April 2018

IPSOS UPDATE

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

Ipsos Knowledge Centre

GAME CHANGERS

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WELCOME

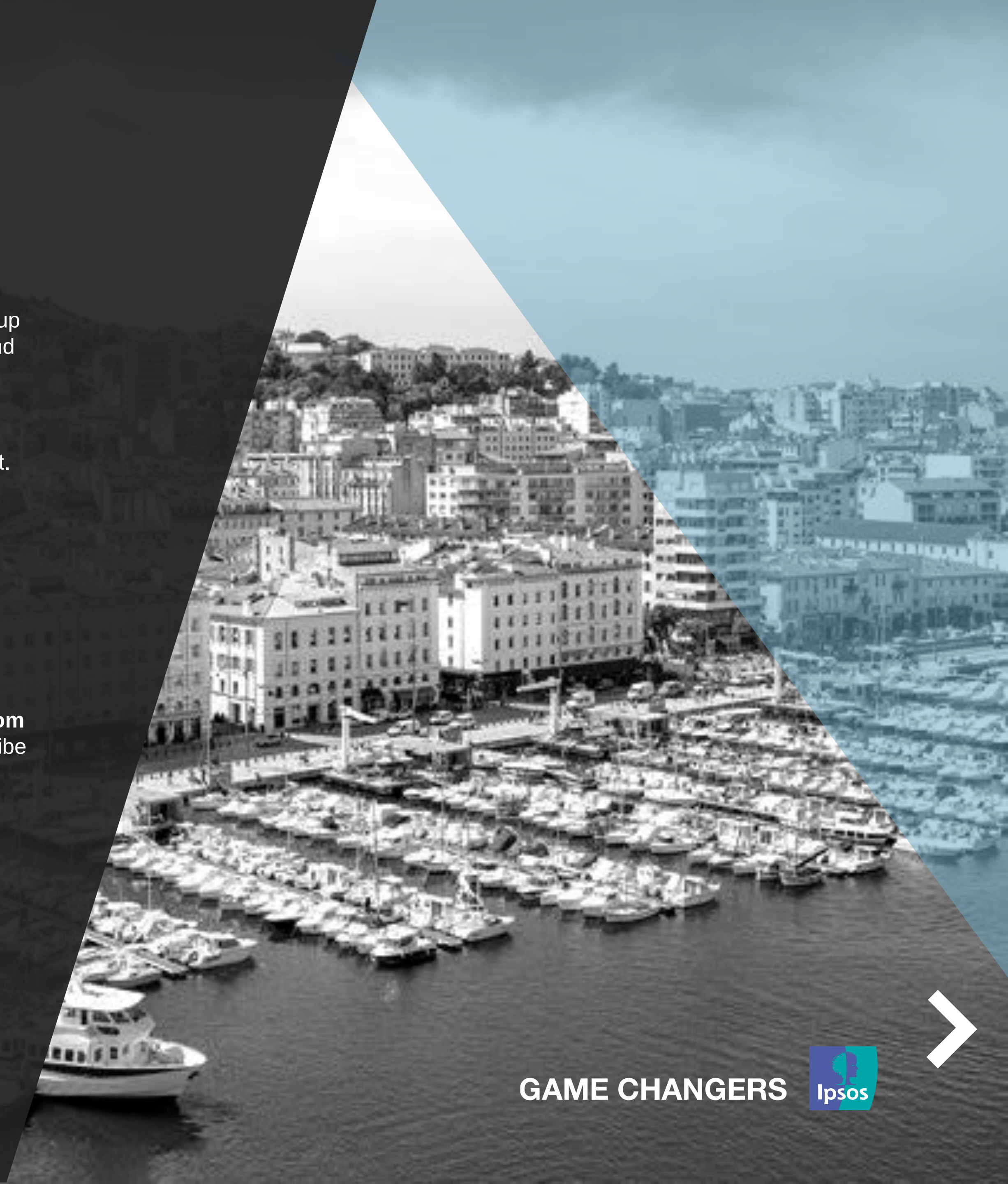
Welcome to the April edition of *Ipsos Update* – our round-up of the latest research and thinking from Ipsos teams around the world.

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.



