
August 2017

IPSOS UPDATE

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

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GAME CHANGERS



WELCOME

Welcome to the August 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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GLOBAL TRENDS: LATAM briefing

Using Global Trends data, this new Latin America briefing explores socio-political and economic trends – covering themes such as work and the future – to provide a unique snapshot of the region.

MYSTERY SHOPPING: Seven Steps to Success

This new white paper guides us through how to design a 'smarter' mystery shopping programme, helping to drive more impactful results and create organisational behaviour change.

CANADA'S 150th BIRTHDAY: Special report

We examine perceptions and attitudes on Canadian progress, culture, identity, the monarchy, race and immigration in this report marking the country's 150th birthday celebrations.

WHEN TRUST FALLS DOWN: Brands and advertising face challenging times

In this white paper, we discover how attitudes in Britain that led to Brexit and the General Election result have impacted society more widely, and what this means for trust in brands and advertising.

SOCIAL INTELLIGENCE: A Sharper Vision of Your Brand and Category

This new thought piece looks at how to build market structure maps, showing how using social intelligence is an ideal way to develop our understanding of a particular market.

ROBO-ADVISORS: The Rise of Automated Financial Advice

A new Point of View using recent research and analysis to explore the impact of robo-advisors – a new type of digital advisory service that debuted on the scene over five years ago.

GLOBAL @DVISOR: Consumer confidence is on the rise

July 2017's global Primary Index score – reflecting public attitudes across 24 countries – finds China, India and Sweden displaying the highest levels of consumer optimism.

ASEAN HEALTHCARE: Identifying opportunities

Improving economic development across the Association of Southeast Asian Nations (ASEAN) is driving the healthcare industry's development, and the strong growth potential continues to attract attention from global businesses.



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GLOBAL TRENDS

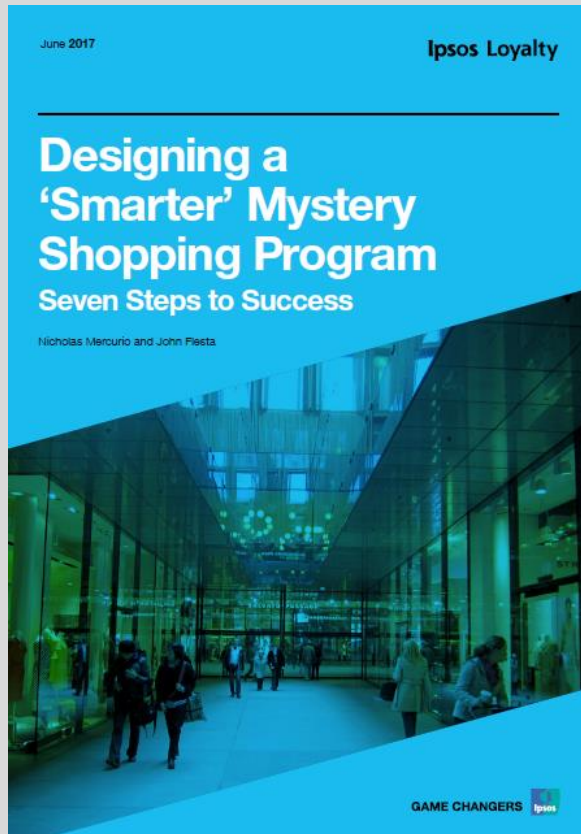
LATAM Briefing

Using [Ipsos Global Trends](#) data, this new Latin America briefing explores socio-political and economic trends to provide a unique snapshot of the region.

It was presented by Alfredo Torres, Executive President of Ipsos Peru, at a recent Canning House event in London and covers work, the future, the world and society.

Highlights include:

- Support for globalisation is greater in Latin America – 64% say it's a good thing – than in the developed world (46%).
- Latin Americans tend to be critical of the quality of their public services. Just 14% say they are satisfied, compared to 30% of citizens globally.
- Career success is valued highly by Latin Americans, with 57% believing that fulfilment in life is achieved by reaching a prominent career position (compared to 38% of the developed world).
- Faith is more important in developing countries. 66% of Latin Americans state that religion/faith is very important, whereas in developed countries it is 39%.

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MYSTERY SHOPPING

Seven Steps to Success

Countless research studies show that brands which put the customer first and deliver a superior experience relative to their competition, achieve greater customer loyalty, higher profits and better returns for shareholders.

In the current age of customer-centricity, consistently delivering a positive customer experience has never been more critical – or more challenging.

