

WHATEVER HAPPENED TO THE NEW NORMAL?

WORK | LIFE | HEALTH

KEYS – A WEBINAR SERIES BY IPSOS

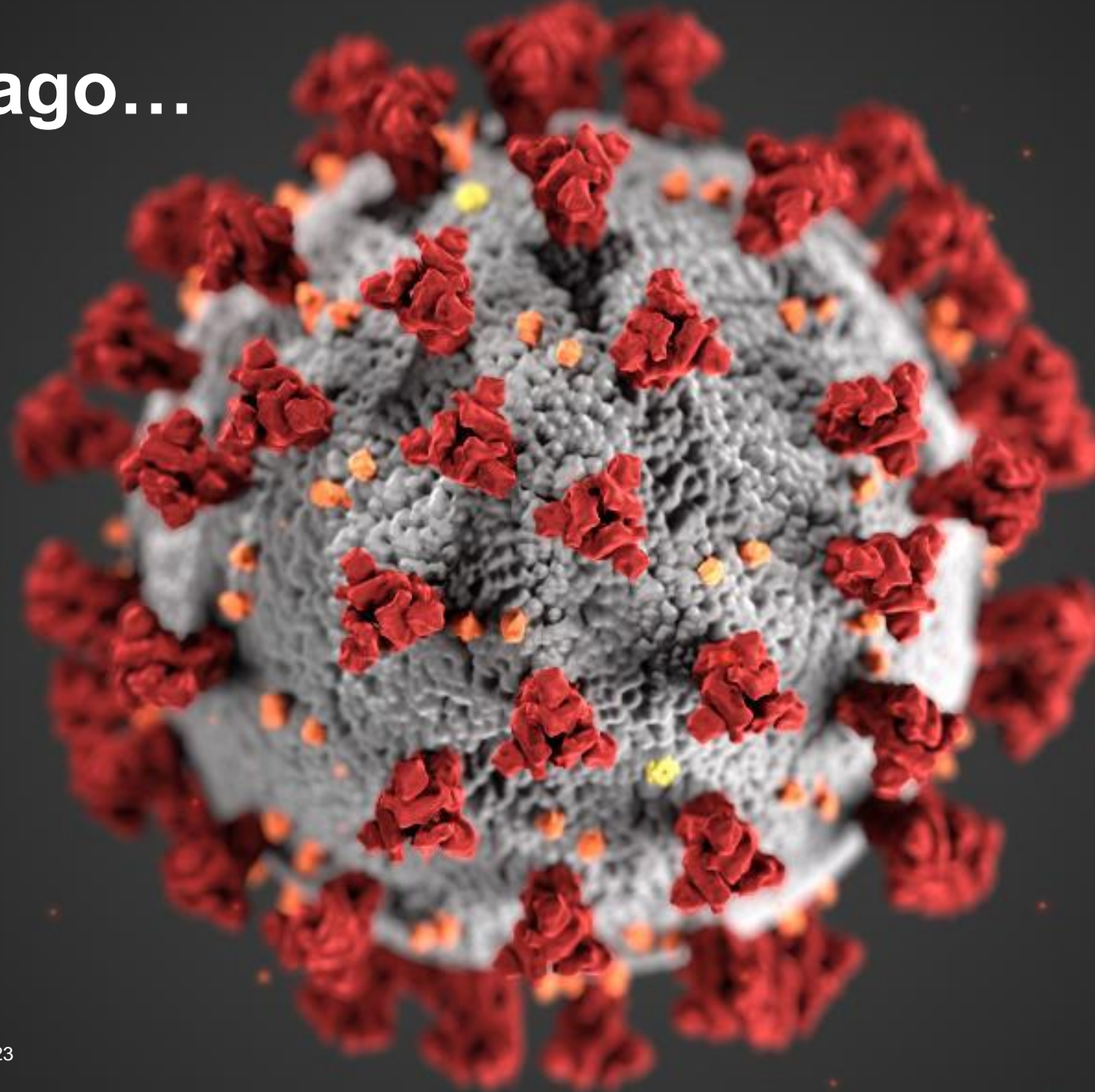
9 November 2023



[Watch the recording](#)

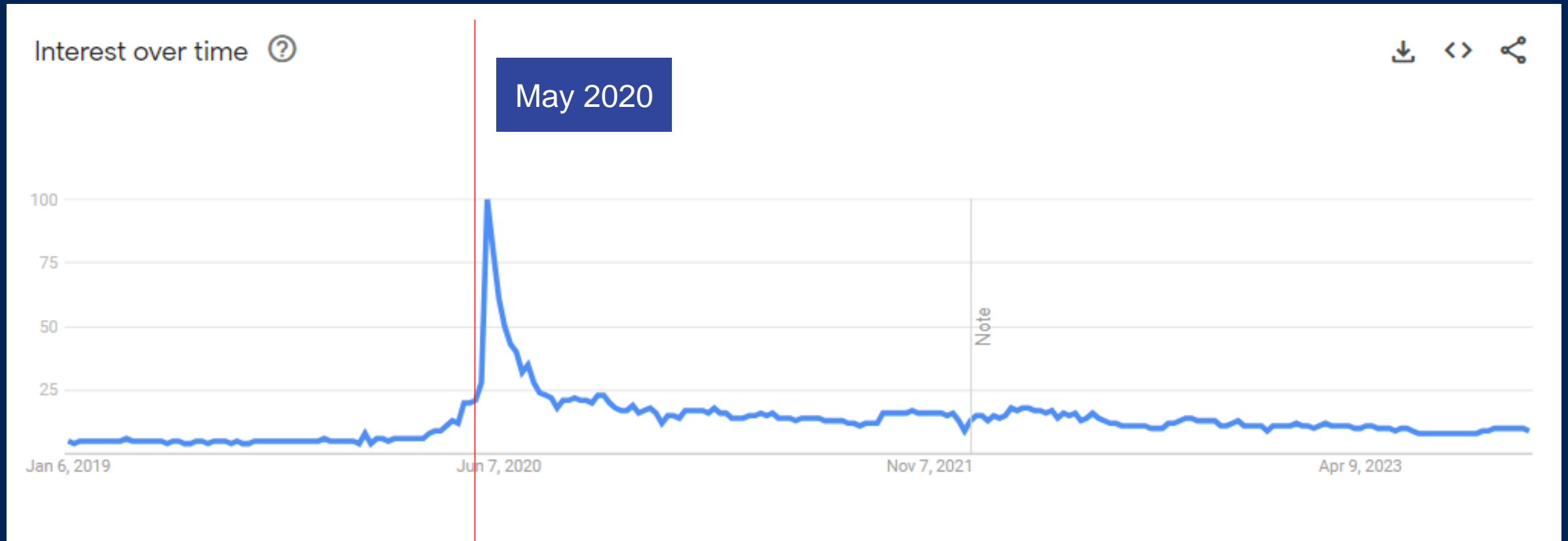


Four years ago...





IN SEARCH OF THE NEW NORMAL



Source: Google Trends

THE NEW NORMAL: TODAY



Pandemic Diaries: People Share What Their New Normal Is Like | NBC News

16K views • 3 years ago



NBC News Digital is a collection of innovative and powerful news brands that deliver compelling, diverse and engaging news ...



Scotland publishes framework for coping with 'new normal' of Covid-19

36K views • 3 years ago



Scotland must adjust to the 'new normal' of living with Covid-19, which may include moving in and out of strict lockdowns at short ...



Navigating the 'new normal' of virtual learning

908 views • 3 years ago



The majority of Tampa Bay area students are back in school today after a week off for spring break. They're in the process of ...

THE NEW NORMAL: AFTER THIS IS OVER



Covid-19: Are pandemics the new normal? - BBC News

43K views • 2 years ago



Though scientists had warned the world was due a pandemic, no-one could have predicted the scale and impact of Covid-19.



What Will Be Seattle's New Normal After The Coronavirus Outbreak? | MSNBC

108K views • 3 years ago



MSNBC delivers breaking news, in-depth analysis of politics headlines, as well as commentary and informed perspectives.

Subtitles



Covid-19: is working from home really the new normal?

720K views • 3 years ago



Further reading: Find The Economist's most recent coverage of covid-19 here: <https://econ.st/2Z4kl6C> Sign up to The Economist's ...

AGENDA



01

The Public Mood: Now and Then

Simon Atkinson

Chief Knowledge Officer,
Ipsos

02

Changing Conversations

Helena Junqueira

Social Intelligence Lead,
Ipsos in Brazil

03

Lessons in Leadership

Jack Evans

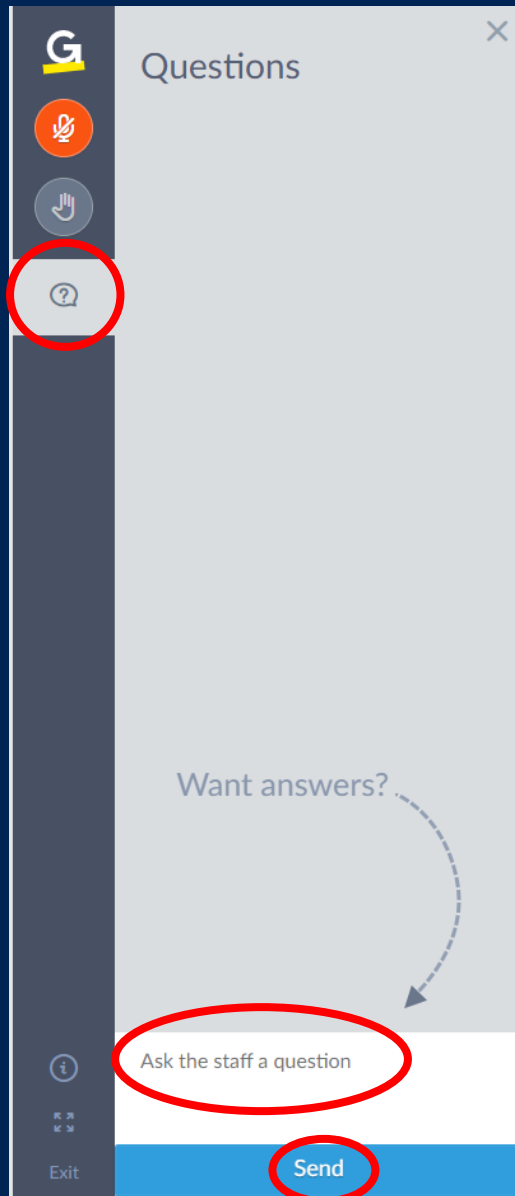
Managing Director, Ipsos
Karian & Box

04

An Emotional Rollercoaster?

Cristina Craciun

Global Director, Censydiam,
Ipsos



QUESTION TIME

Do you have questions for our panellists?

Please send them by clicking on the  on the left panel.

You can ask your question at any time during the session.



QUIZ TIME!

Watch out for a pop-up message a little later...

THE PUBLIC MOOD NOW AND THEN

Simon Atkinson

THE NOW


Things aren't
always that
easy to read

How to explain the puzzle of the world economy

Welcome to the Mona Lisa effect



The Economist, 17 April 2023

A close-up, slightly blurred image of the Mona Lisa's face, focusing on her eyes and the central part of her face. The background is dark and textured, suggesting the canvas of the painting.

**“The post-pandemic economy is like
the Mona Lisa. Each time you look,
you see something different.”**

The Economist, 17 April 2023

IPSOS CONSUMER CONFIDENCE INDEX



APRIL

Finance & economics | The art of interpretation

How to explain the puzzle of
the world economy

Welcome to the Mona Lisa effect

The
Economist



Consumer confidence moves in opposite directions among world's largest economies

Sentiment rises significantly in Japan, Germany, and Canada while France hits a two-year low.

19 April 2023 Consumers / Economic Pulse / Economy

MAY

Global consumer confidence rises to highest point in sixteen months

All four sub-indices show significant gains as sentiment rises across much of Europe.

17 May 2023 Consumer Confidence Index / Society / Economy / Consumers

JUNE

June 2023 Global Consumer Confidence Index shows contrasting trends among the world's largest economies

Sentiment down in the U.S. and Germany, but up in Britain and at a 10-year high in Brazil;
Expectations index in Turkey plummets

22 June 2023 Consumer Confidence Index / Society / Economy / Consumers

JULY

July 2023: Consumer confidence declines sharply among many European countries

Sentiment is significantly down in Great Britain, France, Hungary, and the Netherlands.

20 July 2023 Consumer Confidence Index / Society / Economy / Consumers

AUGUST

August 2023: consumer confidence varies widely across regions

Sentiment down in North America but up in Europe; consumer confidence in Turkey plummets.

23 August 2023 Society / Economy / Consumer Confidence Index / Consumers

SEPTEMBER

Consumer confidence down across Europe in September 2023

Sentiment declines significantly in Germany, Spain, and Italy.

21 September 2023 Society / Economy / Consumer Confidence Index / Consumers

OCTOBER

October 2023: Consumer confidence declines sharply across Southeast Asia

Sentiment is down in Malaysia, Singapore and Indonesia.

19 October 2023 Society / Economy / Consumer Confidence Index / Consumers



Sometimes we can be too close to the action

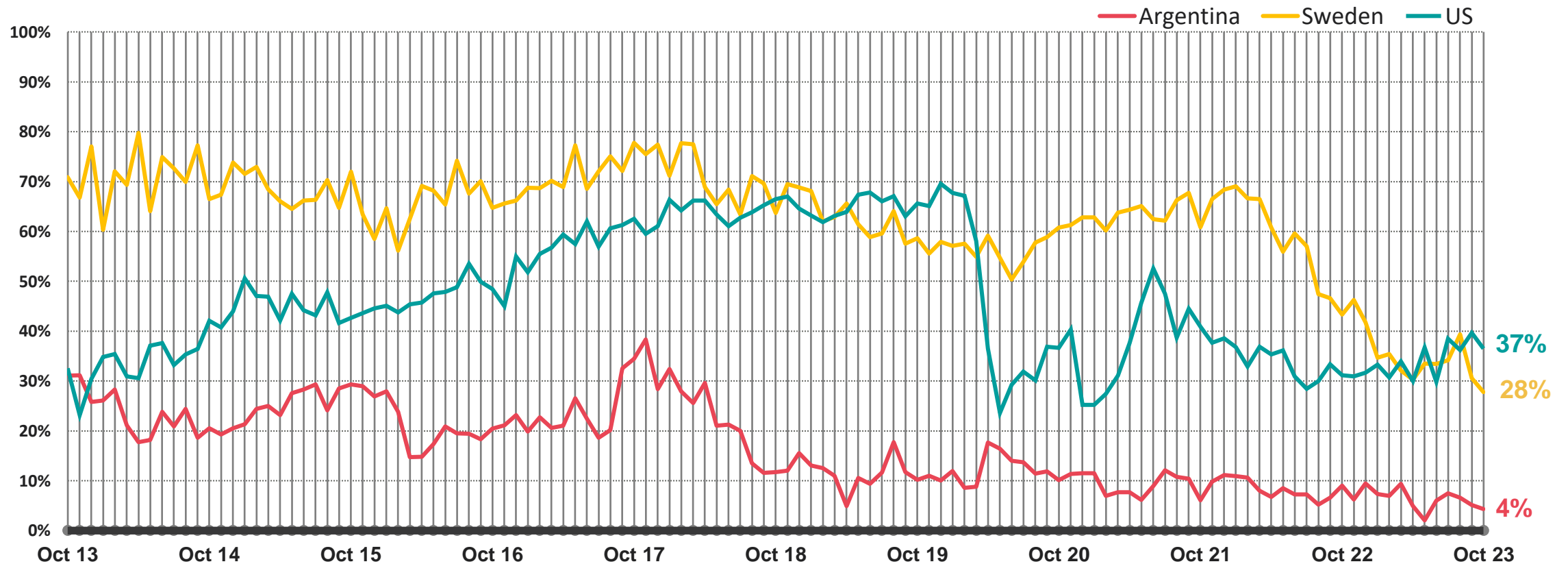
NOW AND THEN THE PUBLIC MOOD

Q: How would you describe the
current state of the economy in
your country?

The Trend Line

THE LONGER TERM PICTURE

Q How would you describe the current economic situation in your country?
(% 'Very good' or 'Somewhat good')



Base: Representative sample c. 2500 adults aged 16-74 in Argentina, Sweden and the US, 2013 - 2023.

Source: Ipsos What Worries the World.

NOW AND THEN THE PUBLIC MOOD

**WHAT WORRIES
THE WORLD?**

October 2023



GAME CHANGERS

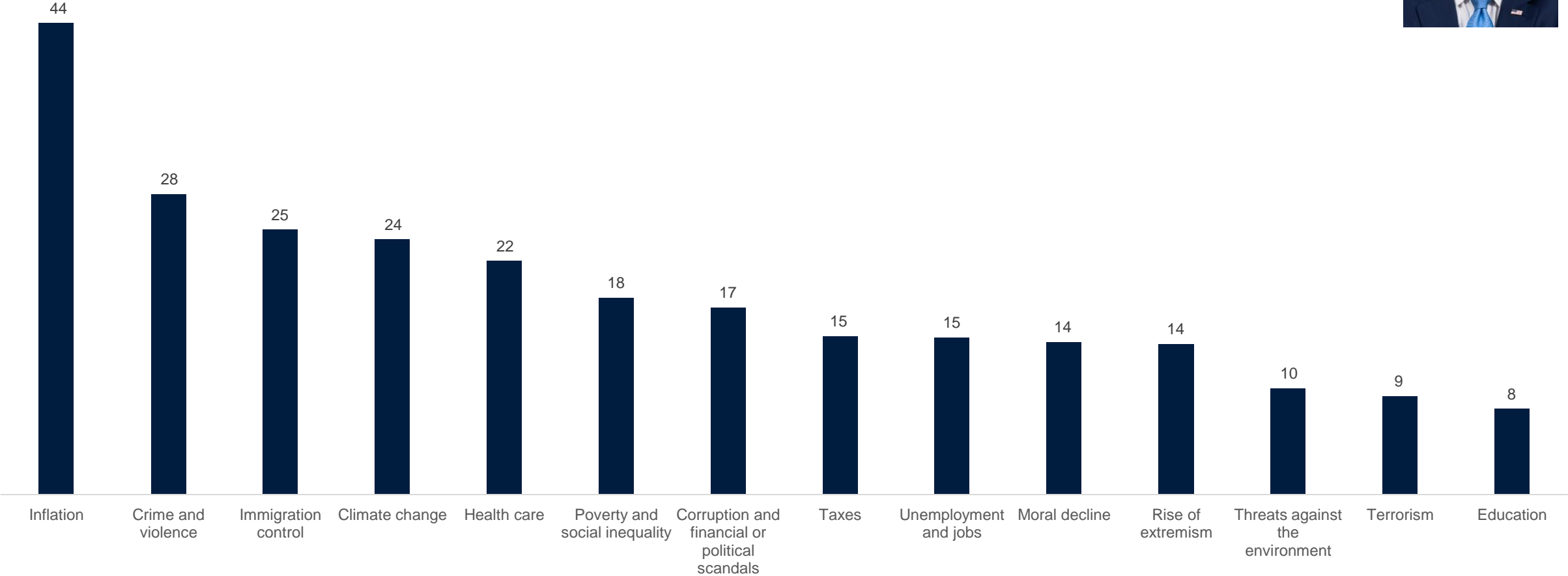
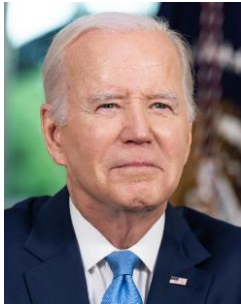


Q: Which three of the following topics do you find the most worrying in your country?

