August 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 August 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

GENERATION Z: More mild than wild?

This latest thought piece from *Ipsos Thinks* pulls together existing and new research and analysis to provide a better understanding of Generation Z, including how they differ from previous generations.

CUSTOMER CENTRICITY: From stance to reality

More than ever, customers have a powerful influence on their relationship with brands. In this thought piece, we set out six simple and decisive principles for brands to follow in order to be successful and secure their future growth.

UNDERSTANDING CULTURAL BIAS: When difference doesn't mean different

Running global customer experience studies provides value for money and a degree of standardisation across markets. Yet, cultural bias remains a risk. In this paper, we examine what needs to be addressed as a result.

SPOTLIGHT ON RUSSIA: TrendVision

This Russia TrendVision report provides an overview of the country's current social and economic situation, examining key demographic data and consumer behaviour to forecast possible future trends.

THE FUTURE OF MOBILITY: Electrification

This *Ipsos Views* paper analyses the results of interviews with car owners across nine different markets to learn more about consumers' thoughts on electric and hybrid vehicles – one of today's key mobility trends.

GLOBAL VIEWS ON HEALTHCARE: Perceptions on quality of healthcare vary widely

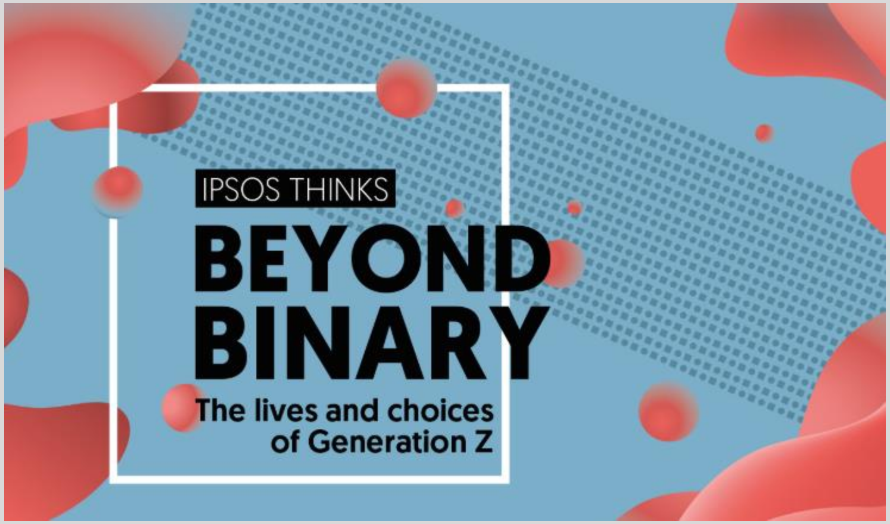
Less than half of global citizens rate the quality of the healthcare in their country as good, according to this comprehensive study covering personal health, technology, information and future expectations.

HUMAN RIGHTS: Global attitudes in 2018

This latest *Global Advisor* poll across 28 countries finds just four in ten people believe everyone in their country enjoys the same basic human rights, casting doubt over how universal human rights actually are.

MYSTERY SHOPPING: Driving better automotive CX performance

What should an automotive mystery shopping programme focus on? This paper explores how a well-executed mystery shopping campaign can fuel a better customer experience for customers and employees alike.



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GENERATION Z

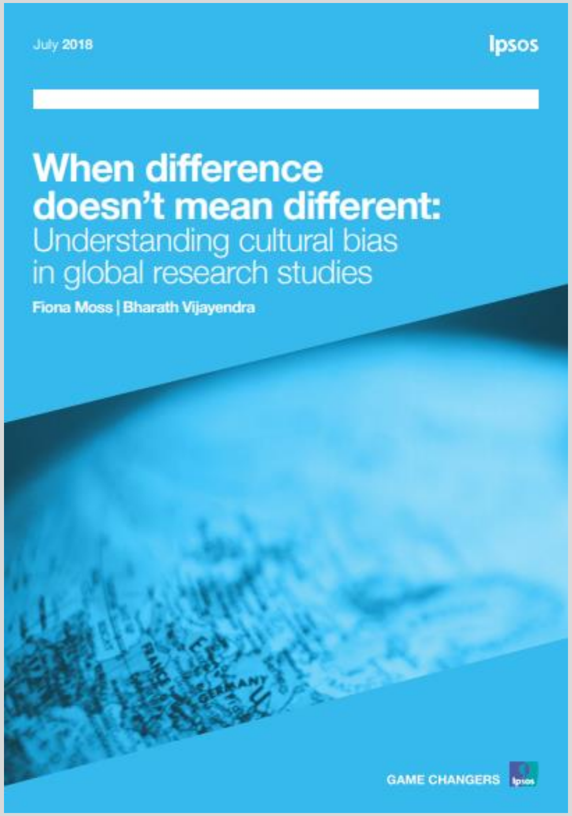
This latest *Ipsos Thinks* report pulls together existing and new research and analysis to provide a better understanding of Gen Z.