IN THIS EDITION

FLAIR FRANCE:
Simmer? Shudder? Or quiver?

Flair France 2018 explores three possible developments: a country that will *simmer* out of anger at undelivered promises, *shudder* at how fast the world is changing or *quiver* with joy at the idea that future could again mean progress.

ITALIAN GENERAL ELECTION:
A new bi-polar political landscape

Italy's recent general election ended in a political stalemate and revealed a divided nation. In this post-vote analysis, we compare the results alongside those from 2013, highlighting some potentially transformational dynamics.

UNDERSTANDING SOCIETY:
Patient Experience

In this special edition of *Understanding Society*, we examine how to best understand, measure, and improve patient experience in the US, drawing on the perspectives of healthcare leaders and latest research.

PURCHASE DECISIONS:
A behavioural science perspective

Exploring the link between brand associations and brand salience, this paper sets out a framework examining how consumers make choices when they don't have the mental capacity or motivation to engage in more deliberate thinking.

GENDER EQUALITY:
Global misperceptions and the need for progress

In the wake of the #MeToo and #TimesUp movements, this special 27-country study highlights public opinion on a number of equality issues, finding that sexual harassment is seen as the top concern facing women and girls today.

RUSSIAN TRAVEL TRENDS:
Consumer mood and market changes in 2017

Using *RusIndex* survey data, this special report explores the key trends in Russian outbound travel over the past year, including the type of trips taken and the preferred travel providers, transport and accommodation.

EMBRACING SOCIAL PURPOSE:
Effective corporate citizenship programmes

This paper explores how, by using an evidence-based approach to defining social purpose, businesses can support the development of an authentic, credible, and effective corporate citizenship programme.

GLOBAL CONSUMER CONFIDENCE INDEX:
Latest figures reveal tied record high

March's Primary Index – reflecting attitudes across 24 countries about the current and future state of local economies – has risen to 50.6 to equal January's record high since Ipsos started tracking in 2010.

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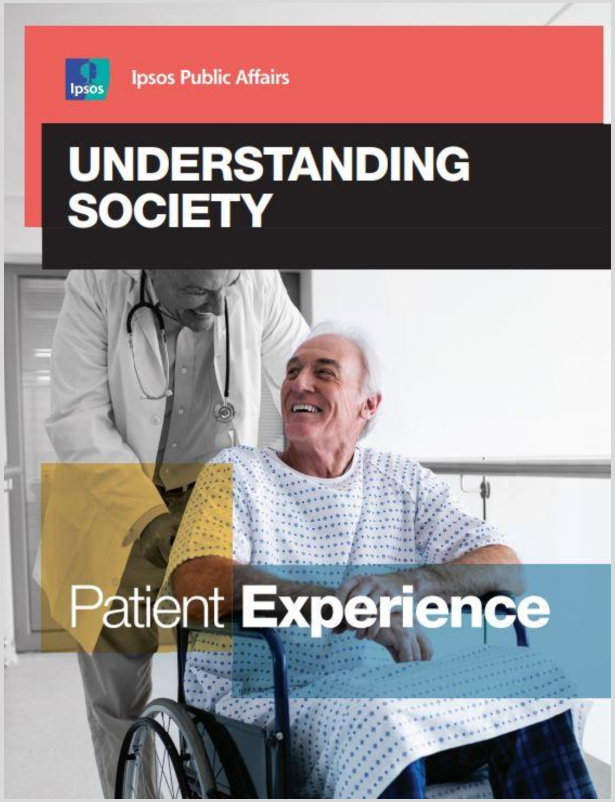
FLAIR FRANCE 2018

This year Flair France explores three possible developments: a country that will *simmer* out of anger at undelivered promises, *shudder* at how fast the world is changing or *quiver* with joy at the idea that future could again mean progress.

