
December 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 December edition of *Ipsos Update* – our round-up of the latest research and thinking from Ipsos teams around the world. To mark the end of the year, this month's edition includes a special section showcasing some of our highlights from 2017.

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.

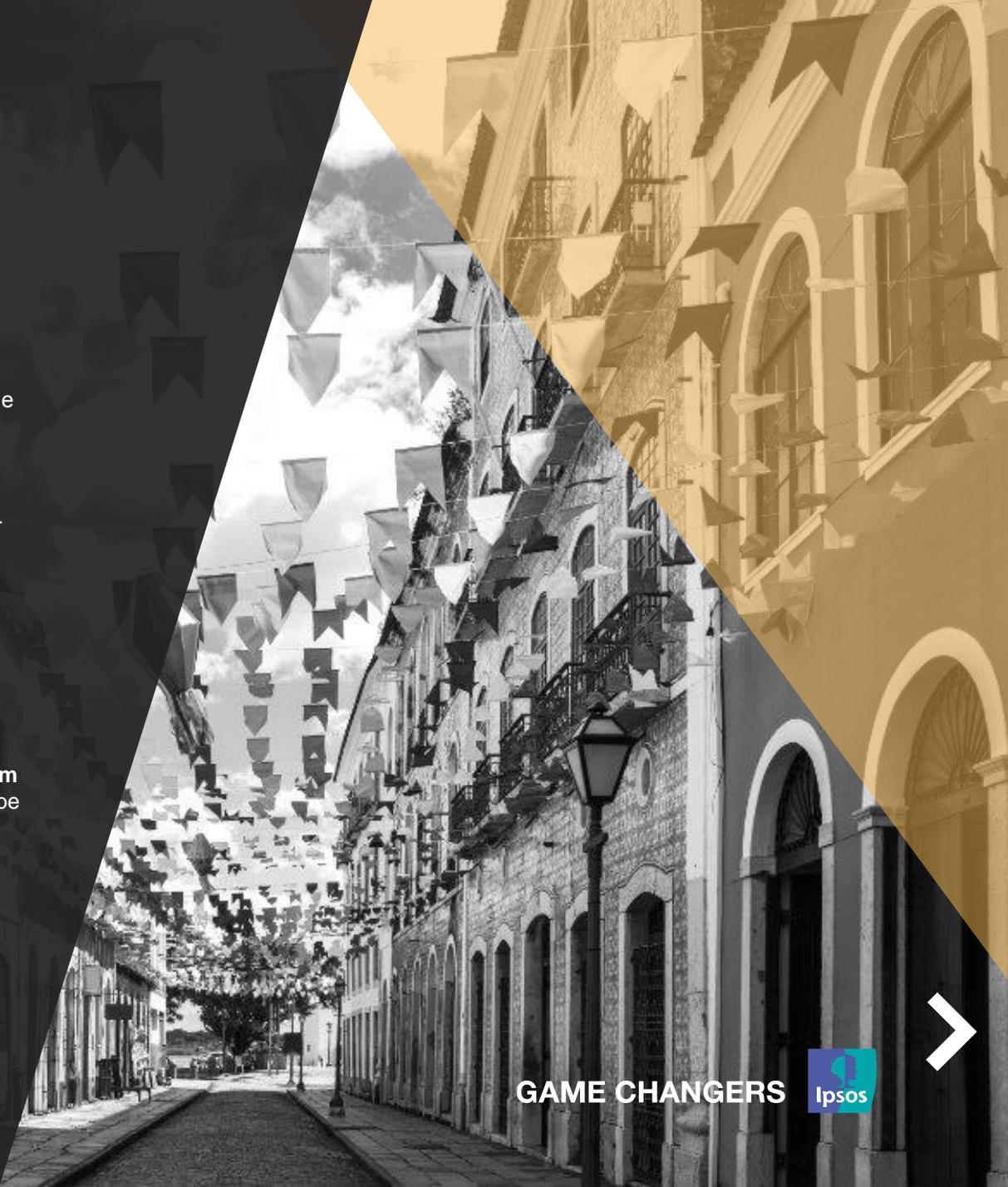
Links are provided to the various points of view and information sources, as well as the Ipsos colleagues responsible for each piece of work.

