
June 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 June 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



THE EVOLUTION OF SHOPPER BEHAVIOUR: Five key changes

Continued developments in digital technology and advances in e-commerce mean that the way we shop for products and services is evolving. In this white paper, we explore five key changes influencing shopper behaviour.

GLOBAL ATTITUDES TO SOCIALISM: Country variations in scepticism and approval

This 28-country *Global Advisor* survey explores the perceptions of socialism in the 21st century, highlighting considerable differences between countries in the way in which socialist ideals are currently perceived.

COGNITIVE BATTLEFIELD: A framework for assessing engagement strategies

The first in our three-part *Cognitive Battlefield* series presents a framework for understanding and assessing the decision-making process, based on the multi-attribute model.

FLAIR ITALY: A country in search of identity

As part of our *Ipsos Flair* series, this bitesize version of the eighth Italy edition summarises the current mood of the country, including how Italians feel about their place in the world.

UNLOCKING THE VALUE OF REPUTATION: The importance of trust

Drawing on research from the *Ipsos Global Reputation Centre* across 31 countries, this report explores the definitive link between corporate reputation and better business efficiency.

WHAT WORRIES THE WORLD: A review of global concerns over the past year

Every month, our *What Worries the World* survey asks citizens in 26 countries about the biggest worries for their nation, ranging from crime and violence to childhood obesity. This white paper summarises the concerns of 2017.

THE ROYAL WEDDING: International perceptions of the Royal Family

The Queen and Prince Harry are the most popular members of the Royal Family, followed by the Duke and Duchess of Cambridge, according to this global poll carried out ahead of the recent royal wedding.

2018 SUMMER HOLIDAY PLANS: The 18th annual Ipsos/Europ Assistance survey

This survey focuses on the 2018 holiday plans of European, American and Asian travellers and highlights key trends by country, including preferences for the type of holiday, duration of travel and budget.





THE EVOLUTION OF SHOPPER BEHAVIOUR

Continued developments in digital technology and advances in e-commerce mean that the way we shop is evolving.

Technology has created a digital retail landscape that is unrestricted by geography and the normal dynamics of bricks and mortar stores, while physical stores now not only integrate technology but better connect with the digital world to increasingly deliver a seamless omnichannel offering. As a result, we need to understand these changes and their implications when planning go-to-market strategies or optimising shopping marketing programmes.

In this white paper we look at **five key changes** we're experiencing and reflect on their implications:

1. Increasing complexity of choice promotes shortcuts in decision making
2. Pre-store preferences are a huge factor shaping purchases
3. The digital revolution is reinventing shopper behaviour
4. New disruptive e-commerce models evolve every day
5. Omnichannel brings together the physical and digital worlds

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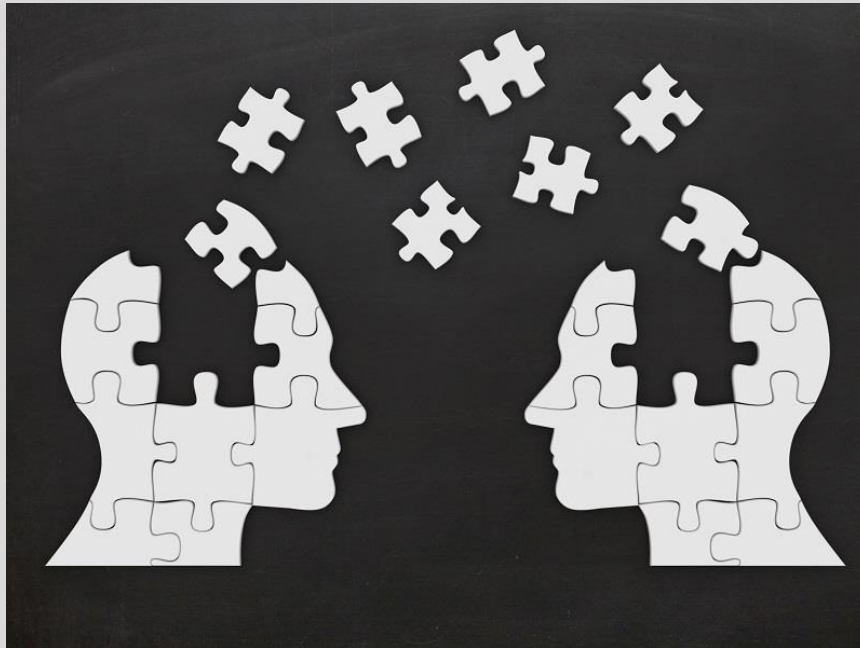
GLOBAL ATTITUDES TO SOCIALISM

Two hundred years after the birth of Karl Marx, this 28-country *Global Advisor* survey explores the perceptions of socialist ideals in the 21st century, throwing up some big differences by country.

