



October 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 October 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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GAME CHANGERS



ARTIFICIAL INTELLIGENCE: Are consumers ready?

This new report examines Australian perceptions of Artificial Intelligence (AI), finding that most people understand little about the range of technologies that fall under the AI banner and are unsure whether to be afraid or hopeful.

INTERNATIONAL DEVELOPMENT: Global understanding of progress

Most people in developed nations have little knowledge about the level of progress towards international development goals, including how much their governments spend on development aid, according to a new 28-country study.

CHINESE INTERNATIONAL TRAVEL MONITOR: Mainland Chinese traveller habits

Taking into consideration the growing affluence of Chinese citizens, along with the relaxing of visa restrictions, this special report takes a comprehensive look at the impact on global travel by mainland Chinese travellers.

IMMIGRATION AND REFUGEE CRISIS: Global study reveals a feeling of unease

New data from the *Global @dvisor* study across 25 countries reveals people's unease towards immigration and refugees, with only one in five believing that immigration has had a positive effect on their country.

THE MILLENNIAL BUG: Public attitudes on generational living standards

Exploring British public attitudes on the living standards of different generations, this new report finds widespread concern across society about young people's prospects.

SOUTH AFRICAN PERCEPTIONS OF WOMEN: Poll uncovers recent improvements

In a positive step for gender equality, findings from a new poll have uncovered small but significant improvements over the past two years in the overall perceptions of women in South Africa.

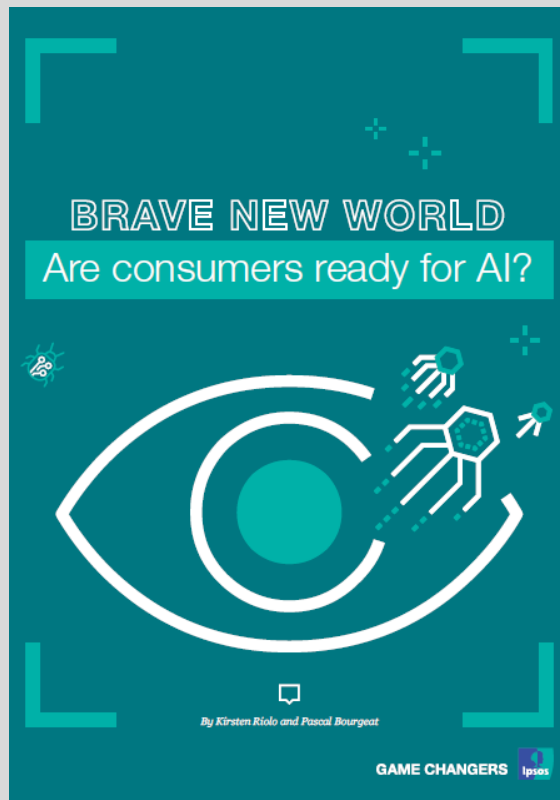
SPOTLIGHT ON AMERICA: What makes a "real American"?

People who believe in free speech top the list of characteristics of a "real American", followed by caring about the welfare of all Americans equally, according to a new comprehensive study from the US team.

PASSIVE PERCEPTIONS: Understanding how passive measurements work

Focusing on the usage of smartphones and tablets, this new thought piece uncovers how passive measurement works, including the key benefits of the technique.





ARTIFICIAL INTELLIGENCE

This new report explores how much consumers understand about Artificial Intelligence (AI) and its potential role in the future.

Barely a week goes by, it seems, without a provocative and usually fear-inducing media headline about AI and its potential to reshape the world as we know it.

To explore perceptions, this survey of more than 1,000 Australians reveals that most people understand little about the range of technologies that fall under the AI banner and are unsure whether to be afraid or hopeful.

On the one hand, just under half (48%) feel optimistic about the future of technology and the same proportion (48%) are looking to technology to help solve some of the world's biggest problems in the future. However, at the same time, 46% are afraid of technology taking over in the future and just over half (54%) believe that we already rely too much on technology.

In addition to the research findings, the report outlines the thoughts of Ipsos' APAC Director, Dr Pascal Bourgeat. In his piece, 'Hello to the Age of Cognition,' AI is explored through the lens of Behavioural Science and sets the scene for what AI really can do.

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INTERNATIONAL DEVELOPMENT

Most people in developed nations have little knowledge about the level of progress towards international development goals, according to a new 28-country study.

Ipsos partnered with the *Gates Foundation* to explore public awareness of, and perceptions towards, the global progress made battling poverty, immunisations, infant mortality and other public health issues.

Key findings include:

- Most citizens in donor countries believe that living conditions in the developing world are worsening. However, the majority of data actually shows marked progress towards meeting development goals.
- Few people in donor countries expect the quality of economic opportunities, health, or education in the world's poorest countries to improve over the next 15 years.
- Those in developed countries (significantly) overestimate the amount of money their governments spend on development aid.

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CHINESE INTERNATIONAL TRAVEL MONITOR

The *Hotels.com* Chinese International Travel Monitor takes a comprehensive look at the impact on global travel by mainland Chinese travellers.

Along with the growing affluence of Chinese citizens, the relaxing of visa restrictions around the world has helped encourage more Chinese international travel.

This report is based on research involving both Chinese international travellers and hoteliers around the world and includes detailed information about spending patterns, travel preferences, accommodation choices and future plans.

Highlights include:

- Over 10 million Chinese travellers visited Europe in 2016.
- Spending on travel increased across all age groups last year, but particularly for those born after the 1970s, who spent 7% more on average.
- Overall, Chinese travellers spent 28% of their income on international travel in 2016, with “90s millennials” the biggest spenders across the age groups.