In this new white paper, we propose seven steps to success:

1. Start with strategy
2. Design with your customer in mind
3. Define shopper and shop requirements
4. Design a sound survey instrument
5. Create realistic shopper scenarios and thorough briefing materials
6. Formulate a smart and strategic sampling plan
7. Design your analytical plan

Following these steps will help improve the design and operational execution of your mystery shopping programme, but will also drive more impactful results and help create true behaviour change across your organisation.

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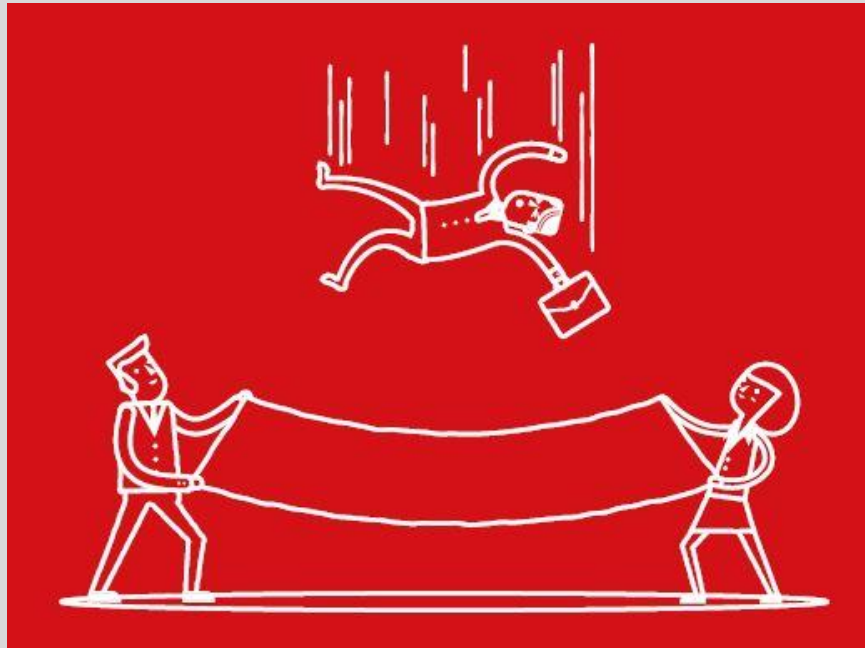
CANADA'S 150th BIRTHDAY

A special report examining Canadian perceptions on progress, culture, identity, the monarchy, race and immigration

This year, Canada celebrates its 150th birthday. While half (51%) of Canadians feel there's no better time than now to celebrate, excitement is muted compared to how they felt about celebrating the 125th anniversary in 1992 (-21 pts).

This special report marking the occasion also explores:

- **Canadian culture:** 39% of Canadians picked nature and landscape as the best thing about their country. 23% say it's the people and diversity, while 17% say it's Canadian values.
- **Progress in 25 years:** Canadians see the greatest progress on gender equality, Canada's image in the world, and environmental protection. Issues seen as having worsened include political leadership, responsiveness of government, and the quality of infrastructure.
- **Immigration:** While eight in ten believe Canada is a welcoming place to newcomers, many express concerns about immigration, including that it places a strain on public services (53%) and the job market (36%).



WHEN TRUST FALLS DOWN

How brands got here and what they need to do about it

In this white paper, we look at how the attitudes in Britain that led to Brexit and the General Election result have impacted society more widely.

The misjudgement of the public by politicians and commentators has caused the world of marketing and advertising to ask itself some searching questions. If the current political landscape points towards a rejection of the 'Establishment' by those who feel left behind by the London metropolitan elite, then what does this mean for trust in brands and advertising?

Findings include:

- **Brands and advertising face challenging times** ahead as 42% of people claim to distrust brands and 69% say they distrust advertising.
- **Brands are out of touch** as people don't perceive their own lives to be represented in advertising, particularly life outside of London.
- **Advertising is not as connected to popular culture as it was** with 48% of adults agreeing that they don't talk about adverts as much as they used to.

