
November 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 November 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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FLAIR BRAZIL 2019

The Sound and the Noise

Flair Brazil gives us a better understanding to the often nearly inaudible deep changes happening in Brazil. A succession of monumental events, from economic crises to presidential impeachment and the Olympic Games, make the current climate turbulent and fast-moving.

SHARED MOBILITY

What does the future of mobility look like?

The lure of vehicle ownership and full independent mobility may be overridden by the draw of technological advancements in transport. We look at how sharing with others can offer both greater convenience and cost-saving.

SPOTLIGHT ON HEALTH

Access to treatment a question of equality

Looking at research findings from European countries, China and the USA, a recurring issue for global healthcare - in particular advancements in cancer therapies - is patients' ability to access and afford treatment.

NATION BRAND RANKINGS 2018

How strong is your country's global reputation?

This report ranks 50 countries' national images according to a series of categories, from exports to culture. Germany upholds the strongest national brand, with Japan, the UK and France occupying other top spots.

FLAIR RUSSIA 2019

The Time of Adjustments

This first edition of Flair Russia sketches an image of an often misunderstood country, looking at the aspirations and expectations of its tech-savvy people and at how companies are adapting to changing market needs.

WHAT WORRIES THE WORLD

Corruption is now the greatest global concern

Our monthly survey finds 60% of people around the world say that their country is "on the wrong track", with Brazil, Spain, South Africa, France and Peru the most pessimistic of the 28 countries covered.

BREXIT PREDICTIONS AND (MIS)PERCEPTIONS

The most important issue facing Britain today

Recent polls and reports by Ipsos in the UK show that, as the negotiations proceed, anxiety around Brexit remains high and people's expectations for a positive outcome are increasingly low.

GLOBAL BUSINESS INFLUENCERS

How do the <1% live?

The great purchasing power and therefore influence of the world's most senior executives make this group an interesting subject to study. This annual survey gives an insight into their habits and thought processes.





FLAIR BRAZIL 2019

“The Sound and The Noise” tunes into the multiple, diffracted voices of Brazil trying to make themselves heard in a changing society.

This fifth edition of Flair explains why the election of an authoritarian leader in Brazil was a likely outcome, and addresses other profound changes happening in the country.

A feeling of discontentment is loud and clear; 85% of the population think the economic situation is not good and 83% believe Brazil is going in the wrong direction. Crime, violence and corruption are the biggest concerns, and these featured strongly in newly elected Bolsonaro's speeches.

Amongst the headlines:

- Brazil currently has over 10,000 start-ups, accounting for millions of Brazilian Reais' worth of transactions.
- Issues of diversity are being expressed in both political and cultural arenas, including in Brazilian music.
- 45% of Brazilians claim to be “less tolerant”, compared to the global average of 30%. Differences in public/political opinion are the leading factor of this tension.
- The number of hours Brazilians spend streaming video content has increased by 90% in three years.



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THE FUTURE OF MOBILITY: SHARED MOBILITY

Our new paper on shared mobility completes our 3-part series on the future of mobility.

In the age of digitalisation, a raft of new mobility services were born, including app-ordering services like free-floating and peer-to-peer car-sharing, car-pooling or ride-sharing.

These have now become a part of day-to-day life for many and form the modern alternatives to traditional public transport or taxis and cars.

Key findings from the report include:

- 96% of the time the car is parked at a standstill.
- More than 50% of current car owners predict that, in the future, people will use shared mobility services instead of owning a car.
- But current usage of car-sharing is lacking. Only 2% of car owners and 4% of non-car owners have ever done it.
- Cheap (49%), simple (48%), and fast (41%) are the top three recognized benefits of ride-sharing.

Read the rest of the series:

- [Part I: The road to driverless cars](#)
- [Part II: Electrification](#)

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GLOBAL BUSINESS INFLUENCERS 2018

This survey analyses the media, business, financial, luxury, and travel habits of the most senior global executives in 23 countries.

Global Business Influencers (GBI) are the most senior business people in companies with 50+ employees. They represent less than 1% of the population.

This year's study reveals the following about this segment:

- They are avid and heavy consumers of all media and access content via multiple media brands and platforms.
- They are savvy investors with an average net worth of US\$1.2m – 24% are millionaires.
- In the last year they have taken on average 7 return flights for business, 57% using first or business class.

