
November 2017

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 November 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 FUTURE OF MOBILITY: On the road to driverless cars

This new white paper investigates global consumer attitudes towards the prospect of fully automated cars, including their concerns for the future.

SUGAR: WHAT NEXT? The world's growing obesity crisis

Putting the spotlight onto the world's impending obesity problem, this report looks at public and legislator views towards sugar, and its future control.

PATH TO PURCHASE: Are you leveraging P2P as a path to growth?

This paper defines a clear framework of the path to purchase and sets out how marketers and retailers can develop a successful strategy.

BREAKING THE STEREOTYPE: Women in advertising in developing markets

Drawing on different ad campaign examples, this thought piece explores how advertisers can shape the way people traditionally think about women.

VIRTUAL REALITY: Hype or the future?

VR has been around for at least a decade but has not yet hit mass adoption. This new white paper explores why, and looks at what the future holds.

WHAT WORRIES THE WORLD: Majority think their country is on the "wrong track"

Citizens of South Africa, Italy, Brazil and Mexico are most concerned with the direction their country is heading, according to new Global @dvisor data.

PUBLIC PERSPECTIVES - CANADA NEXT: A wave of change is coming

This new report explores attitudes in Canada towards technology, the economy, governments, businesses, their communities and their lives.

DEVICE AGNOSTIC: What marketers need to know

Device agnostic surveys are becoming the research reality. Two new white papers show how marketers can adapt to stay connected to consumers.

CYBERCRIME: The cybercrime threat to corporate reputation

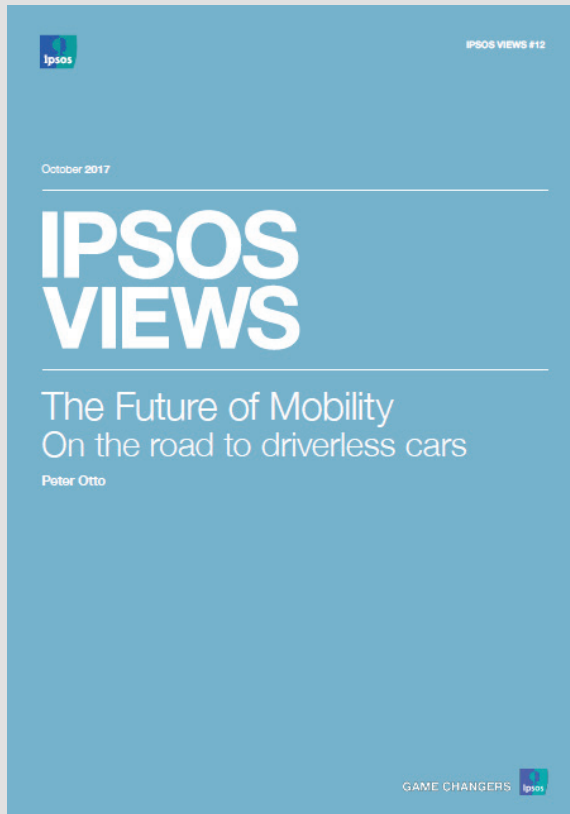
High profile attacks have brought cybercrime to the forefront of corporate minds recently. This paper investigates the threat to company reputation.

SMARTIFICIAL INTELLIGENCE: Who comes out on top: man, or machine?

This thought piece weighs up the potential and limitations of artificial intelligence to establish whether technology still needs a human touch.

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THE FUTURE OF MOBILITY

At a time when technology has the potential to change the way we travel, this new white paper looks at global consumer attitudes towards the prospect of fully automated cars.

The survey on which the paper is based reveals that:

- People believe that tech companies such as Google and Apple will lead the way ahead of some (but not all) traditional car manufacturers.
- People in Asia are more willing to be driven by a fully automated car than they are to let the car park itself.
- In Asia, people are twice as likely to anticipate taking a nap in the vehicle than their European counterparts.
- Under 35s and those in big cities are more likely to be interested in new technological features than those over the age of 50.

As well as detailing some of the specific technological advances in 'disruptive driving' – the term 'disruptive' is used to describe something which changes the way people use something – this paper investigates attitudes by region and age group, including concerns around issues such as data protection and privacy.

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SUGAR: WHAT NEXT?

