



December 2018

IPSOS UPDATE

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

Ipsos Knowledge Centre

GAME CHANGERS



WELCOME

Welcome to the December 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.

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THE GLOBAL INFRASTRUCTURE INDEX

Satisfaction with airports, roads, housing and more

Our new Global Advisor report shows how citizens across 28 countries rate their local infrastructure and what concerns them most.

CONNECTED HEALTH TRENDS 2018

Moving in the right direction?

Globally, 12% of people use connected health devices for a range of reasons. But why are user numbers stagnating?

COGNITIVE BATTLEFIELD PART II

How to make your message compelling

Using a framework for effective communication, this paper discusses polarized political opinions and how the 'packaging' of messages can unite or divide.

AI, AUTOMATION, AND CORPORATE REPUTATION

The prospect of integrating AI and automation for businesses comes with social and reputational impacts. Our new white paper explores.

ENTREPRENEURIALISM

The presence of worldwide 'Entrepreneurial Spirit'

A survey on entrepreneurial characteristics, experiences and aspirations of people across 24 countries.

SAUDI ARABIA TRAVELLERS REPORT

Independent and spontaneous travellers

As part of the Spotlight Series, this report reveals the travel habits and preferences of Saudi Arabian locals.

UK VERACITY INDEX 2018

Who do the British trust to tell them the truth?

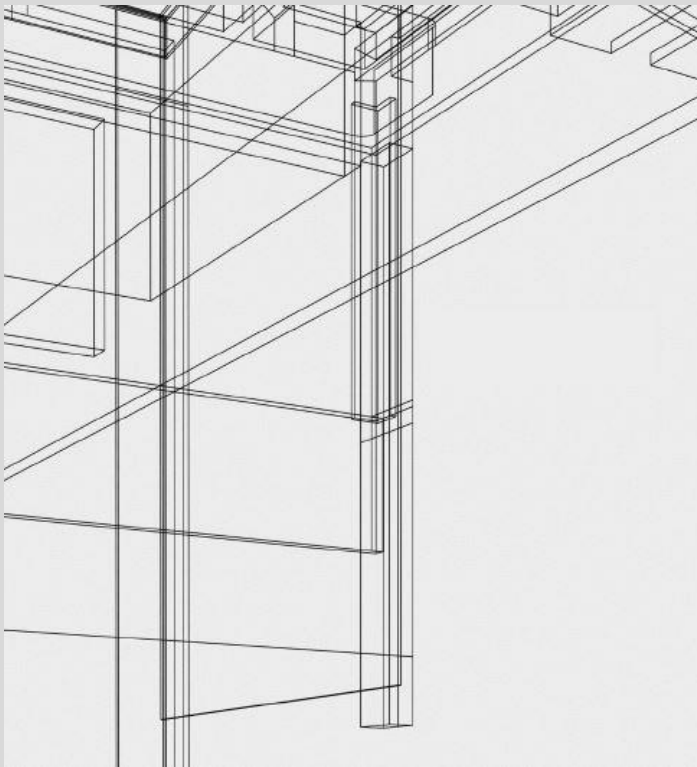
Trust is rising across the board, but there is a vast discrepancy in how the public see different professions.

BLACK FRIDAY 2018:

Shifting its centre of gravity

The report traces the history of Black Friday as the rise of online shopping and other global sales days force retailers to reinvent their offers.





GLOBAL INFRASTRUCTURE INDEX

This new Global Advisor report analyses current satisfaction levels with infrastructure across 29 countries.

Globally, people are split on their feelings of current levels of infrastructure quality. One third are satisfied, one third have negative opinions, and a third are neutral.

Views diverge considerably by country, however, Saudi Arabia (71%) and India (59%) have the highest levels of satisfaction, while Romania (5%) and Brazil (12%) register the lowest satisfaction scores.

The report looks at attitudes to airports, motorways, local roads, rail, housing, flood defences, energy, nuclear, broadband, and water supply.

Across the world, airports are rated most positively, while flood defences and nuclear energy score less well.

Again, there are some sharp differences by country. In the G8 nations, for example, there is frequent criticism in relation to digital infrastructure, new housing, and roads.

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ENTREPRENEURIAL SPIRIT

To coincide with Global Entrepreneurship Week (12–18 November 2018), this report looked at entrepreneurialism across 24 countries.

The report finds strong “Entrepreneurial Spirit” worldwide, with six in ten respondents possessing entrepreneurial characteristics according to a list of attributes such as ‘strong work ethic’, ‘disciplined’, ‘well-connected’, and ‘ambitious’.

Our study looks at entrepreneurialism in its ‘traditional’ form; business creation. But there is also recognition of *social entrepreneurialism*, seen in the creation of charities and community groups.

