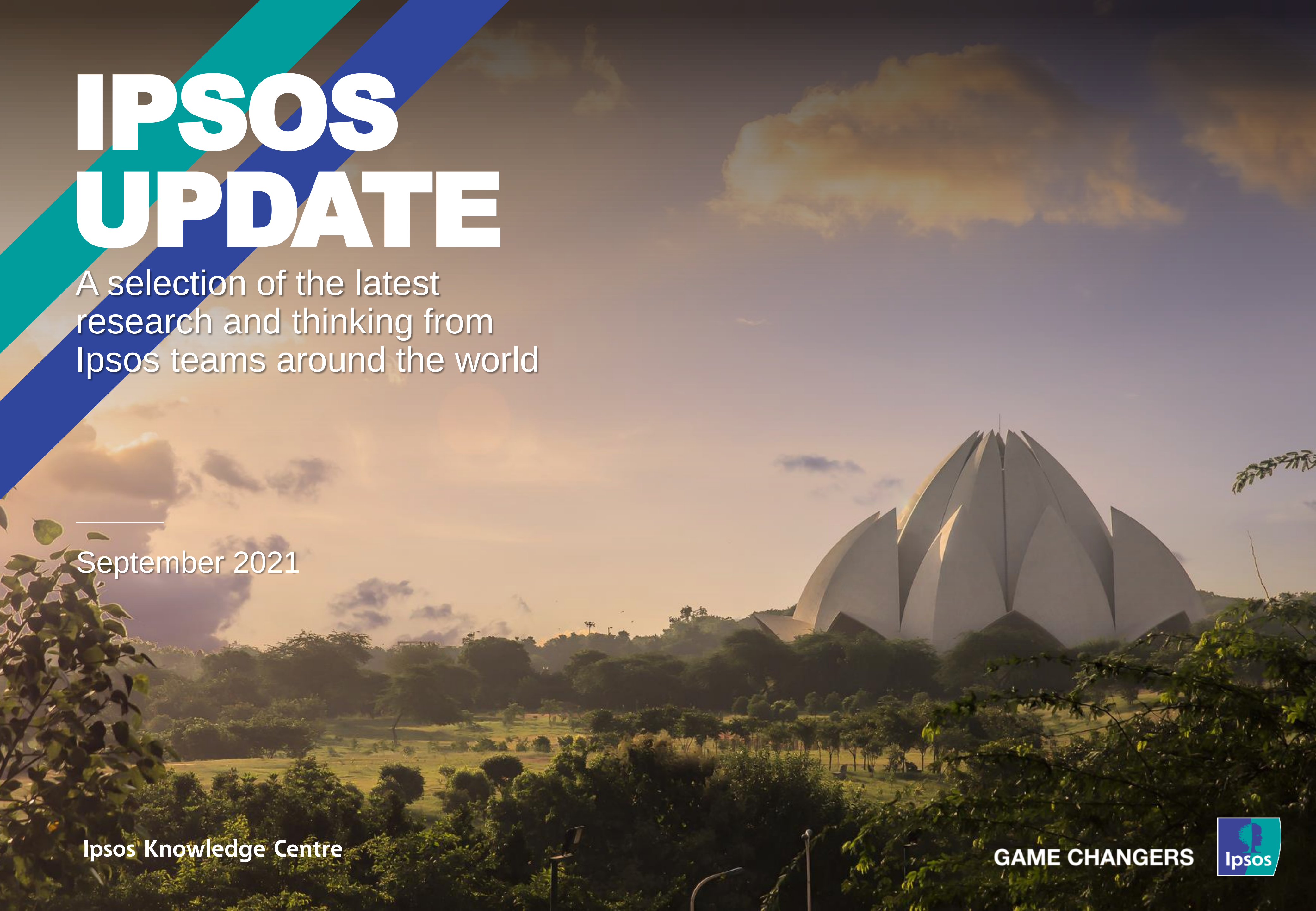

IPSOS UPDATE

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

September 2021

Ipsos Knowledge Centre

GAME CHANGERS

Ipsos

WELCOME

Welcome to the September edition of *Ipsos Update* – our round-up of the latest research and thinking from Ipsos teams around the world.

The underlying idea of *Ipsos Update* is simple: to present aspects of the “Best of Ipsos” in an easily digestible format. We have not tried to be comprehensive; the focus is on content which will be relevant to more than one market or specialist research area.

Links are provided to the various points of view and information sources, as well as the Ipsos colleagues responsible for each piece of work.

We hope you find this useful. Please email **IKC@ipsos.com** with any comments or ideas, or if you would like to subscribe to future editions.

Thank you.

IN THIS EDITION

WOMEN IN ADVERTISING
The power of positive representation

Positive, modern representations of women in advertisements help shift society towards gender equality. We consider whether they can also contribute towards a more successful brand.

WELLBEING IN INDIA
Digitalisation and mental wellbeing

Our latest India briefing paper explores the impact of Covid-19 and digitalisation on mental wellbeing. We focus on digital connectivity, mental health, stepping back, and consider the opportunities for brands.

