IPSOS UPDATE

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

November 2023

Ipsos Knowledge Centre

GAME CHANGERS

IPSOS UPDATE NOVEMBER 2023

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

We have all been shocked by horrific events taking place in Israel and Gaza. The human costs are all too apparent and upsetting, while the geopolitical implications are uncertain and worrying.

Renewed conflict in the Middle East is a reminder of our ongoing "polycrisis", with a backdrop of gloomy economic news. Consumer confidence remains muted, with our monthly index showing declines in Southeast Asia (Malaysia, Singapore & Indonesia) and a number of European countries (Netherlands, Sweden & France). While concerns about cost of living have plateaued, they remain high: inflation has been the top issue globally in our *What Worries the World* study for 19 months consecutively.

Conflicts, as well as economic challenges, drive rising immigration, and Ipsos finds global concern about how it is managed is now at the highest level for three years, with concern particularly high in Turkey, Germany and the Netherlands. With working age populations shrinking across Europe, governments and citizens face some hard choices.

Poverty and inequality also feature among the global public's top concerns and our new 16-country study shows the stark reality: one in five people globally say their children have gone to bed hungry in the last month. Meanwhile we ALSO have a global obesity crisis, where "sugar is more dangerous than gunpowder", to quote Yuval Noah Hahari.

Staying on health-related issues, post pandemic, mental health has overtaken cancer as the number one health worry, with women particularly concerned. Four in ten workers globally say they have had to take time off because of stress.

Given our health worries, we can take some solace that doctors and scientists retain their positions as the world's most trusted professions in our latest *Trustworthiness Index*. Politicians retain their position as the least trusted, followed by journalists and advertising executives. This is nothing new – politicians are always among the least trusted in most societies – but given our desperate need for leadership, it is always sobering.

Finally, with so much uncertainty, nostalgia is booming - 60% of people around the world tell us "I would like my country to be the way it used to be." This is the theme of our Ipsos Flair release on Brazil, which is titled "Nostalgia and Perspectives". The tenth edition in the series finds our team reviewing Brazil's experience over the last decade as they explore the dynamics of the world's seventh-most populous country.

We hope that some of the research here can be useful in your own work – as ever, please get in touch if you'd like to discuss anything in more detail.

Ben Page, Ipsos CEO

POLL DIGEST

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

GB: Over six in ten (65%) Britons think Black British history should be taught in secondary school.

US: 60% are in favour of the US being part of an international peacekeeping force between Israel & Palestine.

PAKISTAN: Six in ten worry about not being able to cover their daily financial needs.

CROATIA: Nearly eight in ten Croats are willing to make changes to preserve the environment.

CHILE: 75% of Chileans believe minimum animal welfare requirements should be implemented in chicken farming.

TURKEY: 65% of consumers don't know what to do for a 'more sustainable life'.

IN THIS EDITION

MENTAL HEALTH DAY 2023
Four in ten have taken time off work due to stress

While 78% think mental health is as important as physical health, only 34% globally say their country's healthcare system treats them both equally.

DEMYSTIFYING DOUBLE MATERIALITY
A new model for corporate ESG compliance and leadership

We share an innovative new approach to double materiality assessments – a critical tool to bridge the perceived divide between 'good for wallet' and 'good for people and planet'.

WHAT WORRIES THE WORLD?
Immigration control worry highest since March 2020

Despite growing concerns about immigration, inflation remains the number one issue for a 19th month in a row, making it the longest running top worry in our survey.

NOT ENOUGH
Global perceptions on child hunger and malnutrition

Data collected for World Vision International across 16 countries finds a fifth of parents say their child has gone to bed hungry in the last month.

TETRA PAK INDEX 2023
The future of health and nutrition

This year's edition explores how the global pandemic has shifted the consumer focus towards health and sustainability, creating new demands on our food and diets.

GLOBAL TRUSTWORTHINESS INDEX 2023
Politicians remain the least trustworthy

Running since 2018, this index tracks how trustworthy (or untrustworthy) people across 31 countries see various professions, including politicians, doctors, and scientists.

RESPECTING RESPONDENTS
Why respondent centric research drives quality insight

The pool of individuals willing to participate in market research is finite. Attracting and retaining the most engaged research participants will provide the best quality data and answers.

FLAIR BRAZIL 2024
Nostalgia or perspectives

Written by our local experts, our 10th edition of Flair Brazil continues its deep dive on the social, economic, and political factors shaping the direction of the country.

Cover photo: Joao Pessoa, Brazil. Discover all things societal, economical, and political in the latest edition of Flair Brazil on .