Key points include:

- **France is loosening the purse strings:** In 2017, car sales increased 10.3% without any government incentive, 42 million French residents went on holiday (2.2 million more than in 2016) and there were 42.8 million transactions on Black Friday corresponding to a total sales volume of €3.8 billion.
- **France has stopped looking in the rear-view mirror:** The proportion of respondents who consider that “times used to be better in France” fell from 74% to 64%. A positive attitude towards what lies ahead is also illustrated by the fact that 53% of respondents (+10 pts. since April 2015) now believe “France’s future is full of opportunities”.
- **France is rejuvenating:** Representations of age, skill and responsibilities are no longer automatically linked to each other, and the opinion of millennials matter: *AccorHotels* is one of the first major companies to have set up a shadow executive board whose members are all under 35.



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UNDERSTANDING SOCIETY: PATIENT EXPERIENCE

In this special edition of *Understanding Society,* we examine how to best understand, measure and improve patient experience in the US, drawing on the perspectives of healthcare leaders and latest research.

Covering a wide range of healthcare topics, this report explores fair benchmarking of providers, patient expectations, consumer perceptions of hospital ratings, drivers of patient experience, and specific measures that can enhance healthcare delivery.

Featuring exclusive interviews with healthcare leaders, we look at the challenges and solutions for optimising the patient experience. These include:

- The role of clinical trials for improving the provision of high quality care.
- The challenges of measuring and improving the patient experience in a home healthcare setting.
- The key obstacles and solutions for incorporating the patient voice into healthcare evaluation.

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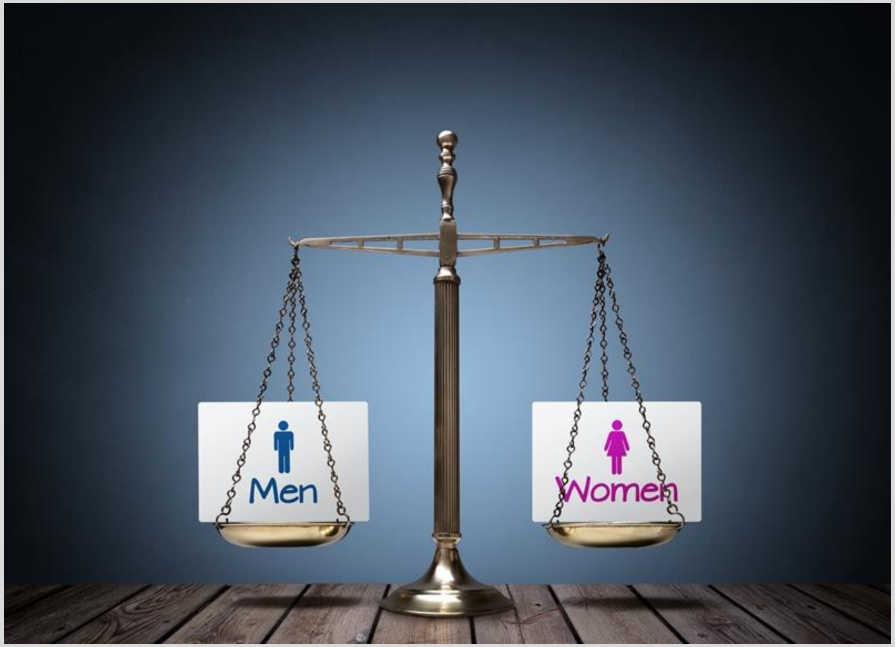

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GENDER EQUALITY

This special 27-country study highlights public opinion across the world on a number of equality issues.

Key findings include:

- **Sexual harassment is seen as the top issue facing women**: 32% believe sexual harassment is the biggest equality issue facing women and girls in their country – rising to 58% in Peru and 51% in Malaysia and Turkey. In contrast, it is seen as less of a problem in Serbia and Russia (7%).
- **Violence (21%), domestic abuse (20%) and equal pay (19%) are also highlighted as key issues:** There is little difference between the views of men and women on the issues of harassment and violence. However, women are slightly more likely to cite equal pay as an issue than men (20% vs 17%), balancing work and caring responsibilities (17% vs 13%) and the amount of unpaid work women do e.g. cooking, cleaning and childcare (14% vs 8%).
- **We hugely overestimate women's representation in business leadership:** On average, we estimate that, of the world's top 500 companies, one in five (19%) has a female CEO – when the actual figure is just 3%. Six in ten people (61%) globally agree that things would work better if more women held positions with responsibilities in government and companies, compared with 26% who disagree.