The Country Context

NOW: TODAY'S CONTEXT

October 2023

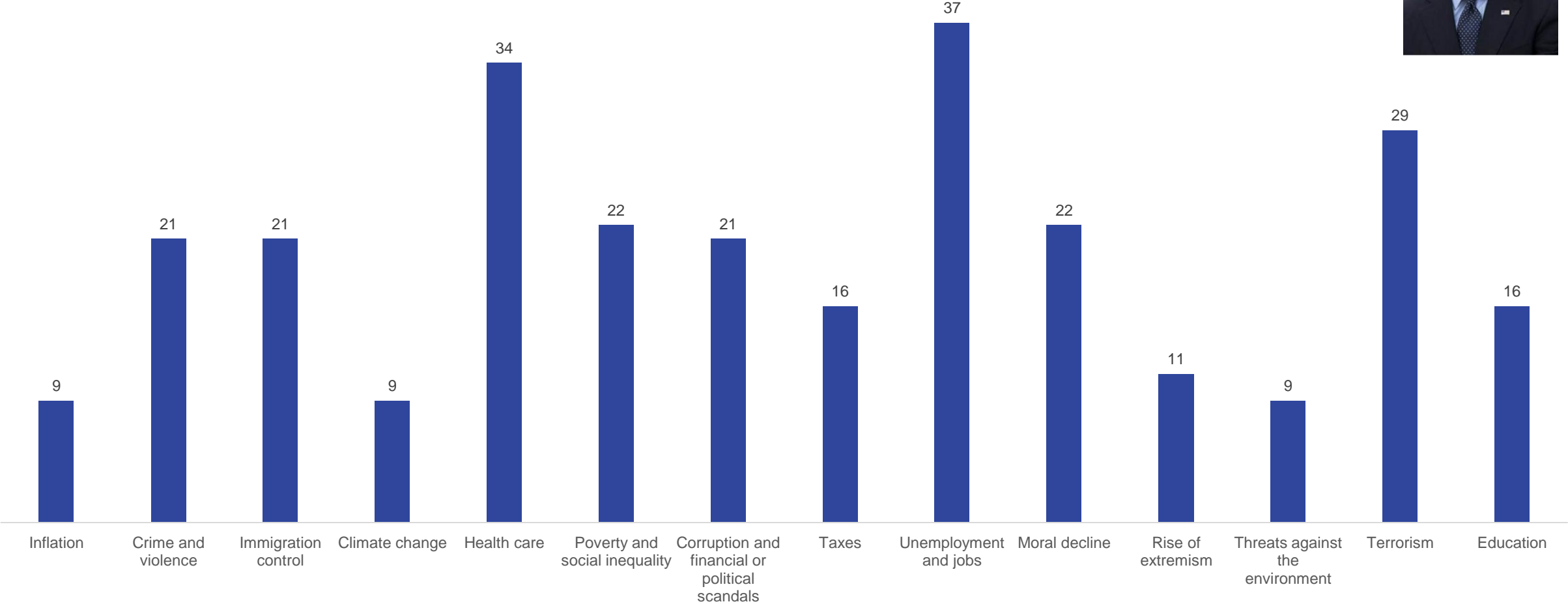


Source: What Worries the World



THEN: HEALTHCARE, UNEMPLOYMENT...

October 2014

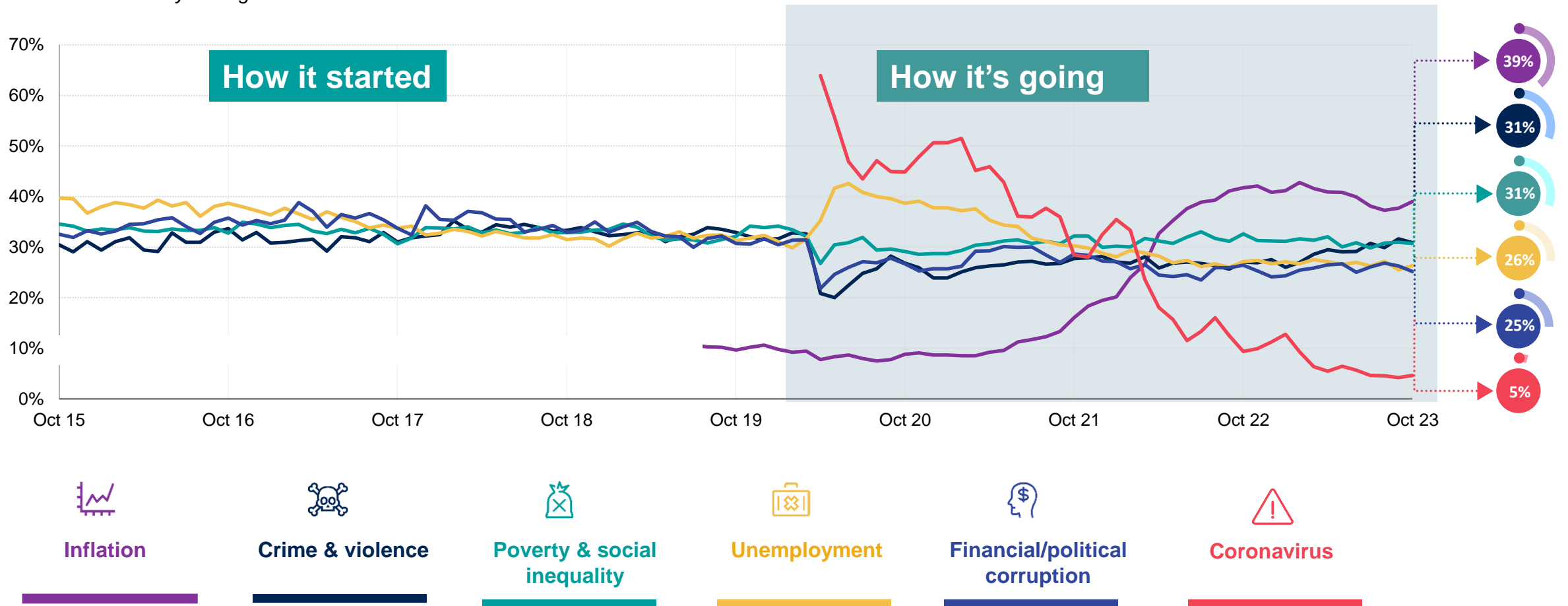


Source: What Worries the World

DISRUPTION OR CONTINUITY?

WORLD WORRIES: LONG-TERM TREND: **DISRUPTION!**

Q Which three of the following topics do you find the most worrying in your country?
Global country average

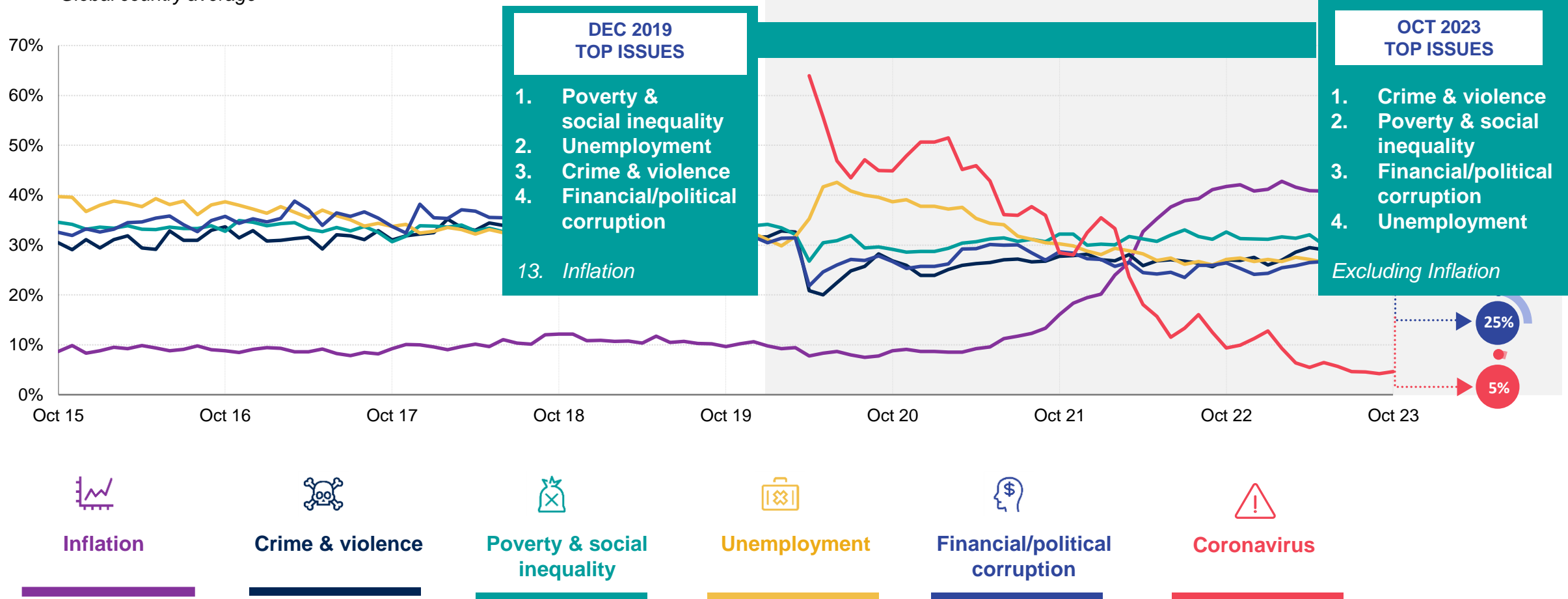


Base: Representative sample of 25,220 adults aged 16-74 in 29 participating countries, 2015 - 2023.
Source: Ipsos Global Advisor. *Global score is a Global Country Average. See methodology for details.*

WORLD WORRIES: LONG-TERM TREND: CONTINUITY!

Q Which three of the following topics do you find the most worrying in your country?

Global country average



Base: Representative sample of 25,220 adults aged 16-74 in 29 participating countries, 2015 - 2023.
Source: Ipsos Global Advisor. Global score is a Global Country Average. See methodology for details.

WHATEVER HAPPENED TO THE NEW NORMAL?

What's changed?

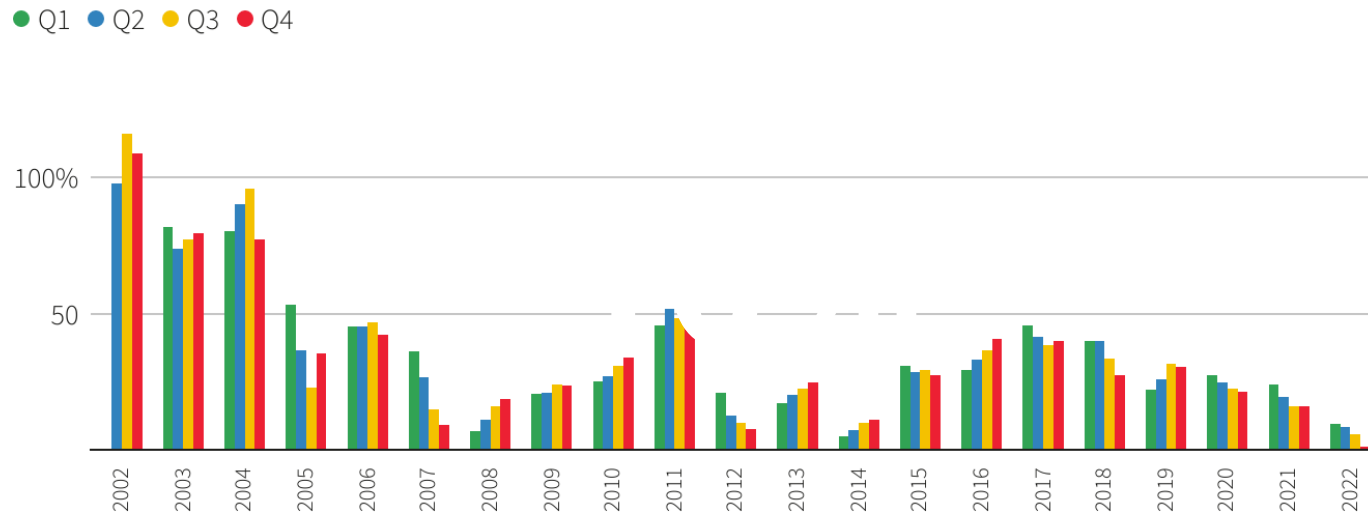
What's staying the same?

#1: DAILY LIFE

STAYING IN LESS?

Netflix set to report slowest revenue growth in 20 years

The streaming giant recently launched its ad-supported tier which is yet to gain traction at a time when consumers are crimping their spending due to still-high inflation.



Source: Company filings

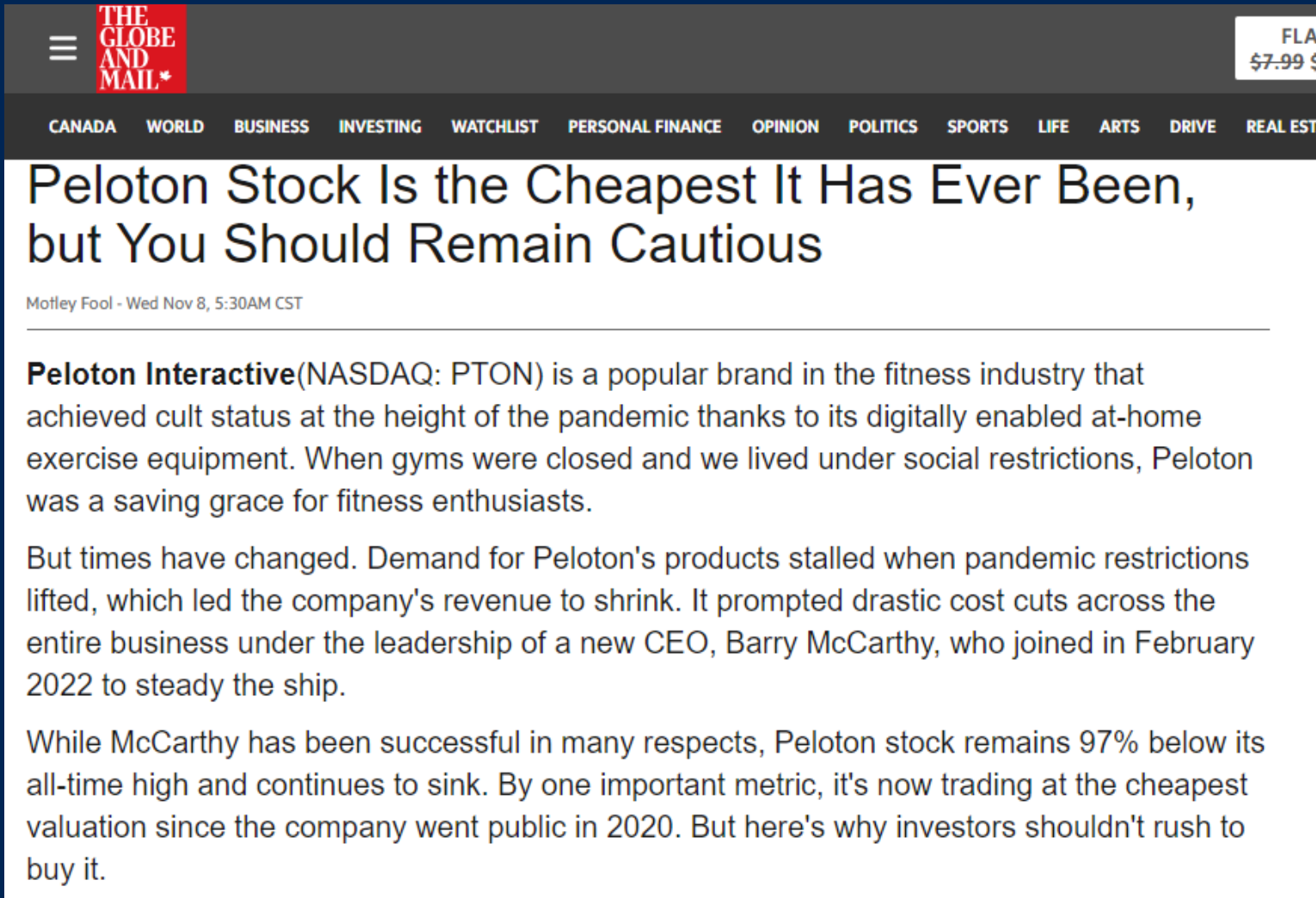
17%

have cancelled
subscriptions (SVoD,
Gym, etc.) to manage
impact of recession in
last 2 weeks

Sept 2023

(Source: Ipsos Essentials)

GOING OUT MORE?



The screenshot shows the top of a news article from The Globe and Mail. The header includes the newspaper's logo, a navigation menu with categories like CANADA, WORLD, BUSINESS, INVESTING, WATCHLIST, PERSONAL FINANCE, OPINION, POLITICS, SPORTS, LIFE, ARTS, DRIVE, and REAL ESTATE, and a price tag for Florida (\$7.99). The article title is 'Peloton Stock Is the Cheapest It Has Ever Been, but You Should Remain Cautious' by Motley Fool, dated Wednesday, November 8, 5:30AM CST. The text discusses Peloton Interactive's (NASDAQ: PTON) status in the fitness industry, noting its popularity during the pandemic and its current low stock price, 97% below its all-time high.

Peloton Interactive(NASDAQ: PTON) is a popular brand in the fitness industry that achieved cult status at the height of the pandemic thanks to its digitally enabled at-home exercise equipment. When gyms were closed and we lived under social restrictions, Peloton was a saving grace for fitness enthusiasts.

But times have changed. Demand for Peloton's products stalled when pandemic restrictions lifted, which led the company's revenue to shrink. It prompted drastic cost cuts across the entire business under the leadership of a new CEO, Barry McCarthy, who joined in February 2022 to steady the ship.

