IPSOS UPDATE

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

May 2024

Ipsos Knowledge Centre

GAME CHANGERS

IPSOS UPDATE MAY 2024

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

As the world heats up, willingness to act is falling. That's the headline finding from our annual Ipsos Earth Day report. Across 26 countries, 62% tell us that "if individuals like us do not act now to combat climate change, we will be failing future generations". But this is down 13 points on 2021 levels. Only a third of us feel our government has a clear plan on how the public sector, businesses and individuals are going to work together to make concrete progress. And we find a growing fatalism, particularly among the young, and most markedly among younger men, that it may already be "too late" when it comes to tackling climate change.

The Earth Day findings serve as a reminder of the challenges involved when it comes to making hard choices right now. That said, people are more supportive about moving away from fossil fuels than some politicians might have us believe. On balance the energy transition is expected to have a positive impact on a whole range of indicators, from air quality through to the economy in my local area. And our Mobility Barometer shows how fast things have been moving when it comes to new forms of transport: e-bike ownership now stands at 19% in Europe.

As our latest What Worries the World survey shows, people remain most preoccupied with their day-to-day uncertainties: making ends meet, access to employment and feeling safe where they live. When it comes to the economy, the overall picture is still very mixed, and varies considerably from country to country. This month we see some improvements in consumer confidence in Europe, but more muted levels of sentiment in Latin America and some parts of Asia. For more on what the current economic climate means for people on the ground, watch out for our new Cost of Living Monitor, out later this month.

All of which shapes the context of this unprecedented year of elections. In Britain, we see record-breaking lows when it comes to satisfaction with a Prime Minister, as the UK waits for a general election which must happen by the end of 2024. Meanwhile in the US, we've been looking at how Joe Biden and Donald Trump perform as political brands. Both are doing less well than they were four years ago, but in today's context it's "Brand Trump" which is ahead when it comes to building that all-important empathetic bond with the target market, giving voice to their concerns and making them feel valued. Meanwhile our work ahead of the European elections in June indicates a rise to the radical right. It's such a crucial year – keep updated with the latest developments on our new web page.

Away from politics, our regular poll round-up includes a focus on leisure activities around the world. Ahead of the Olympic Games, 53% of French people say they are interested in the event, while the same proportion of urban Indians are following the cricket Indian Premier League.