GLOBALISATION
Perceptions have cooled since before the pandemic

In a 25-country Ipsos survey for the World Economic Forum, we uncover a mix of polarisation and ambivalence among the public about free trade, globalisation, and protectionist policies.

WHAT WORRIES THE WORLD?
New highs for Coronavirus in some countries

The latest wave of our monthly global survey finds continued concern about Coronavirus, with new highs recorded in Malaysia and Australia.
We include a look at where climate change is a rising issue.

ECONOMIC RECOVERY
Confidence in the economy rebounding

Three in four people worldwide expect it will take their country's economy at least two more years to recover from the pandemic. Our Consumer Confidence Index sees declines in the world's two largest economies.

THE GLOBAL COMMONS
Planetary stewardship and system change

Presenting public opinion across G20 countries, a survey for The Global Commons Alliance finds people are concerned about the state of nature, both for the present day and for future generations.

EXERCISE & SPORTS
Levels of physical activity around the world

We explore global attitudes to sports, finding people from the Netherlands to be the most physically active. We also examine barriers to further participation, which include lack of time and lack of money.

PODCASTS
Listen in to the latest episodes and an all-new series

Find the latest releases on fieldwork from *The Operational Angle,* the season finale of *Customer Perspective* and discover *Educated Conjecture*, a new podcast series from Ipsos in Canada.

WOMEN IN ADVERTISING

The power of positive representation.

Advertising has the power to shape how people see each other: 76% of people across 7 countries agree with this. Nine in 10 American girls say that they compare themselves to images they see in the media. With this in mind, it is vital that brands take responsibility to represent women in a modern, positive manner to further shift our social norms as we strive for gender equality.

Looking beyond the social impact, our new *Ipsos Views* paper in partnership with SeeHer examines whether positive representations of women in advertising brings benefits to brands.

Ipsos applies the Gender Equality Measure (GEM) to advertisements, focusing on four key characteristics of the women featuring in them: how they are presented, whether the portrayal is respectful, whether the portrayal is appropriate, and whether the portrayal offers a positive role model.

When compared with key performance metrics, we see that ads with high GEM Index scores are more likely to have a positive impact on both short-term behaviour change and long-term brand relationships.

In this paper, we explore the power brands have to drive societal change through advertising and consider the associated benefits for brand growth.

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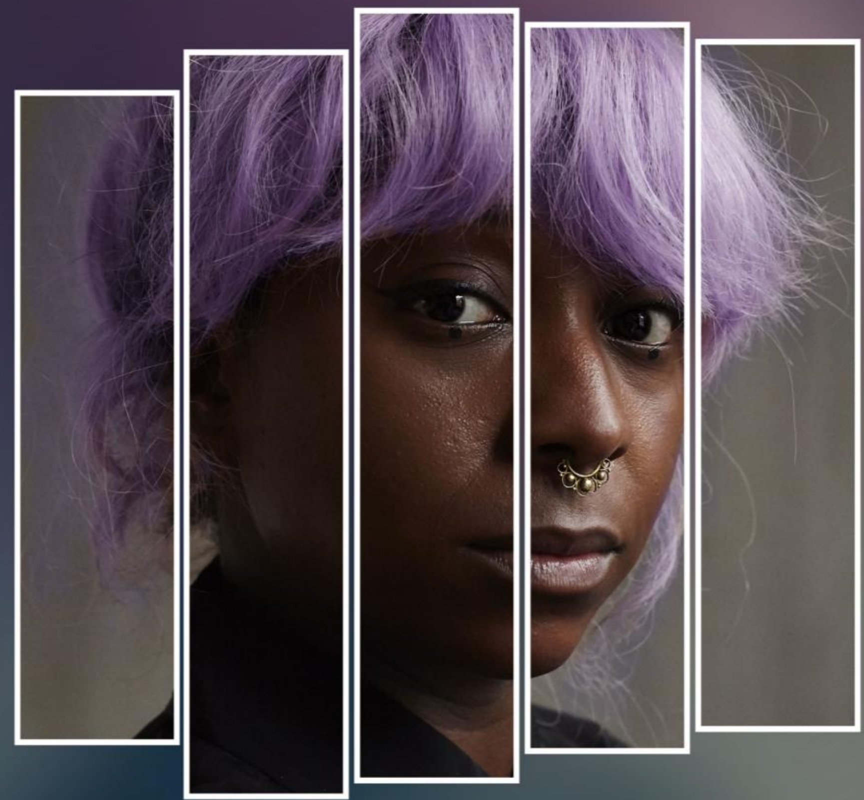

WELLBEING IN INDIA

Digitalisation and mental wellbeing.

The Covid-19 pandemic has pushed our relationship with technology to new extremes. While digital connection has been invaluable during this time, people are recognising that the way they use the internet, and social media, can leave them feeling overwhelmed. Concerns about the impact of screen time have been pushed aside to fulfil daily tasks and roles – be it in work, education, entertainment or self-enhancement.