Key findings include:

- Half of people globally agree that socialist ideals are of great value for societal progress, with those in China (84%), India (72%) and Malaysia (68%) most likely to agree.
- Almost seven in ten people around the world (66%) agree that free market competition brings out the best in people. People in India (86%) are most likely to agree followed by those in Malaysia (84%), Peru and South Africa (both 83%). In contrast, only about half of respondents in Sweden (52%), Belgium (51%), Germany (49%) and France (43%) agree.
- 69% think that it is right for people who are talented to earn more than those who are less gifted. Romanians and Russians (both 82%) are most likely to agree, while only around half of respondents in Belgium (56%), France (51%) and Germany (47%) think the same.

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COGNITIVE BATTLEFIELD

The first in our three-part *Cognitive Battlefield* series presents a framework for understanding and assessing the decision-making process, based on the multi-attribute model.

The amount and pace of verbal and written information that people exchange every day has increased dramatically over the past decade. A major question of our time is: how does this information influence people's attitudes, behaviours, and decision-making?

The multi-attribute model is an established framework that uses people's priorities to evaluate the favourability of an actor (e.g. a political candidate) or an object (e.g. Coca-Cola).

The idea behind the multi-attribute model is that when people are making decisions, they don't just judge each choice in and of itself. Instead, they consider multiple factors, or attributes, when developing an overall opinion or decision.

As well as providing an overview into how people make evaluations and decisions, this paper looks at the theoretical basis of the multi-attribute model and presents a case study of former Brazilian President Lula – showcasing how the model can be applied to electoral outcomes.

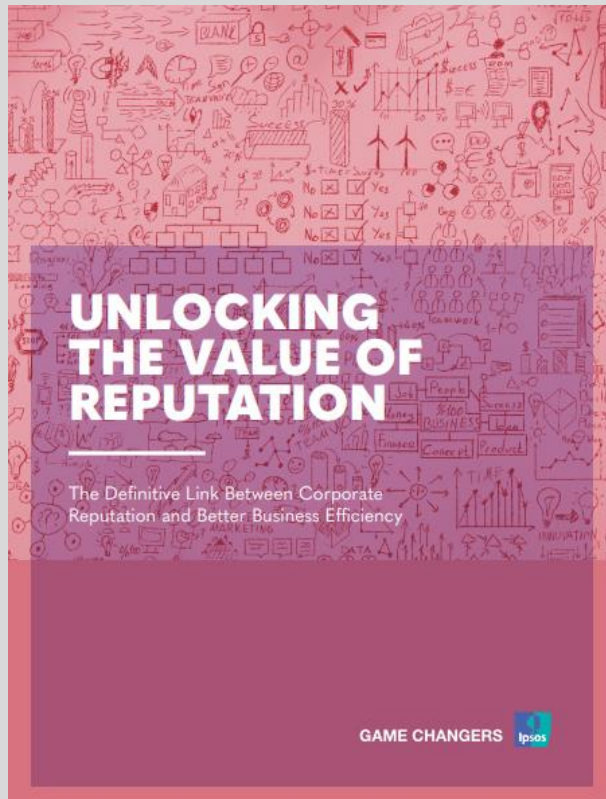
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FLAIR ITALY 2018

As part of our *Ipsos Flair* series, this bitesize version of the eighth Italy edition paints a picture of a country in search of identity.

Key points include:

- **An unequal country:** The number of people at risk of poverty or social exclusion has increased from 26% in 2008 to 30% in 2016. Poverty among young families grew by eight points between 2007 and 2015, while among elderly families it fell by one point.
- **Weak political identities:** The failure of Italy's former Prime Minister Renzi to complete the long overdue reform programme redefines the political framework of reference. In the most recent March 2018 election, no party emerged with a clear majority, resulting in a hung parliament and the exposure of a divided nation with a new bi-polar political landscape.
- **In search of simplicity:** There is a growing demand for simplicity in terms of information. Consumers are demanding only essential labels on products that are most relevant to them. To get noticed in this informational chaos, brands must therefore use every means to present themselves as friendly, genuine entities in real life, to be able to "talk to people".



UNLOCKING THE VALUE OF REPUTATION

This report examines the link between corporate reputation and better business efficiency.

Management teams around the world face a variety of complex business situations daily. A great way to start boosting your business is by leveraging the power of your reputation.

In this report, we present research from the *Ipsos Global Reputation Centre* across 31 countries showing conclusive proof of the relationship between a good reputation and better business efficiency. Reputation is a key consideration in purchase decisions. The vast majority (87%) of consumers around the world say that they take the reputation of the company into account when purchasing a product or service.

This report also highlights regional differences in intensity of opinion. For example, consumers in Latin America (62%) and the Middle East/Africa (50%) are the most likely to say they are “very likely” to take reputation into account, whereas consumers in Europe feel less strongly – just 24% are “very likely” to consider reputation – but still a vast majority (79%) say they take reputation into account at least to some extent.