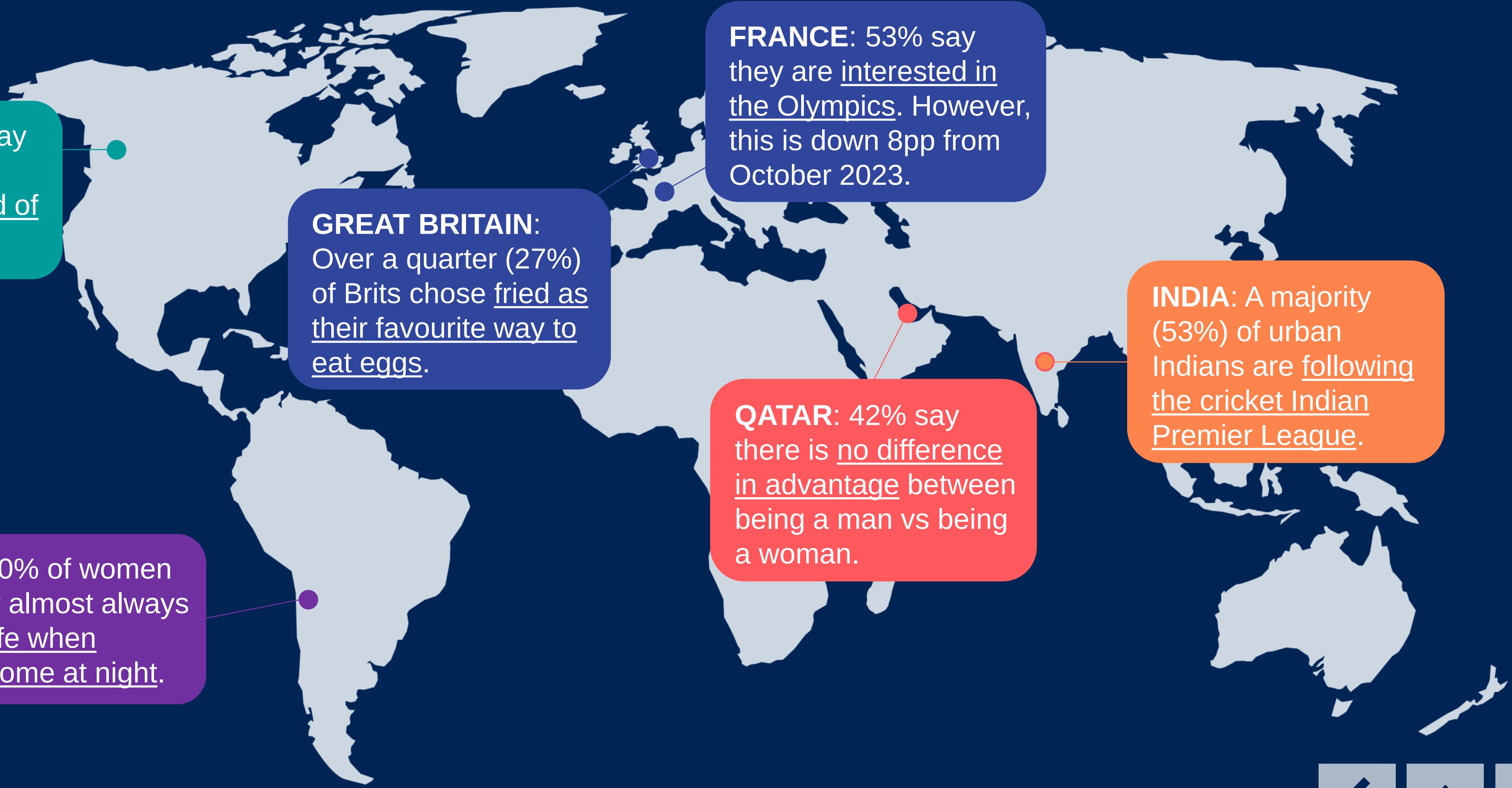
Do get in touch if you want to discuss anything in more detail.

Ben Page, Ipsos CEO

POLL DIGEST

Visit Ipsos.com and our local country sites for the latest polling and research.

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



CANADA: 76% say measles is dangerous, ahead of Covid-19 (71%).

GREAT BRITAIN: Over a quarter (27%) of Brits chose fried as their favourite way to eat eggs.

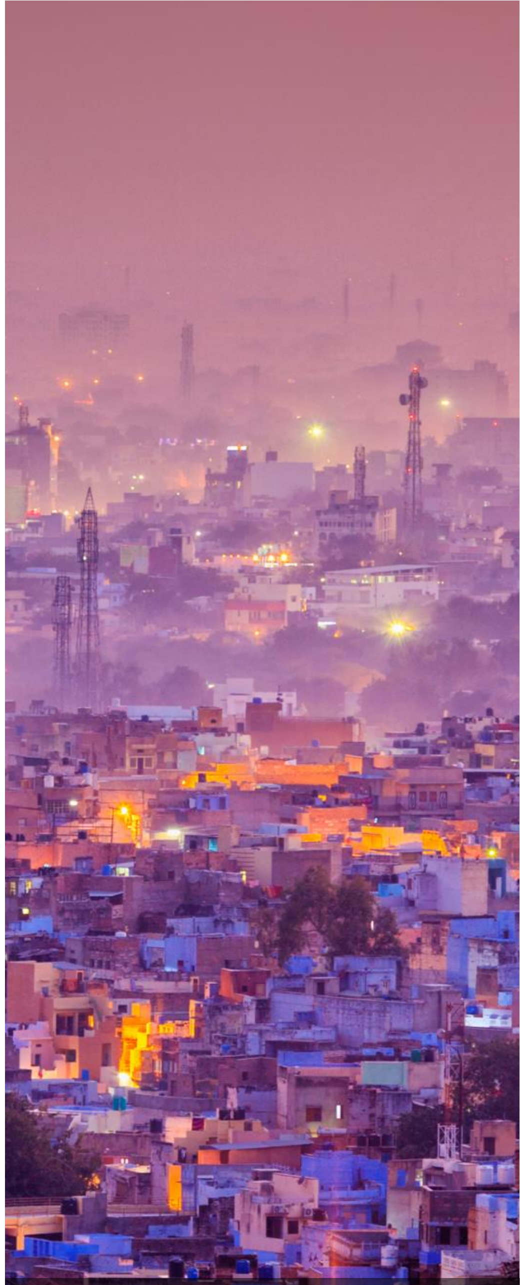
FRANCE: 53% say they are interested in the Olympics. However, this is down 8pp from October 2023.

