marketing, politics and society having transformed how people view everything from gender identity and expression to roles and equality.

This is a fraught landscape for brands to navigate in terms of their marketing and their products. The ways brands respond could pave new opportunities — or present new barriers — to how people everywhere see themselves and live their lives.

In our latest edition of *What the Future*, we explore the tensions that will drive the future of how we see gender, including representation in the media, shifting views on gender equality and the gender binary, and attitudes towards trans identities.

Key takeaways include:

- 37% of Americans say that gender is a spectrum.
- Gen Z and Millennials are most likely to say that their gender identity is important to their relationship with their family and friends (76% agree)
- One in two Americans (49%) think the conflict around transgender athletes competing in the league of the gender they identify with will get worse over the next few years.
- By treating women as a monolith, brands risk not truly understanding their unique relationship with womanhood and connecting with them in resonant ways.
- 63% agree that TV and movie plots can change how we perceive traditional gender roles.
- 58% believe the world would be better off if people followed traditional gender roles.

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76% OF GEN Z AND MILLENNIALS SAY
THAT THEIR GENDER IDENTITY IS
IMPORTANT TO THEIR RELATIONSHIP
WITH THEIR FAMILY AND FRIENDS. ”



WHAT WORRIES THE WORLD?

Inflation is the top concern for 15th consecutive month

Inflation remains a top concern for many countries, with 40% of respondents around the world citing it as a top issue affecting their nation. Concern is highest in Argentina (71%) but has risen most from last month in Colombia (+5pp to 42%).

Poverty and social inequality ranks as the second biggest global concern, with nearly a third (31%) considering it a top issue in their country. A 6pp rise in worry in Indonesia (44%) makes it the country most concerned about poverty this month and it is the number one concern in Brazil (40%), Japan (35%), and the Netherlands (33%). Singapore (20%) is bottom of the rankings, despite an 8pp increase from last month.

Global concern about crime & violence remains unchanged from May 2023. This is the third largest global worry with 29% considering it a significant issue. Chile (62%), Peru (60%) and Israel (46%) have crime as their top worry, with Israel's level of concern rising 8pp from last month.

With concern about corruption falling 2pp from May 2023 (down to 25%), unemployment has moved into fourth position on our list of world worries; 27% choose it as a top issue. South Africa remains most concerned about unemployment, recording the highest level of concern seen from any nation since our survey began in 2010 (70%).

Coronavirus ranks 17th out of 18 worries globally, with only 6% choosing it as a top issue. Last month, Singapore was the world's most concerned country but worry here has now fallen by 14pp down to 12%. Nevertheless, it remains in the top three most concerned countries, with the top six places all taken by countries in APAC.

Indonesia's "good" economy score has risen by 9pp, making it the joint most economically optimistic country in our survey (tying Singapore and India on 72%). Spain (35%) and Italy (33%) have also had good months, both recording new all-time high "good economy" scores.

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**SOUTH AFRICA HAS NOW RECORDED
THE HIGHEST LEVEL OF CONCERN ABOUT
UNEMPLOYMENT FROM ANY NATION: 70%.”**



SPOTLIGHT ON GLOBAL SURVEYS



PRIDE MONTH 2023

Across 30 countries, 9% of people identify as LGBT+, with strong generational and geographic differences: from a global average of 18% among Gen Z to 4% among Baby Boomers, and from 15% of people in Brazil to 4% in Peru.

Support for same-sex marriage ranges from 49% to 80% in the 20 countries surveyed where it is legal. Among the 10 countries where it is not legal, majorities in all countries except Turkey support at least some form of legal recognition for same-sex couples.

While views on same-sex parenting are warmer than those on same-sex marriage, they show similar patterns. Globally, 65% say same-sex couples are just as likely as other parents to raise children successfully and 64% say they should have the same rights to adopt children as heterosexual couples do.

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WORLD REFUGEE DAY

A new 29-country survey finds that three-quarters of people globally support the principle that people should be able to take refuge in other countries – including their own – to escape war or persecution.

However, in the majority of countries surveyed, there are significant levels of concern about refugees not being genuine: 58% on average agree foreigners trying to enter their country as a refugee just want to migrate for economic reasons or to take advantage of welfare services.

Despite this, the global public remains divided on whether to close their borders to refugees (43% support this, 49% do not). Support for closing borders is highest in Turkey (76%) and Malaysia (72%) but there have also been notable increases in support for this since 2022 in Belgium (+18), Germany, the Netherlands and Peru (+16 each).

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CRIME AND LAW ENFORCEMENT

On average across 29 countries, one in three people (34%) report the level of crime having increased over the past year in their neighbourhood. But this proportion rises to more than six in ten in Chile (68%), Argentina, Peru and South Africa (64% each).

Vehicle thefts and illegal drug consumption are the most reported crimes, with 50% saying they have seen or heard of these happening in their neighbourhood.