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WHAT WORRIES THE WORLD

Every month, our 26-country *What Worries the World* survey asks citizens about the biggest worries for their nation, ranging from crime and violence to childhood obesity. This paper summarises the top concerns of 2017.

Key findings include:

- The world has become marginally more optimistic: 40% believe their country is headed in the right direction, up from 37% in 2016.
- Unemployment remains the biggest worry for 2017 overall, but its lead over poverty/inequality and corruption diminished over the year.
- This fall in concern about unemployment has been driven by big drops in worry about job security in “established nations” including Canada and the US.

The paper also looks ahead to what 2018/19 may bring, suggesting that the rise in optimism will continue – in part due to several established and previously pessimistic Eurozone economies that are now experiencing growth. However, it remains unlikely that the global balance will fully tip in favour of optimism any time soon.

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THE ROYAL FAMILY

The Queen and Prince Harry are the most liked royals, followed by the Duke and Duchess of Cambridge, according to this global poll carried out ahead of the recent royal wedding.

Other findings include:

- Across the world, views towards the Royal Family are more favourable than unfavourable (by 35% to 11% on average), though around half are either neutral (37%) or don't know (16%).
- Outside the UK, the most positive attitudes towards the Royal Family can be found in Romania (58% favourable), Saudi Arabia (50%), India (48%) and the US (43%) – while Spain and Argentina are the most negative (only 18% favourable in each).
- When asked what impact the Royal Family has on their views of Britain, around half on average (51%) say it makes no difference.
- Around half of those in Canada and Australia, where the Queen is currently head of state, think that abolishing the monarchy would “make no difference” to their country's future, and only 15% think it would make things better.

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SUMMER HOLIDAY PLANS

The 18th annual Ipsos/Europ Assistance summer holiday survey looks at the 2018 holiday plans of European, American and Asian travellers.

Key findings include:

- In the US and Brazil, 68% of respondents plan to take a holiday this summer, followed by China (67%), India (64%) and Europe (64%).
- The seaside remains the top destination for holiday makers, with Italians (70%), Chinese (68%), Austrians (67%) and Germans (65%) the most likely to holiday at the beach this summer.
- The average trip duration is below two weeks, with people from India and China planning a holiday of 1.3 weeks. Meanwhile, Brazil records the highest duration (2.2 weeks), followed by France and Switzerland (both 2 weeks).
- Travellers are split in terms of how far ahead they book their holidays. 49% of British and Germans book their holidays *more* than four months in advance, compared to 35% of Italians and 33% of Spanish. Outside Europe, 51% of Brazilians and 46% of Americans book their holidays *more* than four months in advance, whereas Asian holidaymakers are more spontaneous: 65% of Indians and 81% of Chinese book their holidays *less* than four months in advance.

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SHORT CUTS

Irish referendum exit poll on abortion

Irish voters went to the polls on May 25 for a national referendum to remove restrictions on abortion from its constitution, allowing abortion to be made legal in Ireland.

Ipsos MRBI was commissioned by *The Irish Times* to undertake an exit poll to be published immediately after polling stations closed – a major challenge as publishing an exit poll so quickly had never been previously achieved in Ireland.

The results, published online by *The Irish Times* and subsequently read one million times across the world, found that 67.7% voted in favour of removing the constitutional restriction on abortion. Our exit poll was more accurate and closer to the actual result (66.4%) than the national broadcaster's own exit poll. It also provided key insights into the dynamics of the electorate, including the huge rise in turnout among young women.

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Canadian women and work

Three-quarters of Canadian women say there is no gender equality in the workplace, according to a new study from the *McCann Worldgroup Canada* in partnership with Ipsos.

The Truth About Canadian Women series explores the changing conversation around women in Canada today, with 'Women and Work' the first of five reports in the study – examining how women are shaping profound change in the workplace.

While we collectively count the number of women who are employed, their level of employment, and how women compare to men in terms of pay and access to opportunities, this advancement toward measurable equity is part of something bigger. This study highlights how women are introducing new expectations, behaviour rules and definitions for success.

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Shakespeare still has power to shock

In the UK, Ipsos MORI and *The Royal Shakespeare Company* partnered on an innovative research project to monitor the audience's emotional engagement of *Titus Andronicus* – Shakespeare's bloodiest play.

With virtual reality (VR) rapidly growing traction in the field of research, this programme of work elicited valuable insights about the role of VR in accessing reality and in its ability to transport people into the mindset of the real-life experience. The study demonstrated that the realism that VR can bring has potential not only for the entertainment industry, but also for the research industry – for the means of better observing, understanding and predicting behaviour and intuitive reactions.

The research won the bronze award in the 'Best Research Project Initiative' at [The Connies 2018](#) last month.

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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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