

IPSOS UPDATE

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

April 2023

IPSOS UPDATE APRIL 2023

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

Welcome to more uncertainty. We are now well into the “Twitchy Twenties”. Globally, inflation has been the top concern for consumers in our monthly 29-country study for a full year now, plateauing at around 40%. Looking for glimmers of hope, it has at least stopped rising. Overall economic confidence may be starting to stabilise, despite being generally lower than before the pandemic, and particularly low in Europe. We can see some encouraging signs in Brazil and Mexico, and in Europe – which has been the gloomiest region of the world in recent months – we see some cautious improvements in the prevailing mood in Belgium, and in Italy. Overall, Asia remains far more optimistic than anywhere else.

As ever, women have it harder than men, whatever the economic situation. Analysis by Ipsos Karian & Box – our specialist employment research team – finds that three years after giving birth, less than three in 10 mothers are in full-time work, compared with nine in 10 fathers. Meanwhile our International Women’s Day survey finds that, globally, 68% say there is inequality in their country when it comes to men’s and women’s rights, and some 54% say that when it comes to giving women equal rights in my country “things have gone far enough”. It’s a

study which merits an in-depth reading; although there is a clear gender gap when it comes to attitudes, the variations by country are even greater.

Given the uncertain economic situation, we have also tracked wellbeing, looking at the drivers of life satisfaction. Fortunately, it is not all about money (although it does help up to a certain point). Consistent with other studies, the key drivers of happiness are feeling in control, feeling our life has meaning, and feeling well in ourselves. But having decent living conditions is not far behind. As we find in our Brand Success programme, understanding people’s context, and demonstrating empathy remain hugely important – as much as offering good products at good prices.

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

MAPPING THE JOURNEY TO SUSTAINABLE PACK

What consumers want

We share new research on designing a holistic sustainable pack strategy, including consumer perceptions of packaging materials, the role of sustainability claims, and willingness to pay.

MAKING BELONGING JOYFUL

Inclusive representation in advertising

Virgin Atlantic's "See the World Differently" wins Ipsos' Ad of 2022 award, with an effective piece of ESG (environmental, social, governance) advertising.

GLOBAL HAPPINESS SURVEY

Happiness is on the rise for the second year in a row

Happiness is up six points globally since last year. But global averages hide big regional differences, with life satisfaction soaring in Latin America but dropping in many Western countries.

REFLECTIONS ON RAMADAN

Behaviours and habits during the month

We dive into the results of a survey in Saudi Arabia, UAE and Egypt to find out how individuals' consumption behaviours change during the month of Ramadan.

WHAT WORRIES THE WORLD?

One year of inflation concerns

Inflation worries four in 10 (42%) people across 29 countries, while Covid-19 concerns have fallen to the lowest level since it was added to the survey back in April 2020.

EMBEDDING ESG IN EXPERIENCE

Strengthening customer relationships

ESG (environment, social, governance) commitments are not just a necessary cost of doing business, but an opportunity to create value and drive stronger and mutually profitable relationships.

INTERNATIONAL WOMEN'S DAY

Global views on gender equality

While six in 10 globally agree that gender inequality exists in their country, our 32-country survey finds that half now believe it is coming at the expense of men.

VIOLENCE IN DEMOCRACY

The role of disinformation and social media

How has violence invaded democracy in recent decades and what has the role of digital media been? New Ipsos analysis explores these questions and more.



Cover photo:

This month, South Africa is the most concerned country about three separate issues in our What Worries the World survey. Find out more on [page 5](#).

MAPPING THE JOURNEY TO SUSTAINABLE PACK

What consumers want

A key part of a holistic sustainability strategy for most CPG companies is their packaging blueprint. And the move towards more sustainable packaging is not only an opportunity to help the planet but also a commercial opportunity for CPG companies, with consumers looking for more environmentally-friendly solutions.

However, consumer perceptions of what's sustainable don't always align with the actual carbon impact of packaging.

In this paper, we share research into the effect of different packaging materials and designs as a driver of choice and set out five key findings:

- No material is universally perceived to be sustainable.
- Factor in the 'say-do' gap. Despite strong opinions about one material

being more sustainable, consumers may still choose a product packaged in a different material.

- There is no sustainability claim that is universally associated with the same material.
- Most consumers are not ready to pay for the sole benefit of sustainability.
- There is no such thing as an average consumer. Attitudes towards materials and willingness to pay can differ significantly depending on level of concern and engagement with the environment.

The paper also provides a five-step framework to help CPG companies navigate these differences and design a holistic sustainability strategy, from packaging material sourcing to communication, on or off-pack.