Millennials are old news. Gen Z are the new focus of attention, and often wild speculation. Most of them are still very young, with the oldest only just reaching their early 20s, but they are already the subject of false claims and myths about who they are and what they're going to be.

Beyond Binary: The lives and choices of Generation Z, explores their differences and similarities to previous generations covering topics including health, political views, sexuality, technology use and social attitudes.

Highlights include:

- **Their norms of sexuality and gender are changing:** Gen Z are much less likely to identify as solely heterosexual and have much greater contact with people who don't identify as just one gender.
- **They're worried about the future:** no one is very optimistic about the lives of Gen Z being an improvement on what Millennials are currently experiencing.
- **Touched by the dark side of tech:** there's a clear negative correlation between social media use and mental health – particularly anxiety and depression.



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CULTURAL BIAS

Running global customer experience studies provides both value for money and a degree of standardisation across markets. However, their validity remains at risk from an age-old research problem: cultural bias.

Cultural response bias is not a new theory. However, the ongoing attention paid to it by the research community shows it remains a significant consideration in research programme design and results interpretation. Indeed, for organisations to glean the most value possible from their global studies, it's essential to be aware of the substantial and systematic differences that can present themselves when analysing scores across several countries.

Using our customer experience global norms data, this paper examines the three commonly occurring cultural response styles and discusses the options available to address them and how doing so can ultimately improve an organisation's Return on Customer Experience Investment (ROCXI).

It explains how, by ensuring that cultural response bias is considered carefully at programme setup – or reviewed for existing studies – its impact can be controlled and the results of global research studies can be more reliably interpreted.

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THE FUTURE OF MOBILITY: ELECTRIFICATION

One of the key mobility trends, now and of the future, is electrification. But how are consumers reacting to the concept?

Although the electric vehicle (EV) has been around for over 100 years, early solutions were not popular or practical and had limited capabilities. The need for EVs was minimal until the late 20th century when gas shortages and environmental concerns came to the fore. By this time, transportation emission regulations were issued, creating a renewed interest in EVs.

In this *Ipsos Views* paper, we analyse the results of interviews with car owners across nine countries to learn more about consumers' thoughts on electric and hybrid vehicles, including:

- Current consumer behaviour regarding combustion engines and EVs
- Familiarity and purchase consideration with different types of vehicles
- The benefits of and barriers to owning and driving EVs
- Who is most interested in EVs
- The most trusted partners to offer EVs and mobility services

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HUMAN RIGHTS IN 2018

This latest *Global Advisor* poll across 28 countries finds just four in ten people believe everyone in their country enjoys the same basic human rights, casting doubt over how universal human rights actually are.

Key findings include:

- Eight in ten people stress the importance of having laws that protect human rights in their country, with those most likely to agree coming from Serbia (90%), Hungary (88%) and Colombia (88%). Disagreement is most prevalent in Brazil (12%), Saudi Arabia (11%) and Turkey (11%).
- Just three in ten adults say human rights aren't a problem in their country, ranging from 55% in Germany to 17% in Colombia.
- Nearly four in ten (37%) agree that the only people who benefit from human rights in their country are those who do not deserve them such as criminals and terrorists. Agreement for this is most prevalent in Brazil (60%), Peru (60%) and India (53%), and least common in Japan (16%), the United States (22%) and Canada (23%).
- Freedom of speech, the right to life, and the right to liberty rank as the most important human rights to be protected.

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CUSTOMER CENTRICITY

More than ever, customers have a powerful influence on their relationship with brands. In this thought piece, we set out six key principles for brands to follow in order to be successful and secure their future growth.

1. **The customer couldn't care less about the channel**: instead, they expect coherence and continuity in their experience across the different channels.
2. **The customer couldn't care less about touchpoints and reasons of contact**: customer experience no longer revolves around a series of experience points, but rather an everyday, ongoing intimacy.
3. **The customer couldn't care less about sectors**: they don't just compare rival brands, but every brand in between, going beyond business sectors.
4. **Humans aren't machines**: digital technology has strengthened the need for a human touch in the customer relationship.
5. **Awareness of the abundance of personal data is creating a demand for relevance**: big data is not just a trendy term – every proposal and message put out by a brand must be perfectly customised.
6. **Bland is boring**: consumers attach real value to anything offbeat or surprising in the customer experience.