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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FLAIR BRAZIL 2018: The Mask Slipped! Time for Truth

The latest report in our *Ipsos Flair* series focuses on Brazil – a country seeking transparency and consistency after years of political scandals, government corruption and the omnipresent “fake news”.

THE DESERTIFICATION OF “MAIN STREET”: Global study of consumer shopping experiences

In this *Global @dvisor* poll, consumers in 24 countries report seeing fewer traditional “Main Street” businesses, while increasingly resorting to digital and convenience-focused alternatives.

FUTURE-PROOF YOUR BRAND: Using disruptions as an opportunity for growth

This white paper sets out a brand future-proofing approach to help you uncover consumer insights and turn category disruptions into exciting new brand opportunities.

THE WORLD AT WORK: Fears and expectations

At the recent annual *Revolution@Work* event in Paris, Ipsos presented this exclusive study on employees’ fears and expectations regarding the future of the workplace.

LATAM OPINION LEADERS: Perceptions of presidents across the region

In this latest edition of the *Latin American Opinion Leaders* survey, we present the regional presidential rates of approval for 2017 alongside comparison data with the previous years.

INTERNATIONAL AFFAIRS: Growing consensus of free trade benefits

Results for the eighth wave of Ipsos’ annual study for the *Halifax Security Forum* show that 84% of global citizens across 24 countries believe that free trade benefits local economies.

SPOTLIGHT ON GREAT BRITAIN: Reflecting a changing Britain in a changing world

At a time when it can seem like Britain is becoming an increasingly divided nation, this report explores the truths in these divisions as well as the factors that bring the country together.

WHAT THE FUTURE: Housing

In a global study, people around the world explore what makes a great place to live. Diving deeper into American attitudes, housing is also the first topic in a new Ipsos quarterly series, *What the Future*.





Ipsos Flair Collection



Brazil 2018:
The Mask Slipped!
Time for Truth

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BRAZIL FLAIR 2018

After years of political scandals, government corruption and the omnipresent “fake news”, it’s a “time for truth” for Brazil.

Written collectively by our local experts, the latest in our series of *Ipsos Flair* reports – and the accompanying 10 key points – considers the behaviours, attitudes and opinions of Brazilians to present a vision of the country.

Key points include:

- **Brazil feels literally “cheated”**. Brazilians feel misled by the media, politicians and by all those who inform and govern them, with corruption concerning 56% of Brazilians.
- **In the 2018 presidential election, populism may thrive**. There’s a deep feeling of dissatisfaction and a growing wave of conservatism could pave the way for political outsiders (and the possible election of a “Brazilian Trump”).
- **Brazil is overwhelmingly connected via mobile technology**. Mobile devices are a priority channel of communication when reaching out to Brazilian consumers, with mobile broadband now covering 78% of the overall population.



THE DESERTIFICATION OF “MAIN STREET”

The move towards online shopping coincides with a decline in the presence of physical retail establishments, according to a new global study of consumer shopping experiences around the world.

Consumers across 24 countries report seeing fewer traditional “Main Street” businesses, while increasingly resorting to digital and convenience-focused alternatives.

Key findings from the study include:

- 39% of people believe they are seeing fewer bookstores now in local shopping areas than three years ago, followed by fewer newsstands (37%) and fewer furniture stores (34%).
- Consumers in China, Britain and Poland are those most likely to report that they shop online more, or as often, as they did three years ago.
- 45% of people report banking in person more, or as often, as they did three years ago – a smaller figure than the 71% of people who report banking online more, or as often, as they did three years ago.

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FUTURE-PROOF YOUR BRAND

We are seeing disruptions that are shaking up categories today like never before, and these disruptions will have a fundamental impact on the way consumers relate to brands.

It is no longer enough to update your brand's portfolio regularly with brand extension launches or support your brand by simply changing the media approach. It's time to think more strategically, and long term, about the role and saliency of your brand and your business model in light of market disruptions.

In this new white paper, we set out a four-step Ipsos brand future-proofing approach to help you embrace category disruptions, and use them as an opportunity for growth instead of a threat.