Focusing on India, this paper explores how the different aspects of digitalisation and the fast-paced nature of modern society more generally are affecting people's wellbeing.

The key points include:

- **Digital connectivity is a double-edged sword**. The digital world can bring us together, but we miss real-life contact.
- **The impact of Covid-19 is overwhelming**: Mental health remains a key health concern, and is ranked 3rd overall by (urban) Indians, after coronavirus and cancer.
- **Indians are stepping back**: Many are making conscious moves to manage their hectic lives and reduce stress. Mindfulness/meditation apps are seeing a surge in demand.
- **Brands are aware**: The heightened importance of mental wellbeing to Indians is now being reflected in brand communications and campaigns.

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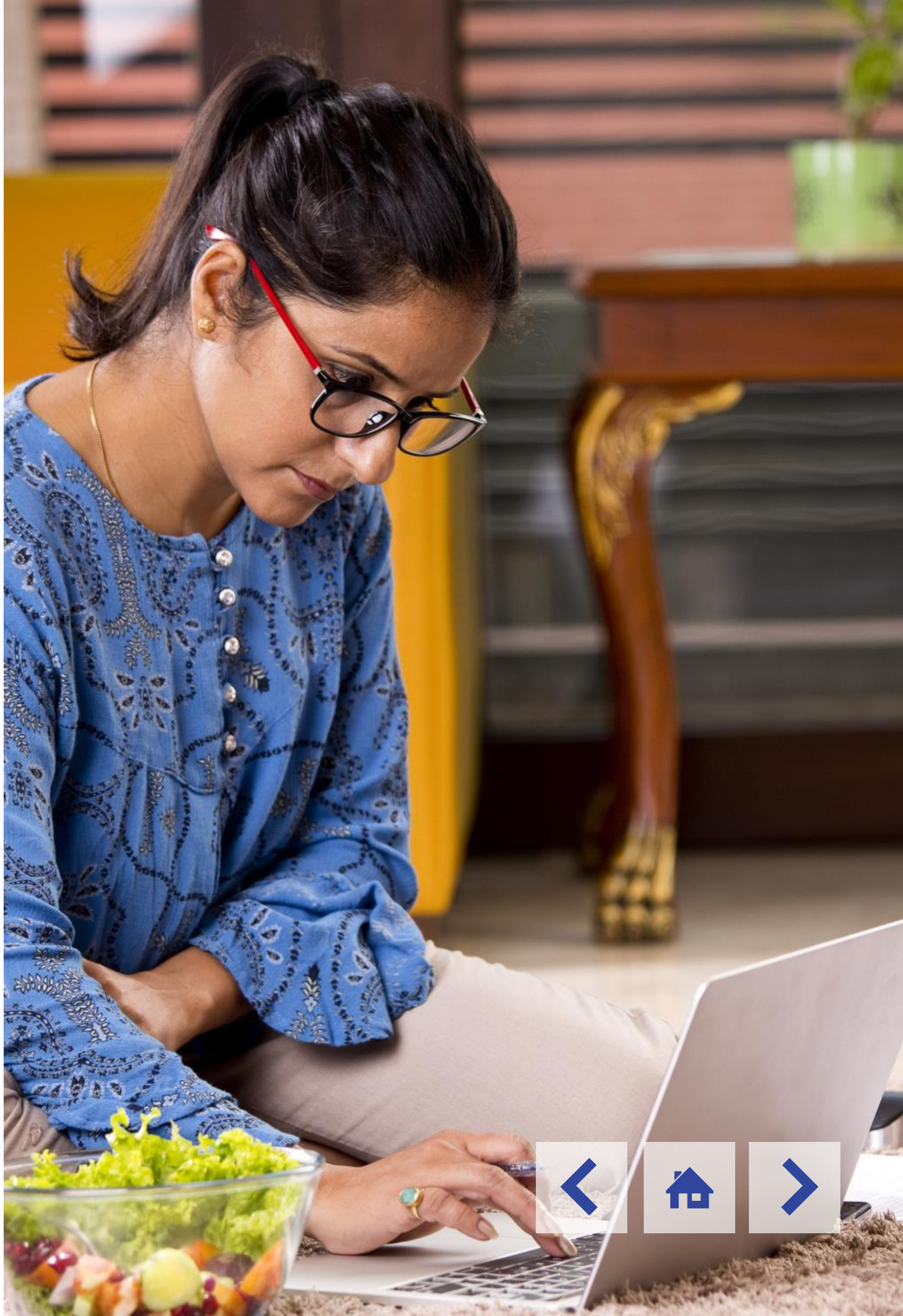

WORLD VIEWS OF GLOBALISATION

Perceptions have cooled since before the pandemic.

Most adults in the 25 countries surveyed by Ipsos for the World Economic Forum agree that expanding trade "is a good thing" (a global country average of 75%). Yet, in most countries, more agree than disagree that there should be more trade barriers to limit imports of foreign goods and services (37% vs. 27%).

The survey findings uncover a mix of polarisation and ambivalence among the public throughout the world about free trade, globalisation, and protectionist policies.