While McCarthy has been successful in many respects, Peloton stock remains 97% below its all-time high and continues to sink. By one important metric, it's now trading at the cheapest valuation since the company went public in 2020. But here's why investors shouldn't rush to buy it.

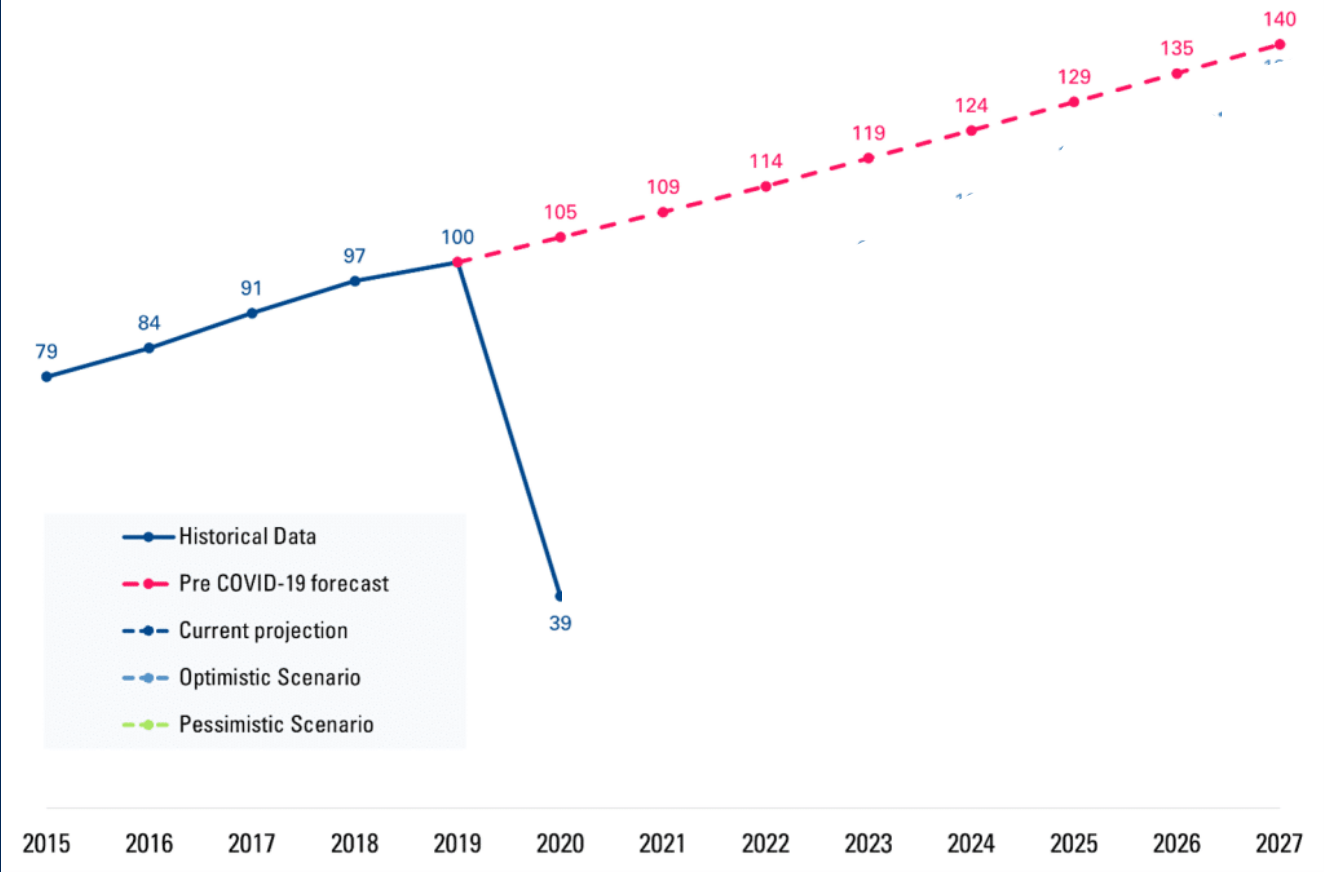
16%

plan spending more
time exercising out at
gym or facility

Sept 2023

(Source: Ipsos Essentials)

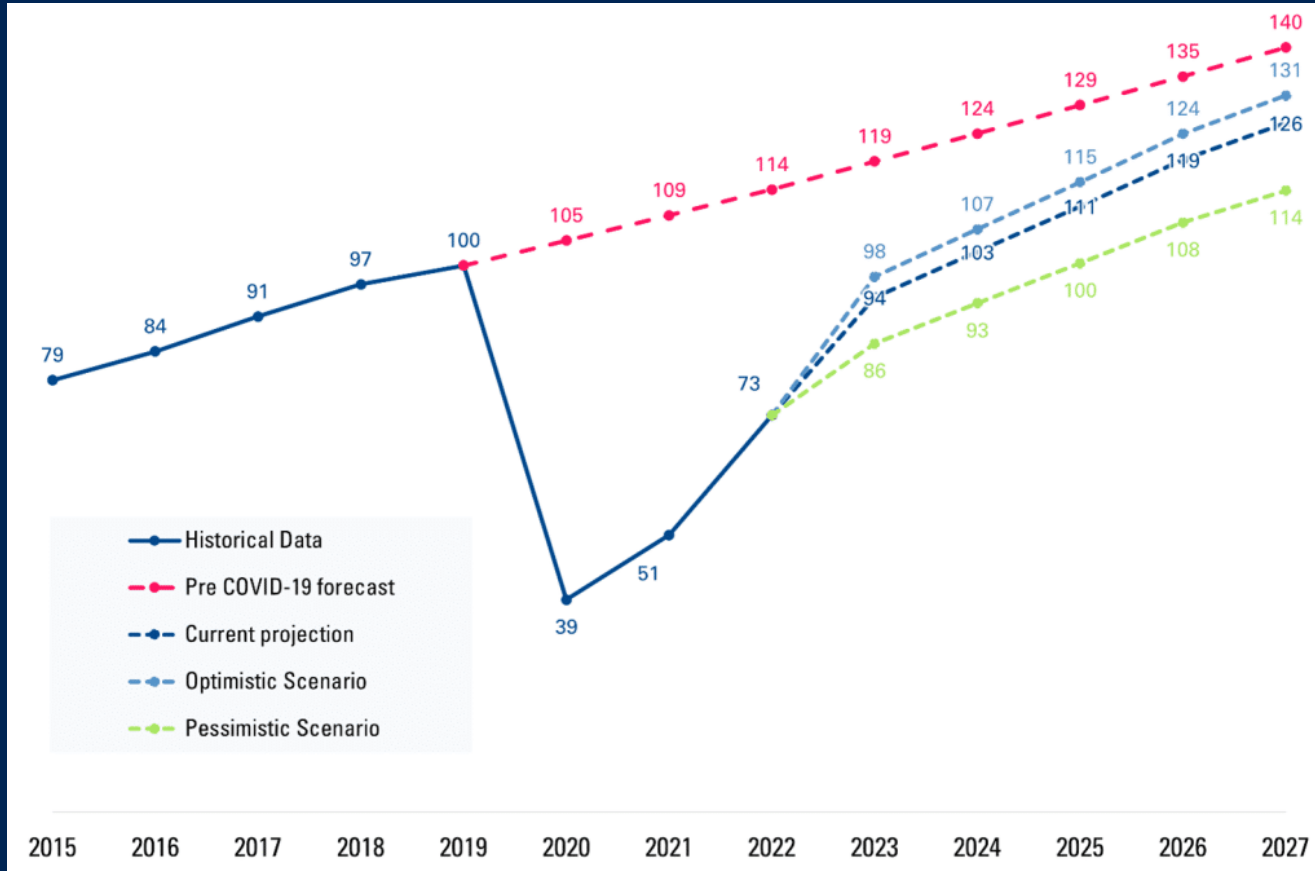
GROUNDING



Source: [Airport Councils International](#)



UP IN THE AIR AGAIN – BUT NOT AS MUCH AS BEFORE?



42% agree

45% disagree

People will fly less than they did in 2019

Source: [Ipsos 2023 predictions survey](#)

#2: WORKING LIFE



THE NEW NORMAL! HOME-BASED WORKING HAS TRIPLED!

April 06, 2023

Press Release Number CB23-TPS.38

APRIL 6, 2023 — The U.S. Census Bureau today released a report describing trends in working from home before and after the COVID-19 pandemic hit the United States in March 2020. The report, [Home-Based Workers and the COVID-19 Pandemic](#), uses 2019 and 2021 American Community Survey (ACS) 1-year estimates to compare teleworking sociodemographic, geographic and occupational patterns the year before and after the pandemic's onset.

Highlights:

- The number and percent of home-based workers **more than tripled** between 2019 and 2021, from 5.7% (roughly 9 million workers) to 17.9% (about 28 million workers).
- The share of women working from home increased from 50.7% of home-based workers in 2019 to 51.3% in 2021.
- About 20% of workers in the public administration industry, over 36% in the professional, scientific, management and administrative industry, and nearly 40% of workers in the finance, insurance and real estate industry worked from home in 2021.



18%
Home-based

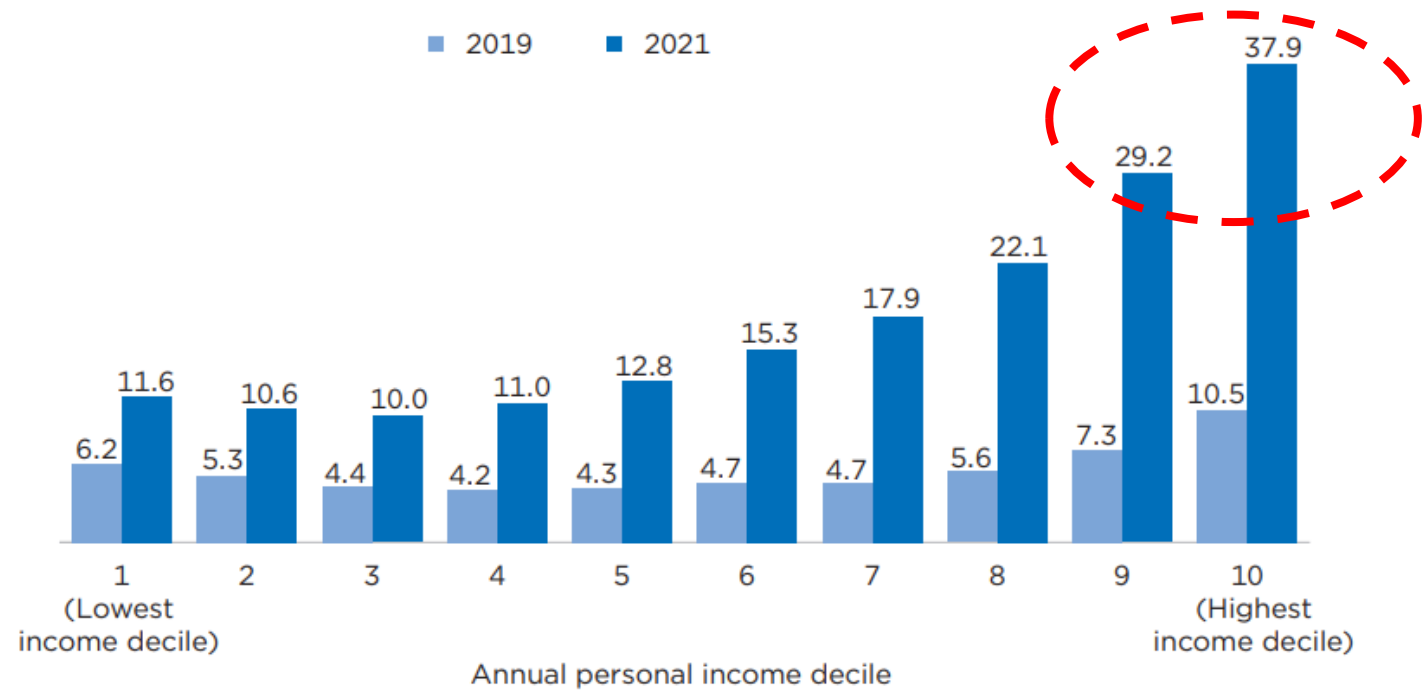
Source: US [Census Bureau](#)

THE NEW NORMAL FOR SOME!

Figure 4.

Percentage of Home-Based Workers by Income: 2019 and 2021

(Workers aged 16 and older living in the United States, excluding Puerto Rico. In percent)

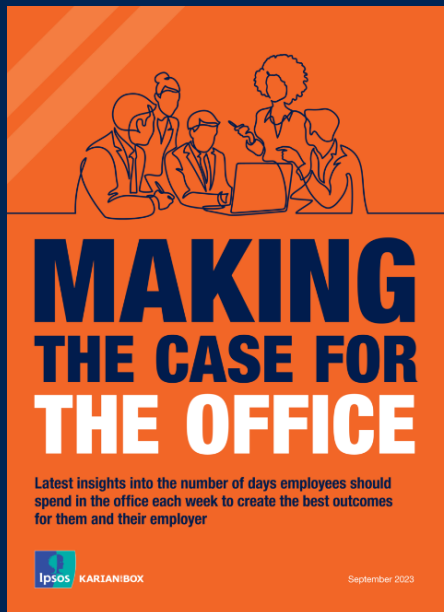


Note: Margins of error for all estimates are 0.2 or less. For information on confidentiality protection, sampling error, nonsampling error, and definitions, refer to <www.census.gov/acs>.

Source: U.S. Census Bureau, 2019 and 2021 American Community Survey, 1-year estimates.

Source: US Census Bureau

THE “NUANCED NORMAL”

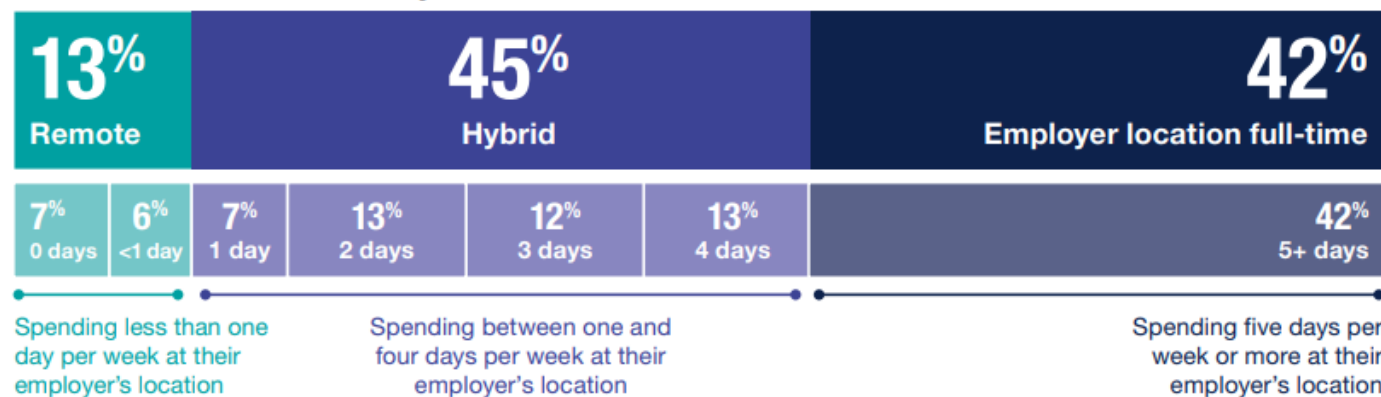


Source: [Ipsos Karian & Box](#)

Majority of UK full-time office workers work from their employer's location most of the time

How often do you usually work at your employer's location (office, contact centre, etc.)?

Full-time office workers only



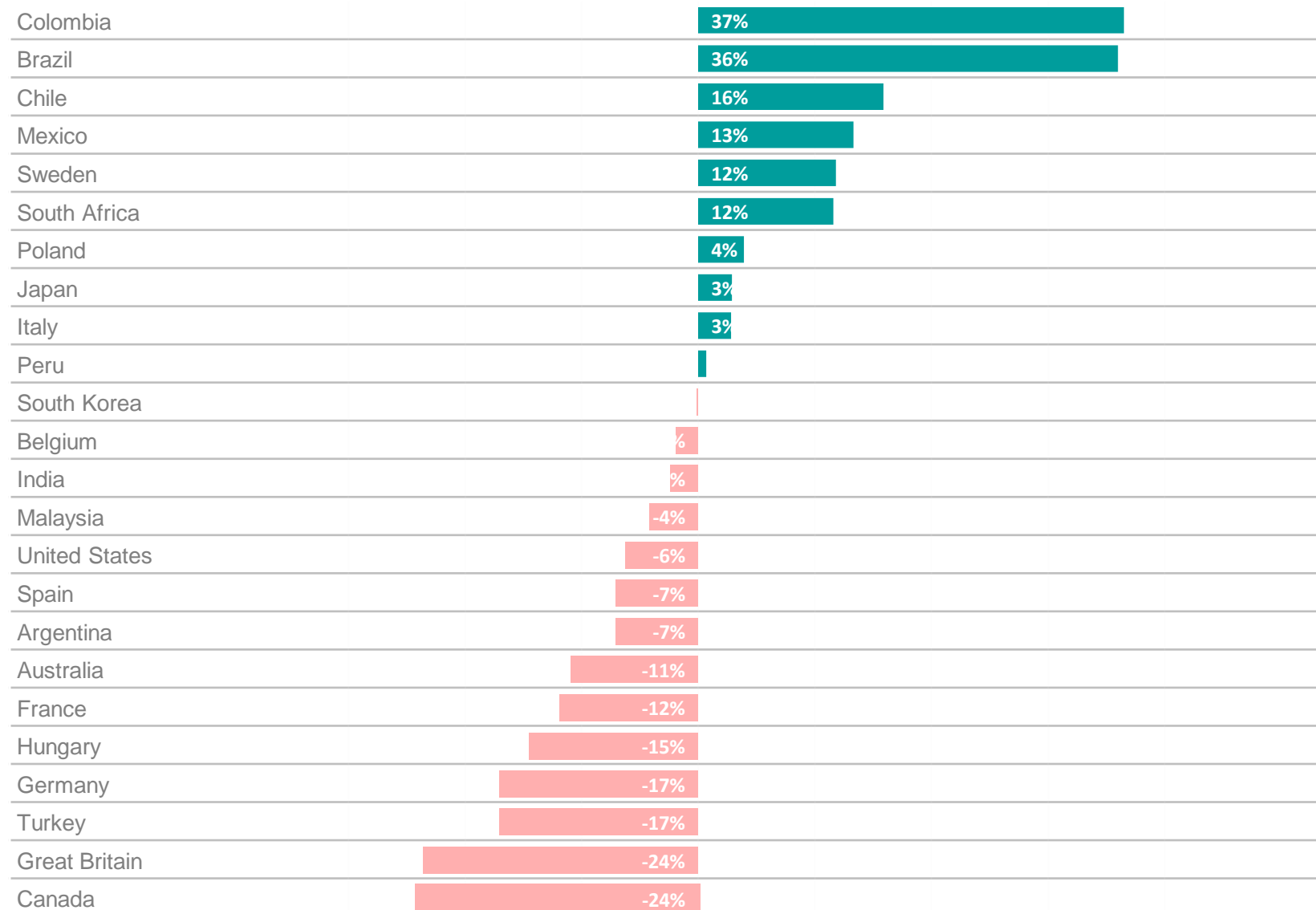
#3: HEALTHY LIFE?