The four steps:

- Do not assume you know your category
- Figure out what people in the disrupted category really need
- Create a brand that really stands out
- Make sure you can quickly "pivot" your brand

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THE WORLD AT WORK

A new international survey reveals employee fears and expectations regarding the future of the workplace.

Presented at the recent annual *Revolution@Work* event in Paris, the study explores questions such as; “What are the opportunities and fears of the employees?”, “Will the work experience be more or less fulfilling in 10 years?” and “Are companies well-prepared to face the transformations?”.

Findings include:

- Most employees are convinced a workplace revolution is on the way. 80% think we will work differently in 10 years' time and 61% believe having multiple jobs simultaneously will become the standard.
- Automation tends to worry employees. Only 15% perceive artificial intelligence (AI) at work as an “opportunity for employees”, compared to 39% who declare AI as a “threat to most employees”.
- The overall work experience won't become more satisfying for everyone. Less than half (40%) expect the work experience to be equally fulfilling in the future, but significant differences are registered in this regard.



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LATIN AMERICAN PRESIDENTS

In the latest edition of the *Latin American Opinion Leaders* survey, we present the region's presidential rates of approval.

The opinions reflected in this report represent over 350 opinion leaders across 14 Latin American countries who – through their published work in the region's media – influence the development and construction of public attitudes.

This year, the LATAM presidents with the highest rates of approval among opinion leaders are Juan Manuel Santos of Colombia (78%) Tabaré Vázquez of Uruguay (67%), Mauricio Macri of Argentina (69%), and Michelle Bachelet from Chile (69%). In contrast, the lowest approved rates are for Nicolás Maduro of Venezuela (5%), Michel Temer of Brazil (17%) and Raúl Castro of Cuba (22%).

Comparing results from the last three years, the study highlights changes in the perceptions of the opinion leaders over time. Michelle Bachelet, Juan Manuel Santos and Enrique Peña Nieto (Mexico) have all seen their approval ratings increase continuously since 2015. However, Evo Morales (Bolivia), Raúl Castro and Nicolás Maduro have continuously lost approval over the same period.

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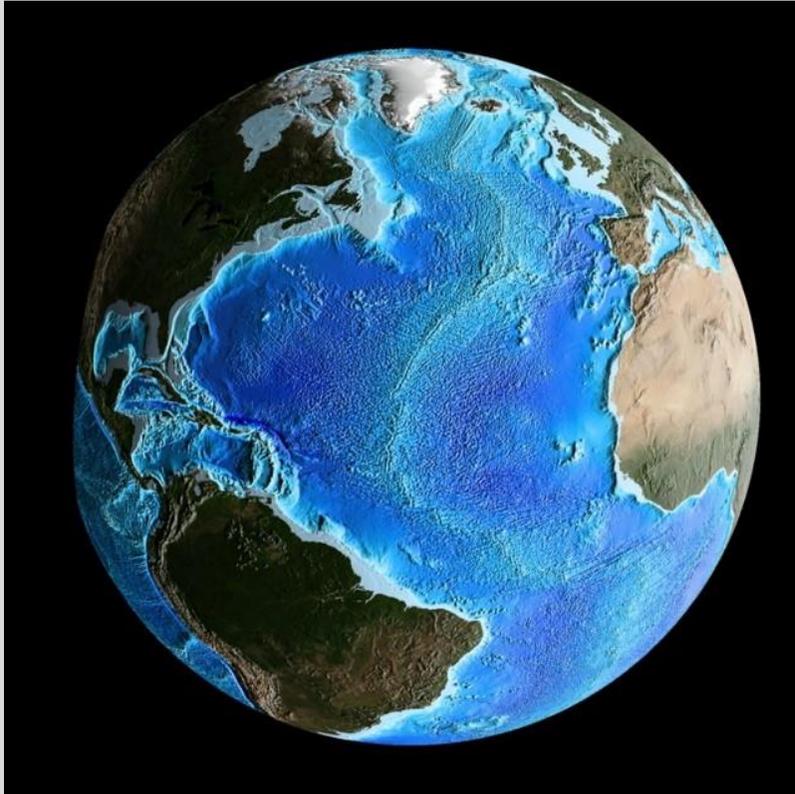
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INTERNATIONAL AFFAIRS: A GLOBAL PERSPECTIVE

A global poll shows a growing consensus that free trade benefits local economies.