WORLD MENTAL HEALTH DAY

58% think about their mental wellbeing often

While 78% think mental health is as important as physical health, only 34% of people globally say their country's healthcare system treats them equally, the *Ipsos World Mental Health Day* survey finds.

58% of people across 31 countries say they think about their mental wellbeing often, rising to 75% among South Africans and Brazilians. Meanwhile, South Korea is the only country where people are more likely to say they don't think about their mental wellbeing, with 61% saying they think about it 'not very much/never'.

Drawing on three years of trend data, the study explores changes in how people feel about their own mental health and the factors that are impacting their mental wellbeing, setting this against the backdrop of the broader healthcare environment.

Stress has been a growing issue in recent years, and it is seen as the third biggest health concern in the *Ipsos Global Health Service Monitor*.

Globally, 62% say that at least once in the past year, they have felt stressed to the point where it had an impact on how they lived their daily lives; 34% say this has happened several times. 39% say they've had to take time off work due to stress in the last year, with 18% saying they had to do this on multiple occasions.

Women are more likely to say stress is having an impact on their life. Over a third of women (36%) say in the past year there have been several times when stress has impacted their daily life, or they have felt they couldn't cope, versus 26% of men. Women are also more likely to say they have felt depressed to the point they felt sad or hopeless almost every day for a couple of weeks or more (30% vs 24% of men).

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39% SAY THEY HAD TO TAKE TIME OFF WORK DUE TO STRESS IN THE LAST YEAR, WITH 18% SAYING THEY HAD TO DO THIS MULTIPLE TIMES. "

TETRA PAK INDEX 2023

The future of health and nutrition

Following the pandemic, today's consumers are more focused on health and wellbeing than ever – 70% across 10 countries say that health has become more important over the last few years.

People are now demanding food that supports their health, with 74% of people saying they are interested in buying food with specific health claims and more than four in ten (43%) saying they would choose products that strengthen the immune system and reduce the risk of diseases.

Three-quarters of consumers now agree that mental health is as important as physical health – and this is evident in their food choices too. The joint second-most desirable health-related products are those that are good for both physical and mental wellbeing, at 39%.

Climate change and other environmental issues are increasingly seen as interlinked with health. Seven in ten (70%) say that healthy products shouldn't harm the environment; almost as many believe environmental factors (e.g., pollution, global warming etc.) have an impact on health (67%).

As a result, we see a trend of 'climatarianism', consumers who are keen to make meaningful trade-offs that they believe will have a positive environmental impact. More than one in two consumers (54%) believe that by changing their diet, they can contribute to a better world.

Technology is seen to have a major role to play in both health and sustainability going forward; 65% of global consumers agree that technology applied to health will become increasingly important, and 62% believe that it will play a role in ensuring a more sustainable future. This year's report also explores the innovations of tomorrow and shares a new consumer segmentation.

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MORE THAN ONE IN TWO CONSUMERS (54%) BELIEVE THAT BY CHANGING THEIR DIET, THEY CAN CONTRIBUTE TO A BETTER WORLD. "

DEMYSTIFYING DOUBLE MATERIALITY

A new model for corporate ESG compliance and leadership

ESG (Environmental, Social and Governance initiatives) is increasingly recognised as a business imperative. Yet inherent doubts about return on investment can cloud investment strategy and decision-making. This ultimately perpetuates a perceived divide between what's **good for people and planet** and what's **good for the wallet**.

Double materiality assessments necessitate equal consideration and understanding of areas of financial impact and areas of impact on people and planet. They are therefore critical to help bridge the perceived divide between the two.

However, they remain a relatively new concept and as a result there is no universally standardised approach and many competing and confusing frameworks.

In theory, double materiality assessments can help a business prioritise decision-making and strategy more effectively. But limitations in conventional approaches mean businesses are at risk of conducting assessments in a way that does not add meaningful value.

This paper demystifies the process of carrying out double materiality assessments, highlighting key pitfalls and limitations within conventional approaches. It also introduces a new, innovative model that addresses traditional limitations and increases confidence in the results of the stakeholder consultations.