Just one in two globally are confident that law enforcement can stop violent (50%) and non-violent (48%) crimes from happening and a similar proportion (53%) report feeling confident that law enforcement will treat all citizens with the same level of respect.

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HOLIDAY BAROMETER 2023

Despite inflation, no concessions on holidays made

Despite rising inflation, enthusiasm to travel this summer remains strong across Europe, North America, Australia, and Malaysia, with around 74% - 80% of people eager or happy to travel. Three in four Europeans plan to travel this summer, the highest proportion since 2011 and higher than pre-Covid levels.


Inflation tops the list of concerns for travellers; almost a third of Europeans cite price increases as having a significant impact on their enthusiasm and economic reasons are the primary barriers for those not planning a trip.

Travellers have adjusted their habits, with a third opting for cheaper accommodation or last-minute deals. Trip duration, however, seems a sacrifice travellers are much less willing to make. As Covid-19 concerns have decreased and confidence in travelling has returned, 63% of European travellers now plan to book their trips at least two months in advance.

International travel intentions continue to grow in Europe (52%) and Australia (50%) but stagnate in North America. Personal cars are preferred as the primary mode of transportation, while plane travel gains popularity.

Seaside holidays continue to be the most popular choice for Europeans, with rest and the social aspect of travelling remaining the ideal summer activities, followed by cultural exploration. However, the new phenomenon of a “workation” (working while on holiday) is gaining ground in Europe and the USA.

Despite travellers, especially in Europe, indicating that they support responsible and sustainable travelling practices, we see actions falling short. Although environmental awareness exists, it's coupled with a lag in changes to travel habits.

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ALMOST THREE IN TEN EUROPEANS
INTEND TO WORK FROM THEIR
HOLIDAY LOCATION THIS SUMMER,
ALSO KNOWN AS A “WORKATION” ”



REWIRING YOUR CX DNA

The foundations of a winning customer strategy


Customer desires and expectations are constantly changing. If you don't have a plan to deal with change, you are planning to fail on meeting those expectations.

Building a customer strategy is a multi-faceted, multi-phased, and often hugely complex undertaking. But ultimately, if done well, it will deliver a return on your investment; a Return on your CX Investment (ROCXI).

Our latest Ipsos Views paper acts as a guide for creating the ideal customer strategy – whether that means starting from scratch, making fine-tuning adjustments or going completely back to the drawing board. Complete with case studies, this paper shares six principles that make up the foundations of a successful customer strategy.

These include:

- **Set yourself up for CX success** with executive commitment, dedicated CX leadership, and cross-functional governance.
- **Understand where you are** by assessing the current state of your organisation's CX maturity and mapping your customers' journeys – including their emotional and functional needs.
- **Continuously monitor and improve** by listening to customers wherever they interact with you and by using CX Service Design to tailor your experiences
- **Be people first.** Secure employee buy-in by aligning your CX and Employee Experience (EX) programme initiatives.

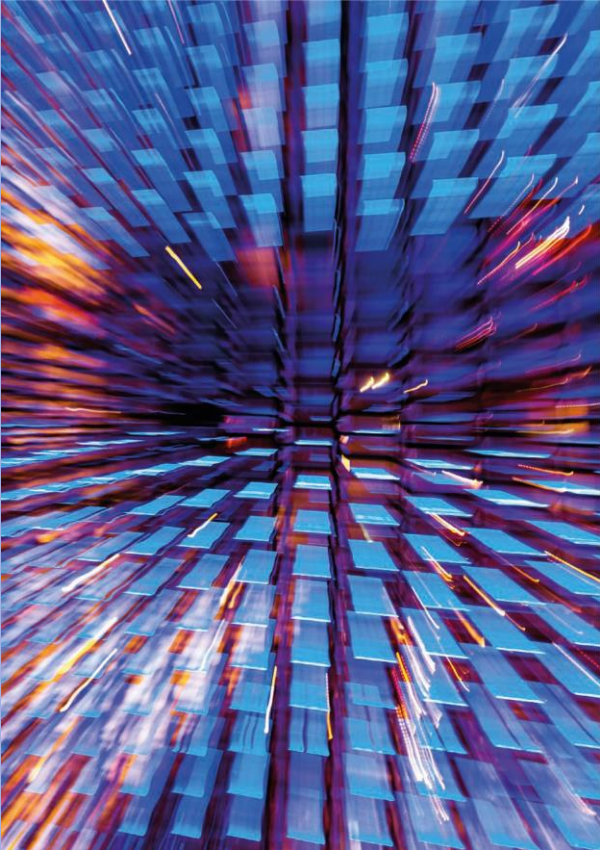
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WHO BETTER TO INFORM YOU OF HOW CUSTOMERS EXPERIENCE YOUR BRAND THAN THE FRONT-LINE EMPLOYEES WHO LIVE IT EVERY DAY? ”



FLAIR FRANCE 2023

The Crisis of Crises



The latest in our **Ipsos Flair** series shines a spotlight on France – a country, like many others, experiencing simultaneous and interdependent crises: geopolitical, economic, climate, refugees, social and identity-related. In fact, our Global Consumer Confidence Index reveals France as one of the countries where economic confidence has fallen most significantly since early 2022.