NOW: COUNTRY CONTEXT MATTERS AS MUCH AS EVER!

Change in NET satisfied (2018-2023)

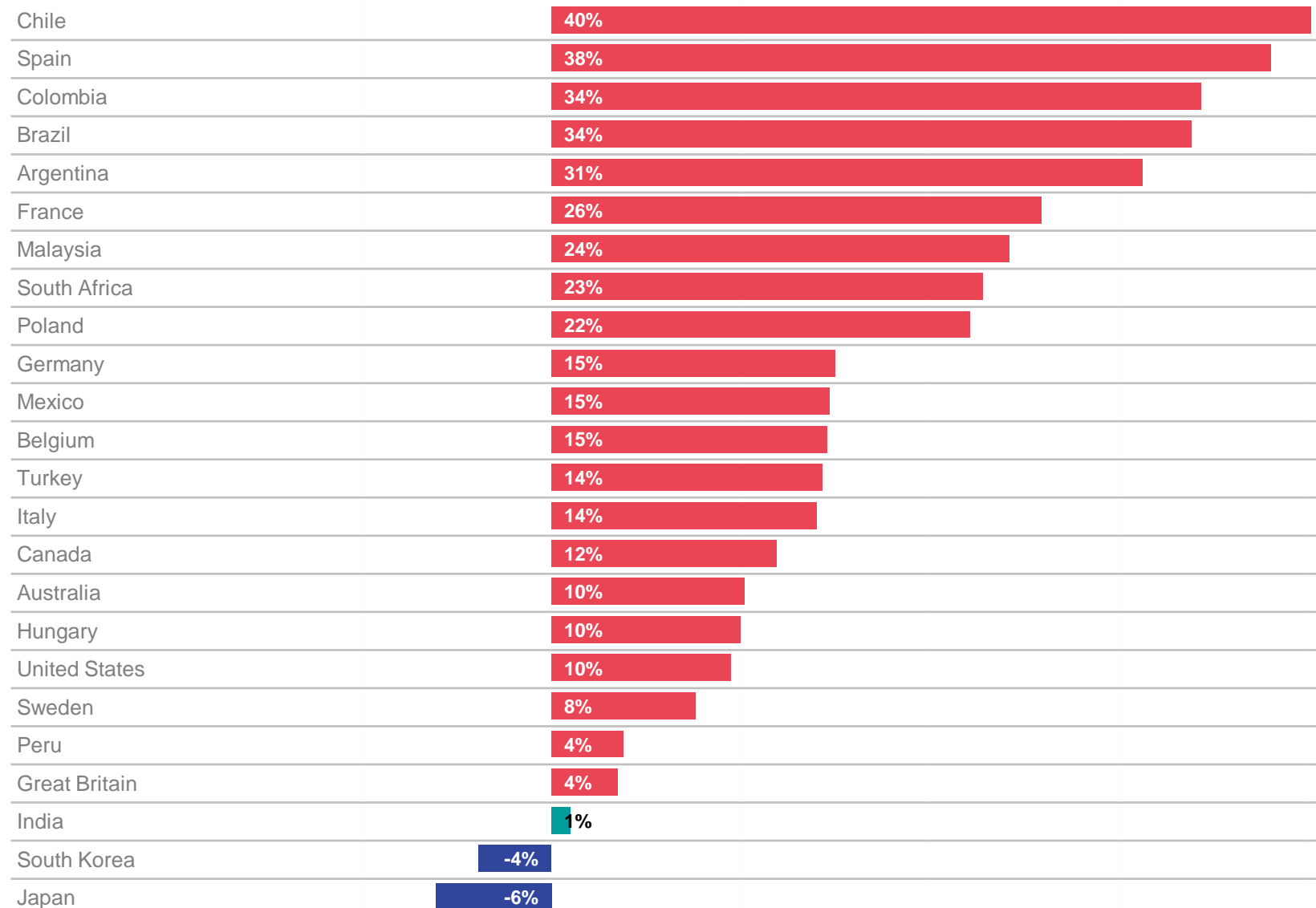
Q How would you rate the
quality of healthcare that you
and your family have access
to in your country?
(Good/Poor)



Source: Ipsos [Global Health Service Monitor](#)

NOW: MENTAL HEALTH MATTERS MORE

Change in % mentioning
Mental Health as a priority
(2019-2023)



Source: Ipsos [Global Health Service Monitor](#)

THE PUBLIC MOOD NOW AND THEN

Simon Atkinson

CHANGING CONVERSATIONS

A man wearing a grey t-shirt and a grey baseball cap is sitting on a dark metal bench. He is looking down at a smartphone in his hands. His arms are crossed over his knees. The background is a blurred outdoor setting with green foliage and a dark wall.

HELENA JUNQUEIRA

Ipsos Brazil

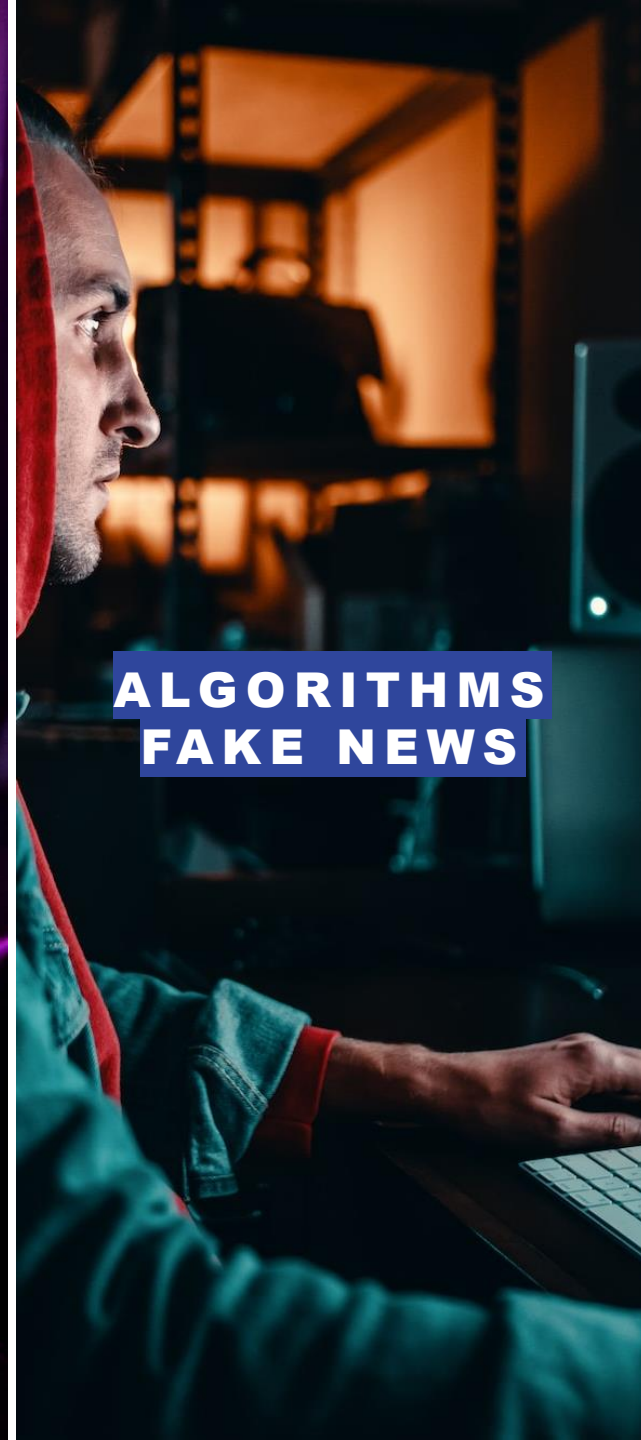


**ARE WE
(ALREADY) OK?**

THE WORLD IS IN A POLYCRISIS



**POLARIZATION
CULTURE WARS**



**ALGORITHMS
FAKE NEWS**



**ECONOMIC CRISIS
INFLATION**



**SUSTAINABILITY
CLIMATE CHANGE**

UNEMPLOYMENT GOOGLE SEARCHES (WORLDWIDE)



Source: Google Trends

Note: an improvement to Google's data collection system was applied from Jan 1s 2022

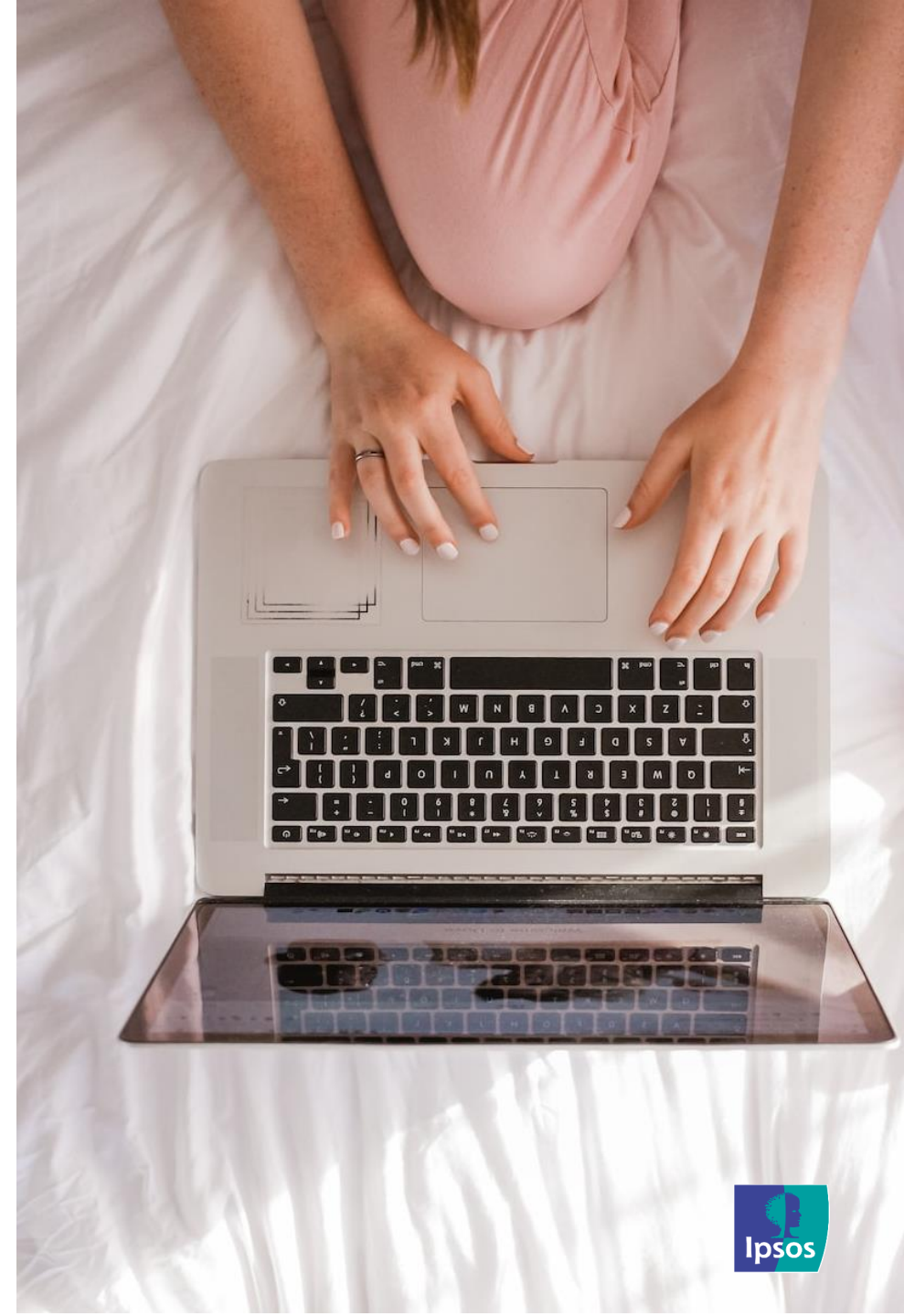


REMOTE WORK GOOGLE SEARCHES (WORLDWIDE)



Source: Google Trends

Note: an improvement to Google's data collection system was applied from Jan 1s 2022

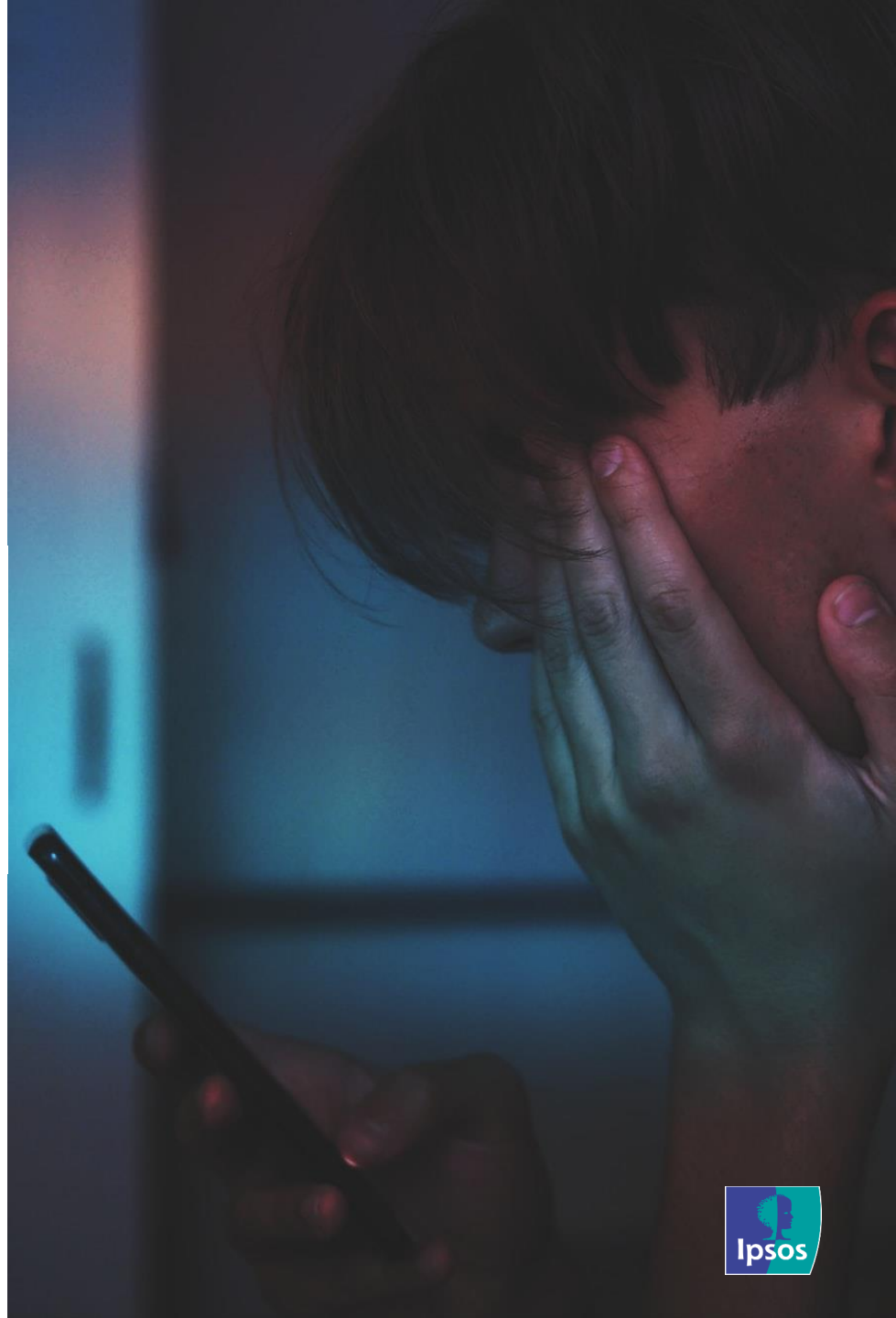


MENTAL HEALTH GOOGLE SEARCHES (WORLDWIDE)



Source: Google Trends

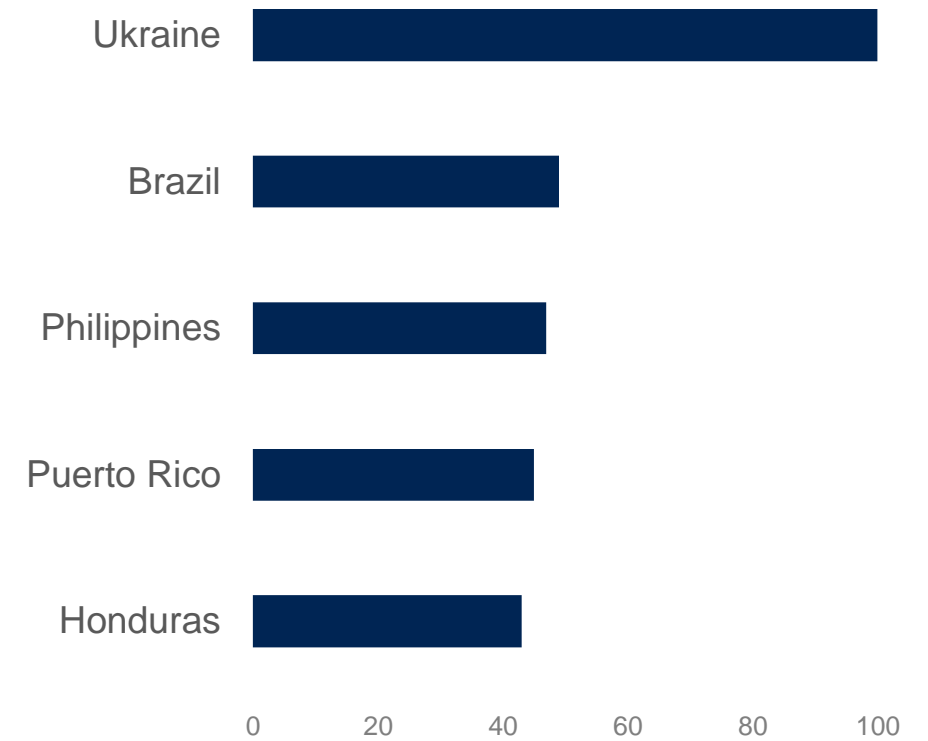
Note: an improvement to Google's data collection system was applied from Jan 1s 2022