Hear the authors in discussion about double materiality and Ipsos' new model in the accompanying webinar.
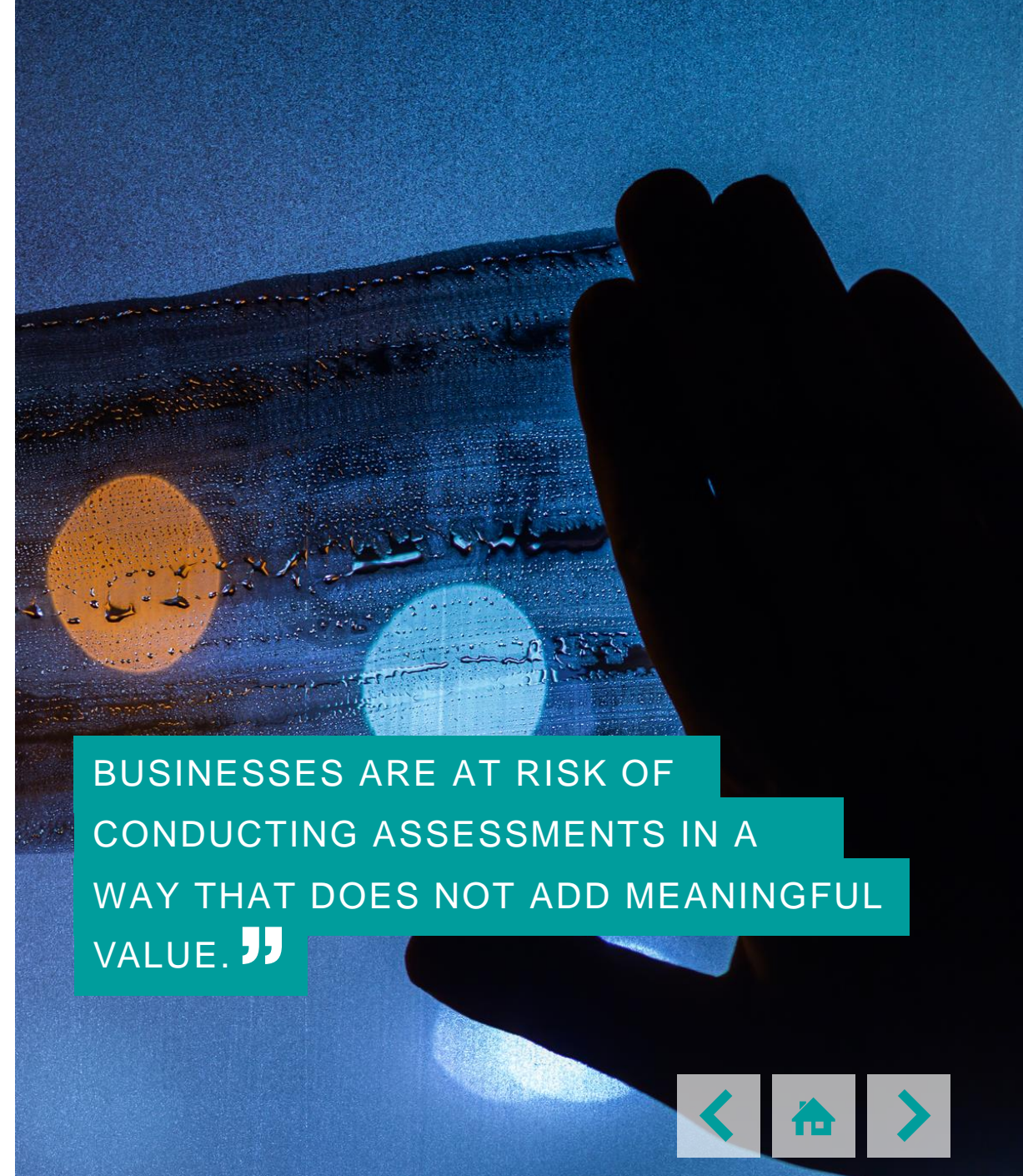
BUSINESSES ARE AT RISK OF CONDUCTING ASSESSMENTS IN A WAY THAT DOES NOT ADD MEANINGFUL VALUE.

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GLOBAL TRUSTWORTHINESS INDEX 2023

Politicians remain the least trustworthy

Running since 2018, the Ipsos Global Trustworthiness Index tracks how trustworthy or untrustworthy people across 31 countries see different professions, including politicians, doctors, and scientists.

Overall, doctors and scientists retain their position as the world's most trustworthy professions. Almost six in ten of the global public consider them both to be trustworthy (58% and 57% respectively).

Four countries display the highest confidence in doctors: Spain, the Netherlands, Indonesia, and Argentina, with 68% of people in each country rating doctors as trustworthy. There are five countries where less than half of the public think doctors are trustworthy: Romania (49%), Poland (45%), Japan (44%), Hungary (42%) and South Korea (38%).

Trust in scientists is highest in Spain and Argentina, where 71% consider them trustworthy. There are five countries where trust is below 50% - Malaysia and India (49%), Singapore and South Africa (47%) and Japan (39%).