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CONSUMER PERCEPTIONS OF WHAT'S SUSTAINABLE DON'T ALWAYS ALIGN WITH THE ACTUAL CARBON IMPACT OF PACKAGING. ”



WHAT WORRIES THE WORLD?

One year of inflation concerns

Across 29 countries, four in 10 (42%) cite inflation as a top worry, marking a full year of inflation sitting in the top spot of our What Worries the World survey.

Despite a 4pp fall from last month, concern remains highest in Argentina (66%). This drop in concern is reflected in an uptick in positive sentiment towards the country's economy. After a 20-month streak as the most economically pessimistic country, the proportion of Argentinians describing their country's economic situation as "good" has risen by 2pp to 9%. This now puts them second last, less than a full percentage point ahead of Japan (9%).

Meanwhile, concern about coronavirus has now fallen to its lowest level since it was added to our survey in April 2020. With 6% of people globally considering coronavirus to be a top worry in their country, Covid-19 now ranks 16th out of 18 worries. In this edition, our Global Head of Public Affairs, Darrell

Bricker, reflects on the pandemic and his views of how people feel around the world.

Climate change (15%) remains in eighth position. With an increase of 5pp from last month, France is now the most concerned country (29%) and it's the country's second largest concern, behind inflation.

This month, South Africa has become the most concerned country about three issues: unemployment (67%), crime & violence (59%) and financial or political corruption (55%).

Overall, just over six in 10 (62%) believe their country is heading in the wrong direction, unchanged from February. This figure rises to 87% in Argentina and 86% in South Africa.

How much do you know about what worries Great Britain? Test yourself in our quiz [here](#).



SOUTH AFRICA HAS BECOME THE MOST CONCERNED COUNTRY ABOUT THREE ISSUES: CRIME & VIOLENCE (59%), UNEMPLOYMENT (67%) AND CORRUPTION (55%). ”

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MAKING BELONGING JOYFUL

Inclusive representation in advertising

Making effective Environment, Social, Governance (ESG) advertising was a hot topic in 2022, with companies striving to find the right balance between delivering excellent creative experiences, having a unique ESG take and meeting business outcomes.

Against this backdrop, we have awarded Virgin Atlantic's "[See the World Differently](#)", made by Lucky Generals, as ad of 2022. This advert is a brilliant example of how to do the 'Social' in ESG, with positive representations of crew and passengers, while still being entertaining and consistent with the brand.

Ipsos' signature creative assessment offer [Creative|Spark](#) provided quantitative results, determining that this ad was in the top 10% of ads in Ipsos' creative database in the UK, excelling on all three effectiveness KPIs. These are **brand attention index** (measure of memory encoding), **creative effect index** (short

term sales lift potential), and **equity effect index** (long term market share growth potential).

"See the World Differently" is a great example of being a [Misfit](#) ad, delivering a creative experience that entertains its audience and showing that Virgin is different to its competitors. It also mirrors [SeeHer](#) research, which shows that positive portrayals of women and girls in advertising is a strong predictor of increased short-term sales and better brand relationships.

At Ipsos, we have identified three key principles for developing good ESG advertising: be **true to the facts**, **true to the people**, and **true to the brand**. Virgin Atlantic's ad successfully managed to hit all three principles.

Listen to the latest episode of [People, Planet, Prosperity](#) to continue learning about inclusive advertising.

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OUR PEOPLE ARE OUR DIFFERENTIATOR,
SO IT MADE SENSE TO START
BY CHAMPIONING THEM
AND THEIR INDIVIDUALITY. ”



EMBEDDING ESG IN EXPERIENCE

Strengthening customer relationships and doing right by the world

Organisations are coming under an increasing amount of pressure to do business sustainably. But ESG (environmental, social, governance) commitments shouldn't be considered simply as a cost or necessary requirement of doing business.

ESG commitments, if grounded in the reality of customers, can translate into opportunities to create value and drive stronger and mutually profitable relationships that lead to improved business performance.

This paper sets out the crucial role that Customer Experience (CX) plays in making ESG commitments tangible and shares key principles for driving stronger relationships and desired customer behaviour outcomes like increased retention, share of spend, advocacy and operational efficiency – while doing the


right thing for the planet, people and society:

- **Go beyond the fundamentals.** Failing to go beyond ESG essentials like reducing waste or paying their fair share of taxes opens up brands to the risk of being lost in a sea of sustainability sameness.
- **Deliver on promises.** ESG commitments create expectations that Customer Experience must be able to deliver on. Brands must consider how to deliver on their promises when building and communicating sustainability initiatives.
- **Ground ESG in Customer Experience.** Engagements that are in line with the brand's core offering and can be demonstrated via the experience are most likely to be impactful.