ANXIETY GOOGLE SEARCHES (WORLDWIDE)

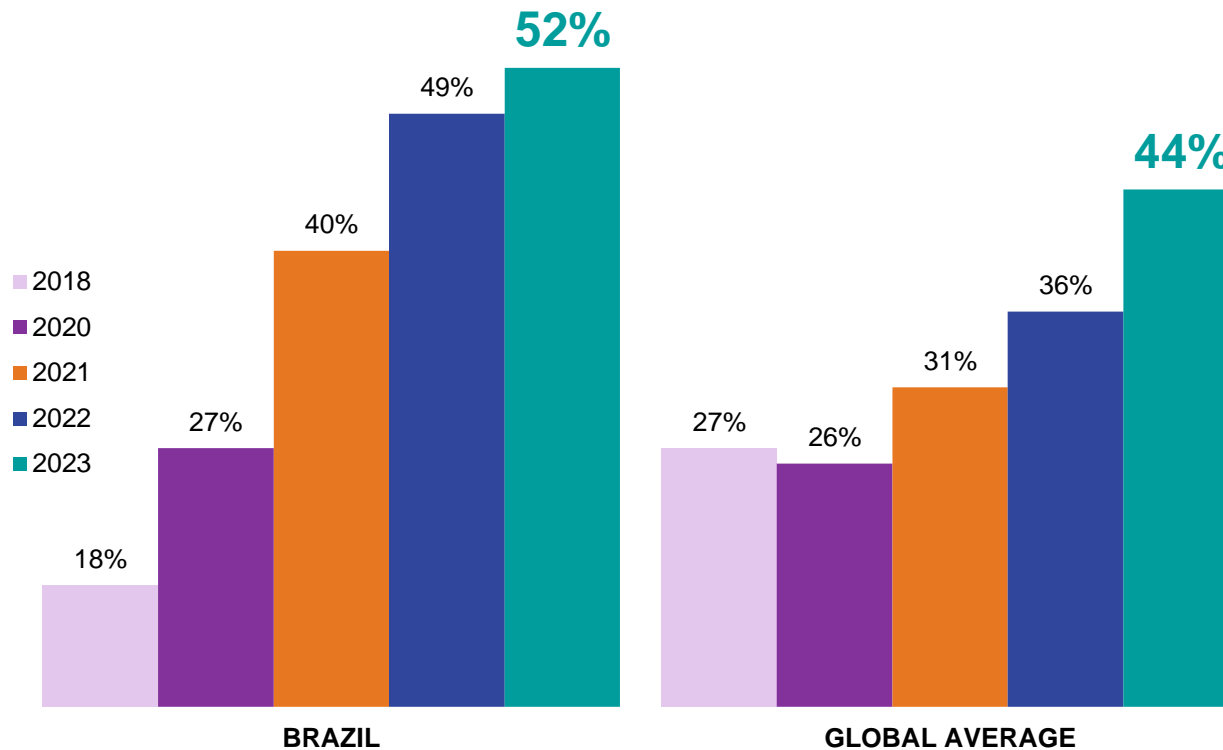


Source: Google Trends



MENTAL HEALTH CONCERN

Mental health is the biggest health problem in Brazil today, ahead of cancer (38%) and drug abuse (36%)



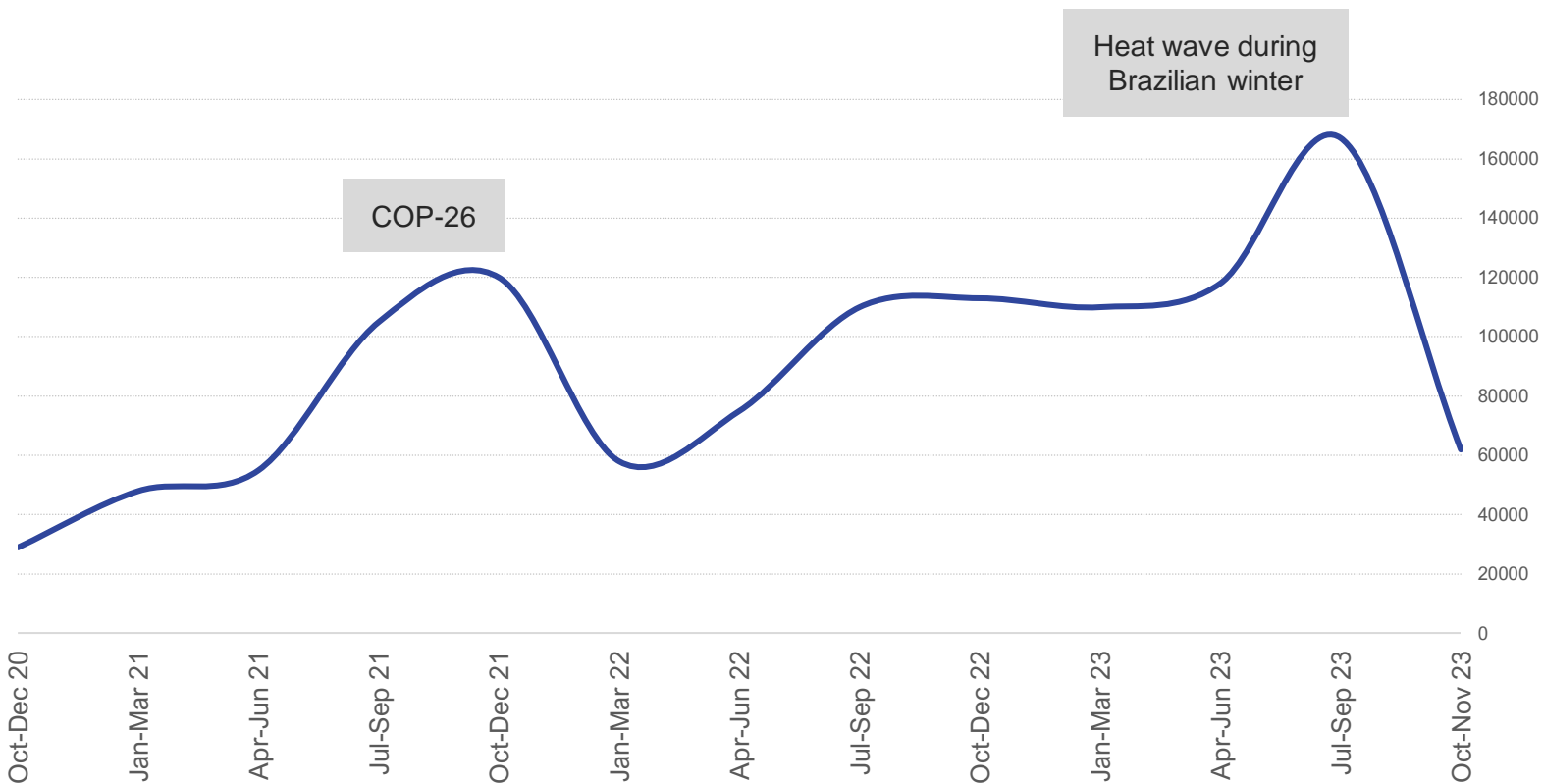
Source: Ipsos Global Healthcare Monitor 2023 – September 2023





Photo: Miguel Monteiro/ Instituto Mamirauá
Published by Agência Brasil, Oct 2023

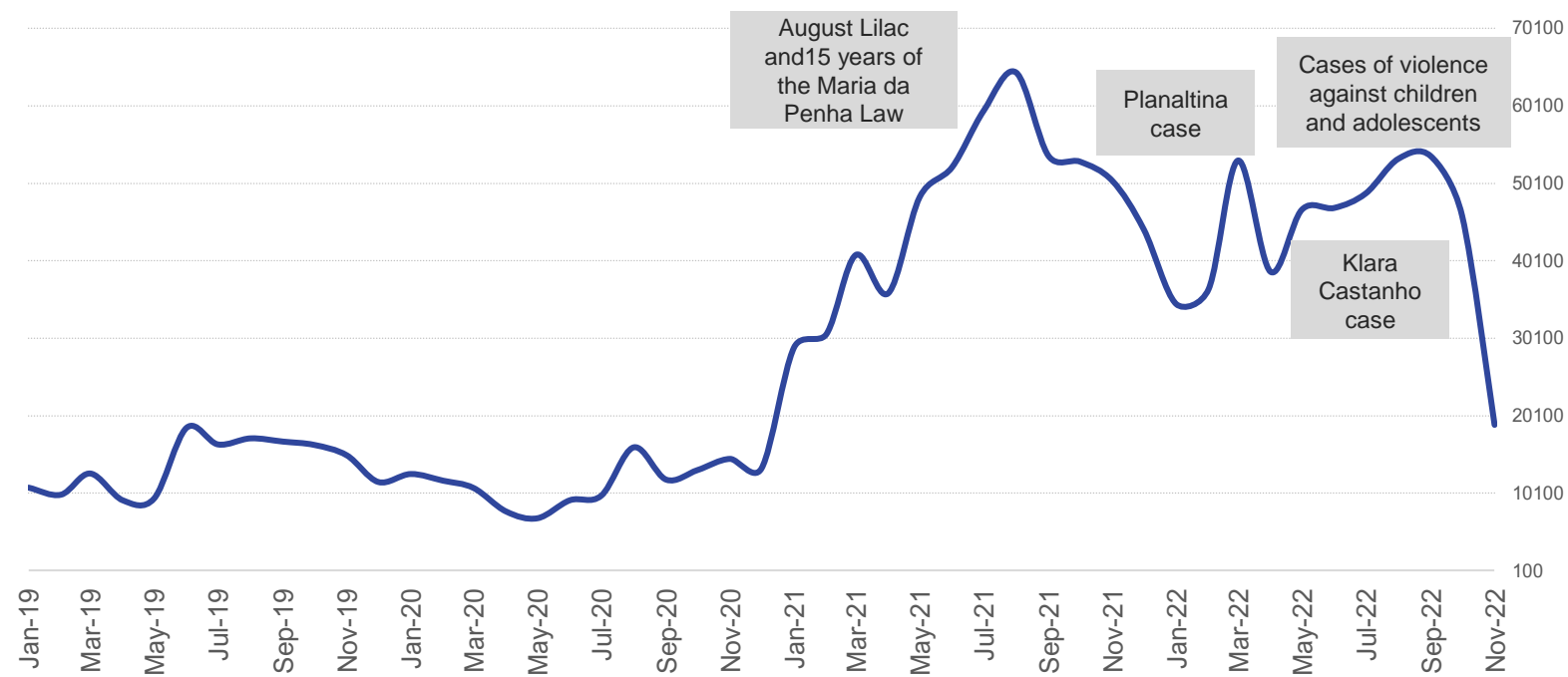
GLOBAL WARMING ONLINE MENTIONS (BRAZIL)



Source: Synthesio Flashdash, estimated volumes



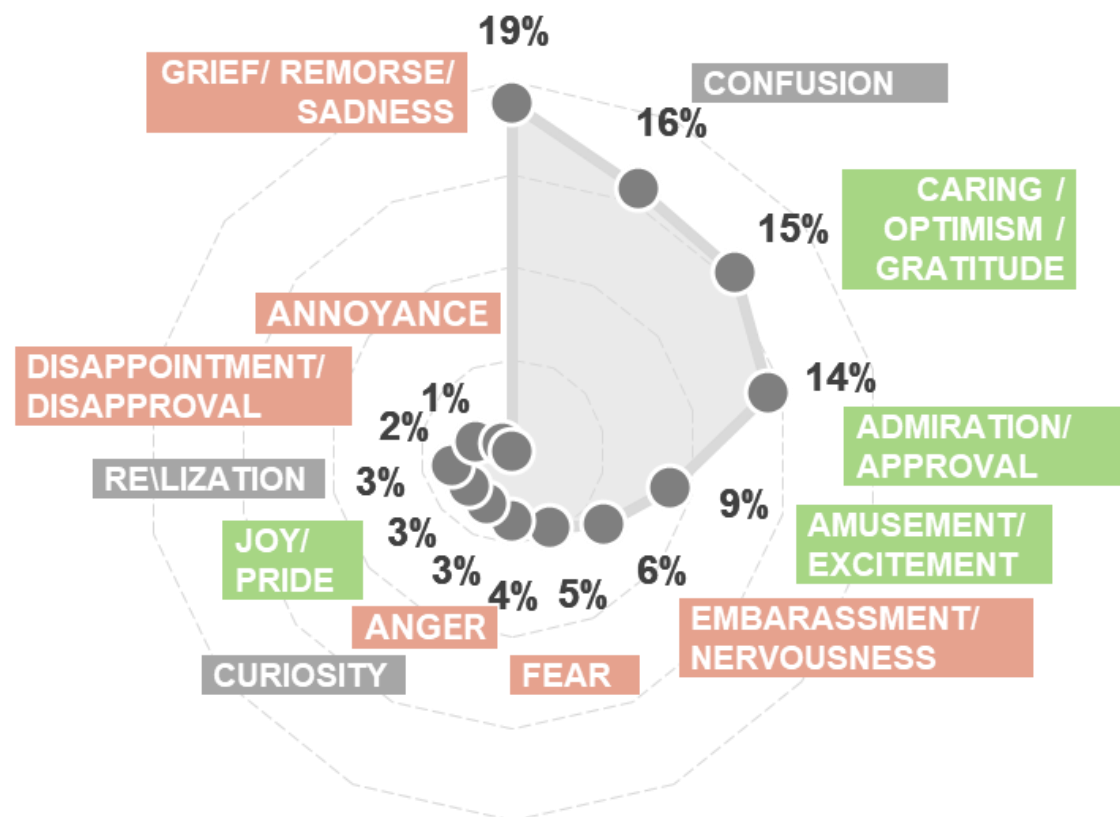
GENDER-BASED VIOLENCE ONLINE NEWS IN BRAZIL



Source: Synthesio
Ipsos & UN Women monitor of violence against women and girls



GENDER-BASED VIOLENCE EMOTIONS IN SOCIAL MEDIA (BRAZIL)



Source: Synthesio
Ipsos & UN Women monitor of violence against women and girls



THE POLYCRISIS IS ALSO DIGITAL

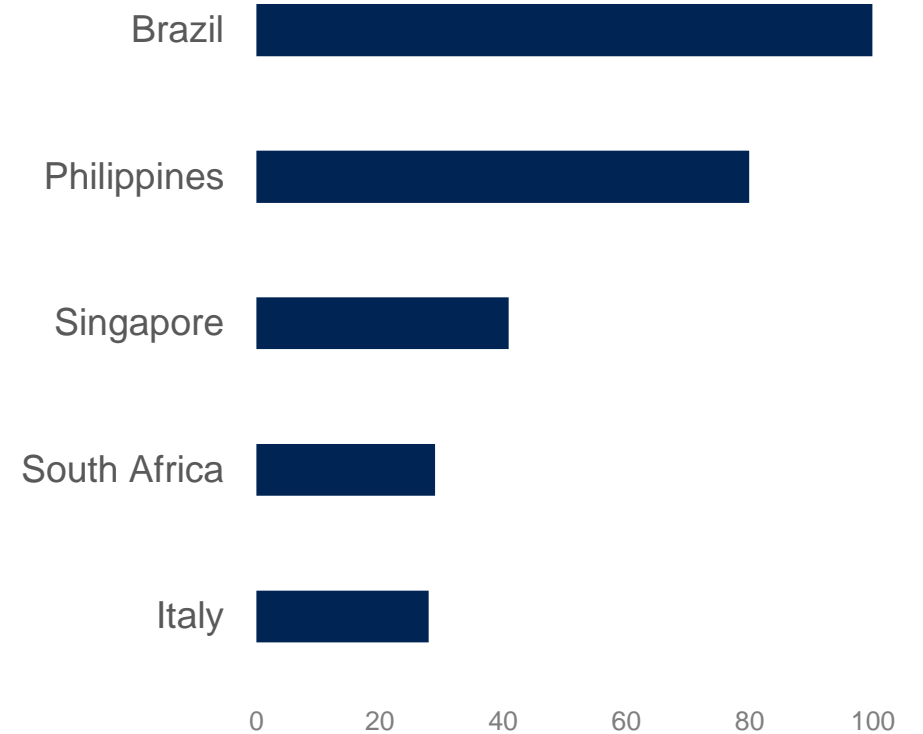


FAKE NEWS

GOOGLE SEARCHES (WORLDWIDE)



Source: Google Trends



25-30% of fake profiles identified by Bot Sentinel on Twitter are Brazilian

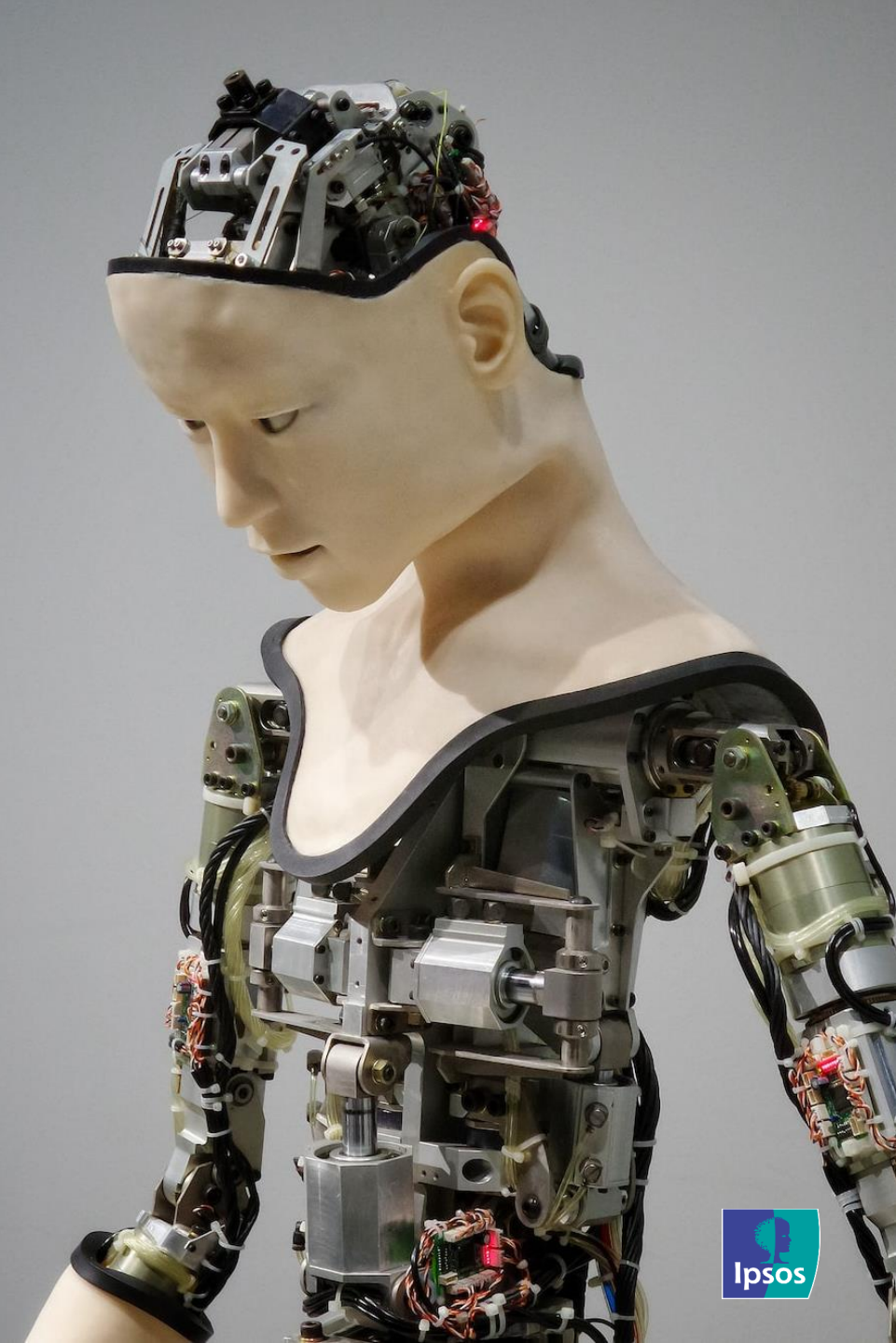
Source: UOL, 2021

ARTIFICIAL INTELLIGENCE GOOGLE SEARCHES (WORLDWIDE)