Read the [2018 briefing](#) for information on how brands can appeal to this demographic

See presentations for [Asia](#), [Europe](#) and the [USA](#), where Ipsos experts explore the factors that govern the purchase decisions of the GBI; emotion, cognition or intuition.



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WHAT WORRIES THE



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WHAT WORRIES THE WORLD: SEPTEMBER 2018

Most global citizens feel their country is on the wrong track, with corruption the biggest worry

Across 28 countries, 60% of people think that their country is on the wrong track, with Brazil, Spain, South Africa, France and Peru the most negative.

Financial and political corruption has risen through the ranks of worries to occupy the top spot when it comes to global concerns.

This is most acute in Peru, where 68% think it is one of the most worrying issues, compared to the global average of 38%. Argentina has also become increasingly worried about corruption recently. Sweden and Germany are the two least concerned countries when it comes to this subject.

In summary, the 5 issues that most worry the world are:

1. Financial/Political Corruption
2. Unemployment
3. Poverty/Social Inequality
4. Crime & Violence
5. Healthcare



SPOTLIGHT ON HEALTH

This month we present a recent collection of research on healthcare looking at the issue of affordability in Europe, China and USA.

A new study asks people in five European countries; France, Germany, Italy, The Netherlands and Poland to rate their health systems. It finds:

- 49% think their health system has got worse in the last 10 years.
- People are most satisfied with the expertise of medical professionals (64%)
- Access to innovative therapies scores lowest (37%).
- 70% of people also feel there is unequal access to innovative therapies across Europe.

[Read more \(in French\)](#)

Unequal access is also the message of a [report on cancer treatment in China](#). It finds that despite a 'remarkable revolution' in the war against cancer, an affordability gap means that many poorer patients will miss out on new therapies.

Meanwhile, a [U.S. study](#) shows 6 in 10 Americans are concerned they could not afford cancer treatment: three-quarters say that it would have a catastrophic impact on their finances.



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BREXIT PREDICTIONS AND (MIS)PERCEPTIONS

Our latest research finds the UK public worrying about Brexit and what happens next.

Half the British public state Brexit is the single biggest issue facing their country, according to [Ipsos MORI's September Issues Index](#).

There is little general optimism about the initial impact of leaving the EU according to the [Public's Brexit Predictions](#):

- 44% expect the UK to leave the EU without a deal.
- Only 14% expect Brexit will increase their standard of living in the next five years. 31% expect it will decrease.

[Ipsos MORI's October Political Monitor](#) tells us:

- 78% lack confidence in Prime Minister Theresa May to get a good deal.
- In a no-deal scenario, the European Union and the Conservative Party would be considered equally to blame.

[Brexit Misperceptions](#) shows that very few have their facts right on issues related to Brexit. For example:

- Less than a third (29%) of the public (correctly) think that immigrants from European countries pay £4.7bn more in taxes than they receive in welfare benefits and services.

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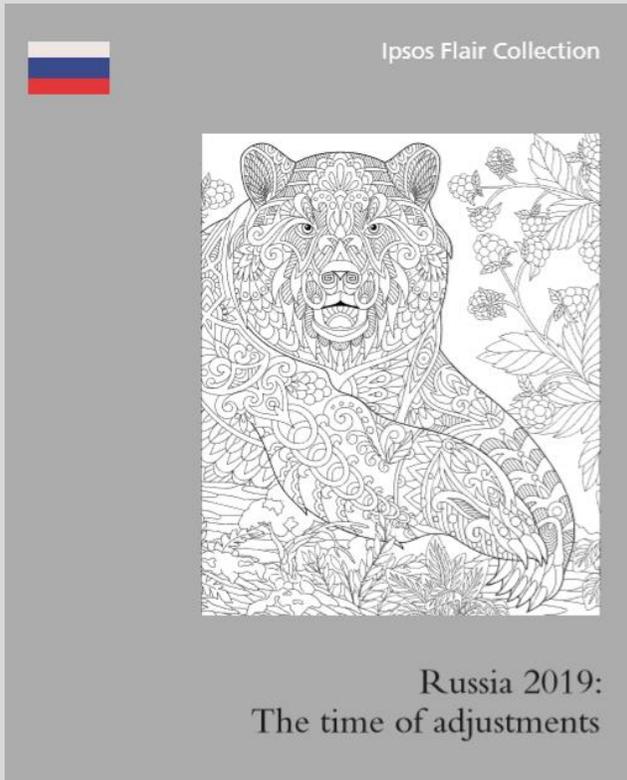
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FLAIR RUSSIA 2019

The first edition of Flair Russia focuses on the aspirations and expectations of its 145 million people, which represent a huge market of opportunity.