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RUSSIA TRENDVISION

Providing an overview of the country's current social and economic situation, this report examines key demographic data and consumer behaviour to forecast possible future trends.

Key findings include:

- Russian GDP grew in 2017 by 1.5%, compared to a 3.7% global average, and is projected to rise no more than 2% annually in 2018-2021, suggesting that companies need to adjust for muted growth.
- Russia remains highly dependent on volatile oil and gas prices (yet, as the oil price approaches $70 per barrel, it boosts competitive US oil production).
- Despite the economic situation stabilising since 2016, Russia still ranks low on our global *Consumer Confidence Index* (measuring consumer attitudes), with the country's primary index score standing at 41% in the first quarter of 2018, compared to a global average of 51%.
- The 55+ age group has significant purchasing power in Russia, accounting for 29% of all current bank accounts, 26% of concert visits, and 22% of appliance purchases in 2017.

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GLOBAL VIEWS ON HEALTHCARE

Consumer assessment on the quality of healthcare varies widely, with just under half rating it as "good", according to this comprehensive *Global Advisor* study covering personal health, technology, information and future expectations.

Key findings include:

- Countries where consumers tend to rate the quality of their healthcare positively are Great Britain (73%), Malaysia (72%), and Australia (71%). Poor ratings outnumber good ratings in nine countries, including Brazil (by 39 percentage points), Poland (31 points) and Russia (29 points).
- Access to treatment/long waiting times tops the list of worldwide concerns (40%) about the problems facing healthcare systems, followed by insufficient staffing (36%), and the cost of accessing treatment (32%).
- Over half of consumers (56%) agree they are in good health, with highest levels reported in India (70%), Serbia (68%) and Saudi Arabia (67%), while those with the lowest levels are Hungary (47%), Poland (48%) and Russia (49%).

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AUTOMOTIVE MYSTERY SHOPPING

This paper explores how a well-executed mystery shopping campaign can fuel a better customer experience for customers and employees alike in the automotive industry.

The automotive industry is facing a technological revolution and, with it, customer expectations are rapidly developing. But how can the fractured supply chain, from manufacturers through to individual dealerships, keep track of their performance in this ever-changing landscape?

The answer lies with mystery shopping, a measurement tool already widely used across other sectors such as leisure and retail, and now realising its huge potential in the automotive industry. Performed correctly, it can help ensure the delivery of better customer experiences. However, to achieve success it must be understood and accepted by the entire company – from frontline staff to the boardroom.

In this paper, we examine what an automotive mystery shopping programme should focus on, as well as demonstrating how well-designed mystery shopping programmes can enhance value, improve quality and increase return on investment for some of the most successful automotive organisations in the world.

SHORT CUTS

"Moodvertising" – the second half

Every four years, the World Cup creates unparalleled global excitement. With the potential for mood influencing ad effectiveness, we measured the emotional impact of several World Cup ads in four different and important markets from the most traditional football schools in Europe and Latin America in the few days preceding the beginning of the tournament.

The ads were tested using advanced measurement for nonconscious emotional response with Electroencephalogram (EEG) and Eye Tracking.

In the follow up from the "first half" paper, this piece explores how mood swings can influence the ROI of an advertising campaign and provides recommendations on the best advertising winning strategy.

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Smart advertising, smart business

Small and medium-sized businesses (SMBs) form the backbone of the Australian economy, accounting for an estimated 57% of private sector economic activity and 68% of private sector employment. The scale of these headline statistics, however, belies the reality of what it takes to be a success.

With this in mind, we were commissioned by *Google* to undertake two quantitative studies to examine the Australian SMB market and the role smart advertising technologies are playing in their operations, with a focus on the impact and opportunities of these new solutions.

The study revealed some of the challenges for Australian SMBs, their perceptions and attitudes towards new trends in advertising technology, and their expectations about how smart advertising tools will contribute to their growth in the years to come.

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Six key affluent traveller types

The travel category is undergoing significant evolution and change, driven by cultural movements, generational changes, emerging technology and other factors. Travel is becoming more and more experiential, but there are a wide variety of the types of travel experiences people seek.

Ipsos Affluent Intelligence uncovered six key types of affluent travellers in the US – wellness seekers, active challengers, sightseers, cruisers, historians and gourmands – along with the attitudes, desires and expectations of each.

As well as an infographic, you can also download our paper, *The New Experiential Traveller*, for more information on the types of travel experiences people choose and how they differ from each other.

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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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