

September 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 September 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



WHAT WORRIES THE WORLD: Over half say their country is on the wrong track

Our latest 28-country *What Worries the World* study finds that the majority of people (58%) feel their country is on the wrong track, with citizens in Brazil, Peru, and South Africa citing the highest levels of concern.

MYSTERY SHOPPING: The luxury industry

In this paper, three experienced mystery shopping experts share their knowledge of mystery shopping in the luxury industry, and show how it is a vital part of a holistic customer experience strategy.

SERBIA UNDER A MAGNIFYING GLASS: Key economic and demographic trends

This report provides an overview of the current economic and demographic shape of Serbia, including a focus on shopping habits, advertising, and digital consumption.

WOMEN AND WATER: A ripple effect

This two-part paper investigates the gendered impacts of water programmes, including a look at our primary research findings from across three countries - Rwanda, Swaziland and Nigeria.

IN-APP ADVERTISING: Good news for brands

Previous research has shown that different apps encourage different behaviours. In this report, we investigate the potential of mobile apps and websites as an effective advertising channel.

AFFLUENT TRAVEL: Where do the wealthiest spend their holidays?

With affluents increasingly searching for unique experiences, rather than growing their material possessions, the luxury travel market is booming. This report explores travel trends among the affluent worldwide.

SOCIAL MEDIA IN INDIA: Are you using social data optimally?

Social media data is being recognised as a goldmine for consumer insights and is becoming an intrinsic part of consumer research. Focussing on India, this paper sets out how we can help marketers maximise its full potential.

CONNECTED HEALTH: The rise of health data is transforming healthcare

At a time when millions of people now use digital technologies to track their health, the subsequent rise of health data is transforming the industry. This article, part of our latest *What the Future* magazine, explains how.





WHAT WORRIES THE WORLD

Our latest 28-country *What Worries the World* study finds that over half (58%) of citizens feel their country is on the wrong track.

Key findings include:

- Just 15% of Brazilians think their country is going in the right direction, followed by Peru (22%), South Africa (24%) and Hungary (26%).
- At the other end of the spectrum, China once more scores highest on national direction, with 91% saying they think their country is on the right track, followed by Saudi Arabia (76%) and India (67%).
- In Italy, which has had a new government since June, optimism in the country's direction has risen from 14% in May to 47% today.
- Mexicans also show a high increase in national optimism, with a score of 30%, a 11-percentage-point upsurge from the previous month. This is Mexico's highest score for national positivity in over a year, coinciding with Andrés Manuel López Obrador's recent election victory.

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MYSTERY SHOPPING IN THE LUXURY INDUSTRY

In this paper, three experienced mystery shopping experts share their knowledge and advice when it comes to mystery shopping in the luxury industry.

Customer experience is of great importance in any industry. This is arguably most evident in the high-end spectrum of the market where affluent consumers literally spend billions of dollars, pounds, euros, yuan, or yen – year in, year out.

Ipsos Mystery Shopping uses panels of expert shoppers in more than 100 countries to collect objective feedback from unbiased consumers. More than one million tasks are conducted every year, of which an increasing number are completed by dedicated, affluent mystery shoppers – these individuals don't rely on mystery shopping as an income, but rather enjoy the experience so much they count it as a pastime.

Mystery shopping in the luxury industry requires a very different approach to regular high street retail shops. However, there is much that the high street can learn from how luxury goods are sold. This paper sets out the techniques top-end retailers use to maintain an excellent customer experience and how we can design luxury mystery shopping programmes to benefit retailers of any calibre.

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SERBIA UNDER A MAGNIFYING GLASS

This report provides an overview of current economic and demographic trends in Serbia, including a focus on shopping habits, advertising, and digital consumption. Public opinion on key geopolitical issues, and how these compare with the rest of the world, are also included.