Putting the spotlight onto the world's growing obesity crisis, this new report looks at public and legislators' attitudes towards sugar, and its future control.

The coming years are a critical period for us to address the impending obesity crisis – 30% of the global population is now overweight or obese, a figure which rises close to 60% in the developed world.

There are many complex factors driving obesity levels, including a number of different elements of diet and physical activity. But sugar has received a huge share of attention, potentially because (compared with other elements of the diet) it's a component which can be more easily targeted in what we consume.

This report outlines the context and challenges around reducing sugar consumption and provides a framework for intervention. It explores where the responsibility for healthy eating lies and, with only 17% of people globally able to accurately estimate the amount of sugar in a can of soft drink, questions whether the public are placed to take responsibility. Or should the government policy makers, retailers and manufactures be held accountable?

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ARE YOU LEVERAGING YOUR PATH TO PURCHASE AS A PATH TO GROWTH?

Technology has created an omnichannel world, bringing together physical and digital shopping experiences that influence consumers' brand opinions and buying behaviours.

Marketers are scrambling with how to deal with this new reality – and there's often a lack of insight on how the paths to purchase are influencing sales and how they can be leveraged to drive business growth.

This new paper provides an understanding of today's opportunities, including the four path to purchase stages:

- Stage 1: The path starts with a purchase trigger. At the time of the trigger, the consumer may already have brand preferences (pre-trigger brand preferences).
- Stage 2: The consumer may (though not necessarily) actively start exploring and evaluating options.
- Stage 3: The consumer transforms into a 'shopper' and makes his/her final choice at the point of sale.
- Stage 4: Purchase is followed by the actual product experience, in turn impacting mental networks that shape brand preferences for the next purchase.

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BREAKING THE STEREOTYPE

Empowering women in advertising in developing markets.

Traditionally, in many developing markets in particular, stereotypes were used to portray women. Most advertisements were centred around activities performed by women at home to make the family happy.

This thought piece points out that, while stereotypes are a reality in society, nearly half of women surveyed agree that TV commercials show too many outdated gender stereotypes.

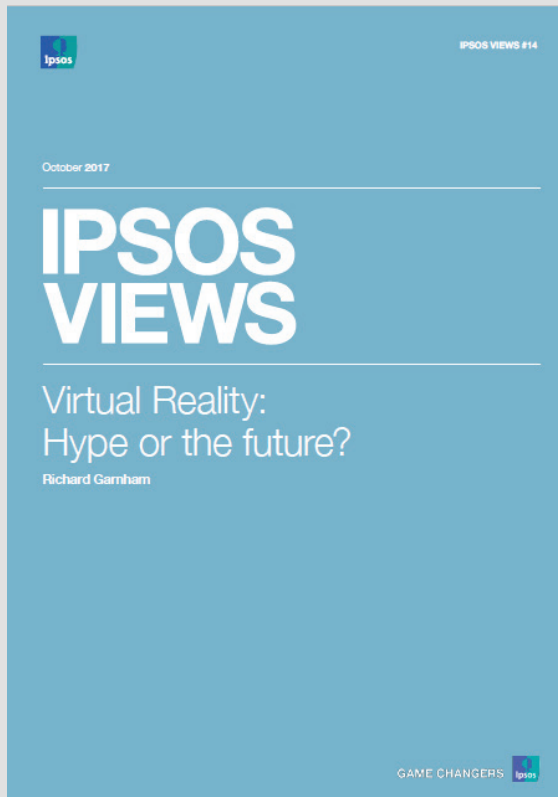
Fortunately, some of the old stereotypes are giving way to new approaches to advertising in developing markets. Ariel launched their “Is laundry only a woman’s job?” campaign, which challenges the typical stereotype that was predominant for years. This was followed by their *Cannes Lions* winning “Share the Load” campaign, which not only achieved results for the brand, but also led to a broader cultural change in behaviour.

By looking at a variety of ad campaigns featuring women, this thought piece explores what works, what doesn’t, and how advertisers can shape the way people traditionally think of women in advertising.

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VIRTUAL REALITY: HYPE OR FUTURE?

Virtual Reality (VR) has been around for at least a decade but has not yet hit mass adoption. This new white paper explores why, and what the future holds.

