



February 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 February 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



FLAIR INDIA: Aspiration to action

The first publication from India in our *Ipsos Flair* series investigates society, consumer behaviour and market trends in the world's second most populous country.

PREDICTIONS FOR 2018: Painting a global picture of the year ahead

Over half of global citizens (59%) think that China will become the world's biggest economy this year, according to this special 28-country *Global @dvisor* study asking citizens for their predictions for 2018.

BRAND GROWTH: More people, more often or both?

Presenting our research findings into the importance of 'more people' versus 'more often', this thought piece explores the purchase behaviour of consumers across 200+ brands over a 12-month period.

THE FUTURE OF INTELLIGENT THINGS: How connected health is disrupting MedTech

There is little doubt that connected health may offer the answer to alleviating financial pressures on healthcare systems and improving patient outcomes, but how exactly can this be achieved? This paper sets the scene.

OPEN BANKING: The great data giveaway?

Our recent research into consumer attitudes, conducted just a few months ahead of the launch of Open Banking, offers us a snapshot of the sorts of organisations that consumers are likely to trust to use their data.

GETTING BRAND ASSETS RIGHT: Leveraging your distinct brand identity for growth

At a time when brands exist in an ever-changing, dynamic environment with plenty of disruptive competition, this paper offers tips on how to leverage your distinctive brand identity in order to grow your brand.

FOOD SHOPPING HABITS: How tech is transforming the food retail industry

This paper investigates the impact of the smartphone on grocery retailing and explores how chat is opening up new channels of communication between retailers (or brands) and their customers.

GET FAIR OR FAIL: Why fairness is key to business success

This paper sets out how to judge what incidents are critical, which customers are expendable and what the most suitable and cost-effective response or intervention will be to give a competitive advantage.





FLAIR INDIA 2018: ASPIRATION TO ACTION

The first publication from India in our *Ipsos Flair* series investigates society, consumer behaviour and market trends in the world's second most populous country.

Key points include:

- **India is one of the largest markets in the world:** By 2030, India will have more than 70 cities with over 1 million inhabitants.
- **India has massively adopted mobile technologies:** It has the world's second-largest mobile phone user base (1 billion, with 0.5 billion internet users).
- **India is empowering women:** The female literacy rate has jumped from 54% to 65% in the last decade, and women are increasingly being hired in well-paid positions.
- **India wants to be healthier:** There is great pressure on eating habits and staying fit and healthy. Yet, notoriously unhealthy products usually perform far better than the ones with the strongest health claims.

Flair India is available as a full report or, for a shorter read, you can download the [10 key points](#).

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PREDICTIONS FOR 2018

In a special Ipsos *Global @dvisor* survey, citizens across 28 countries have shared their predictions for the year ahead.

Predictions include:

- Over half of global citizens (59%) think that China will become the world's biggest economy this year.
- Turning to the tense relationship between the US and North Korea, people are divided over the likelihood of the two countries starting a war against each other: 42% think that it's likely, compared with 40% who think it's unlikely. People in South Korea, though, are more likely to think it won't happen (66%).
- Most countries think that the average global temperature will increase (71%). This prediction is particularly high in Serbia (87%), and is least evident in Russia and the US (both 56%).
- There are noticeable variations in concern about a terrorist attack. Half or more of people in Britain (65%), Turkey (60%), France (53%), Germany (51%) and the US (51%) believe an attack in their country is likely, but in most of the countries surveyed only one in four or less think an attack is likely.

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BRAND GROWTH

More people, more often, or both? This thought piece investigates the contribution of existing customers to brand growth.

Understanding and explaining how brands grow is top of mind in the industry. For decades, Ipsos has been helping our clients answer the question, “How do I grow my brand?”

At Ipsos we believe that brand growth comes from having **more people** buying your brand, **more often**, and **more easily**:

- ‘More people’ is primarily about brand penetration.
- ‘More often’ relates to the level and/or share of spend that you get from your existing customers.
- ‘More easily’ is about accessibility – the more people perceive that they can easily obtain one option vs. another similar option, the more likely it is to be selected.

Presenting our research findings into the importance of ‘more people’ versus ‘more often’, this thought piece explores the purchase behaviour of consumers across 200+ brands over a 12-month period.

It provides evidence that brand growth is not solely about increased customer penetration, but also about maintaining (or increasing) the levels of spend from existing customers.



THE FUTURE OF INTELLIGENT THINGS

How connected health is disrupting the world of MedTech



Ipsos Healthcare

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THE FUTURE OF INTELLIGENT THINGS

How connected health is disrupting the world of MedTech.

There is little doubt that connected health may offer the answer to alleviating financial pressures on healthcare systems and improving patient outcomes, but how exactly can this be achieved? What concerns and barriers need to be considered and who exactly is leading the future of healthcare?

This new paper explores:

- **The land of data protection and cybersecurity:** One of the greatest concerns to proponents of connected health and sceptics alike are the security measures put in place to guard patient information.
- **The importance of user experience:** Devices and services in the healthcare industry must be user friendly, intuitive and designed to be accessible to all ages, socio-economic groups, literacy levels and cultures.
- **The future success of connected health relies on transparency, education and advocacy:** These are key in order to gain buy-in from the more sceptical healthcare providers.

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OPEN BANKING: THE GREAT DATA GIVEAWAY?

Open banking may deliver the envisaged sea change in the financial services sector, but *trust* will be a big factor in determining who will take advantage of the opportunities.