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GLOBAL VIEWS ON IMMIGRATION AND THE REFUGEE CRISIS

New data from *Global @dvisor* reveals unease in public attitudes towards immigration and refugees.

Key findings include:

- Three in four people around the world believe that immigration has increased in their country over the last five years.
- Only one in five (21%) on average say that immigration has had a positive effect on their country, compared with two in five (42%) who believe it has had a negative impact.
- Half (48%) of respondents think that there are too many immigrants in their country. Turkey has the highest number of people who think this (83%), followed by Italy (66%), South Africa (62%), and Russia (62%).
- Only 43% of respondents are confident that refugees coming to their country will successfully integrate into their country, with Serbia (70%) and Peru (65%) being most confident.

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THE MILLENNIAL BUG

Examining public attitudes on the living standards of different generations, this report finds widespread concern across society about young people's prospects.

Britons across all age groups no longer believe that young people today will have a better life than their parents, with pessimism strongest among graduates and high earners.

Overall, people are more than twice as likely to say that young people today will have a worse standard of life compared to their parents (48%) than a better standard of life (23%). There has been a sharp turnaround in views compared to 15 years ago, as the proportion of people who think their children will have a better life than them has halved.

One in three millennials (33%) agree that they would prefer to have grown up when their parents were children. In contrast, just 15 per cent of Baby Boomers and Generation X said they'd prefer to be a young person growing up today.

The report is based on research for the *Resolution Foundation*, who say that tackling the challenges of living standards that lie behind this widespread anxiety about the direction of Britain for young people is a central task of politics today.



SOUTH AFRICAN PERCEPTIONS OF WOMEN

In a positive step for gender equality, findings from a new poll have uncovered recent improvements in the overall perceptions of women in South Africa.

Tracking the views of both men and women, the poll also explores the efficiency of government efforts in the fight for gender equality. Looking at the results over the past two years, we can see a small but significant progression in people's attitudes.

Findings include:

- 22% of adult South Africans think that men make better political leaders than women do – in contrast to over a third (36%) in 2015.
- One in five (21%) people believe that when jobs are scarce, men should have more rights to jobs than women – compared with 28% in 2015.
- 20% think that a woman's place is in the house – a change from 24% in 2015.
- 18% believe that a boy has more rights to education than a girl – in comparison to 21% who felt that way in 2015.

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SPOTLIGHT ON AMERICA

What makes a “real American”?

People who believe in free speech top the list of characteristics of a “real American”, according to a comprehensive study from the US team.

Americans ranked items on whether or not they represented a “real American”, with the most popular answers being; believing in free speech (91%), caring about the welfare of all Americans equally (88%) and George Washington (88%).

At the opposite end of the spectrum, burning the flag came last on the list (13%), followed by sympathising with the Alt-Right movement (21%) and having extreme political views (32%).

Political affiliation has an impact on attitudes, with 92% of Republicans considering themselves a “real American”, compared to only 82% of Democrats.

America and North Korea

A separate poll revealed the majority of Americans don't understand the presidential procedure for a nuclear strike. Respondents were asked how much they know about North Korea and their nuclear capabilities. Aside from geography (57% were able to identify North Korea on a map of Asia), they struggled generally with the detail in the questions.

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PASSIVE PERCEPTIONS

Focusing on the usage of smartphones and tablets, this new thought piece from Ipsos Connect uncovers how passive measurement works and the key benefits to this technique.

In the context of IPA's *TouchPoints Daily Life Survey*, Passive Perceptions explores how the combination of passively captured data, along with diary and questionnaire data, can lead to richer insights into participants' daily lives.

Key findings:

- People in the UK spend an average of 104 minutes a day using apps and websites via smartphone, compared to 61 minutes via tablet.
- App usage is nearly twice as high on smartphones than tablets.
- Smartphones tend to have more apps than tablets.
- 60% of time online is spent across social, games, email, and media.
- Instagram continues to grow, despite the plateau of other social media sites.
- Bespoke surveys which combine passive with additional data achieve better results.



SHORT CUTS

Category trends in the age of the consumer

Staying ahead of trends in today's rapidly shifting landscape is more important and complex than ever before. In an age where ideas and influence can spread quickly, we need to better equip ourselves with the category understanding and depth of knowledge that's essential to success.

This new presentation presents recent examples of leveraging behavioural, search and social conversation data to validate key consumer trends and qualitative insights in the CPG and automotive categories.

Topics explored include the key challenges and opportunities associated with tracking trends in the age of the consumer, and how we can more effectively close the gap between macro trends and category realities to identify and explore the trends that truly matter.

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Storytelling for action

Are you putting meaning into the stories you tell? In this article for *MarketingLand*, Ipsos' Peter Minnium sets out why ads that "capture the movement" of a fully developed story are the ones that will compel the consumer to buy. He says:

"Many unsuccessful ads are likely crafted by marketers who think they are telling a story. Some may have started to, but by failing to tell it completely, they were unable to effectively bridge the gap between interest and action..."

"We use stories to explain to each other who we are, to urge people to change, and to articulate the importance of a thought... Successful ads confirm what human beings have known for thousands of years: the movement captured in a complete story is the best way to engage an audience and communicate an idea that results in action."

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Technologies that will change the world

Tech elites are more likely than the general population to believe that new technologies will change the way in which humans experience the world, and that they'll have an impact sooner, according to a new survey.

The tech elite definition includes being over 25 years old, having an income of \$75,000+, holding a college degree or higher, and currently employed in the tech industry.

Both tech elites and the general population believe that machine intelligence and autonomous vehicles are most likely to create change. Private sector investments, rather than government investments, were seen by both sets of respondents as more likely to encourage technological advancements.

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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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