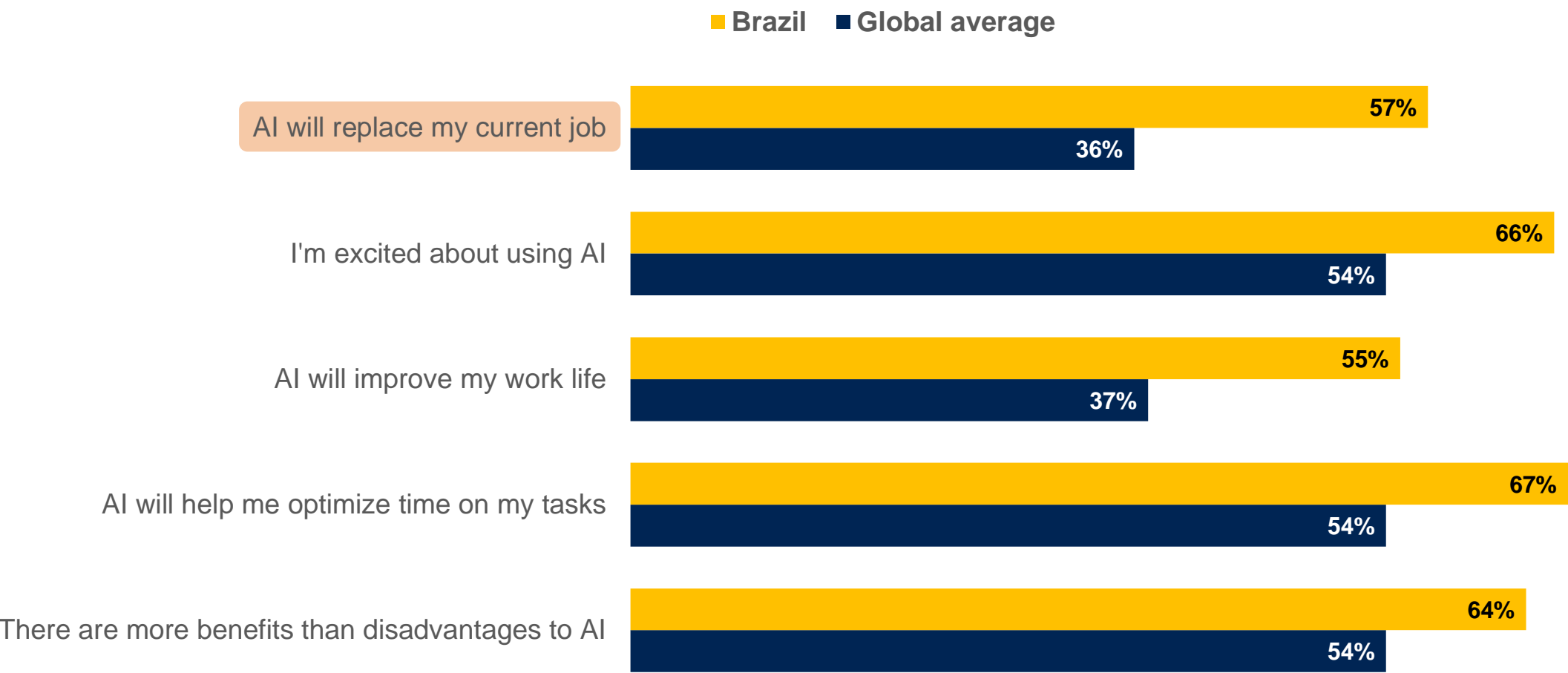


Source: Google Trends

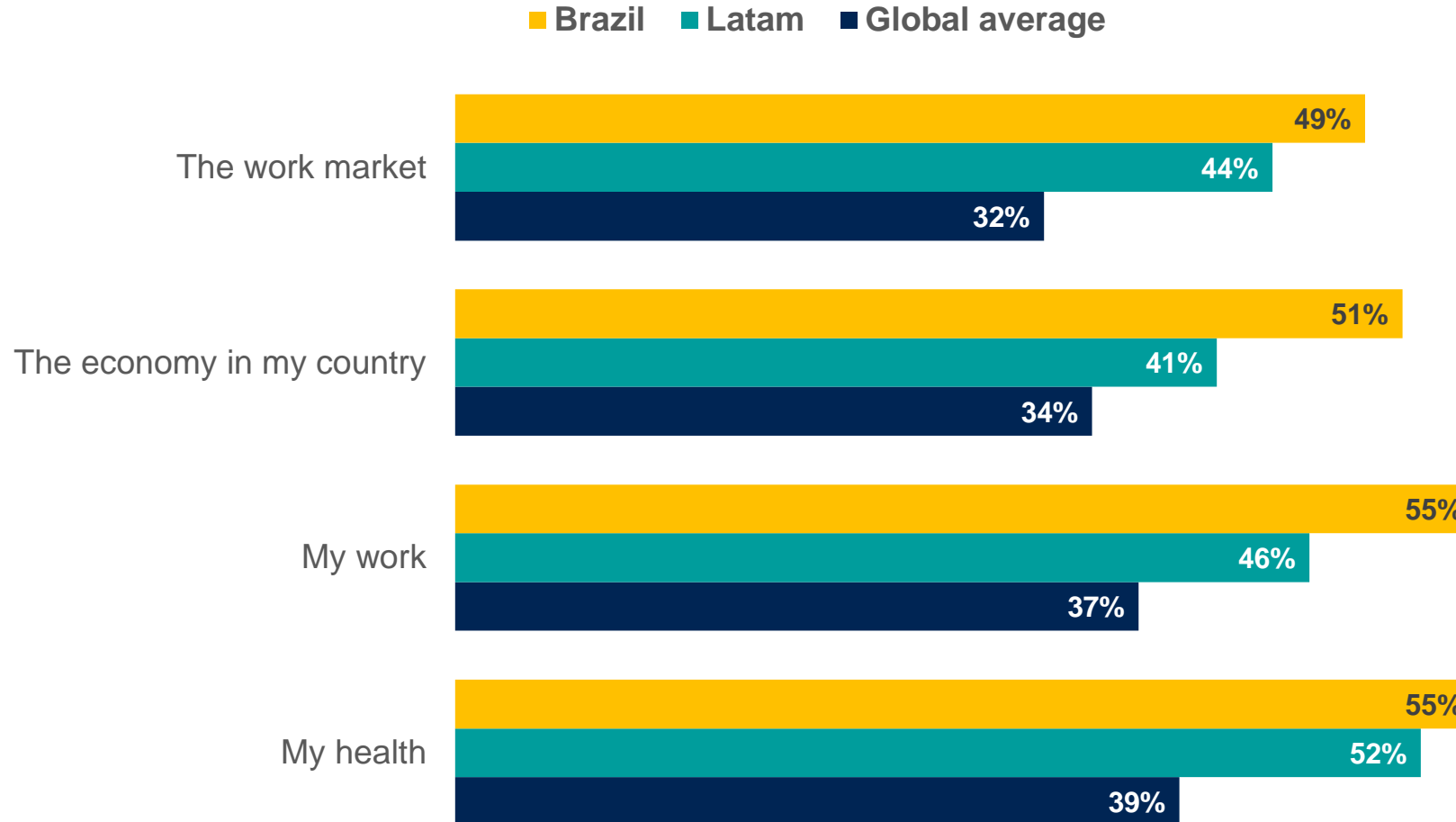
Note: an improvement to Google's data collection system was applied from Jan 1s 2022



ARTIFICIAL INTELLIGENCE



EXPECTATION THAT INCREASED USE OF ARTIFICIAL INTELLIGENCE WILL MAKE EACH OF THE FOLLOWING BETTER



Source: Ipsos Global Views on A.I.



THE LASTING APPEAL OF NOSTALGIA

61%

of Brazilians want the
country to go back to the
way it “used to be”

Global average: 60%

Source: Ipsos Global Trends Survey, January 2023

BRASIL 2024

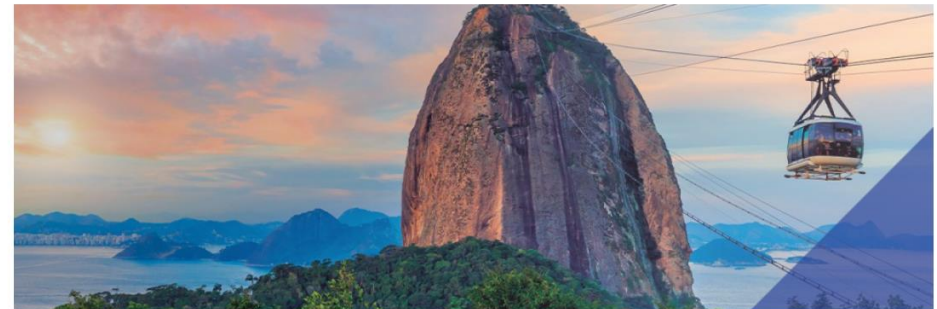
NOSTALGIA OU PERSPECTIVAS



An introduction to Flair Brazil 2024: Nostalgia or perspectives

There is much opportunity to be found in Brazil. We need to go beyond metrics and delve deeper to understand individuals and society. And it is with this aim that we present Flair Brazil 2024.

17 October 2023 Flair / Economy



[Explore the report](#)

Four lessons for leaders on how to lead change and build high- performing teams

Jack Evans - KEYS

9th November

Based on research for some of the world's biggest and best organisations

We partner with

50%
of the
FTSE 30

and other global clients

We survey

3m
employees

every year



DIAGEO



Sainsbury's

TESCO

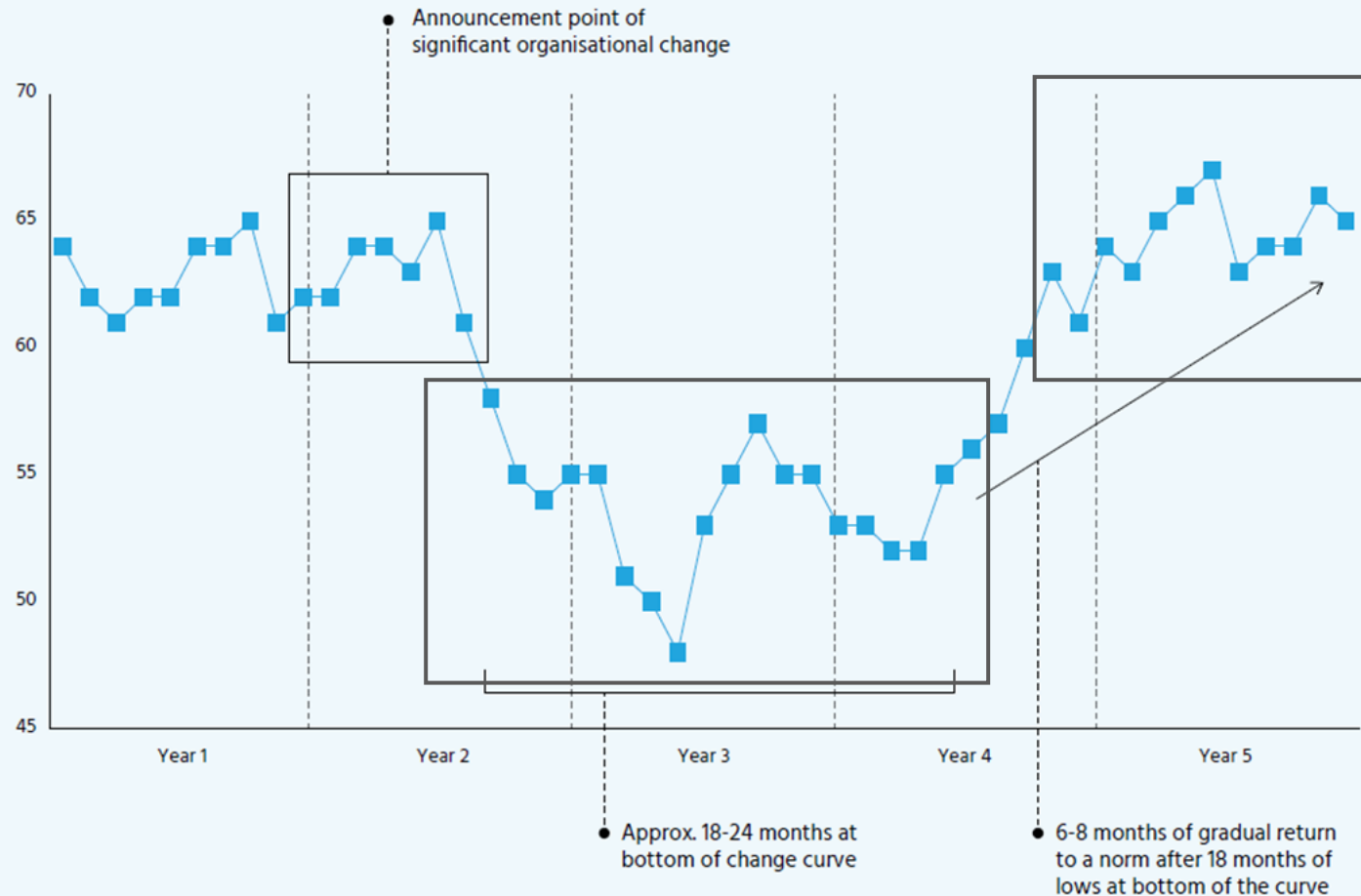


PHILIP MORRIS
INTERNATIONAL

We're all navigating through change at an unprecedented rate

It takes approximately 18 months for the change curve to 'play out'

■ % Employee advocacy trend



Source: Ipsos Karian and Box Organisational Change: managing the impact on employee engagement and culture

Four lessons for leading change and building high-performing teams

01 **Visible** leadership

02 **Active listening** and openness to giving and receiving feedback

03 **Clarity of team purpose** and alignment – and its link to the wider organisational priorities

04 **Empowerment** – with open, believable communications, underpinned by psychological safety