Results for the eighth wave of Ipsos' annual study for the *Halifax Security Forum* show that 84% of global citizens believe in the benefits of free trade – up 7 percentage points since 2016. Support is highest in China (96%), Peru (95%), Britain (93%) and Mexico (93%), with the lowest agreement coming from France (64%).

As well as free trade, the report examines public attitudes towards other global affairs topics including:

- **Threat assessment:** 80% agree that over the last year “the world has become a more dangerous place”.
- **Engagement in global affairs:** 71% agree that “given the difficult economic issues in my country today, my country needs to focus less on the world and more at home”.
- **World affairs influencers:** When it comes to influence in world affairs, global citizens most trust Canada (82%), Germany (76%), France (75%), and the UN (72%).
- **Values and securities issues:** 44% agree that “under some conditions war is necessary to obtain justice”.
- **Climate change:** Half of respondents agree that “most of the world’s countries are doing what is appropriate and reasonable to fight climate change”.

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REFLECTING A CHANGING BRITAIN IN A CHANGING WORLD

At a time where Britain is portrayed as an increasingly divided place, this report examines both the factors that split the nation and those that bring it together.

Whether the divide is between the “haves” and the “have nots”, Millennials and Baby Boomers, Brexiteers and Remainers, or the experts and the rest, it can feel like Brits share very little in common as a country. But what is the truth in this? Is Britain really an increasingly divided nation? And what are the shared values and priorities that Brits agree on?

This new report for the BBC examines the factors which divide Britain and those that bring it together. Putting the issues into a wider context, it also highlights the fact that the country is not alone in experiencing uncertainty about the future, with other countries across the world exhibiting some of the current attitudes.

Finally, the report considers the role for British TV content, and for institutions like the BBC, in both reflecting differences, and providing shared values or moments.

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WHAT THE FUTURE: HOUSING

In a global study, people around the world explore what makes a great place to live.

The findings from our latest *Global @dvisor* study across 15 countries put the cost of living as the most important factor when considering a place to move to, followed by the ability to afford housing that meets your/your family's needs, low crime rates and access to quality healthcare.

What the Future: Housing

Diving deeper into the attitudes of Americans, *WTF: What the Future of Housing*, looks at whether citizens think they can age with their home and what incentives should be in place to improve support for forthcoming housing developments.

WTF is a new quarterly series which will attempt to answer the question, "What the Future?". Housing is the first topic in the series and subsequent issues will feature three other key consumer-spending categories: transportation, healthcare and food.

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SHORT CUTS

The Rise of Fakism

It should not be a surprise for any marketer that advertising and creativity thrive on echoing real life trends to get people's attention and engage.

"Fakism" is just one of the disruptive creative strategies advertisers have used this year to get more attention, by playing on an underlying tension between truth and fiction, that is captivating people as much as [Donald Trump](#). Indeed "fake news", a concept introduced by Trump during the 2016 US Presidential campaign, has become a common currency these days.

This new thought piece investigates the rise of fakism in advertising and explores how brands are using – and in some cases misusing – the concept for their own ends.

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Global Infrastructure Index

According to the Ipsos 2017 *Global Infrastructure Index*, a third (37%) are satisfied with infrastructure in their country but this varies regionally from 35% in LATAM countries to 43% in the APAC region, reaching a high of 65% in Saudi Arabia – four times the low of 15% recorded in Italy.

In terms of attitudes, while the global average is a 56% agreement that their country "is not doing enough to meet its infrastructure needs", this varies from 80% in South Africa to just 23% in Japan.

Among the ten different types of infrastructure, flood defences and nuclear energy-generation receive the worst ratings, while airports are among the best rated.

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World Luxury Tracking

The Ipsos annual global *World Luxury Tracking* survey monitors trends throughout different markets and allows brands to better understand consumer expectations.

This latest wave covers France, Italy, Spain, Germany, UK, USA, Saudi Arabia and the United Arab Emirates, as well as the emergence of maturing luxury consumers and a new "luxury culture".