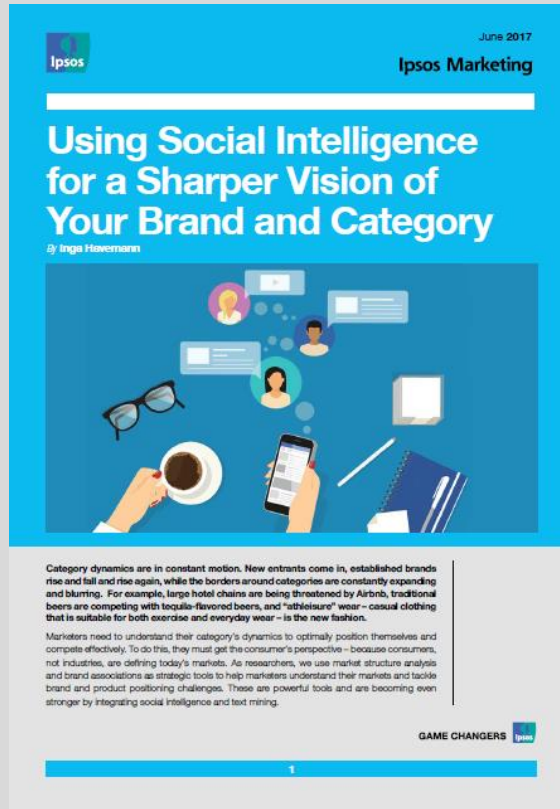
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SOCIAL INTELLIGENCE

A Sharper Vision of Your Brand and Category

Marketers need to understand their category's dynamics to optimally position themselves and compete effectively. To do this, they must get the consumer's perspective – because it is consumers, not industries, who are defining today's markets.

In this thought piece, Inga Havemann looks at building market structure maps, using an automotive sector case study on the emissions scandal of 2015. Negative events can erupt – often quite suddenly – that impact how consumers view the brand, competitive brands, and how the category is defined.

Using social intelligence is an ideal means for developing market structures in particular, and has clear advantages over relying solely on traditional survey approaches:

- **On-demand:** Social intelligence can be done anytime and anywhere.
- **Broad scope:** Up to 60 brands can be examined at a time.
- **Fully flexible:** Social intelligence lets you zoom in or zoom out of a market or competitive set.
- **Time period analysis:** You have the ability to understand trends or the impact of specific events.



Robo-advisors: the rise of automated financial advice

Has digital disruption in the financial industry created a win-win-win scenario for consumers, financial service companies and upstart FinTech companies? Or can the existing market dynamics support the growth everyone is banking on?



POINT OF VIEW

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ROBO-ADVISORS

The rise of automated financial advice

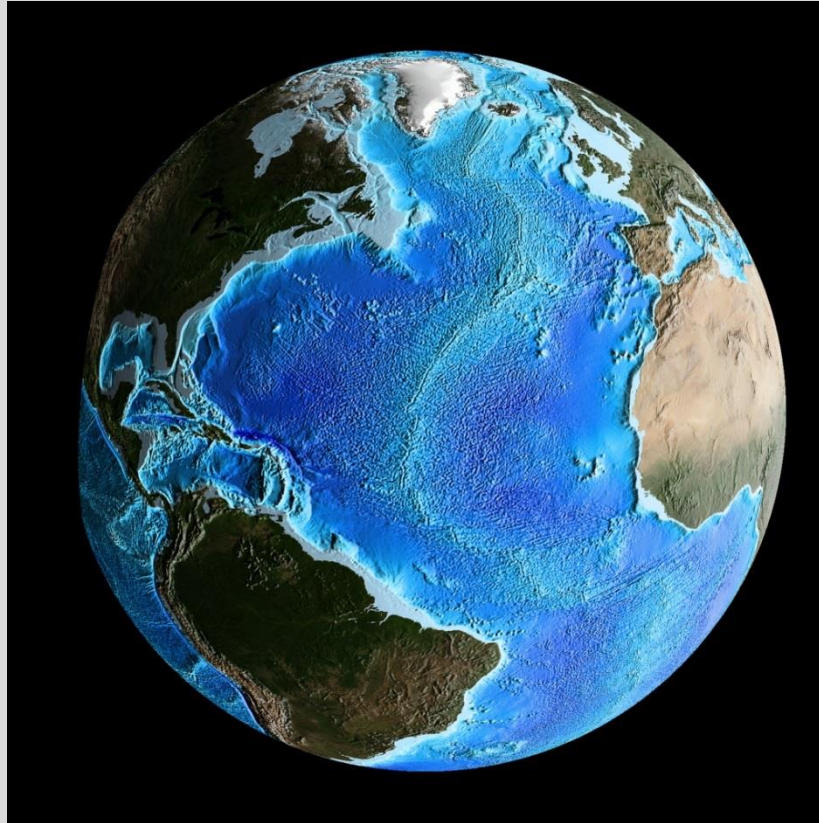
Has digital disruption in the financial industry created a win-win-win scenario for consumers, financial service companies and upstart FinTech companies? Or can the existing market dynamics support the growth everyone is banking on?