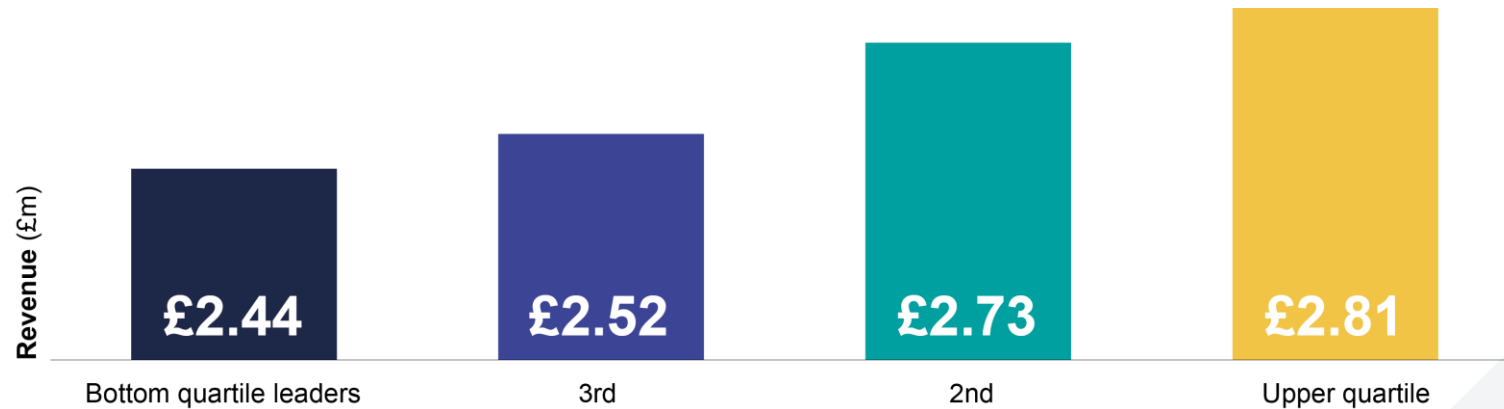


High-performing teams

Their behaviours



Their results

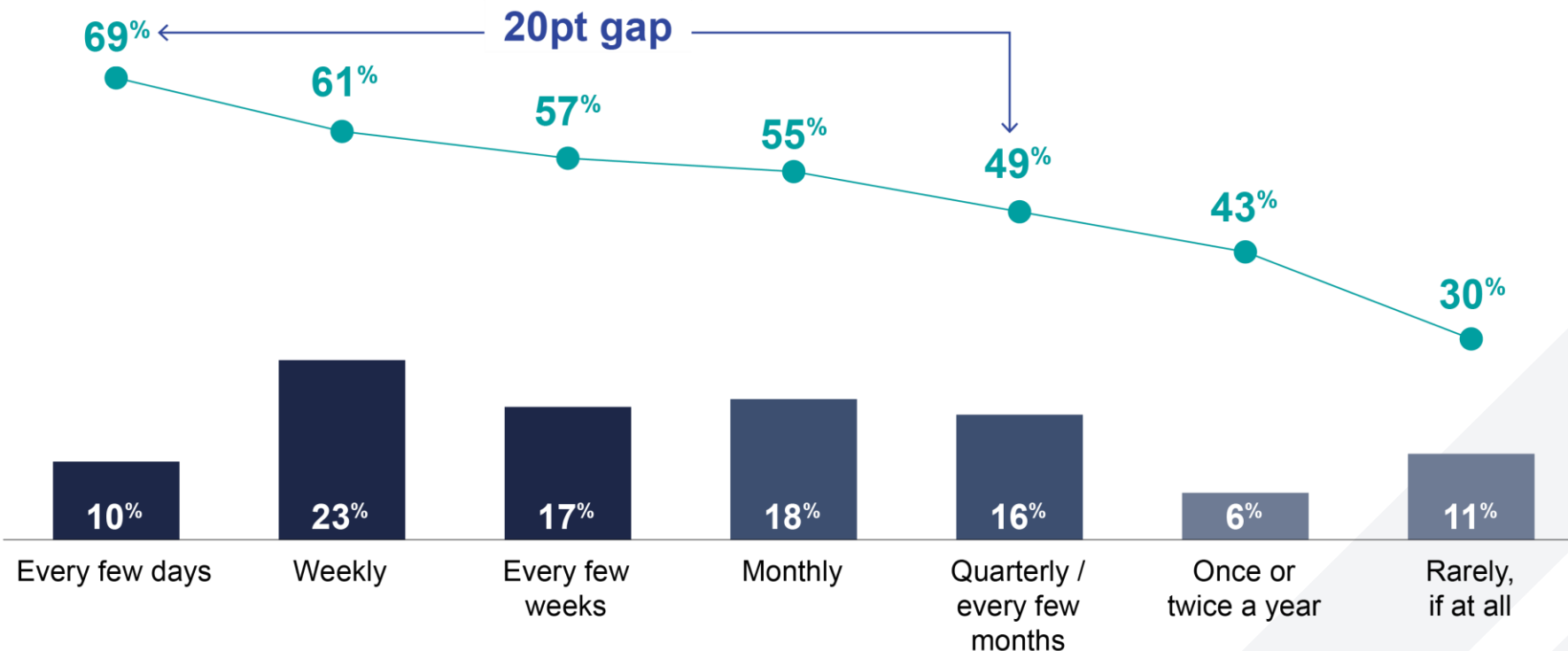


Lesson one: **Visible leadership**

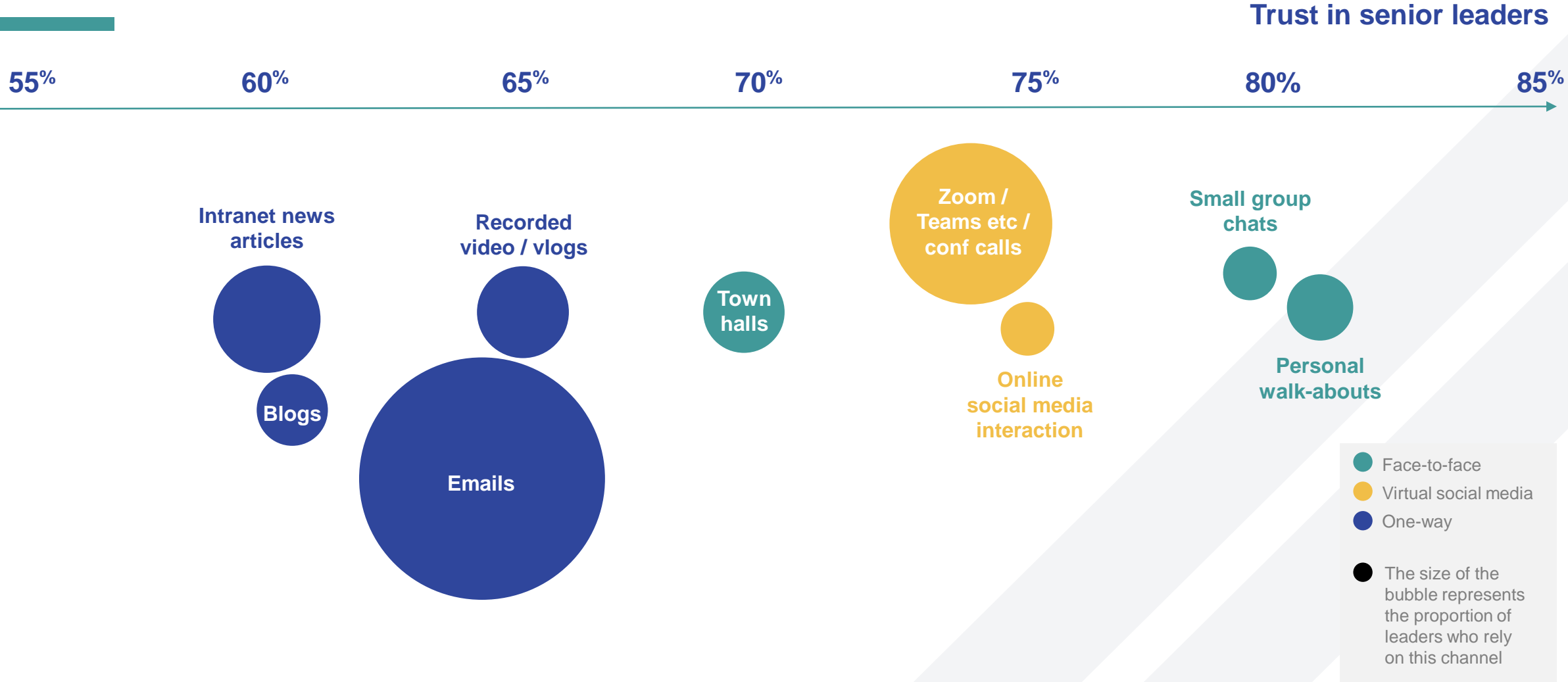
Engagement drops off when leaders communicate less frequently

This pattern holds for leaders at all levels

Key: ● Engagement ■ How often does your organisation's CEO communicate with employees around you?



Face-to-face communication builds trust

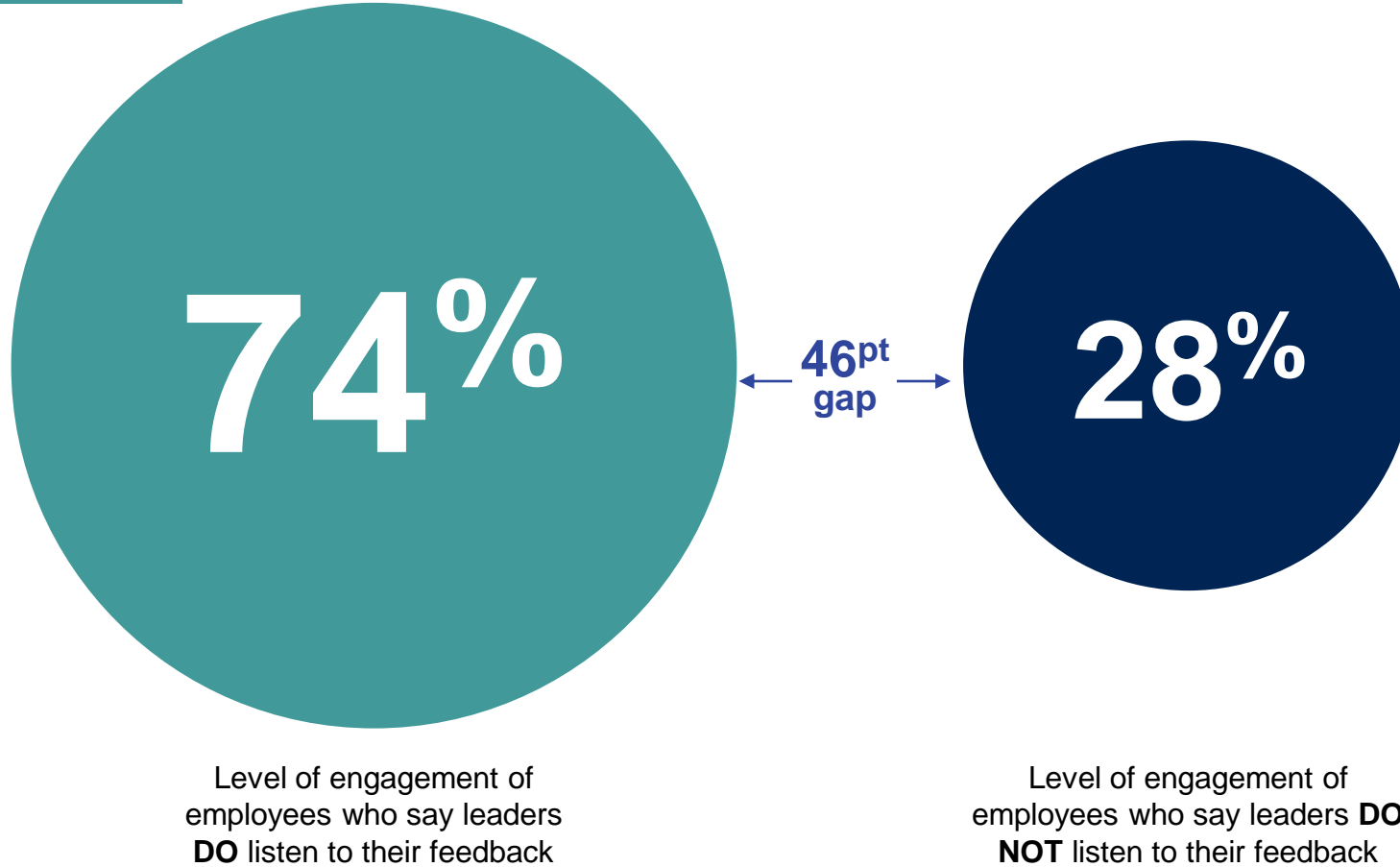


Source: 2021 analysis of Ipsos Karian and Box data covering 900,000+ employees

Lesson two:

Active listening

Active listening



But

1 in 3

say where they work
people are **NOT**
genuinely listened to
when they share their
opinions

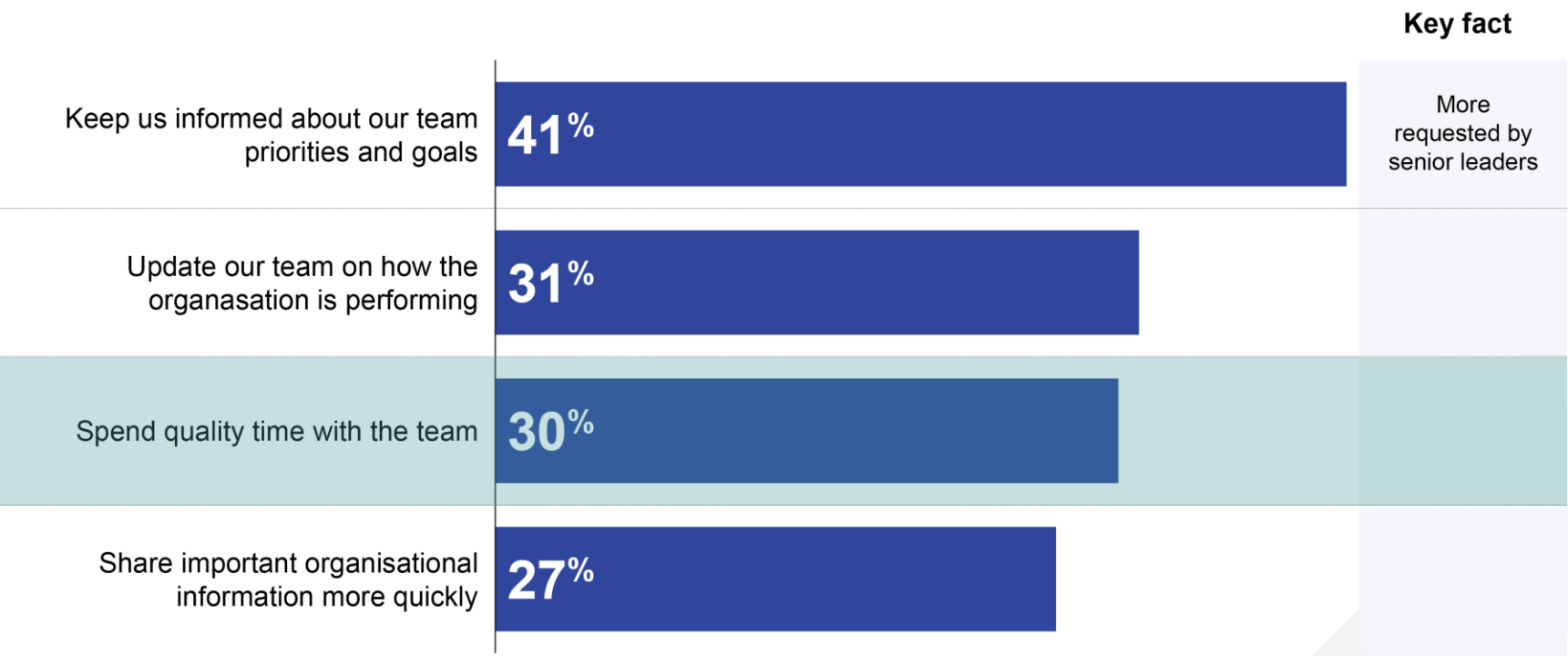
Lesson three:

Clarity of team purpose

Keeping informed about team priorities and goals is the biggest ask of managers

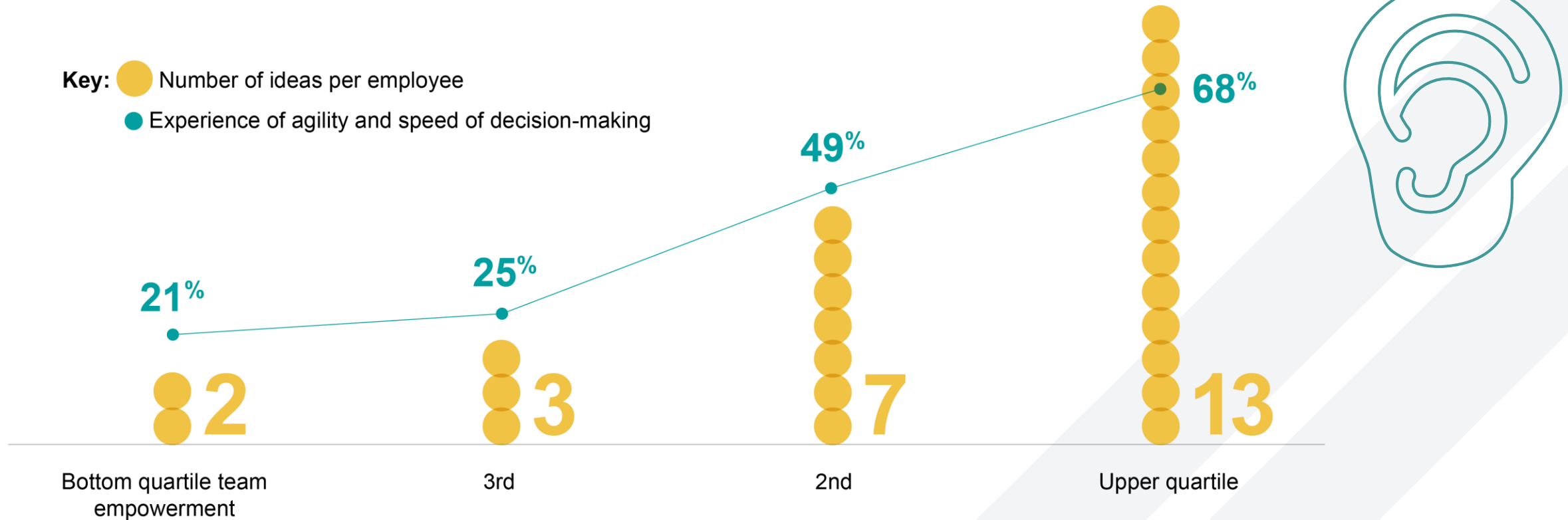
Updates on priorities and performance key ask of managers

What do you want MORE of from your direct manager to help you be at your best in your job?
(Please select up to three of the most important ones for you)



Lesson four: **Empowerment**

Listening and empowerment are the major contributors to culture of innovation and agility



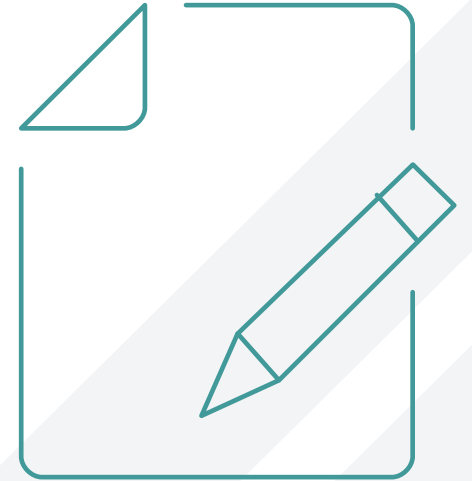
Four lessons for leading change and building high-performing teams

01 **Visible** leadership

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FROM THE NEW NORMAL TO THE NEW FLOW

EVERYDAY CRISIS OR EVERYDAY
OPPORTUNITY?

Within the Ipsos Censydiam human motivations framework
Cristina Craciun | Global Lead Censydiam Qualitative, UU



IPSOS CENSYDIAM: THE UNIVERSAL COMPASS OF HUMAN MOTIVATIONS



What is YOUR superpower during these times?





The World Now & Then: **September 2023** vs. September 2020

Global

© Ipsos Essentials Wave 76 v. 46

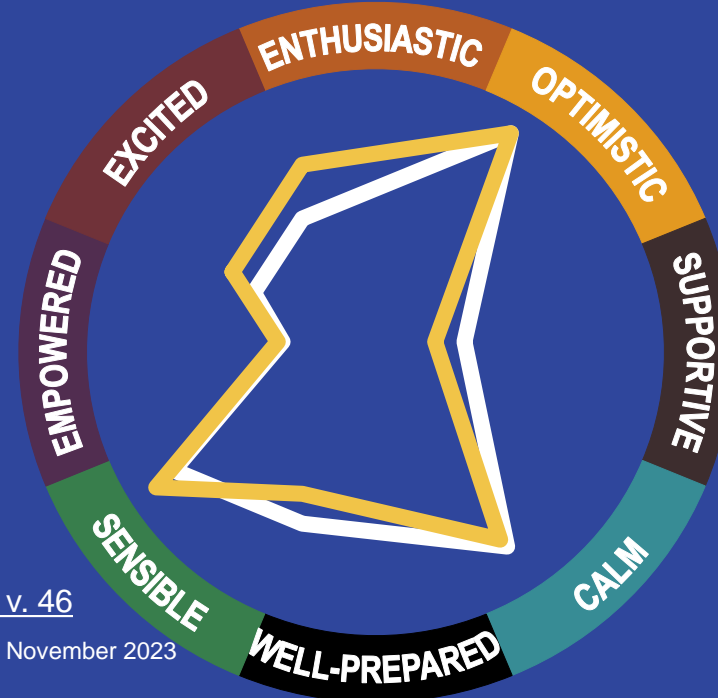
United States



United Kingdom



China



Brazil



THE WHY BEHIND: “Being Human” makes a difference in a world dominated by algorithms.