Key findings include:

- Appetite for luxury has increased (+16 pts in Europe and the US since 2015).
- Consumers are expecting more from brands - 70% of affluents in the US (+8pts on two years ago), 72% in Europe (+8pts) and 85% in the Middle East say that luxury brands should "surprise them by offering creativity, audaciousness, never-before seen products".

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BEST OF 2017: Some Ipsos highlights from the past year



Using Social Intelligence for a Sharper Vision of your Brand and Category

What marketers need to understand about their category's dynamics.

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June 2017

IPSOS VIEWS

The Role of Surveys in the Age of Behavioral Science

Including five key reasons why we should continue to ask questions.

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FEMINISM AND GENDER EQUALITY AROUND THE WORLD

Feminism and Gender Equality

Many global citizens feel the current social and political situation is characterised by inequality.

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VIDEO

SERVICES IN MENA

Digital Trends in MENA

A report investigating what content is being consumed, how and who by.

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Flair Peru 2017: From Informality to Modernity

A country looking ahead to the future.

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GLOBAL TRENDS

Ipsos Global Trends: Fragmentation, Cohesion and Uncertainty

Our unique snapshot of the world today.

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Flair Italy 2017: The Bespoke Reality

A report painting a picture of a country that “internalises turbulence”.

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THE ECONOMIC SITUATION IN LATIN AMERICA

What do key opinion leaders think about Latin America?

The Economic Situation in LATAM

Our survey of how key opinion leaders in the region feel about Latin America.

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What Worries the World

A paper examining how the world's everyday worries are shifting.

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Mobile payment usage in China

A report looking at the rise of transactions through non-banking apps.

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IPSONS VIEWS

The Future of Mobility: On the road to driverless cars

Consumer attitudes to technology's potential to change the way we travel.

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SUGAR

WHAT NEXT?

Sugar: What next?

Addressing the world's growing obesity crisis through public and legislator opinions about sugar.

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Designing a 'Smarter' Mystery Shopping Program

Seven Steps to Success

Nicholas Mercurio and John Fleeta

Designing a Smarter Mystery Shopping Program

Presenting seven key steps to success.

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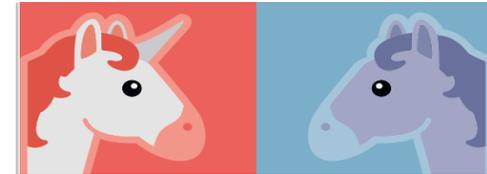
+100 million African Lions

With a total spending power of **+\$400 million per day**

African Lions

An in-depth research study exploring the middle class in Sub-Saharan Africa.

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Millennials: Myths and Realities

A major report into the "most derided" generation.

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What makes a "Real American"?

A survey of Americans' views on identity, race, religion and more.

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Device Agnostic:
Why you need to transform now
Marketers must adapt quickly or risk losing touch with consumers.

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Thailand 2017,
Beyond the concerns.

Flair Thailand 2017:
Beyond the concerns
Putting the spotlight onto a country hurt by slow economic growth.

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BEST OF 2017: Some Ipsos highlights from the past year

Opinion Polls: Why they remain the reference

Henri Wallard

Opinion Polls: Why they remain the reference

A paper evaluating the role of opinion polls in today's political climate.

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July 2017
**Global Views on
Immigration and the
Refugee Crisis**

Immigration and Refugee Crisis

Only one in five global citizens say immigration has had a positive effect.

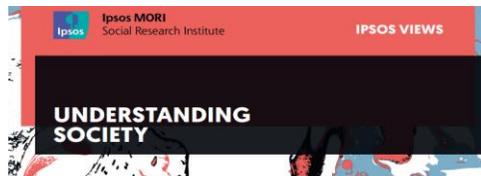
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BRAVE NEW WORLD Are consumers ready for AI?

AI: Are Australian consumers ready?

Examining the potential of Artificial Intelligence to reshape the world.

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Understanding Society: Beyond Populism

Bringing together influential voices to discuss major political and social shifts.

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Passive Simplicity

The Future for TV & Radio
Audience Measurement

Tim Farmer

Passive Simplicity: The Future for TV & Radio Audience Measurement

The greatest understanding comes from studies with the least impact on behaviour.

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Flair Colombia 2017: "Reviving"

"Reviving" is the word of the year in Colombia – our report sets the scene.

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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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