Key findings include:

- Four in five Serbs think Russia's influence on world affairs will increase. This is more than any other country and significantly greater than the global average of 50%.
- Serbs strongly believe global temperatures will rise – with 87% saying they think this will happen, compared to the global average of 71%.
- The country's population is falling, with Serbia estimated to see a decline from 7.1m in 2016 to 6.2m in 2041.
- Spending within the advertising market in Serbia grew to €178m in 2017, the highest it has been since 2008. TV advertising still dominates the market, but digital is growing at the expense of print.

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WOMEN AND WATER: A RIPPLE EFFECT

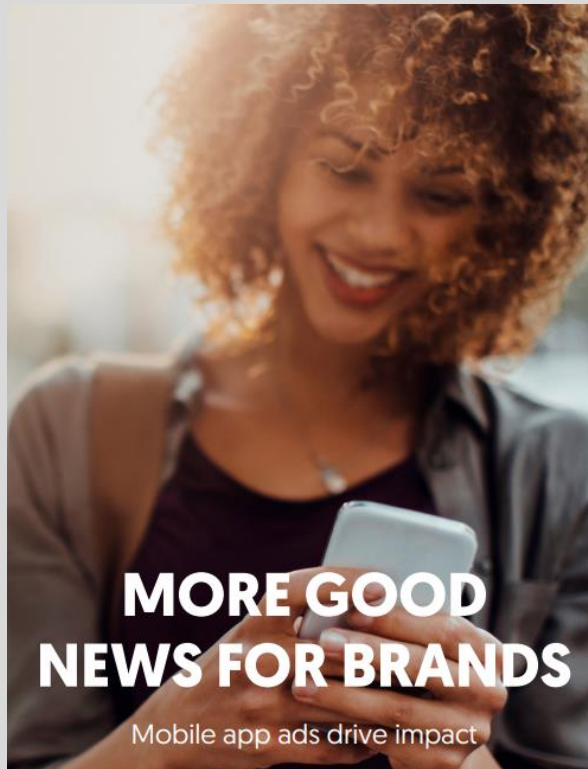
In this two-part paper, we investigate the gendered impacts of water programmes.

With women responsible for domestic chores such as collecting water, cooking and cleaning, as well as taking care of sick family members, access to clean water and sanitation can positively impact multiple aspects of their lives. As time collecting water and handling the health consequences of unclean water is spent elsewhere, there is the potential for women to spend time on other things, including income-generating activities. However, evidence of the ability to turn time savings into income generation is largely anecdotal.

In 2017-18, we conducted a study with the *Water & Development Alliance (WADA)* to map the hypothesized direct gendered impacts (“women and water”) and the pathways to indirect empowerment impacts (“the ripple effect”) of water programming. We collected primary data from research across three countries - Rwanda, Swaziland and Nigeria - to assess whether these hypotheses can be supported.

The outcome of the study is a tool that can be used by development practitioners to understand how applying a gender lens to their water programming can lead to greater empowerment impacts for women.

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IN-APP ADVERTISING

A new report investigating the potential of mobile apps and websites as an effective advertising channel.

Previous research shows that different apps encourage different behaviours; news app users snack on content up to three times a day, while entertainment app users immerse themselves in programmes for up to seven hours a week.

This report, commissioned by *Google*, sets out how in-app advertising is effective both at reaching decision makers and in driving action.

Findings include:

- **Ads within apps drive a strong connection:** Close to half of app (49%) and mobile website (48%) users said that the ads they saw gave them a good feeling about the brand, compared to just over a third (34%) of PC users.
- **People viewing on apps feel more likely to interact with a brand:** Half (50%) of those who saw ads in apps said they would be likely to interact with a brand in the future.
- **In-app ads are able to inspire a specific action:** Smartphone users are more likely to do something specific as a result of seeing an ad on a mobile app.



AFFLUENT TRAVEL

With the affluent increasingly searching for unique experiences, rather than growing their material possessions, the luxury travel market is booming.