Russia has long been prominent on the global stage in terms of world affairs and geopolitical issues, but this Flair goes beyond the country's often mysterious image, presenting facts on consumer and business trends.

Following an 'innovation boom', internationally competitive Russian companies are gaining market share in a variety of sectors, driven by tech-savvy consumers.

Key findings include:

- The beauty industry in Russia is changing, with a growth in male grooming and the popularity of micro-influencers.
- Traditional values are important to Russian mothers: 81% say families should have children if they can.
- The dominance of vodka is not what it was as younger generations favour craft beers and whiskey.
- Furthermore, alcohol consumption is falling as more desire a healthier, more active lifestyle.
- Russia has the most internet users in Europe (110m) with mobile internet providing the key to access in many more remote areas.



NATION BRAND RANKINGS

Germany retains the top spot as 50 countries' national 'brands' are ranked. Japan moves up to second and the UK remains in third.

The Anholt Nation Brands Index (NBI) study measures the power and appeal of each country's "brand image" in six categories: *Exports*, *Governance*, *Culture*, *People*, *Tourism*, and *Immigration/Investment*.

Findings include:

- Germany's leading advantage lies in its strong reputation across multiple categories, *Exports* being a key one.
- The U.S., sharing 6th place with Italy, saw the greatest overall score drop this year. Its brand image has eroded in the *Governance*, *Culture*, and *People* categories.
- Japan is ranked number 2 thanks to the consistency of its brand image. It ranks in the top 10 in all categories but *Governance*.
- In third, the UK is one of the stable leaders despite uncertainties around Brexit, It ranks fourth for *Tourism*; behind Italy, France and Spain, and ahead of Greece.
- Big sporting events can bolster the global image of host nations. South Korea has moved up in rank by three positions after hosting the 2018 Winter Olympics.



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SHORTCUTS

Precarity amongst young Europeans

The majority of young Europeans (51%) feel that precariousness is on the rise in Europe. This increases to 58% when considering *their own* country.

In a survey of 15-25 year olds in France, UK, Italy and Poland, we find:

- 4 out of 10 believe that they risk falling into poverty in the coming months.
- 68% of young Britons feel that poverty is increasing in Great Britain, followed by Italy (65%) and France (64%).
- 2 in 3 ask their parents for financial support, 50% rely on free accommodation
- More than 8 out of 10 young people (and 72% of students) work to support themselves

But there is also solidarity between young people, who are willing to help each other and be engaged in their communities.

For more on young people, see our recent [study on Generation Z](#)

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The Economic Pulse of the World

46% of global citizens rate their national economies as 'good' – a figure which drops to less than one in five in Argentina, Brazil and South Africa.

The global average across 28 countries remains unchanged, but there is variation in mood by country.

Countries whose national economic assessment has improved since the last wave include:

- Peru (62%, +7 pts.)
- Japan (41%, +6 pts.)
- Mexico (32%, +4 pts)

Those with the greatest declines include:

- Belgium (50%, -8 pts.)
- Turkey (31%, -8 pts.)
- Spain (21%, -6 pts.)

The global average for future outlook is down two points with 27% expecting their *local economy* to be stronger six months from now.

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Auto Affluencers

Vehicle subscriptions are the latest innovation shaking up the central role of the automobile in American culture.

This new user model takes inspiration from Netflix or Spotify subscription services, but this time it's for cars.

Auto Affluencers are consumers whose enthusiasm, content habits, buying patterns, and spending on autos makes them influential to others.

An article in [GenPop](#), powered by Ipsos, outlines how these individuals are **eight times** more likely to be "extremely interested" in auto subscription services than average drivers.

Myriad subscription services give access to a choice of vehicles, allowing users to skip traditional ownership or leasing arrangements.

Find out more in our latest [Ipsos Affluent Intelligence study](#).

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