Allowing consumers to choose who they share their information with, what for and for how long seems an obviously positive thing to do.

However, before considering the positions of the various potential players, it's critical to understand how people will make decisions about data sharing. One of the key factors is trust; people are far more likely to give permission to access their data to a provider they feel is trustworthy and will only use the data in appropriate or beneficial ways.

Our latest research into consumer attitudes, conducted a few months before the launch of open banking, offers a snapshot of which sorts of organisations consumers are likely to trust. Unsurprising, established banks come out well ahead of other potential provider groups. They already hold consumers' banking data, have a good track record of keeping it secure and are seen as experts in financial matters – suggesting they have a clear head start when it comes to taking advantage of the opportunities which Open Banking offers.

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GETTING BRAND ASSETS RIGHT

This paper offers tips on how to leverage your distinctive brand identity in order to grow your brand.

Brands exist in an ever-changing, dynamic environment where disruptive competition and blending categories have become the norm. To stay alive and flourish, brands need to stand out and make a long-lasting impression on consumers. Marketers need to identify the distinctive assets that give their brand a unique and ownable identity.

In this paper we demonstrate our newly developed approach to help clients prioritise a set of unique brand assets that strengthen the brand and which can then be reinforced through communication, packaging, etc.

The first step is to define brand distinctiveness through brand linkage, brand uniqueness, sentiment and brand alignment. The second step is to diagnose the potential strength of each asset.

Managing your distinctive assets is a very important element in building strong brands. Our approach helps marketers select a portfolio of brand assets that not only evokes the brand but also subconsciously reinforces what the brand wants to be known for.



THE IMPACT OF TECH ON FOOD SHOPPING HABITS

Smartphones are the game-changing technology having a profound impact on our lives – how we think, work and, not least, shop.

According to the latest *Ipsos Global Trends* survey, we interact with our smartphones 220 times a day. In addition, one third of the world's population (over 2.5 billion) now uses a messaging platform to communicate with one another. One of the appealing things about these messaging platforms, or 'chat' as they have become known, is that they are a real-time channel that can operate at scale and that fits in with today's 'now' society.

Real-time communication by mobile has been a major factor in changing our attitudes and behaviour in the way we shop. And chat isn't the only new communication tool available to retailers; voice-activated virtual assistants such as Amazon's Alexa, Apple's Siri and Google Assistant are also attracting interest from consumers.

This paper investigates the impact of these new technologies on grocery retailing, and explores how they are opening up new channels of communication between retailers (or brands) and their customers.

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GET FAIR OR FAIL

All customer complaints are equal. But some are more equal than others. The challenge is to be fair to all of them – *fair enough?*

Acknowledgement of customer experience (CX) as a driver of business performance is at an all-time high, with most companies making significant investments to meet their customers' needs. But for many the question remains, how do you choose which customers or situations to prioritise?

In 2016, after extensive research in the US and Australia, we introduced a CX metric called the Customer:Company Effort Ratio (C:CER) in an article called '[Are Your Customers Working Too Hard?](#)'. C:CER proved to be three times better at predicting the likelihood of a customer using a company again after a poor experience or complaint than the 'Customer Effort score' alone.

Now, new research in 14 UK service sectors further validates the findings of the original R&D, shedding new light on why it is crucial for organisations to get the perceived balance of effort right.

This paper sets out how to judge what incidents are critical, which customers are expendable and what the most suitable and cost-effective response or intervention will be to give a competitive advantage.



SHORT CUTS

Engaging with Millennials

Defined as those born between 1980-1995, the millennial generation's outlook on life and preferences have been shaped by growing up in an environment very different to their parents and characterised by the emergence and growth of the internet, along with rapidly changing social attitudes.

Millennials are vocal about what they want, and their use of social media as a platform to create major trends is a powerful tool. Brands must go beyond meeting their needs as consumers, but rather understand their emotional drivers.

This video interview with Luc Durand, President of Ipsos Québec, shares a few truths about Millennials that people might not have heard before. It also examines which Canadian brands are connecting with them most successfully and gives tips on how brands can engage with them.

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Path to Purchase: five questions to ask

Technology has created an omnichannel world that brings together physical and digital shopping experiences and offers a proliferation of touchpoints that influence consumers' brand opinions and buying behaviours. Marketers are scrambling with how to deal with this new reality, and often there's a lack of insight on how the paths to purchase are influencing sales and how they can be leveraged to drive business growth.

This Ipsos article, published in *TotalRetail*, sets out five questions that every marketer should answer in order to understand the path to purchase in their category, including:

- What are the dominant paths in the category?
- What is the reach and impact of different touchpoints in the path to purchase?
- How does your brand perform on the path to purchase relative to the competition – in general and on specific touchpoints?

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Is India ready for driverless cars?

Buyers of passenger and commercial vehicles in India will soon be in position to benefit from major government incentives promoting electric vehicles (EVs).

Original equipment manufacturers such as Tata Motors and Mahindra & Mahindra have been leading the way in EV and autonomous driving technology in India. However, they still remain far behind the industry leaders in the west and face unique challenges due to the road conditions and economic realities of the country.

This new paper gives context to the government's vision of a cleaner road network and the car manufacturers' efforts to design the next generation of vehicles for India. Analysing the major challenges ahead, it provides a realistic outlook for the development and deployment of EV and self-driving technology in the years ahead.

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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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