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ESG COMMITMENTS CAN TRANSLATE INTO OPPORTUNITIES TO CREATE VALUE AND DRIVE STRONGER AND MUTUALLY PROFITABLE RELATIONSHIPS. ”



GLOBAL HAPPINESS SURVEY

Happiness is on the rise for the second year in a row

The cost of living crisis has not dampened people's spirits as global happiness continues to increase; across 32 countries three in four (73%) adults describe themselves as happy.

This is the second year in a row satisfaction has risen. It is up 6pp on 2022 and is 10pp higher than August 2020 during the first wave of the coronavirus pandemic.

This year's increase is driven by Latin American countries, many of which show marked year-over-year increases.

This includes Colombia (+26pp), Argentina (+26pp), Brazil (+20pp), and Peru (+18pp).

Conversely, many Western countries register declines in year-over-year reported happiness: Great Britain (-13pp), Poland (-7pp), Canada (-6pp),

Belgium (-5pp), Germany (-5pp), and former happiness champion Australia (-5pp).

In terms of what makes people happy, looking at a global picture, people highlight their relationships with friends and family as what brings the most satisfaction.

Though family and friends are among the biggest sources of happiness, one in five lack a support system of friends or family they can rely on during difficult situations despite many having experienced distressing events in the past year.

At the other end of the scale, far fewer say they're satisfied with their local economic and political situation.

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THIS YEAR'S INCREASE IN GLOBAL HAPPINESS IS DRIVEN BY LATIN AMERICA, WHILE MANY WESTERN COUNTRIES POST DECLINES IN REPORTED HAPPINESS. ”



INTERNATIONAL WOMEN'S DAY 2023

Global views on gender equality

Across 32 countries, seven in 10 (68%) agree that there is currently inequality between men and women in terms of social, political, and/or economic rights in their country, down 5pp from 2017.

At the global scale, women are 9pp more likely to agree with this than men (72% vs. 63%, respectively) but the global average hides some more marked gender differences in certain countries. For instance, there is a 16pp gap between women and men in Australia and a 15pp gap in South Korea, Hungary and Belgium.

Despite a majority agreeing with the existence of gender inequality, just under one in two (48%) agree that we have gone so far in promoting women's equality that we are discriminating against men.

In addition to a gender gap of 14pp (55% of men agree with this vs. 41% of women), we also see generational differences. Just over one in two Millennials (53%) and Gen Z (52%) agree that we are now discriminating against men vs 40% of Boomers. This is one of a number of questions in the survey where there are more marked differences by country than there are by gender.

Nevertheless, more than one in two (56%) people globally report having taken at least one action over the past year to promote gender equality, most commonly by talking about gender equality with their friends or family (32%).

Julia Gillard, Chair of the Global Institute for Women's Leadership, speaks to Sue Phillips, President of the Ipsos Gender Balance Network, on these findings in [Step Forward](#).

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ONE IN TWO SAY THAT WHEN IT COMES TO GIVING WOMEN EQUAL RIGHTS WITH MEN, THINGS HAVE GONE FAR ENOUGH IN THEIR COUNTRY. ”



REFLECTIONS ON RAMADAN

Individuals' habits across Saudi Arabia, Egypt and the UAE

Ramadan is a significant month for Muslims, and while it is a time of spiritual reflection and self-discipline, it is also a time of celebration and community.

To understand how individual's habits and behaviours change during the month of Ramadan, Ipsos in MENA led a survey in the UAE, Saudi Arabia and Egypt.

Across the three markets, nine in 10 people practice their faith during Ramadan by giving back to people in need, engaging with the Quran and religious content, increasing how frequently they pray and praying more often at the mosque.

While strong majorities shop during Ramadan, this is driven by different groups in different markets: more women (92%) than men (84%) shop during Ramadan in Saudi Arabia, while in the UAE the inverse is true (89% of men vs.

80% of women). In Egypt, there is less of a noticeable gender difference and we see shopping driven instead by Millennials (87%).

In all markets, attractive promotions and discounts top the list of motivations for people to shop during this time. Seven in 10 in Saudi Arabia (71%) and in the UAE (69%) say they discover new products during Ramadan, slightly fewer say this in Egypt (64%).

Eight in 10 in Saudi Arabia and the UAE consume video streaming platforms during Ramadan, most commonly Shahid VIP in Saudi Arabia (52%) and Netflix in UAE (65%). One in three play mobile games, with six in 10 mobile gamers in Saudi Arabia (63%) and Egypt (64%) playing every day. In UAE, mobile gamers play less frequently, with just over one in two (53%) playing every day.