Headline findings include:

- Mexico, India, Saudi Arabia, China and South Africa have the highest entrepreneurial spirit, while Sweden, South Korea, and Japan record the lowest.
- Just over one-quarter of people say they have started a business in the past. Another three-in-ten say they have seriously considered it.
- One-in-ten global citizens say they have started a charity or community group in the past. Another one-quarter say they have seriously considered doing so.

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CONNECTED HEALTH TRENDS 2018

Our new report charts the usage of connected health devices around the world, which prompts the question: How to move connected health into the mainstream?

A whole industry of health data devices has emerged to help people track their activity and manage their health, from wearable devices to remote monitoring devices and health apps.

The report finds:

- Around 12% of people globally use connected health devices.
- Usage rises to above 20% in China, India, and Malaysia, with 18% in Saudi Arabia and 15% in the US.
- For Chinese consumers, the main reason for using these devices is an interest in their health data. In India and US, it is to monitor and improve exercise.
- Those using connected health devices tend to be younger and more educated.
- The number of people using the devices globally has stayed around the same since 2016.

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SAUDI ARABIA TRAVELLERS REPORT

The report looks at the travel habits of Saudi Arabians, including destinations, preferences, and spending.

Key findings of the report include:

- The three most popular destinations for Saudi Arabian travellers are Egypt, UAE, and Turkey.
- While only 27% travel for business purposes, three in four travel for pleasure.
- Cost is a major factor for travellers: 'budget friendly' is the biggest factor in choosing a destination, followed by scenery, then beaches and resorts.
- Continuing this theme, 61% said they would rather fly indirectly to their destination and save money than spend more on a direct flight.
- Staying in an apartment is the most popular accommodation choice: 69% prefer this to a hotel.
- On booking methods, 61% book through a travel agent and 39% book online.

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COGNITIVE BATTLEFIELD PART II: A FRAMEWORK FOR PACKAGING INFORMATION

Ensuring consumers are left with a strongly branded memory is key for any marketer. This requires creating a message which is “sticky”.

Part I of the [Cognitive Battlefield series](#) introduced a model for effective communication strategies. It identified important themes and priorities and rank-ordered them to evaluate the favourability of an actor such as a political candidate, or an object such as a can of cola.

Now, Part II looks at how to package those priorities in a way that grabs attention and makes the message “sticky” to influence people’s attitudes.

Using examples from US political opinion research, the paper argues that strategies such as source credibility, belief confirmation, and hot cognition can be used make messages compelling.

Part III of this series will showcase the role that social media plays in shaping these strategies.

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UK VERACITY INDEX 2018: TRUST IN PROFESSIONS

The survey, which has run since 1983, shows trust is rising in relation to almost all professions, with nurses the most trusted and advertising executives the least.

The UK Veracity Index charts which professions people trust to tell them the truth.

The top three most trusted professions are nurses (96%), doctors (92%), and teachers (86%).

Advertising executives, who feature in the survey for the first time, are the least trusted, with only 16% saying they have trust in these professionals to tell the truth.

Politicians are second to bottom with only 19%, while government ministers fared slightly better with 22%.

Gideon Skinner, Research Director at Ipsos MORI, says:

“Our data shows that for many professions, public trust that they will tell the truth has actually been rising over time, both for those at the top of the scale (such as teachers and scientists) and for those nearer the bottom – such as bankers and journalists.”

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AI, AUTOMATION, AND CORPORATE REPUTATION

With AI and automation now part of the reality for many businesses, what will the social impact and reputational effects be?

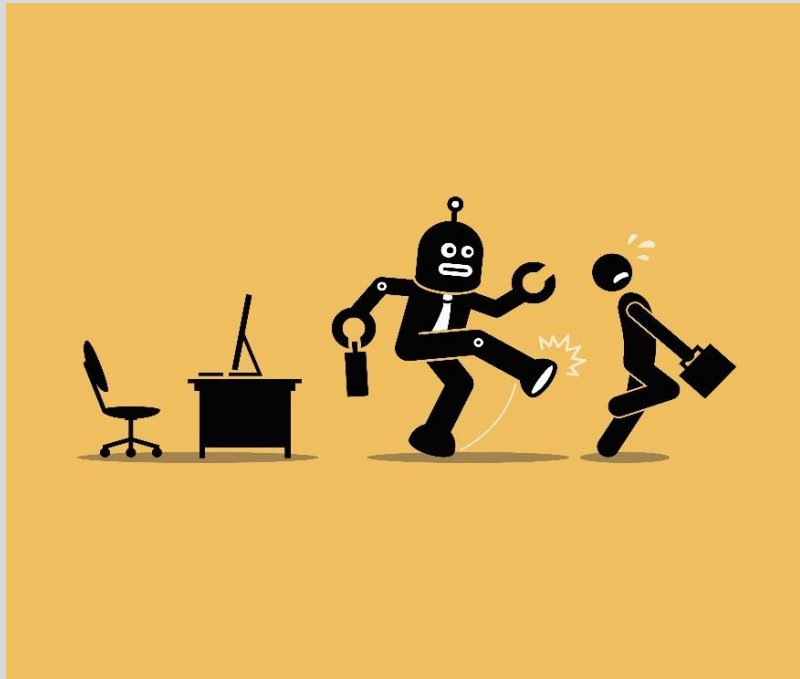
As the “Fourth Industrial Revolution” unfolds, the adoption of AI and wider applications of automation present businesses with both challenges and opportunities.