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EMBRACING SOCIAL PURPOSE

With an evidence-based approach to defining social purpose, businesses can rally stakeholders behind a meaningful corporate mission, and increase competitive advantage via an authentic, credible, and effective corporate citizenship programme.

Business is in a period of rapid transition and increasing uncertainty. Trust in business is at an all-time low, and consumers, employees and investors are increasingly demanding that businesses are transparent about their practices and look beyond their bottom line to create positive social value.

In this paper, we examine the multiple ways in which business can use evidence to support the development of corporate citizenship programmes.

The approach includes assessing geopolitical risk and material threats, consumer attitudes and behaviours, and stakeholder values during the process of programme formation, as well as understanding the impact of solutions and appropriate approaches to internal and external messaging as part of programme delivery.

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ITALIAN GENERAL ELECTION

Italy's recent general election ended in a political stalemate, revealing a divided nation and a new bi-polar political landscape.

Voters in Europe's fourth largest economy did not offer a majority to a single party, instead sharing the largest number of votes between the far-right Lega and the anti-establishment Five Star Movement (M5S) parties.

Our post-vote analysis includes a comparison to the 2013 election results and highlights some key dynamics, including:

- Over 75% of previous M5S voters confirmed their choice again and, of those who didn't, they either didn't vote (9%) or voted for Lega (6%). Lega and M5S also proved attractive in calling to those who didn't vote in 2013.
- Among first-time voters, M5S has most support, followed by the Democratic Party and Lega. M5S also saw the best across-the-board performance and were the first choice across all social classes, with the exception of retirees.
- Within the centre-right, Lega appears the best performer in terms of voter diversity, with gains in the traditional base (self-employed and blue-collar workers) and among the traditional Forza Italia electorate (homemakers).

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PURCHASE DECISIONS: A BEHAVIOURAL SCIENCE PERSPECTIVE

Although brand salience is important, it is not the only factor that determines the final choice.

We live in a digital world where consumers have access to more information and choices that ever before. As much as we would like our decisions to be thoughtful and fully considered, the large amount of information, lack of time and our limited mental capacity make it difficult to do so.

To consider all the available information would not be practical or possible. Instead, we base our decisions on singular pieces of information (i.e. simple rules of thumb or heuristics), allowing us to quickly decide and move on to the next task.

In this paper, we set out a framework examining how consumers make brand choices when they do not have the mental capacity and/or motivation to engage in more deliberate thinking. We also share several case studies illustrating the ways brands improved their market performance by better understanding the link between brand associations and brand salience.

RUSSIAN TRAVEL TRENDS

Global politics and the local economic situation both impact heavily on the Russian travel market. In this report, we reflect on consumer mood and market changes to present Russia's outbound travel trends in 2017.

Main trends include:

- Beach holidays accounted for 45% of all Russian leisure travel in 2017 – up 2 points in the last year.
- Excursions and educational tours have seen a decline in popularity – down 3 points to 17%.
- The proportion of those travelling abroad for wellness medical treatment fell to 2%.
- Overall, average spending on one outbound trip from Russia increased +7% compared to the previous year.
- Safety is a significant factor for Russians in choosing travel destinations, with Asian countries including Japan and China considered some of the safest in terms of terrorist threats and crime rates.

The report, using data from the *RusIndex* survey, also explores how Russians are booking their travels, the number and length of trips, and their preferred transport and accommodation.