You could say VR technology has gone from sci-fi to sci-fact over the past decade. However, it's still seen as a "new" technology and has not hit mass adoption; has something gone wrong? Key takeaways from the paper include:

- Opportunities already exist within the research industry from shopper immersions to testing VR content for broadcasting.
- Multi-sensory testing is going to be an integral part of VR and AR and the researcher's goal of getting closer to the ultimate consumer understanding.
- It's providing the foundation for other technology developments such as Artificial Intelligence, the Internet of Things, and even 3D modelling.
- We're only at the beginning of this journey and, as the technology develops, there should be further cost savings as the software/computer generated imagery (CGI) will become more cost efficient and better.

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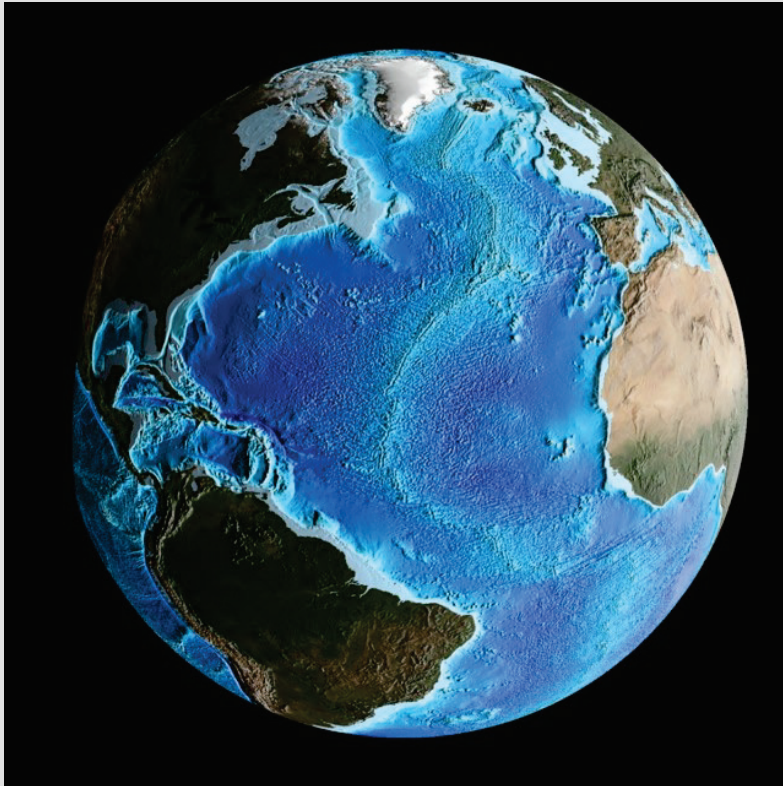
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WHAT WORRIES THE WORLD

New data shows unemployment remains the top concern for citizens worldwide.

The majority of people think that their country is on the “wrong track”, with citizens of South Africa, Italy, Brazil and Mexico being the most concerned, according to the latest *Global @dvisor* survey across 26 countries. At the other end of the ‘worry spectrum’, Argentina and Poland have seen the biggest increase in optimism.

The three major worries for global citizens all remain consistent with the previous month:

- Unemployment is still the primary global worry, with the highest levels of concern in Italy (65%) and Spain (62%). Reflecting previous months, Germany is the least concerned, with only 12% citing unemployment as a worry, followed by Israel (14%) and Britain (15%).
- Financial/political corruption follows, with South Africans most concerned (66%). Germany is now the country least concerned at 7%, now falling behind Sweden (9%).
- Poverty/social inequality is the third most common worry, with the highest level of concern in Serbia (56%) and Russia (53%), and the lowest level in the US (18%).