Looking specifically at views on globalisation, only 48% of those surveyed agree that it is a good thing for their country. This is 10 percentage points less than in 2019. While favourability towards globalisation is down in all countries (most of all in Latin America), it continues to vary widely, ranging from 72% saying it is a good thing in Malaysia to just 27% in France.

Opinion is divided on whether globalisation prevents the proper functioning of democracy. On average, 31% agree and 28% disagree, while 42% are neutral or have no opinion.

Although views on globalisation are mixed, few disagree that investment by global companies in their country is essential for its growth and expansion (9% on average).

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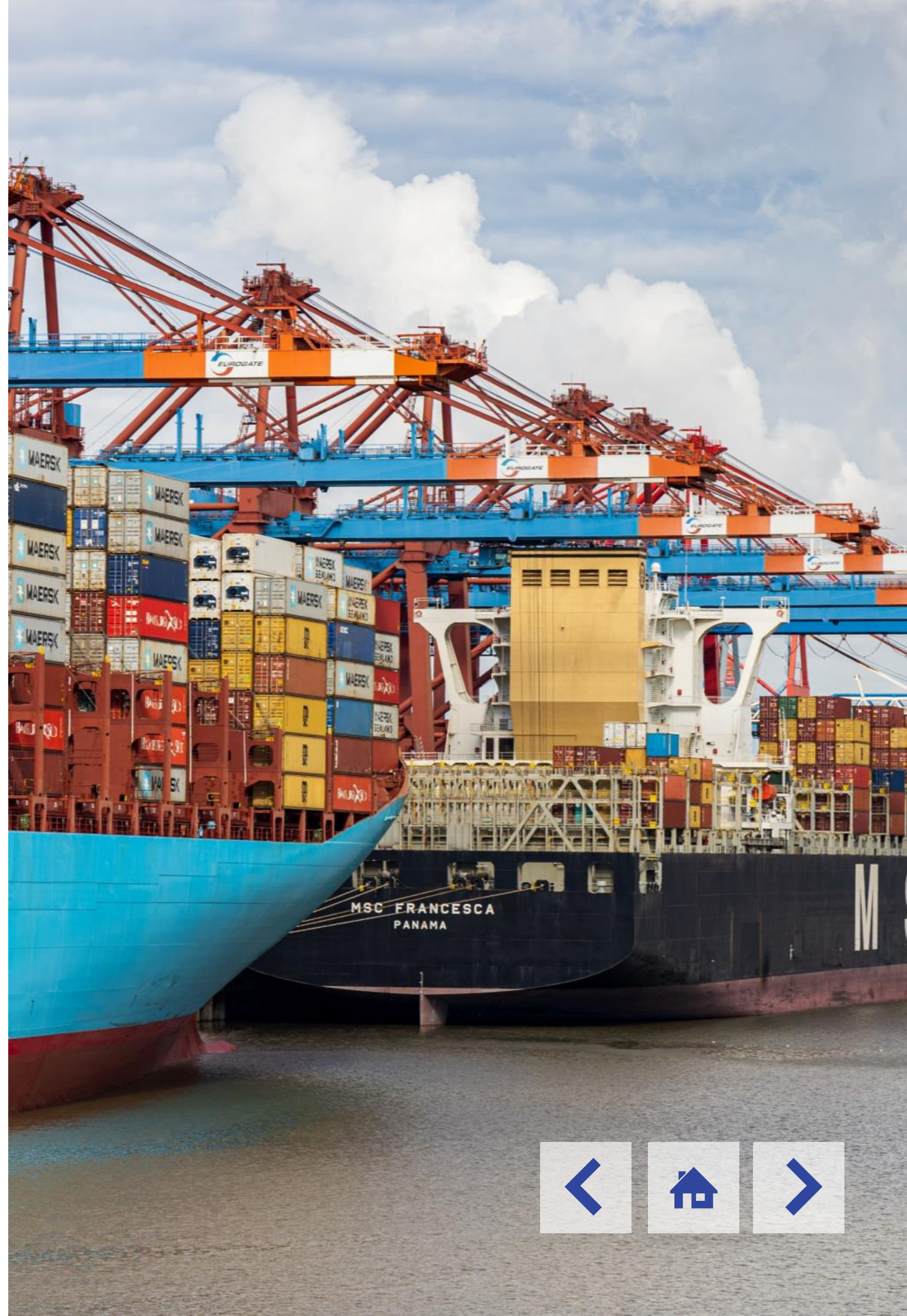

WHAT WORRIES THE WORLD?

New highs for Coronavirus in some countries.

Coronavirus is still the top global concern today, according to our monthly 28-country survey. On average, 37% say that Covid-19 is one of the most worrying issues in their country today.

Malaysia records its highest level of concern about Coronavirus since April 2020 (83%) while public concern about the pandemic in Australia climbs to the highest point in almost a year (58%).

Anxiety surrounding the virus has increased most since last month’s reading in the US (+15 points), Israel (+12) and Mexico (+10).