Meanwhile, politicians remain the world's least trusted profession, with just 14% of people across 31 countries saying they consider them to be trustworthy. They are just below advertising executives and government ministers and cabinet officials, both of whom are considered trustworthy by less than one in five. Trust in politicians is highest in India – 33% consider politicians to be trustworthy, up five percentage points since 2022. Trust is lowest in Argentina, where just 6% consider them to be trustworthy.

ALMOST SIX IN TEN PEOPLE CONSIDER DOCTORS AND SCIENTISTS TO BE TRUSTWORTHY. "

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WHAT WORRIES THE WORLD?

Immigration control concern reaches three-year high

After 19 months in a row, concern about inflation is still top. This is the longest an issue has held the top spot in our survey's history. Our latest release sees a global country average of 39% worried about rising prices.

For the 11th consecutive month, Argentina (69%) is once again the most concerned nation. Worry has risen by a further 3pp this month.

Ten countries have inflation as their highest worry – Argentina, Australia, Canada, France, Germany, India, Poland, Singapore, the US, and Turkey.

Immigration control ranks ninth out of 18, with 15% globally choosing it as an issue. This is 2pp higher than last month and 4pp more than October 2022.

Immigration concern is much higher in Europe than other regions. Germany is now the most concerned country with 44% saying it is an issue. This is up 11pp compared to last month and up 26pp since this time last year. This is the most concerned Germany has been about immigration since February 2016 when 47% chose it as an issue.

Meanwhile, nearly seven in ten (68%) Swedes are worried about crime & violence this month, a sharp rise of 11pp from September 2023. This is only the second time in our survey that Sweden has recorded such a high figure for crime. The last time was two years ago in October 2021. It should be noted that fieldwork took place before two Swedish football fans were murdered in Belgium.

A 6pp decrease sees Canada record its lowest "good" economic score outside of the height of the pandemic. This mirrors recent polling by Ipsos Canada, which found 60% of Canadians think Justin Trudeau should step down before the next election.

> WORRY OVER IMMIGRATION CONTROL HAS REACHED ITS HIGHEST LEVEL SINCE MARCH 2020. "

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RESPECTING RESPONDENTS

Why respondent centric research drives quality insights

Market research comprises three parties: the customer, the research organisation, and the study participants. The agency operates as a guide, knowing what the client requires to give effective insights.

Participants who are actively involved are essential for making relevant recommendations. Clients and agencies must respect their demands to achieve excellent data quality and suggestions.

The pool of individuals willing to participate in market research is finite at a particular point in time, particularly for online surveys. And given it is a finite pool, it has increased the pressure on these individuals to complete surveys.

Therefore, it is critical to keep those who are willingly engaged, and willing to complete additional surveys to the best of their ability. Organisations that are able to attract and retain engaged research

participants will achieve the best quality data and answers.

Key takeaways from *Respecting Respondents* include:

- Market research demands a respondent-centric approach to guarantee revealing insights and recommendations.

- Engaging and caring for research participants is essential to obtain quality data and valuable recommendations.

- Studies should be designed in a respondent-friendly manner, considering factors such as the survey length, variety of questions, and minimal repetition.

- What is needed is forward-looking research by adapting to the evolving digital ecosystem, such as mobile-first design dynamic.

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THE ORGANISATION THAT IS MOST RESPONDENT CENTRIC WILL BE ABLE TO ATTRACT AND RETAIN THE MOST ENGAGED RESEARCH PARTICIPANTS."

NOT ENOUGH

Global perceptions on child hunger and malnutrition

This new global Ipsos study conducted in 16 countries on behalf of World Vision International examines perceptions surrounding child hunger in high-, middle-, and low-income countries.

On average globally, just over a fifth (21%) of parents say their children have gone to bed hungry in the last month. The study also found that almost four in ten (37%) parents or guardians say their children are not getting the proper nutrients they need on a daily basis.

While this sentiment is felt more widely in lower-income countries such as Chad (66%), Malawi (64%) and the Democratic Republic of Congo (63%), roughly two in ten parents or guardians in Germany (24%), the United States (20%), Australia (19%), Canada (18%) and South Korea (17%) also say their children don't receive the nutrients they need on a daily basis.

Among those who have had to put a child to bed hungry, inflation and the increased cost of living (46%), low household income (39%), and not enough government focus on ending hunger (25%) are seen as the main causes of hunger.

When asked whether they think child hunger will be eliminated by 2030, most were pessimistic. On average globally, only 37% think child hunger will be eliminated in their country. The most pessimistic countries are all high-income nations, including Australia (17%), Canada (17%), Germany (16%) and Japan (9%).