This Ipsos Marketing Point of View uses recent research and analysis to explore the impact of robo-advisors – a new type of digital advisory service that arrived on the scene over five years ago.

Broadly defined, robo-advisors are automated portfolio management services that act with little or no direct human intervention, providing services at costs lower than those provided by financial advisors.

Both affluent investors and new millennial savers have shown significant interest, and it is likely that more corporate employees across age groups will use them in company savings plans.

The paper explores how robo-advisors are currently impacting the market and the future outlook, including the potential challenges.

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GLOBAL @DVISOR

Consumer confidence is on the rise

Reflecting attitudes of consumers across 24 countries, July's global **Primary Index** score of 48.7 shows a three-month gain of 1.2 points.

Countries with the highest Primary Index scores are China (67.1), India (66.3) and Sweden (62.1), while the lowest scores are from Italy (37.0), South Africa (38.1), and Brazil (38.6).

In addition, the subset indices are all up globally over the past three months:

- The **Jobs Index** (reflecting perceptions of job security) is up 1.1 points to 56.3. The largest point gains are France (+4.0), the U.S. (+3.7) and Turkey (+2.7). Only South Africa (-2.4) and Great Britain (-1.5) show notable losses.
- The **Expectations Index** (reflecting economic expectations) score of 57.7 is up 0.7 points. India (73.4) and China (71.1) have the highest scores, while South Africa (46.1) and Turkey (48.3) have the lowest.
- The **Investment Index** (reflecting perceptions of the investment climate) shows a gain of 1.1 points to 42.1. Eight countries record gains of 1.5 points or more, with the largest ones in South Korea (+8.3), France (+4.2), and Poland (+3.4).



ASEAN HEALTHCARE

Identifying Opportunities within ASEAN Universal Healthcare Programmes

The strong growth potential of emerging economies, such as those within the Association of Southeast Asian Nations (ASEAN), continues to attract attention from global businesses.

Combined, the 10 member states – Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, the Philippines, Singapore, Thailand and Vietnam – account for almost 9% of the global population.

This Ipsos Business Consulting paper examines the improving economic development across ASEAN that is driving the healthcare industry's development. For example, Singapore, Thailand and Malaysia have all benefited from the rise of global medical tourism which supports quality healthcare facilities, medical professionals, hospitality and related services.

Key takeaways:

- Clear market segmentation is crucial
- Regional disparity affects patient outcomes
- Partnership with industry stakeholders is critical for understanding the evolving market landscape
- Expanding healthcare market will increase competition

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SHORT CUTS

The Belonging Brief

In this episode of *The Belonging Brief* podcast, Christie Moorman, Vice President of Ipsos SMX, discusses a new global study examining how technology influences human connectedness.

For two weeks, approximately 200 citizens in Brazil, Russia, India, China, Germany and the U.S. were engaged in a pop-up community to explore the universal need for belonging and its culturally diverse aspects, to ultimately learn if and how brands and belonging intersect.

Christie says: "The work that we're doing together on belonging has been incredibly meaningful and culturally relevant, discussing topics like belonging, alienation and trust – and it's leading us on a path of new insight and discovery."

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Brazil Pulse

95% of Brazilians now believe that the country is headed in the wrong direction and 84% consider Michel Temer's administration bad or very bad, demonstrating that the feelings of hopelessness, worry and outrage about the future of Brazil remain at concerning levels among its citizens.

In addition, the 'Barômetro Político' (Political Barometer), who in June evaluated 32 personalities with electoral potential, has shown an increase in disapproval towards all of them. This phenomenon comes alongside the growing distrust with the political class as a whole, as well as with parties, institutions, sectors of the economy and large companies.

This scenario of political instability and economic crisis continues to affect consumer confidence and buying habits in Brazil, according to the latest *Brazil Pulse* report.

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Top Cities

The 2017 edition of the Ipsos *Top Cities Index* finds that New York is the most popular city worldwide, retaining the title it claimed when the survey was first run in 2013.

People in 26 countries worldwide were asked which, from a list of 60 global cities, they felt were best to live in, do business in, and visit. Highlights include:

- New York is the most popular city to do business in (23%), followed by Abu Dhabi (21%), London and Hong Kong (both on 16%), and Tokyo (15%).
- Paris is seen as the best city to visit; 21% say it is one of the best destinations for tourism. Rome is second (20%), overtaking New York (16%).
- Zurich is the top destination to live in (18%), narrowly ahead of Sydney (17%).

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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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