Unemployment and Poverty & social inequality are both considered a top concern today by an average of 31% of people across all countries, placing these issues in joint-second place. South Africa is at the top of our country rankings for concern about Unemployment while Russia and Hungary are most worried about Poverty. Financial/political corruption is the next greatest global concern (29%), followed by Crime & violence (25%).

Almost two in three (64%) on average across all countries say that things in their country are on the wrong track. This sentiment is strongest in Colombia (88%) and Turkey (87%) in August 2021, followed by South Africa (83%) and Peru (80%). The greatest change since last month is in Great Britain as 64% say things are on the wrong track, an increase of 10 points.

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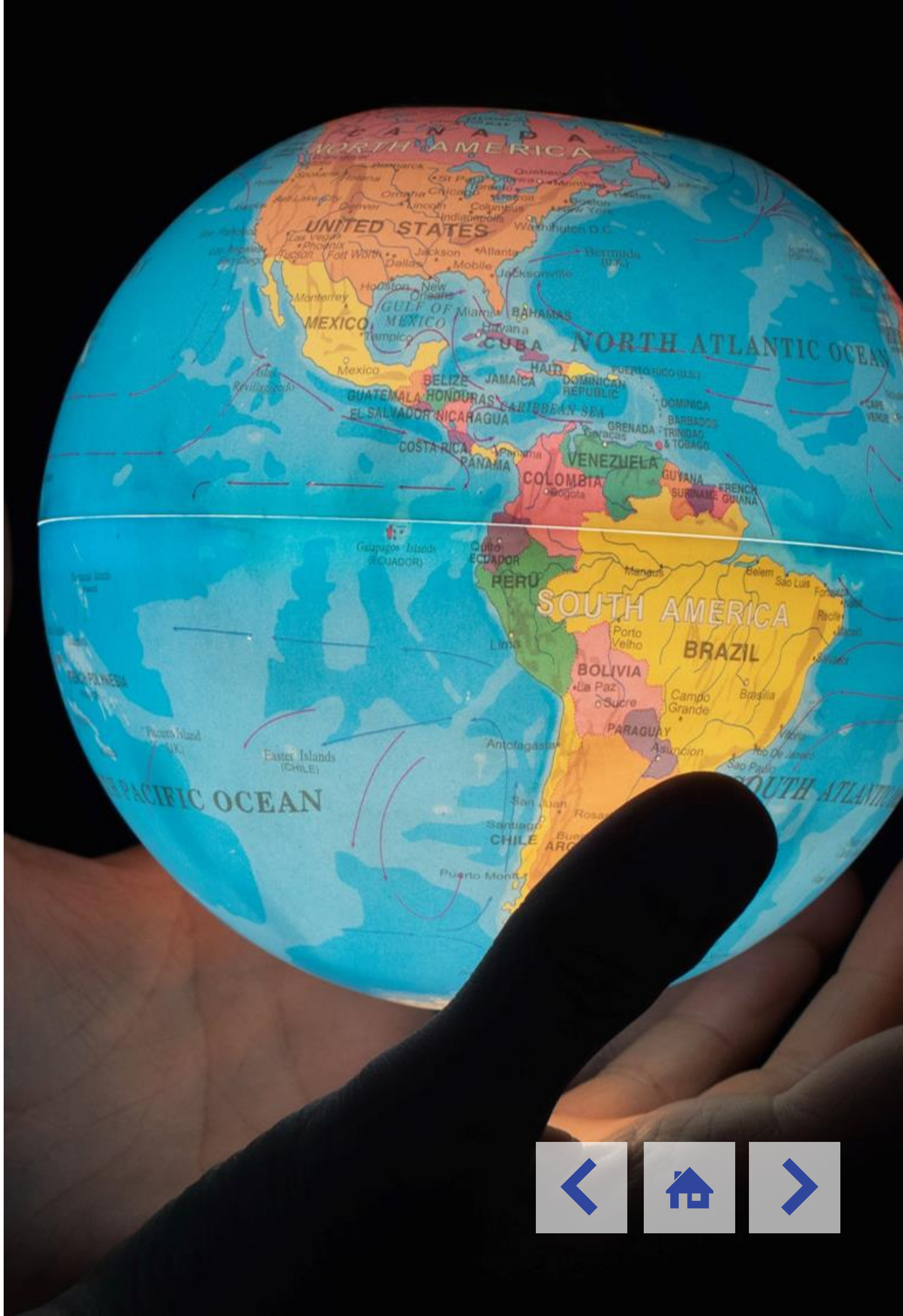

ECONOMIC RECOVERY

Expectations and confidence in the economy rebounding.

An Ipsos survey for the World Economic Forum finds that people do not expect their national economies to recover from the pandemic any time soon.

On average, three in four across 29 countries believe the recovery will take at least two more years. This includes 39% who believe the recovery will take more than three years and 34% who think it will take two to three years. Just 7% think their economy has already recovered, this view being most widely held in China.