The affluent, with their immense spending power, are highly rewarding customers for travel brands. Not only does the average affluent make five roundtrips a year, they are also not afraid to splurge during their limited time off. Even in still developing markets like China, affluent travellers frequently spend over \$9000 on international leisure trips a year.

This summary report explores key affluent travel trends worldwide, with findings including:

- Young affluent singles/those without children are looking to discover places off the beaten track. For example, 77% of European affluent millennials say they value exploration and discovery.
- Four star hotels are the most popular choice for affluents in the US and Asia – respectively 38% and 36% prefer this type of accommodation.
- If the European affluent want to get away from the crowd, they should avoid Spain: over 5.4m of them have planned a holiday to the Spanish mainland in the next year. Also popular is the US (4.5m) and Italy (3.6m).

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ARE YOU USING SOCIAL DATA OPTIMALLY?

Social media data is being recognised as a goldmine for consumer insights and is becoming a key part of consumer research. With a focus on the Indian market, this paper sets out how we can help marketers to maximise the full potential of this data.

Social media data holds a wealth of information about what is being said about a brand; what consumers find good or bad about it and what functionalities and emotional aspects are catching the consumer's attention (or not!), among others. But how can marketers derive value from social media conversations? And what are the challenges faced by market researchers?

This paper explores:

- The current social media landscape in India
- The different types of social content and tools
- How it compares to evolved markets
- The challenges of social data
- The future of social media research in India

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CONNECTED HEALTH

At a time when millions of people increasingly use digital technologies to track their health, the subsequent rise in the availability of data is transforming healthcare.

The promise of connected health is clear: people can use these emerging technologies to collect and analyse context-specific data to better manage their health. It is a key reason healthcare professionals are increasingly recommending connected health devices to patients, according to our survey of nearly 1,700 doctors in 18 countries.

How these connected technologies are adopted is a big, open question for patients and healthcare professionals. The entire health ecosystem is changing and growing, and patients can need a trusted caregiver, a connected health device, an AI-based analytical tool or indeed all of the above to guide them through this shifting landscape.

This article is part of our latest *What the Future* magazine series. Our new edition focuses on health, examining a range of topics including whether technology will make the patient experience more human, and if genetics will be the lock or key to patient privacy.

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SHORT CUTS

French Fractures

This report is the result of the 6th wave of *French Fractures*, an annual study exploring the values, perceptions, and state of mind of the French population.

Our latest findings show that, 10 months before the European Elections, 34% of French people are feeling disappointed by the EU and 52% think that it tends to increase the effects of economic, diplomatic or environmental crises. Other headlines include:

- 51% say globalisation is a threat to France (up from 48% in 2017)
- 66% think there are too many immigrants in France (unchanged from last year)
- 58% believe unemployed people could find work if they really wanted to (up from 55% in 2017)

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Sex lives of young people

As part of our studies on misperceptions, we asked people in Britain and the US to guess how often those aged 18-29 in their country have sex. Findings show both countries think their young people are much more sexually active than the reality.

Men think young women are having an incredible amount of sex – 22 times a month in Britain, and 23 times a month in the US, compared with the actual number of around five times. Women are much closer to reality when guessing about other women's sex lives, with the average guess in both the US and Britain being 12 times a month, although this is still much higher than the reality.

This new data is included in a new book by Bobby Duffy called *The Perils of Perception – Why We're Wrong About Nearly Everything*, released in early September.

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Chinese International Travel Monitor

The seventh edition of the *Hotels.com™ Chinese International Travel Monitor* takes a comprehensive look at the impact on global travel by mainland Chinese travellers.

Travellers were asked about their spending patterns, travel preferences, booking methods, accommodation choices, and future travel plans. Findings include:

- Overall, Chinese travellers are spending greater amounts – in the past 12 months, they spent 40% more on travelling than the previous year.
- The trend towards long-haul destinations continues to grow. Next year, Europe, Africa and the Middle East are the top destinations for over half of travellers.
- Trying local food is a favourite pastime for 69% of travellers, followed by visiting local landmarks (65%).

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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.

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