INDIA: A majority (53%) of urban Indians are following the cricket Indian Premier League.

QATAR: 42% say there is no difference in advantage between being a man vs being a woman.

CHILE: 90% of women always or almost always feel unsafe when walking home at night.

IN THIS EDITION



Cover photo: Jodhpur, India. Find out how Indian's feel about the environment & sustainability on page 11.

EARTH DAY 2024

As the world heats up, willingness to act is falling

In our annual Earth Day report, we explore how attitudes to climate change are shifting, who is responsible for leading the fight against the climate emergency, and what actions people are willing to take.

Fewer people (62%) think they will be failing future generations by not taking action on climate change, down 13 percentage points since 2021. Over the same period, fewer (58%) say businesses and governments will be failing their stakeholders and citizens by not combatting climate change.

Young men (Millennial and Gen Z) are more fatalistic than women of the same age and than older men on the topic of the climate crisis. A third of Millennial (32%) and Gen Z (30%) men say it is too late to do anything about climate change, compared to fewer than one in five Baby Boomer men and women.

Nearly two-thirds (63%) think countries like the US, Great Britain, France, Canada and Germany should pay more to solve climate change. At the same time, France and Canada have seen an increase in people feeling they are being asked to sacrifice too much to fight climate change, with both countries now more likely to say this is the case than not.

But people do want to do their bit to limit the effects of climate change. In all but one country surveyed, a majority agree that if everyone made small changes in their everyday lives this could have a big impact. However, the believe-true gap remains, with people continuing to misjudge which actions would have most impact to reduce greenhouse emissions. Low-impact actions like recycling continue to rank highly, with high-impact actions like living car free remaining lower in the ranking.

Globally, people see having easy access to information on steps they can take to fight the climate crisis as one of the most encouraging incentives to act.

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THE POWER OF THE ESG X BRAND COLLABORATION

Positively shaping expectations & driving brand success

Globally, a large majority of people (80%) believe that businesses can do good for the world while still making a profit. This kind of belief can shape the expectations people have of brands.

One of the first steps brands should take is to get clear about the role they can and will play in Environmental, Social and Governance (ESG) issues – keeping in mind that whatever they do in the ESG space must be relevant for and to the brand.

Having a clear understanding of where you stand in your ESG brand journey is an essential starting point for brands; without this clarity, having your initiatives labelled as greenwashing or being perceived as having a 'green sheen' seems inevitable.

How can brand owners understand the impact of their ESG activities? And how can they navigate the ESG landscape in a way that both benefits their brand, as well as addressing their ESG imperatives?

Read *The Power of the ESG x Brand Collaboration* to find out:

- The opportunity brands have to fill an ESG awareness gap and get ahead of the curve.
- Why it's important that brand ESG perception is congruent with brand ESG action.
- How ESG activities can work in service of the brand to strengthen brand equity.
- The impact of not having ESG associations.
- The power of ESG as part of the whole brand offering.

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INVESTING IN BUILDING ESG AWARENESS AND ESG ASSOCIATIONS IS CRITICAL TO A BRAND'S SUCCESS. ”

PLASTIC POLLUTION TREATY

Overwhelming majority for banning plastics

Our new Global Advisor polling, in partnership with the Plastic Free Foundation and WWF, finds many are ready for a sea change.

Majorities in all 32 countries agree with a range of bans, including banning chemicals used in plastic that are hazardous to human health and the environment, with support strongest in Indonesia (98%) and lowest in Japan (73%).