Consumer confidence has been steadily increasing for the past six months, but this has slowed in August. Our Global Index (the average of 24 countries' National Indices) has increased by just 0.2 of a point since last month, to 48.5 in the latest reading.

The world's two largest economies show significant declines. The United States' National Index dropped by 2.3 points since last month and China's by 1.7 points. Only three of the 24 countries show any significant growth in their National Index over the last month: Spain (+2.0), India (+2.0), and Poland (+1.7).

At a global level, the Jobs Index continues to see significant month-on-month growth (+0.7 point), but the Investment Index is up by a smaller margin (0.3) and the Expectations Index is down by 0.4.

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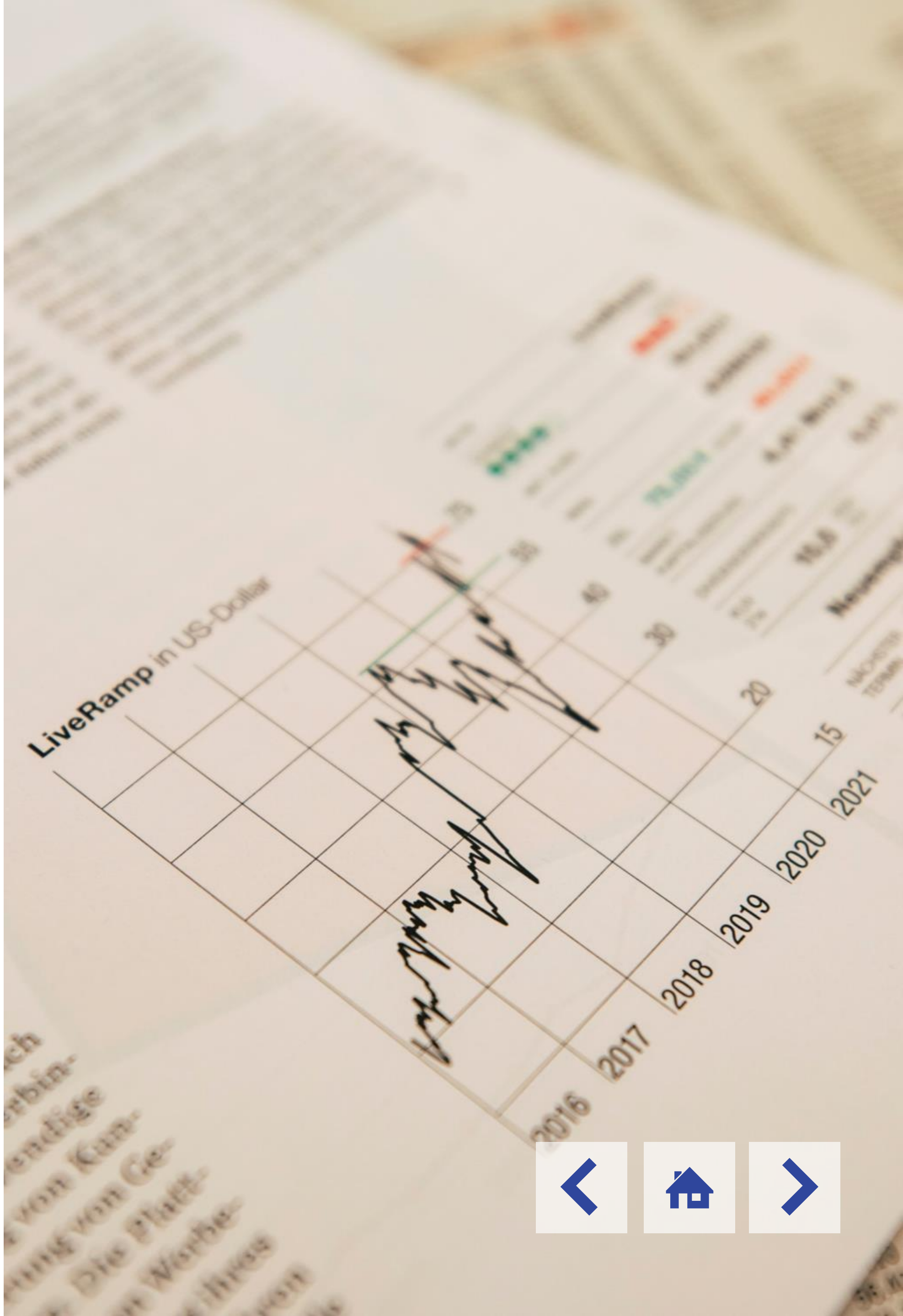

THE GLOBAL COMMONS

Attitudes to planetary stewardship and transformation.

Ipsos conducted a survey for The Global Commons Alliance (with partners Earth4All and FAIRTRANS) to understand people's attitudes across the G20 to the state of the global commons, defined to encompass life on Earth, fresh air and climate, oceans, forests, ice sheets, freshwater, and other processes that keep Earth stable and resilient.