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IN ALL MARKETS, ATTRACTIVE PROMOTIONS AND DISCOUNTS TOP THE LIST OF MOTIVATIONS FOR PEOPLE TO SHOP DURING RAMADAN.”



VIOLENCE IN DEMOCRACY

The role of disinformation and social media

On behalf of *Les Entretiens de New York*, Ipsos conducted new analysis to understand how violence has invaded democracies in recent years and the role that fake news plays.

While violence is condemned by a majority in the US and in France, there is a minority in both countries who see it as justifiable. In France, one in four (26%) say it is acceptable for some people to use violence to defend their interests. Meanwhile, 15% of Americans don't oppose the use of violence by someone in their political party to achieve a political goal.

Disinformation and lack of trust remains a problem and the spread of conspiracy theories is evident. Only six in 10 (58%) of Americans (and 26% of Republicans) believe that Joe Biden legitimately won the 2020 US presidential election and four in 10 (40%) French people say that when they want to know if a fact is scientifically

correct or not, they trust their own personal experience more than the explanations of scientists.

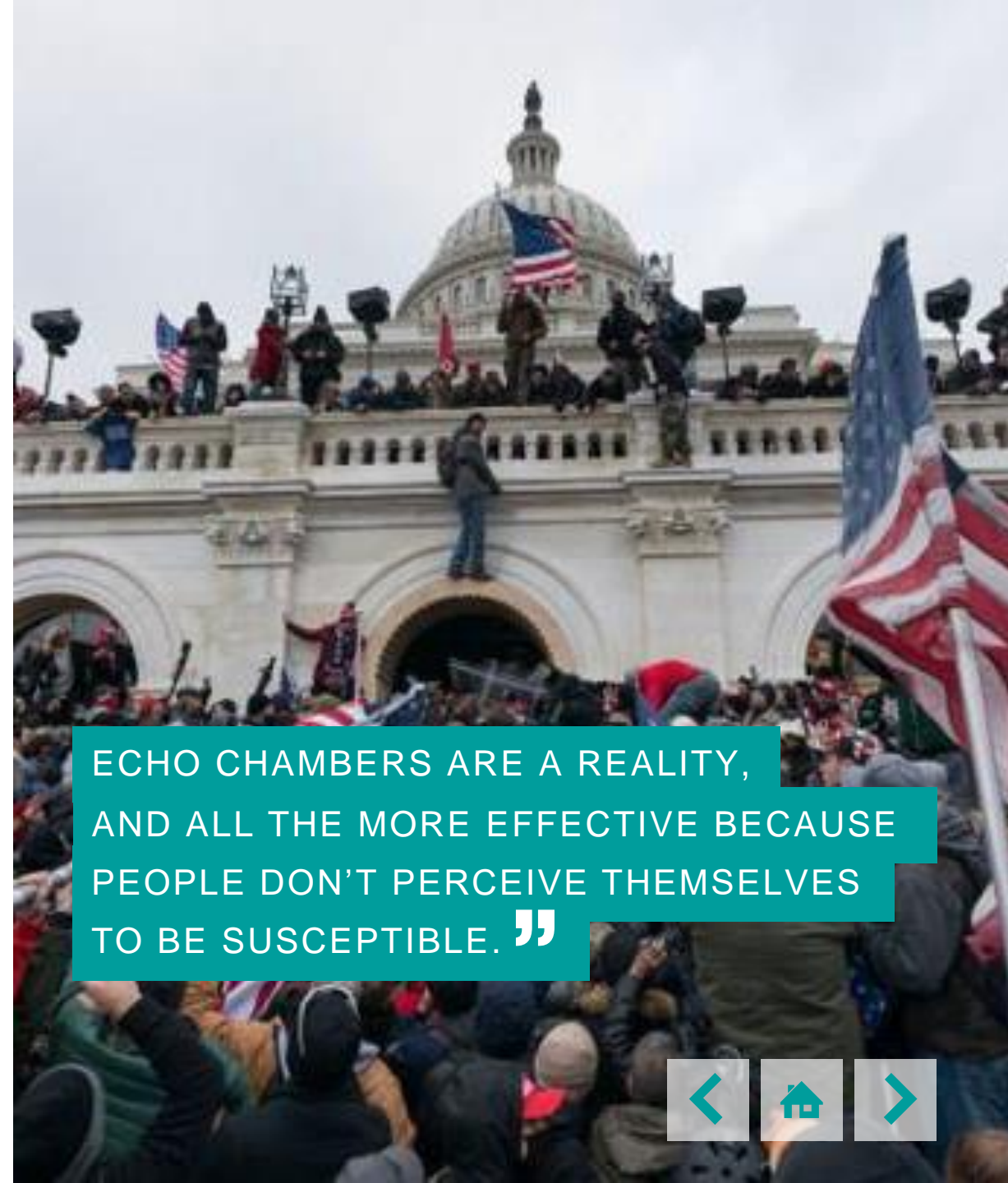
Echo chambers are a reality, and all the more effective because people don't perceive themselves as being susceptible. Across 27 countries, two-thirds (65%) agree that the average person in their country lives in a bubble on the internet, mostly connecting with people like themselves and looking for opinions they already agree with. Only a third (34%) think that they live in a bubble themselves.