OPPORTUNITY FOR BRANDS: Human-as-premium, supporting real people in real time.



85% My children (*if*)

84% Relationship with partner/spouse (*if*)

80% In touch with nature

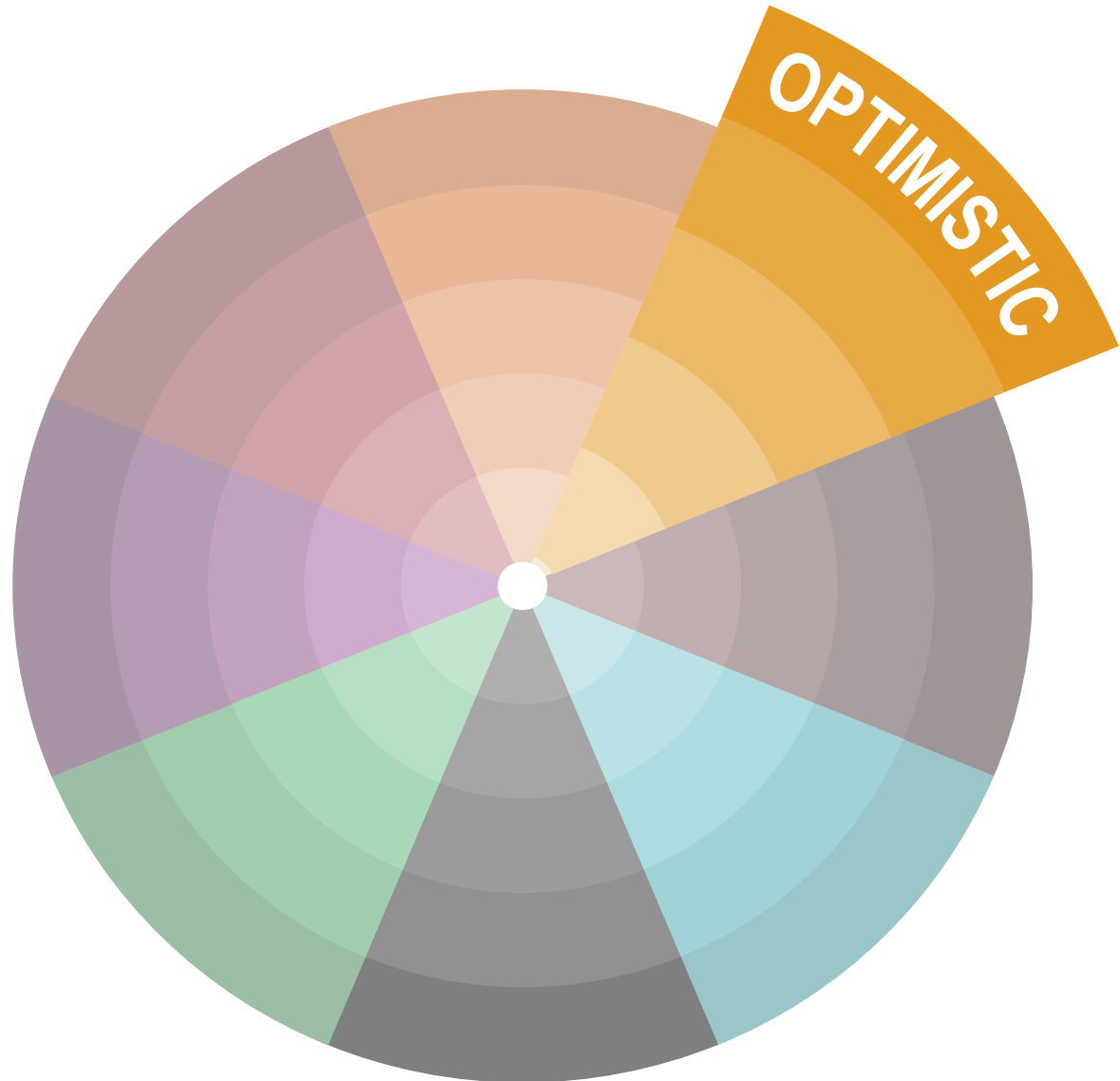
80% Level of education

78% Relationship with relatives

78% Relationship with friends

73%

Barbie™



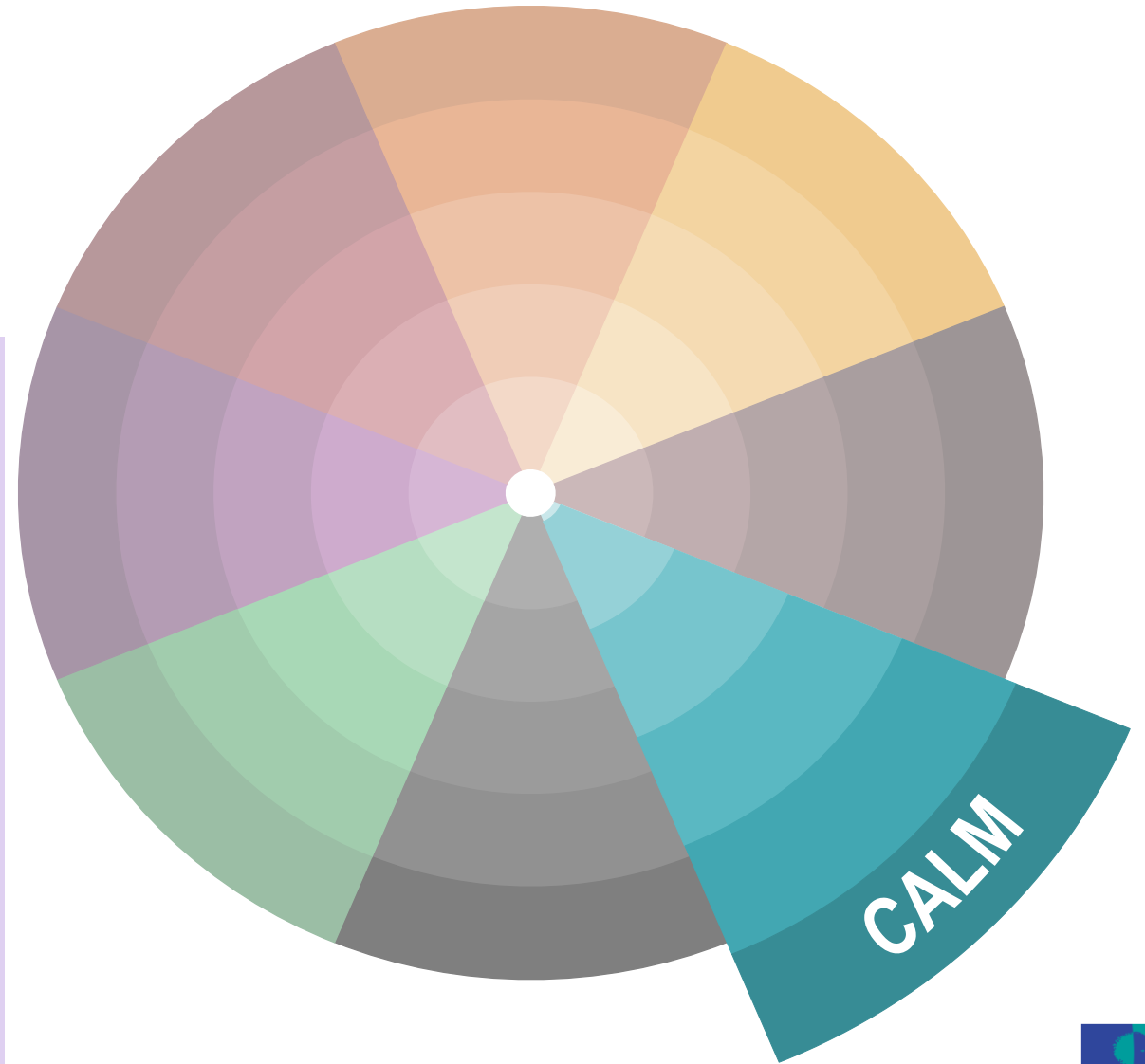
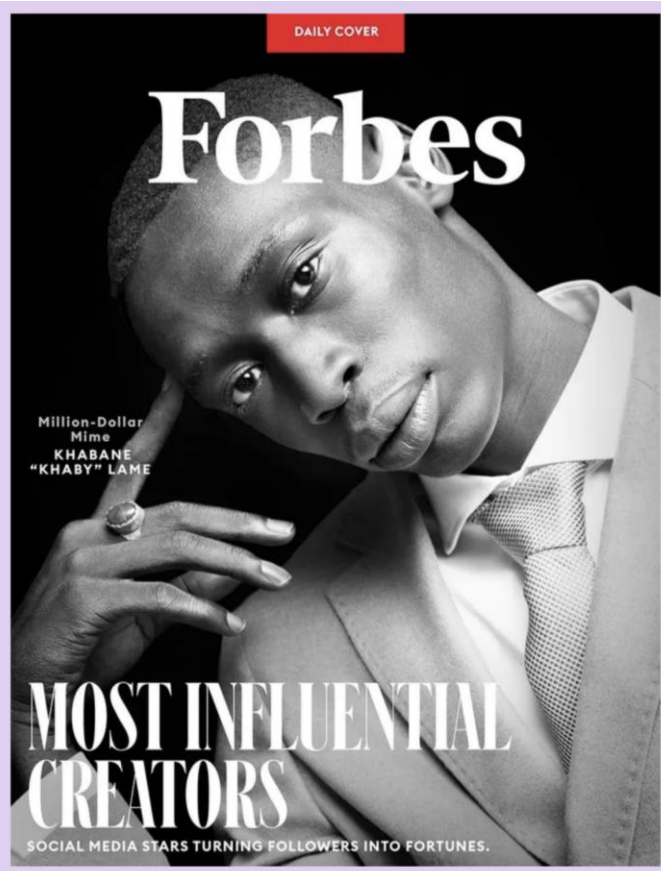
THE WHY BEHIND: The sense of isolation has been generating a loneliness and mental health emergency.

OPPORTUNITY FOR BRANDS: Turning alone moments into experiential intimacy, a source of mental comfort.





How Top Creator Khaby Lame Became TikTok's Most Popular Influencer





FROM
“CONTENT
CREATORS”

TO

“COMFORT
CREATORS”

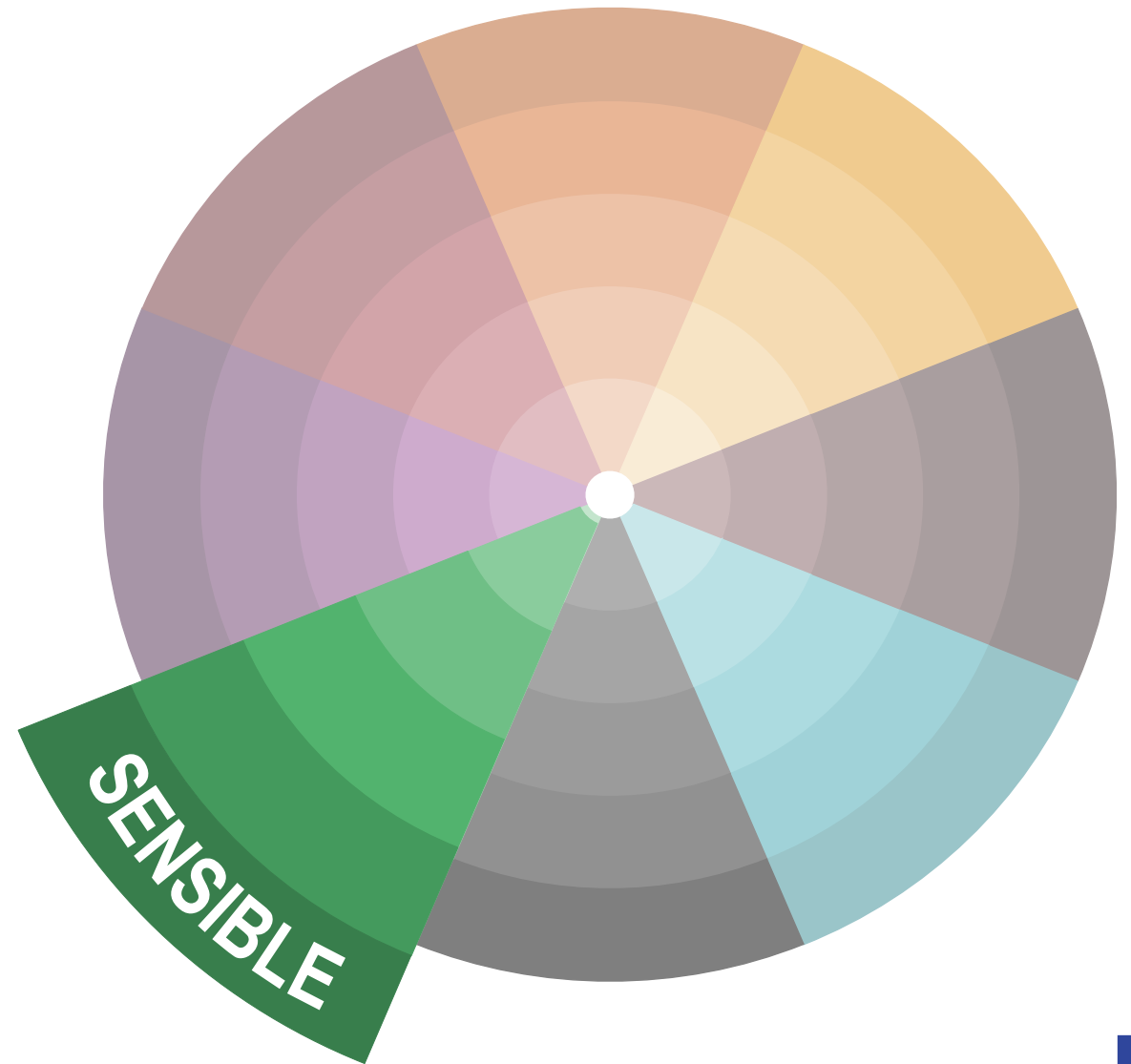
THE WHY BEHIND: The need to outsmart others and the “system” that seems to show a vacuum of values.

OPPORTUNITY FOR BRANDS: Enabling people to filter information and feel in-the-know.





ChatGPT



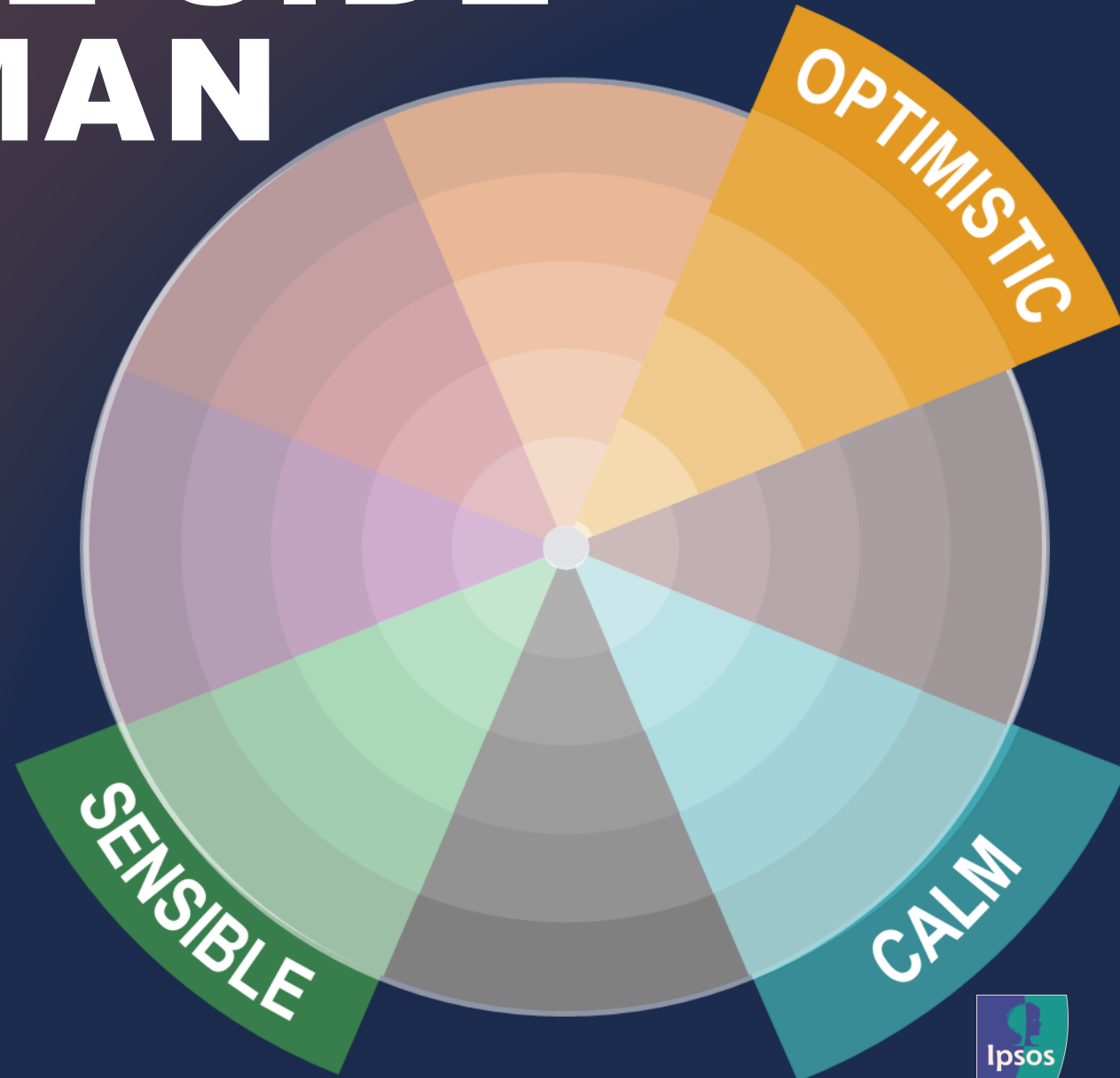
STAY ON THE SIDE OF THE HUMAN

#1. Being human = staying optimistic

#2. Keep calm and watch your comfort creator

#3. Take the AI era with a sensible pinch of salt

Cristina Craciun |
Global Lead Censydiam Qualitative, UU



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