Key findings include:

- A majority of people across the G20 are concerned about the state of nature, both today (58%) and for future generations (61%). Moreover, 73% of people believe Earth is close to “tipping points” because of human action.
- A vast majority (83%) also want to do more personally to protect and restore nature, with willingness higher in developing nations.
- Three in four (74%) agree that their country’s economy should prioritise the health and wellbeing of people and nature rather than focusing solely on profit.
- 75% agree that the pandemic has shown that it is possible for behaviour to transform rapidly. Only a quarter (26%) feel that Covid-19 has made protecting and restoring nature a lower priority.

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EXERCISE AND SPORTS

Levels of physical activity around the world.

Our 29-country survey conducted with the World Economic Forum finds that most people (58% on average) would like to practice more sport, but a lack of time is the biggest obstacle.

We find that people around the world spend an average of 6 hours a week exercising or playing team sports, with general fitness, running, and cycling the most popular forms of physical activity.

Those in the Netherlands claim to spend over 12 hours a week – twice the global country average – doing physical exercise or team sports. People from Germany and Romania are the next most active, both carrying out 11 hours of exercise per week.

At the other end of the scale, Brazilians are the least physically active, spending three hours per week doing physical exercise on average (26 minutes per day). Four other countries report doing less than four hours of physical exercise on average per week – France (3.7), Chile (3.7), Italy (3.6) and Japan (3.3).

The top nations where people are most likely to say they would like to play more sport than they currently do are Peru (81%), Chile (79%) and Colombia (78%). The barriers to further participation, according to our respondents, are lack of time (37%), lack of money (18%) and the weather being too hot or too cold (17%).

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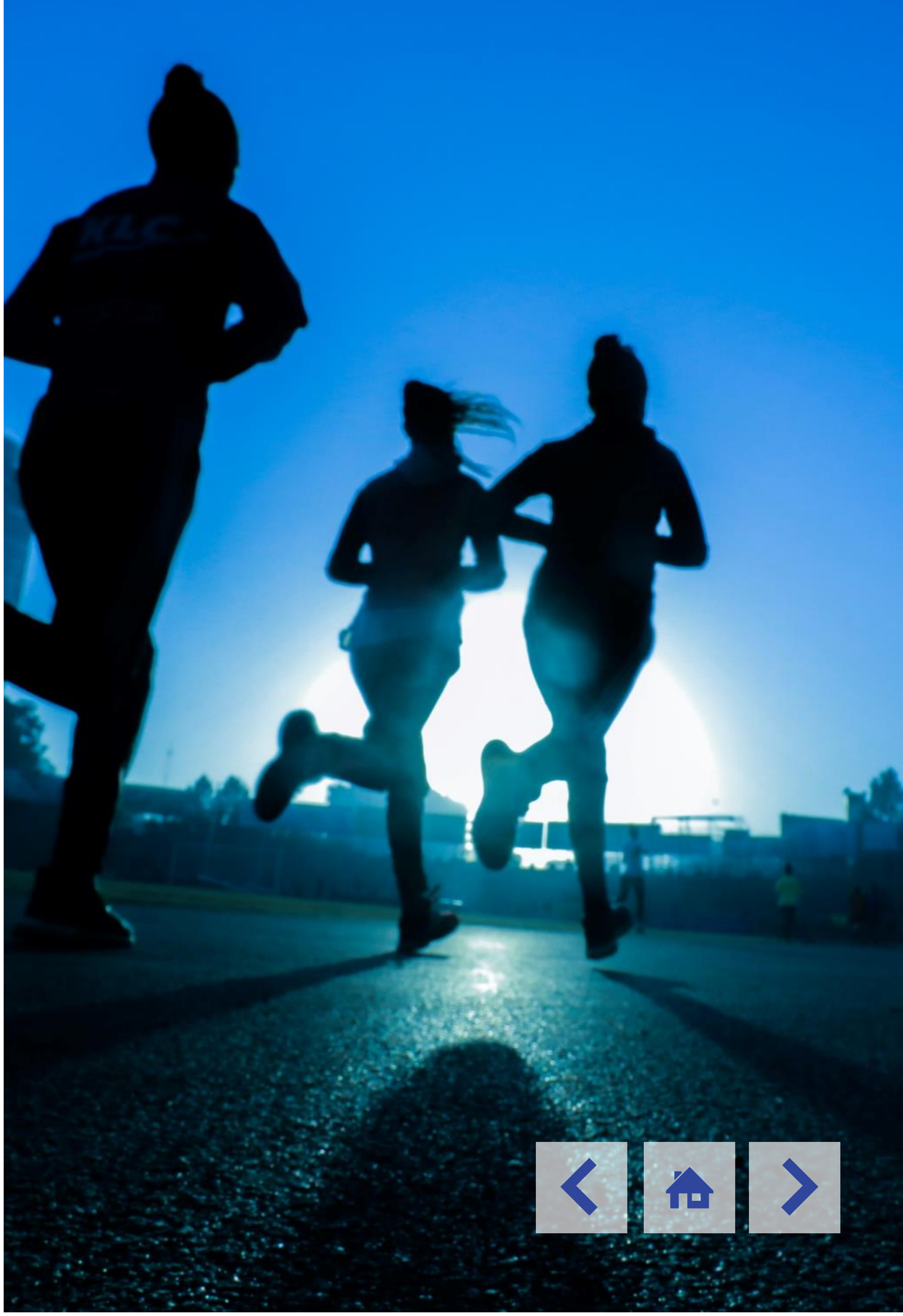
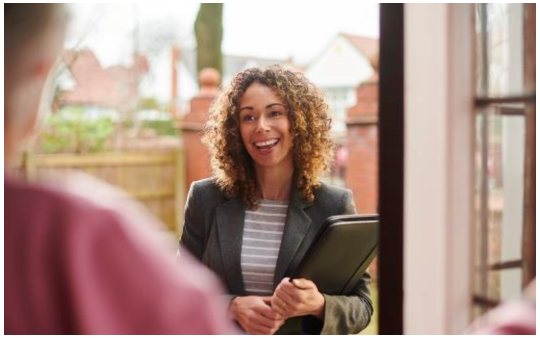