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PUBLIC PERSPECTIVES



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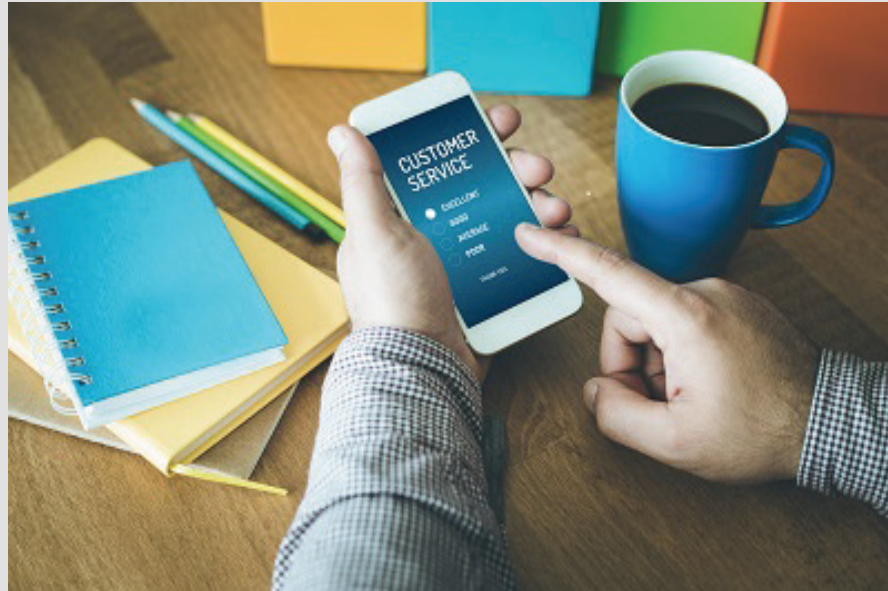
PUBLIC PERSPECTIVES - CANADA NEXT

Driven by demographic shifts and technology advancements, a wave of change is happening across Canada.

This new report explores how Canadians feel about the changes happening in the economy, government, businesses, their communities and their lives.

Key findings include:

- 50% of Canadians expect their overall quality of life to get better over the next 10 years, while 30% believe it will stay the same and 20% say it will get worse.
- On the subject of technology, 70% of Canadians think that the world is changing too fast, while 60% think that law and government policies are not keeping pace with the changes in technology.
- On the future economy, 28% agree that in the next 10 years paper money and coins won't exist anymore, while 76% agree there will be about half as many retail stores as at present.
- On changes in the labour market, 52% believe that more people will be performing completely new jobs every five years.



DEVICE AGNOSTIC

Device agnostic is the new research reality, and marketers must adapt quickly to stay connected to consumers.

Today, over half of the global population use smartphones – a number predicted to rise to 70% in 2021. There is no doubt that allowing respondents to take surveys on smartphones represents a critical tipping point for our industry.

In these two white papers, we explore how device agnostic is transforming the way we do research:

1. Why You Need to Transform Now

Migrating to device agnostic is not just about using a new technical platform; it requires a new way of thinking about research. This revised version of our 2016 *Ipsos Views* paper looks at how we can adapt traditional surveys, and why developing shorter, sharper, more refined questionnaires will ultimately improve the quality of consumer insights.

2. A Researcher's Guide

Drawing on recent Research on Research (RoR), this paper explores the trade-offs associated with length of surveys on mobile. What is “too long”? Are there lengths that are simply not sustainable/appropriate? Based on the RoR findings, it suggests 20 minutes should be the maximum limit, and represents a good compromise across all measures, without sacrificing quality.

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CYBERCRIME

With a number of high profile attacks bringing cybercrime to the forefront of corporate minds, this white paper investigates the threat to company reputation.

Anyone who regularly reads the news would be forgiven for thinking that cybercrime was endemic across the world at the moment. Scarcely a week goes by without a new story and, while many of them are newsworthy for only a short time, as these attacks increase in number so does the frequency with which they become genuine headline news.