Despite single-use plastics being a part of many people's daily lives for many years, most are open to adopting new ways of doing things. The vast majority (85% on average across 32 countries) say it's essential/important to ban unnecessary single-use plastic products, such as shopping bags, cutlery, cups and plates.

While there's a strong consensus surrounding banning plastics and plastic byproducts, support is less clearcut for rules around penalties for governments and around manufacturers' role in reducing plastic production and pollution.

Almost three in four (73%) at a global level support establishing clear consequences for governments that break the rules of the United Nations final treaty to end plastic pollution. The same proportion (73%) support rules to make plastic producers accountable for reducing waste and plastic pollution from their products.

Proposals to ban plastics and hold governments and manufacturers more accountable are important for people, particularly those in lower-income countries, and they are the most focused on how to make drastically cutting plastic pollution a global reality.

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BRAND BIDEN VS. BRAND TRUMP

The power of empathy in a story of brand decline

Leveraging Ipsos' Brand Success framework, we assessed the presidential candidates – President Joe Biden and former President Donald Trump – as if they were commercial brands. Specifically, we measured these 'candidate brands' on how successfully they shape voter expectations, in a relevant context, with empathy.

Headlines include:

- The Biden and Trump brands are both weaker than they were just before the 2020 election.
- On the positive side: Brand Biden is expected to uphold democracy, while Brand Trump is more associated with economic prosperity.
- While more Democrats than Republicans believe "the economy is rigged in favour of the wealthy", Brand Trump is perceived as being better positioned to address this concern among his supporters.
- Trump is seen as being on the side of the people, while Biden is seen as being on the side of the system. Brand Trump has built an empathetic bond with his target market, giving voice to their concerns and making them feel valued.

For more information about Ipsos' framework for building successful brands, please visit our Brand Success microsite.

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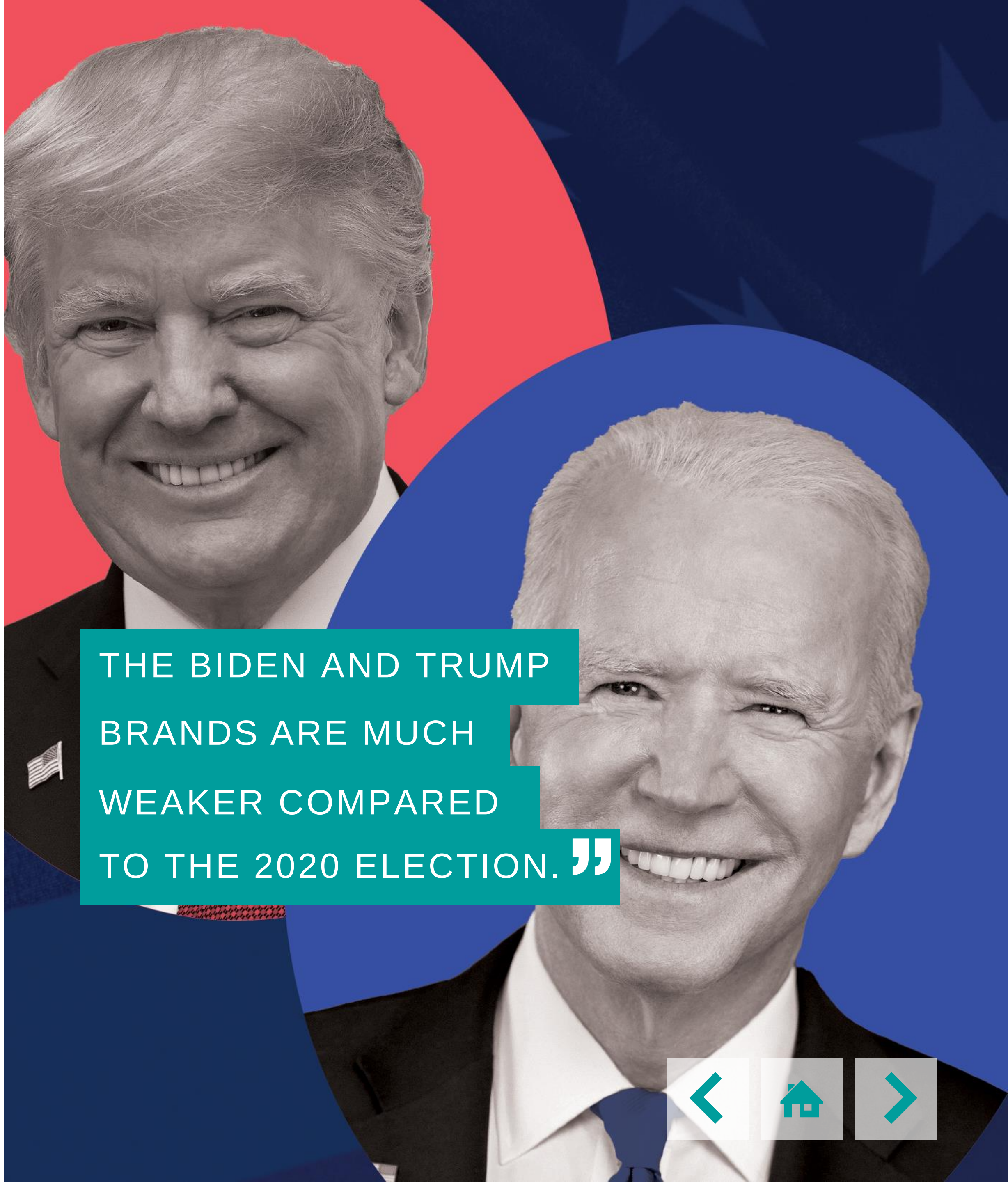