Three-quarters (75%) believe that their government isn't doing enough to support families struggling in their own country, and seven in ten believe their government isn't doing enough to end child malnutrition (71%) or to solve the global hunger crisis (69%).

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21% OF PARENTS GLOBALLY SAY THEIR CHILDREN HAVE GONE TO BED HUNGRY IN THE LAST MONTH. "

FLAIR BRAZIL 2024

Nostalgia or perspectives

This year, Flair Brazil celebrates its 10th edition.

Written by our local experts, we continue our deep dive on the social, economic and political factors shaping the direction of the country, along with the challenges and opportunities they bring.

Despite a turbulent decade full of twists and turns for Brazil, there have been many important developments indicating positive prospects for the future.

Both **nostalgia** and **perception** play a significant role – a dichotomy between the demands of an uncertain future and a better past is one of the main tensions in the country today.

INTRODUCTION:

The celebration of obsession

BRANDS AND SOCIAL PURPOSE:

Taking action in a politically divided time

INFLATION:

The brand vacuum

GENDER EQUALITY IN THE WORKPLACE:

The importance of female representation

TAKING RESPONSIBILITY:

Is ESG the new et cetera?

DIGITAL EXTREMISM:

How algorithms feed polarisation.

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SPOTLIGHT ON: IPSOS' BRAND TALK PODCAST

Discussing the fundamentals of brand success

EPISODE 1: SHAPING EXPECTATIONS

In this first episode in the new series, David Robson, author of The Expectation Effect: How your mindset can transform your life, joins our hosts to discuss the importance of reinforcing and shaping expectations as a brand leader.

EPISODE 2: DESIGNS OF DISTINCTION

In this episode, our hosts are joined by Lee Rolston. Lee is the Chief Growth Officer for Jones Knowles Ritchie (JKR), a creative design agency. Together they discuss the dos and don'ts of distinctive brand asset management and the collaborative work JKR produced with Ipsos: Be Distinctive. Everywhere.

EPISODE 3: TIMELY EXPRESSION OF A TIMELESS TRUTH

In this episode we talk to John Livanos, Lead Brand Strategist for Harman International. Our hosts chat to John about his role and focus on the challenges brand leaders face as they attempt to navigate a portfolio of brands through a constantly shifting contextual backdrop.

EPISODE 4: UNDERSTANDING EXPERIENCE

We're joined by Neeraj Kalani, Global Head of Commercial and Medical Excellence at Moderna. Listen as he shares some of the lessons learned along the way from running insights and brand-building in one of the biggest pharma firms in the world. A great listen for any budding brand strategist.

LISTEN HERE

SHORTCUTS

We Need to Talk About Generations

Marketing is overrun with stereotypes, hot takes and clichés. The buzz around Generation Z is a case in point. Assertions about who they are, how they feel and what they do are widespread – but they are not always backed up by the evidence.

Yet it's clear that using a generational lens can be a really effective way of understanding how and why societies and consumers change. Better analysis can help us separate the myths from the realities.

In this episode of our KEYS webinar series, we share ideas, information and new findings to help us all build an understanding of different generations. This needs to be grounded in today's context: consumers around the world are ageing fast – and 36 countries are losing population already.

Our report dives into the detail.

WATCH HERE

Global Views on AI & Disinformation

A new Ipsos survey examines people's perceptions on AI and its abilities to disseminate fake news.

In 2018, during Trump's presidency, nearly seven in ten (69%) Americans believed there was more lying and misuse of facts in politics and media than there was 30 years ago. Five years later and that number has now dropped five percentage points to 64%.

Moving north we find Canadians the most worried about AI making misinformation and disinformation worse, with over three-fifths (64%) agreeing it will.

Many are also worried about whether other people will be able to tell a fake story from a real story – less than half (44%) think someone in their country can decipher fake news. However, 66% are sure *they* can discern fact from fiction.

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Consumer Confidence Index

This month's Ipsos Global Consumer Confidence Index is down 0.4 points from last month to 47.2. Sentiment seems to have fallen sharply across Southeast Asia – particularly in Malaysia (-5.3 points), Singapore (-4.0 points) and also Indonesia (-3.0 points).

Meanwhile, we also see sentiment falling in parts of Europe, as the Netherlands (-3.9 points), Sweden (-2.3 points) and France (-2.2 points) all show significant declines.

In contrast, consumer confidence is up in Latin America. Argentina (+3.9 points), Colombia (+3.6 points) and Mexico (+3.4 points) all show significant month-over-month gains of at least three points.

Across the 29 countries, India (64.1) now holds the highest National Index score this month.

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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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