With the potential to improve productivity and reduce costs, the benefits of AI and automation for businesses are obvious – but at what cost to the labour market and society?

The paper argues that the social impact of automation makes it a crucial reputational issue for businesses.

Speaking to policy-makers and the public, our research finds that:

- British MPs are largely pro-automation: the majority believe it will have a positive impact on society, the economy, and quality of life.
- The UK public support regulation to restrict automation of work: 44% support an ‘automation tax’ and 50% support ‘human quotas’ in companies.
- However, only 24% say they are concerned about losing their job to automation, whereas 66% say they are not.



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BLACK FRIDAY: SHIFTING ITS CENTRE OF GRAVITY

Sales on Black Friday, which took place on 23 November, are growing year-on-year. But at the same time the retail event is evolving. What can we learn from the trends?

In less than 10 years, Black Friday has become a global retail phenomenon.

It is no longer a 24-hour national sprint, but a multi-day international marathon. And it is no longer a store-based event, with Cyber Monday now following on its tail as its online counter-part.

Some 64% of consumers were expected to shop online as well as in-store this year – so retailers must adapt their proposition.

The paper traces the changing retail environment and, looking at how brands are responding to these challenges and opportunities, outlines five steps to success. It concludes with thoughts on the future of Black Friday.

“The Black Friday proposition must evolve beyond being a Sales Day under strain with a mass market, scattergun approach to in-store and online offers”, writes report author Tim Denison.

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SHORTCUTS

Understanding Society: Tomorrow's business

The new Understanding Society report by Ipsos's Public Affairs Team looks at navigating the challenges currently facing UK business, especially as it faces leaving the European Union: the monthly Issues Index shows that Brexit now dominates public concern just as much as the economy did after the financial crash of 2008.

It contains 10 essays from Ipsos experts and guest authors which analyse the contemporary economic landscape in the UK and beyond, including:

- Solving the productivity puzzle
- Europe 10 years after the crash
- The move from cash to contactless
- The complex world of cyber attacks

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Oncology: disease, dynamics and complexities

According to the World Health Organization, 8.8 million people died from cancer in 2015, accounting for nearly one in six of deaths.

And the number of people with cancer is likely to surge by more than 75% across the world by 2030, with particularly sharp climbs in poorer countries.

Cancer encompasses many different diseases and there is no single cause, nor is there a single treatment protocol.

This report by The Ipsos Oncology Center of Expertise gives a detailed review of our ever-evolving understanding of the disease and its treatment, such as the revolutionary immunotherapy approach that uses the body's own immune system to fight disease.

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Flair Brazil and Flair Russia: 10 key points

Following the recent publication of the fifth Flair Brazil and the first Flair Russia last month, a summary of the 10 key things to know are now available, taken from the full reports.

Brazil: *The Sound and the Noise*

Key points include:

- Brazil is a start-up nation
- Brazil is increasingly addressing the issue of representing diversity
- Brazil is among the leading users of internet and social media.

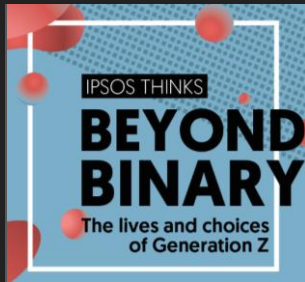
Russia: *The Time of Adjustments*

Key points include:

- Russia wants to live longer and healthier
- Russia is a country of passionate engineers
- Russia has its own digital landscape.

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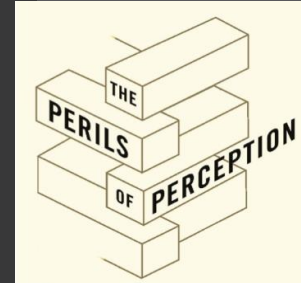
IPSOS 2018 HIGHLIGHTS: Society and Trends



GENERATION Z: BEYOND BINARY

Our enquiry into young adults born since 1995 reveals a more trusting, socially minded and less materialistic generation.