HOW CONTEXT CAN INSPIRE BRAND GROWTH

Shaping brands through contextual insights

People typically have expectations of brands they are familiar with. These expectations include what they believe the brand can do for them, and how it will make them feel. Brands are more likely to be chosen if they can reframe these expectations in a way that resonates.

But how can brands identify which beliefs and feelings resonate most? Many brand growth models attempt to answer this question with static solutions, using generic key performance indicators. However, the reality is that people’s choices of brands do not happen in a vacuum and instead are very much influenced by context – what’s going on in a person’s life and in the wider world around them.

In this paper, we draw on our research to highlight the undeniable influence of both micro and macro contexts on shaping consumer decisions, focusing on:

- Why context is key to brand choice and the importance of functional, emotional, and societal expectations.
- How contextual understanding can help brands to identify their true competition.
- What types of decision-making habits stop people from switching brands.
- The changes in socio-cultural or economic context that can inspire new ways for brands to grow.

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MOBILITY BAROMETER

European mobility becomes increasingly electrified

Findings from the second edition of the Mobility Barometer – tracking mobility habits among 8,000 people across eight EU countries – highlights the growing popularity of electric vehicles.

In 2023, cars remain the primary mode of mobility in Europe: they continue to be ever-present (87% of Europeans own a personal car, and 84% use it daily). Europeans remain attached to their cars: 70% of car owners would not be ready to stop owning a car in the future, a figure that remains stable compared to last year. Among them, 34% are strongly resistant to this idea ("definitely not").

However, transportation methods involving cars in general (whether it is personal cars, taxis, or car-sharing) seem to see their usage decline: 26% of personal car users use it less often than five years ago, a figure that rises to 32% in France.

In parallel, bicycles, whether standard or electric, are still used by nearly four out of ten Europeans. While the ownership of standard bikes is decreasing (57% of Europeans own a standard bike in their household, -5pp vs last year), the presence of electric bikes is progressing: now one in five households in Europe owns an electric bike (19%, +2pp). This trend might be driven by the increasing accessibility and affordability of electric bikes, as well as their enhanced features such as assisted pedaling.

There is also an intensification of the use of electric bikes: 42% of users say they use them more often than five years ago, and 32% say they intend to use it more in the future.

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MOBILITY REPRESENTS A SIGNIFICANT BUDGET FOR EUROPEANS AT 147 EUROS PER MONTH.”

INDIA ENVIRONMENTAL SUSTAINABILITY REPORT

Ipsos' environmental sustainability segmentation

Over nine in ten (92%) Indians are concerned for the environment, while 66% feel it is at risk. Climate change presents both a challenge and an opportunity for businesses and marketers to innovate, adapt, and contribute to a more sustainable future.