IPSOS PODCASTS



OFFLINE FIELDWORK

Offline – or face-to-face – fieldwork remains an integral pillar of market research data collection. Ipsos conducts over 6 million face-to-face interviews each year, with capabilities in 150 markets.

In this episode of The Operational Angle, host Leah McTiernan speaks to Ipsos experts from the UK, India, and Sub-Saharan Africa about iField, Ipsos' best-in-class integrated fieldwork management system, and how it can ensure quality and consistency of data collected for a range of surveys. You can also read more in this article and infographic.

LISTEN HERE

EDUCATED CONJECTURE

Educated Conjecture is a new podcast by Ipsos in Canada that combines what the public thinks with what the experts think. The series is ideal for everyone: government, businesses, non-profits, marketers, researchers and innovators.

In each episode, hosts Mike Colledge and Sean Simpson are joined by a guest to examine a current or emerging issue.

In Episode 1, Darrell Bricker talks about the 2021 Canadian Federal Election.

In Episode 2, Ray Kong talks about the K-shaped economic recovery.

LISTEN HERE

CUSTOMER PERSPECTIVE

Episode 17 of Ipsos' podcast on all things customer experience and channel performance brings season 3 to a close with thoughts on food and grocery shopping – specifically, how to encourage consumers to continue to stock their refrigerator with grocers' produce post-pandemic.

This season has showcased Ipsos thought leadership and welcomed client guests from around the world, including from the UK, US, South Africa, Hungary, Vietnam and Chile. Some of the episodes are also available in Spanish.

LISTEN HERE

SHORTCUTS

SERVICE WITH A SMILE?

How does an organisation create meaningful 'masked moments' that encourage customers to return, spend and recommend?

In an update of our paper, Service with a Smile?, released earlier this year, we set out to provide guidance to those charged with designing and delivering customer experiences in this world of mask wearing, within the context of updated findings from our research in Argentina and Mexico. We also look at how findings from Latin America compare to those from the US.

Across the markets, our study shows that mask wearing has a significant impact on human ability to identify emotions, communicate and, as a result, on customer experience and relationship-building.

Around three in ten customers in the US (28%) and Mexico (30%), and four in ten (40%) in Argentina said that wearing a mask prevented or made it difficult for them to achieve what they wanted in their most recent face-to-face interaction as a customer.

READ MORE

STEPPING UP FOR GEN Z

Generation Z, defined as those born between 1997 and 2012, face especially tough circumstances in the continuing pandemic.

This report, focusing on young people in America, explores how brands can connect with and support Gen Z.

Key recommendations include:

- **Learn what's important to them and stand for something, authentically**. Gen Z care about many issues, including sustainability, fair treatment, diversity and mental health.
- **Reflect their world in brand communications**. Gen Zers expect to see a global view including diversity, intersectionality and individuality.
- **Meet their re-entry needs**. As they resume back to school and soc may include rebuilding connections and addressing mental and physical health.

This report incorporates responses from our panel of Gen Z college students.

READ MORE

SPOTLIGHT ON CANADA

Following the snap election called by Canadian Prime Minister Justin Trudeau, Ipsos is keeping a finger on the pulse of public opinion throughout the campaign trail.

Here are some of the findings so far:

- A poll for Global News found 39% saying Justin Trudeau is most suited to be Prime Minister, followed by Erin O'Toole (25%) and Jagmeet Singh (23%).
- There are signs of a volatile campaign affected by turnout vote-switching as only 45% are certain of their choice.
- Healthcare, the Covid-19 pandemic, and the economy are the top three issues most likely to affect how Canadians will vote on 20th September.

In the inaugural episode of Educated Conjecture, a new Ipsos podcast from Ipsos in Canada, Darrell Bricker, Global CEO of Ipsos Public Affairs joins Mike Colledge and Sean Simpson to discuss what to look out for as the Canadian election campaign kicks off.

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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.

Please email IKC@ipsos.com with any comments, including ideas for future content.

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