This has real world impacts on the political sphere. Before the last midterm elections in the US, 61% of Americans worried that people in their community might decide how to vote based on fake news – but only 25% felt they themselves might vote based off false or misleading information.

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ECHO CHAMBERS ARE A REALITY,
AND ALL THE MORE EFFECTIVE BECAUSE
PEOPLE DON'T PERCEIVE THEMSELVES
TO BE SUSCEPTIBLE. ”



SHORTCUTS

AXA Mind Health Report

Employees are three times more likely to thrive if they work in a company that offers mental health support, according to the third edition of the AXA Mind Health Report.

The study was conducted in collaboration with Ipsos involving surveys of 30,000 people aged 18 to 74 from 16 European, Asian and American countries.

The survey found one in two say they felt happy and confident about the future. This was highest in Mexico (64%) and the Philippines (62%). At the other end of the spectrum is Italy (36%).

Other findings in this year's report include 24% fewer women than men feel fulfilled. Four in 10 (40%) women feel that their skills have been questioned simply because of their gender.

More than one in three 18-24 year olds believe that addiction to technology and social networking has a negative impact on well-being

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KEYS – Why Context Really Matters

People aren't robots, they don't make carefully-balanced purchase decisions, based only on relative price and utility.

Context matters: our [Ipsos Global Trends](#) survey shows rising proportions saying they want to buy brands that share their values. Overall, up to 50% of brand choice can be driven by societal or behavioural factors.

Watch the replay of our latest KEYS webinar:

- **Being Woman.** What does it mean to be a woman across different cultures?
- **When Difference Doesn't Mean Different.** How can we assess whether contrasting survey ratings are the result of variations in actual performance or more a feature of different cultural response styles?
- **The Context of Brand Success.** Successful brands start by considering how people live their daily lives and the wider world around them. We present new thinking on how to differentiate the macro from the micro context.

[WATCH THE RECORDING](#)

Online Conversations about AI

Perceptions of artificial intelligence are evolving almost as quickly as the tools themselves, as people become more aware of the opportunities, risks and unintended consequences of AI models.

While there is a low awareness in general about tech concepts, 55% of Americans describe themselves as familiar with the concept of artificial intelligence, 13pp higher than those who say the same about cryptocurrency.

Six in 10 Americans (62%) say that using AI in the workplace can save time and resources, but a similar proportion (58%) also express concern that AI-generated written work may contain biases or inaccuracies.

Regardless, 46% of workers and 62% of young workers think it's likely that AI will change how they do their current job in the next five years.

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POLL DIGEST

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

TURKEY: Eight in 10 people think there will be a water shortage in the country in the coming days and the coming years.

CANADA: Three-quarters of Canadians say they are unlikely to change their alcohol consumption following new guidelines.

FRANCE: One in two female scientists say they have personally experienced sexual harassment in the workplace.

GERMANY: 61% of Germans are in favour of reintroducing conscription, 43% support conscription for all genders.

CZECH REPUBLIC: One in four Czechs think information warfare is a pretext for the West to restrict freedom of speech.

INDONESIA: Indonesians spend 2.1 hours a day watching short videos to pass time (56%) and to entertain themselves or relax (53%).

UK: Only half (50%) of Londoners are confident in the Met Police's ability to keep women and girls safe.

SLOVAKIA: 47% of employed Slovaks think a diverse working environment inspires new perspectives on various topics.

HUNGARY: One in two Hungarians think they are exposed to disinformation in the media, the highest across Central Europe.

ITALY: One in two of Italians believe that politics in Italy on issues like surrogacy and same-sex adoption is lagging behind society.

US: Two-thirds of Americans think there is more that divides than unites them, 61% think that polarisation is mostly driven by elites.

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

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