In this context, it is important for marketers to understand how Indian consumers think and behave towards environmental concerns, and how it is impacting their choices.

This report applies Ipsos' global environmental sustainability framework to Indian consumers, classifying Indian consumers based on their level of concern for the environment and their amount of action/intended action to tackle climate change.

The five segments as defined within the framework are **Activists, Pragmatists**, **Conflicted Contributors, Busy Bystanders**, and **Disengaged Denialists**.

As companies gear up to proactively engage with environmental concerns, the primary task is to understand where consumers are currently and track their evolution to ensure the brands can be in the right place with the right message along the consumer's journey.

At the same time, one size doesn't fit all; each of the consumer segments needs to be targeted differently.

This report provides guidance for marketers on which segments are most prominent in Indian society, the types of products and services that are most likely to appeal to each segment, and how to target and engage each segment in particular.

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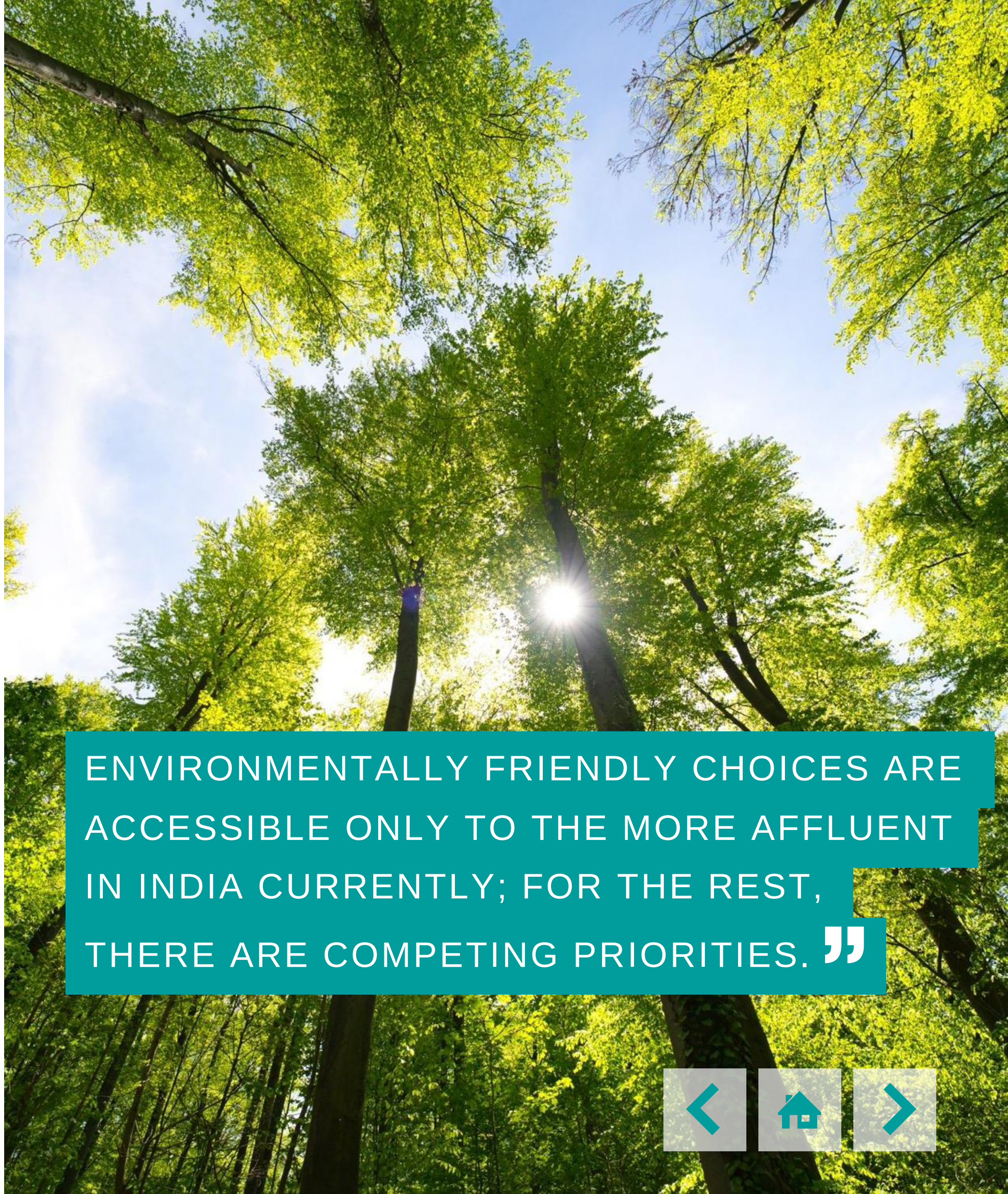