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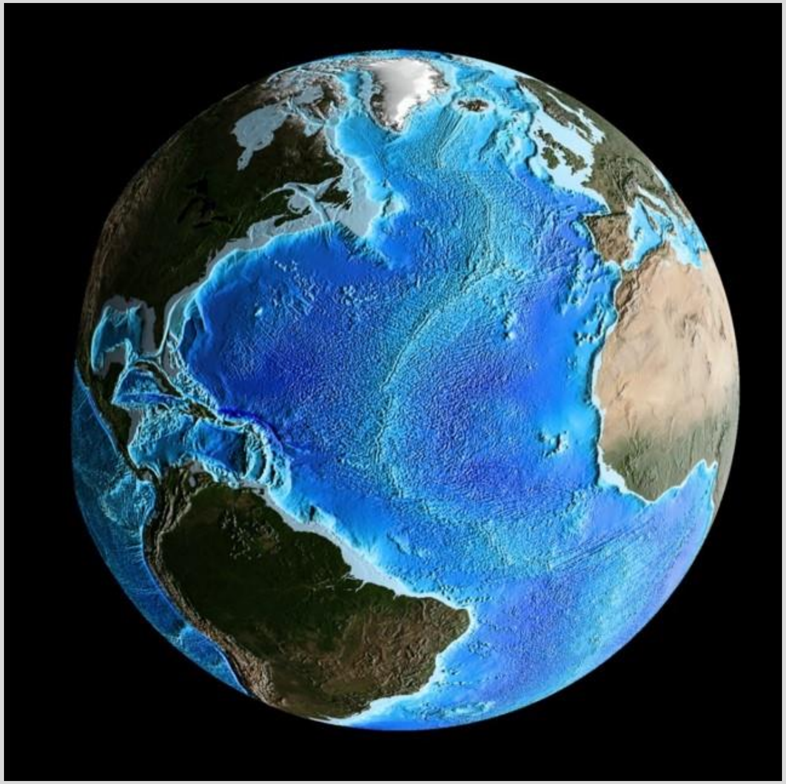

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GLOBAL CONSUMER CONFIDENCE INDEX

March's *Global Consumer Confidence Primary Index* – reflecting attitudes across 24 countries – has risen to 50.6 to tie January's record high since we began tracking in 2010.

Nine countries saw a significant increase in their **Primary Index** score, with South Africa, Turkey, Hungary, Brazil, France, the US, Belgium, Great Britain, and Poland all seeing gains of at least 1.5 points or more. The most significant changes were seen in South Africa (+7.4), Turkey (+3.3), and Hungary (+3.2). In contrast, the biggest falls in consumer confidence were noted in Argentina (-5.7), Russia (-2.2), and Saudi Arabia (-2.1).

In addition, the subsets were all up globally over the past three months:

- The **Jobs Index** (reflecting perceptions of job security) rose 0.4 points to sit at 57.7.
- The **Investment Index** (reflecting perceptions of the investment climate) is now up to 44.3, showing a gain of 0.5 points.
- The **Expectations Index** (reflecting perceptions of future economic expansion) saw the largest increase and now stands at 59.6, up 1.4 points.

SHORT CUTS

Affluent Americans in the age of polarity

The past year was a challenging one for the US, with a controversial president taking office and the country increasingly polarised. The 2018 *Ipsos Affluent Intelligence Outlook* explores how affluent Americans feel about the future of their country.

In many ways, 2017 was the best and the worst of times for affluents. While the vast majority say it was a good year for their own finances, fewer than four in ten considered it a good year for the country. In the first months of 2018, the economy is booming and tax cuts are expected to help the well-off. Yet fewer than half of affluent American consumers are optimistic that it will be a good year for America as a whole, with women and young people among the most sceptical.

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Public attitudes in Brazil

According to the latest *Brazil Pulse* survey, 95% of Brazilians believe their country is *still* heading in the wrong direction. The decline in confidence began in January 2015 and has stabilised at very high levels since then.

Similarly, the country's President, Michel Temer, saw his negative evaluation rise by 2% in February, with 85% of the Brazilians now rating him as "bad" or "very bad".

Overall, consumer confidence has shown no improvement and remains at 77 points. However, employment insecurity dropped for the fourth consecutive month – despite Brazil having 12.7 million people unemployed according to the latest data from the *Brazilian Institute of Geography and Statistics*.

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Amazon Go – the future of shopping?

Imagine walking into a store, picking out what you want and then leaving without checking out. Amazon made that fantasy a reality when it recently opened its first cashier-free store, Amazon Go. In the pilot convenience store, which took five years to develop, shoppers enter through an electronic glass gate activated by the store's app on their smart phones. The app is connected to sensors and cameras that track the shopper's purchases and, when the shopper leaves the store, they are charged and emailed a receipt.

In this article, our experts discuss whether the ability for shoppers to skip the cash register will change how they shop and impact on their relationship with money and technology.

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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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