This decline in consumer confidence is set against a backdrop of a widening gap between optimistic countries looking to the future and pessimists who believe they are trapped by the crisis.

The more uncertainty the polycrisis creates, the more brands will need to demonstrate empathy with consumers by showing that they have truly understood their expectations, motivations, and behaviours – precisely what Ipsos Flair is all about.

[READ THE FULL INTRODUCTION](#)

THE SECRETS OF HAPPINESS:
What are the French happy about?

IS 'LOCAL' THE NEW MAGIC WORD?:
The appeal of organic food

2022 ADVERTISING AWARDS FOR THE GENERAL PUBLIC:
Themes of fun, magic and escape

NEW FORMS OF MOBILITY
Revolution or the limits of reality?

WHY IS LUXURY OUTPACING INFLATION?
The ongoing desire for luxury

SHORTCUTS

Brexit, the UK and the EU

A new survey from Ipsos and the UK:EU Forum finds one in two Britons (48%) saying that Brexit has made their daily life worse, a third (32%) saying that it's made no difference and just over one in ten (13%) saying it's made life better.

In contrast, a 9-country EU average sees six in ten Europeans (62%) having found no difference to their daily lives following Brexit.

Britons are more likely than Europeans from any of the nine EU countries surveyed to say that it's important for the UK and the EU to maintain a close relationship (84% of Britons agree vs. an EU average of 67%). But Britons are also the most sceptical of whether there will actually be a close relationship following Brexit (48% think a close relationship is likely vs. an EU average of 61%).

Perceptions of whether interests are aligned are mixed: while a third of the British public (32%) think the EU and Britain have the same interests, a fifth (21%) say they are at odds.

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The Future of Flight

Meeting sustainability goals is the biggest challenge facing the aviation industry today, according to a survey of 300+ aviation decision-makers from across six countries. Sustainability goals (30%) are cited ahead of ongoing supply chain issues (19%) and labour issues (11%) as top challenges facing the industry.

While almost seven in ten (67%) agree that the industry is united in its focus on implementing sustainability solutions, respondents are divided over whether progress is happening fast enough (51% say too slow vs. 41% who say at the right pace).

Nevertheless, commitment does seem to be in place: 88% say that their company currently has a sustainability strategy in place (rising to 96% in China) and that these now affect how their company operates (74%), is investing (73%) and is hiring (62%).

Just under one in two (46%) think the industry will meet its net zero goal by 2050, while a third (32%) say it will not, and a fifth (22%) are unsure.

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KEYS: Feeling the Pressure?

Polycrisis is a new word in our language, describing a situation where we are dealing with a series of crises all at the same time. Alarm bells have been sounding as the world considers whether the cumulative impact of these crises will be greater than the sum of its parts.

Meanwhile, life goes on. Consumers continue to make choices about how and where to spend their money, and businesses continue to adapt, trying to ensure they are in the best possible shape to succeed.

In the June episode of our KEYS webinar series, we assess the dynamics of public opinion as 2023 reaches its halfway point. We reflect on the implications for brands and for business, exploring what the evidence tells us about what's changing – and what's staying the same. While we are facing many global problems, the impacts really do differ by country, context and category.

Explore the webinar home page [here](#). You can access all previous KEYS recordings and presentations [here](#).

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POLL DIGEST

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

BELGIUM: 4% of Belgians currently own a VR/AR headset, with the majority of these owners using them infrequently.

GERMANY: 39% of Germans believe that a wider range of balanced food in schools is the most suitable way of tackling childhood obesity.

CANADA: 68% of Canadians aged 18-44 feel that buying a home is more out of reach than when their parents were the same age.

US: Almost four in ten Americans (37%) say that "these days I feel like a stranger in my own country".

UGANDA: Ugandans are divided (48% agree vs. 46% disagree) on whether Africa can afford to remain neutral in the Russia-Ukraine war.

KUWAIT: 95% of people with an active bank account have used a digital banking channel, 44% prefer mobile banking apps.

CHILE: 73% of Chileans would eat plant-based foods if they were more or as nutritious as their animal-based alternative.

UK: 22% of people have experienced homelessness, either themselves or through someone close to them.

ITALY: 37% of Italians consider the metaverse to be too expensive, rising to 44% among Gen Z.

HONG KONG: 70% of Millennials who are planning not to travel in the next six months say this is due to financial constraints.

FRANCE: 62% of dog owners would like to be able to take their pet to work with them.

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.

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