WHAT WORRIES THE WORLD

Inflation remains number one for 25 months

Thirty-four per cent say inflation is one of the three biggest issues affecting their country. While the cost of living has been the number one concern in our survey since April 2022, worry is falling. The last time concern for inflation was around this level was April 2022 (when it was 33%).

Argentina remains the most concerned country, which it has been since November 2022. However, the gap between Argentina and other countries is narrowing. In April 2024, Singapore is the second-most worried country about rising prices, with 61% choosing it as an issue, up ten percentage points compared to last month.

The US is now the fifth-most concerned country with 45% choosing it as a top worry. In February, concern about inflation had fallen to 39%, the US's lowest figure since spring 2022, but worry has now risen again over the last two months.

Elsewhere, worry for military conflict between nations has climbed in Poland and fallen in Israel. Please note, the fieldwork was completed before the recent escalation between Iran and Israel on the 13th April.

Back in January, the proportion of Poles citing military conflict as a top worry was 23%. This month, Poland's level of concern has now reached 40%. This is the country's highest level of concern since the issue was added to our survey in April 2022.

Israel has been our most concerned country about military conflict since November 2023. This month, however, the nation drops into second place after decreasing 6pp from March to 39%. That said, this is still a relatively elevated level of worry.

Don't forget to access [Ipsos' Global Consumer Confidence Index] to gain further insight into global sentiments.

POLAND IS NOW THE MOST WORRIED ABOUT MILITARY CONFLICT, REACHING ITS HIGHEST LEVEL OF CONCERN (40%)."

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SHORTCUTS

KEYS: Are we making progress on ESG?

Recent years have seen organisations around the world coming under increasing pressure to do business more sustainably. ESG (Environmental, Social, Governance) considerations are now a key part of many companies' strategies and roadmaps.

Our annual survey of corporate communication professionals finds 63% saying that ESG has "fundamentally changed the way our business operates". But how can we translate this imperative for change into authentic, meaningful achievements?

As we discuss in our latest KEYS webinar, these are not easy topics. For many people, given today's uncertainties, climate change now falls into the "important but not urgent" category. When it comes to how to build stronger and more inclusive societies, the political consensus can be lacking. Meanwhile, regulatory frameworks vary from place to place.

WATCH HERE

2024: A crucial election year

This is a pivotal year for global politics, with elections impacting half the world's population.

In this article, we outline a selection of key indicators produced by Ipsos around the world, highlighting potential shifts in the political landscape.

For instance, we look at the UK where the main opposition party (Labour), leads the current incumbents, the Conservatives, by a whopping 25-point margin.

In the EU, we map out what the parliament might look like this year after the election, with a potential rise in the radical right.

We also look at the upcoming US Presidential election, where a majority of Americans believe that neither Biden nor Trump should be running for president again in 2024.

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What the Future: Risk

We live in risky times. Across industries and around the world, brands, businesses and policymakers need to prepare for a variety of compounding and high-stakes hazards, from geopolitical risks to brand risks to economic risks - alongside the risk of backlash to how they respond to those risks.

Featuring interviews, exclusive polling, and analysis, *What the Future: Risk* dives into the social and commercial ramifications of uncertainty across industries, from black swan events to everyday chance. No matter your business - finance, entertainment, consumer goods, manufacturing, insurance, tech, advertising, policy or somewhere in between - this issue of *What the Future* has valuable takeaways on how you can ensure that your risks are calculated ones.

As well as reading the report, also register for the upcoming webinar.

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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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