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THE PERILS OF PERCEPTION

Revealing the disparity between people's views and reality across the globe, this new book by Bobby Duffy sets out the challenges raised by our long-standing research.

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UNDERSTANDING SOCIETY: Putting people in the picture

A range of issues on economic, social and environmental impacts are explored in this report on sustainable development.

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ETHNOGRAPHY: An unfiltered view of reality

A guided tour of how ethnography can be used to investigate cultural practices, consumer behaviour and social norms.

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THE AI REVOLUTION AT WORK

People's attitudes towards how AI technology could revolutionise work are characterised by both curiosity and concern.

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FOOD AND BEVERAGE TRENDS

A round-up of Ipsos research details 10 food and beverage trends for 2018, including links to articles on natural and organic products.

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IPSOS 2018 HIGHLIGHTS: Consumer and Shopper



WORLD LUXURY TRACKING

Our annual study charts the new luxury values emerging in China, Hong Kong, South Korea, Japan and Russia, such as 'mindful hedonism'.

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GET FAIR OR FAIL

New analysis showing how businesses can deal with complaints to reduce perceptions of unfairness and ultimately enhance customer loyalty.

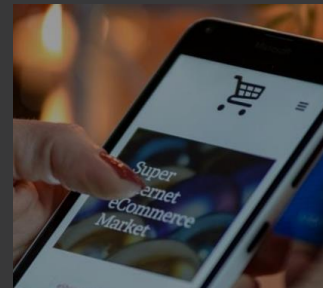
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SIX KEY AFFLUENT TRAVEL TYPES

The Ipsos Affluent Intelligence survey uncovers six types of the new 'experiential' traveller, from wellness-seekers to historians.

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E-COMMERCE IN SAUDI ARABIA

This report expects Saudi Arabia to witness growth in e-commerce due to its young and tech savvy population.

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THE EVOLUTION OF SHOPPER BEHAVIOUR

Our white paper sets out how technology and e-commerce are shaping shopper behaviour in five key ways.

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THE FUTURE OF MOBILITY

A three-part white paper series focusing on the prospects for driverless cars, electric cars, and shared mobility to fundamentally change the automotive market.

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IPSOS 2018 HIGHLIGHTS: Countries



MENA'S MILLENIALS: DECODED

The #Millenials study gives a glimpse into the lifestyles, behaviours, and attitudes of MENA's most disruptive generation.

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FLAIR BRAZIL: THE SOUND AND THE NOISE

Our in-depth country report on Brazil tunes into the diverse voices of a country at a time of social and political upheaval.

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FLAIR ITALY: IN SEARCH OF IDENTITY

Our 2018 edition of Flair Italy shows a divided and unequal country, where economic recovery has not been accompanied by social cohesion.

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FLAIR INDIA: ASPIRATION TO ACTION

Written with the view that, in 2018, the Indian economy would be the fifth largest worldwide, opening up new power dynamics.

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AFRICA'S RISING MIDDLE CLASS

Ipsos' African Lions study explores Africa's middle class: a thriving demographic that cannot be defined in 'dollar terms' alone but by attitudinal and behavioural factors.

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FLAIR INDONESIA: DEALING WITH OPPOSITES

Indonesia isn't in the spotlight enough, according to Flair 2018, which reveals many opportunities for the country.

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IPSOS 2018 HIGHLIGHTS: Politics



BEYOND POPULISM

We revisit populism and 'system is broken' sentiment in 25 countries two years after Brexit and the election of Donald Trump to see how, and in what form, it persists.

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HUMAN RIGHTS IN 2018

How universal are human rights? This survey looks at global understandings of and attitudes towards human rights in 28 countries.

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OUR AGE OF UNCERTAINTY

From a U.S. context, this report argues our world is being re-shaped by long-term cultural change and by generational replacement, rather than the vagaries of the moment.

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WHAT WORRIES THE WORLD

A white paper summarises findings from the monthly survey on the issues of greatest global concern: unemployment, corruption, poverty/inequality.

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ATTITUDES TOWARDS SOCIALIST IDEALS

A report on what people across 28 countries think about socialism in the 21st century, 200 years after the birth of Karl Marx.

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GLOBAL INCLUSIVENESS

This Global Advisor survey shows which nationalities score highest on the 'Inclusiveness Index', taking into account acceptance of religion, citizenship, sexuality, criminal activity and more.

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All the information within this *Ipsos Update* is in the public domain – so it is available to both Ipsos colleagues and clients.

Content is also regularly updated on our website and social media outlets.

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