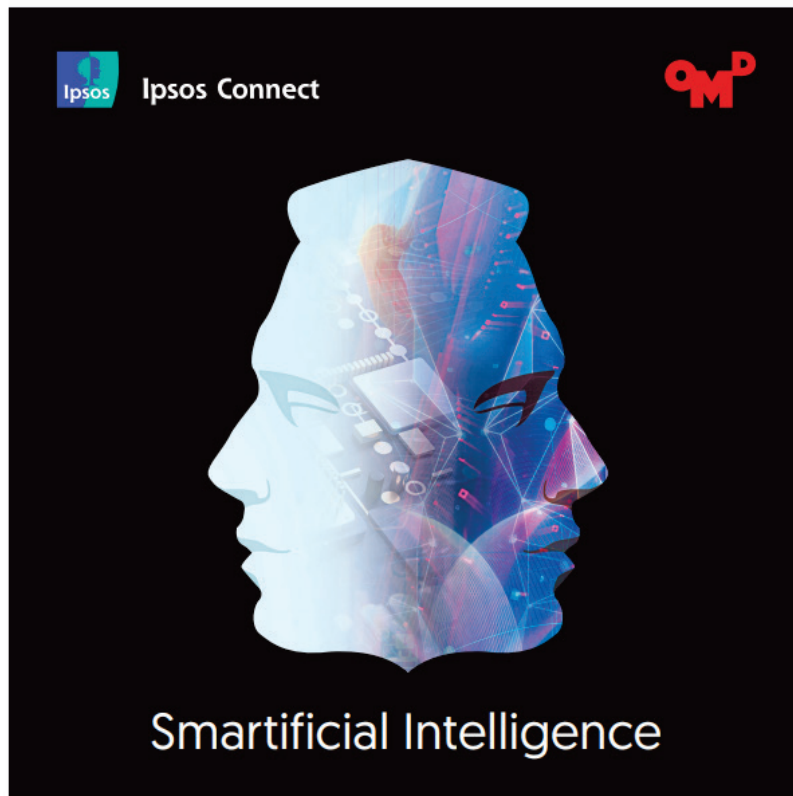
While the short-term impact of these events are usually identifiable, be they a denial of service, the theft of data, the loss of assets or just simple embarrassment, the longer term impact is harder to quantify. For many people, both in business and in politics, the true threat of cybercrime is one's reputation.

In this new white paper, we investigate the scale of the threat, the potential damage to corporate reputation, how high a priority stakeholders consider cyber security, and what businesses are doing – and in many cases not doing – to address the problem.

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SMARTIFICIAL INTELLIGENCE

In the age of artificial intelligence, who comes out on top in the fight for optimisation: man, or machine?

Artificial intelligence (AI) is defined as the theory and development of computer systems able to perform tasks that typically require human intelligence; machines that mimic people. But, as humanity has always been the benchmark for AI, have we reached the stage where the student becomes the master and the machines surpass their creators?

This thought piece investigates the relationship between AI and the commercial universe in key situations: home voice assistants, advertising, content optimisation, and content personalisation.

Through exploring these areas, we weigh up the potential and limitations of AI to establish whether the technology still needs a human touch.

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SHORT CUTS

Leveraging the Irrational

Behavioural Science is a hot topic in our industry, and it's providing new insight into how people *really* make decisions.

The fact is, real people don't always behave rationally. While we make thoughtful decisions about some things, we make *fast or emotional decisions* even more. And, we don't always do what we say and say what we do. But it's not always clear how to apply this new knowledge to market research – what should researchers and brands do differently to get to previously hidden insights? And how can brands more effectively market to people based on this new knowledge?

This webinar and presentation sets out how to incorporate behavioural science into your next project – from design, to analysis, to activation.

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Linkage Analysis: Data's Hidden Stories

In the age of big data, there never seems to be a shortage of stats and figures. Linkage analysis combines survey data with a client's in-house statistics to create richer insights. In this thought piece, we investigate how the process works, including highlighting the following key benefits:

- Every data set has a hidden story and, rather than delivering raw data that provides few tangible insights, linkage analysis allows us to create a narrative from the data.
- The data is then interpreted to deliver tailored and actionable insights to our clients.
- Predictive modelling allows us to find the optimum moment between factors.
- These statistical processes enable research clients to focus on the areas that have the greatest impact on business performance, and offer the best return on investment.

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Global Business Influencers survey

Global Business Influencers (GBI) are a niche group representing less than 1% of the population, and are seen as the driving force behind business and investment decisions globally, leading their companies into a future where disruption is becoming the norm and technology is at the top of the agenda for many.

The GBI 2017 survey, spanning 17 countries, finds technology to be the underlining issue effecting the group. Keen to be at the cutting edge of new developments, these senior business people have an interest in developing platforms such as virtual reality and artificial intelligence, and the majority consider IT infrastructure and cyber security to be a top priority.

Individual GBI presentations for Europe, USA and Asia are available.

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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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