



January 2019

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 January 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



PERILS OF PERCEPTION 2018: Fact-checking our world-views

Now in its fifth year, our latest 'Perils' survey exposes how people in 37 countries see their reality, highlighting how we're wired to think in certain ways and how our environment influences our (mis)perceptions.

BEHAVIOURAL SCIENCE OF CPG: Disrupting the customer experience

Our behavioural science perspective on customer experience and decision-making provides advice for consumer packaged goods brands on how to survive in a digital consumer landscape.

IPSOS MORI ALMANAC 2018 The year in review

Our team captures the current mood of the country with a collection of articles on UK politics and society, including 2018's "Words of the Year".

IN MEDIA WE TRUST? How our views of the media are changing

Our exploration of trust in media uncovers a more complex truth about the levels of trust held in the media. We find big differences when comparing traditional and digital media channels.

HUMAN CURATION IN AN AI WORLD: Strategies to manage over-information

Ipsos experts show that fusing AI analysis with strategic human curation can provide the right strategy for organisations who find themselves information-rich but knowledge-poor with today's ever-expanding access to data.

WHAT THE FUTURE: FOOD What's for dinner?

Innovating in the food sector must take into account a clear understanding of food habits such as whether people still eat as a family, ideas of convenience and consumption of meat and sugar.

GLOBAL ADVISOR Towards a safer world?

A global poll for the Halifax Security Forum asks citizens across 27 countries about the biggest worldwide threats and their confidence in world leaders to address them.

UN WOMEN: SYRIAN REFUGEES The effects of gender and displacement

Ipsos research for the UN shows that the realities of Syrian women displaced by conflict and living in Lebanon, Iraq and Jordan are marked by gender discrimination and great uncertainties.



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PERILS OF PERCEPTION 2018

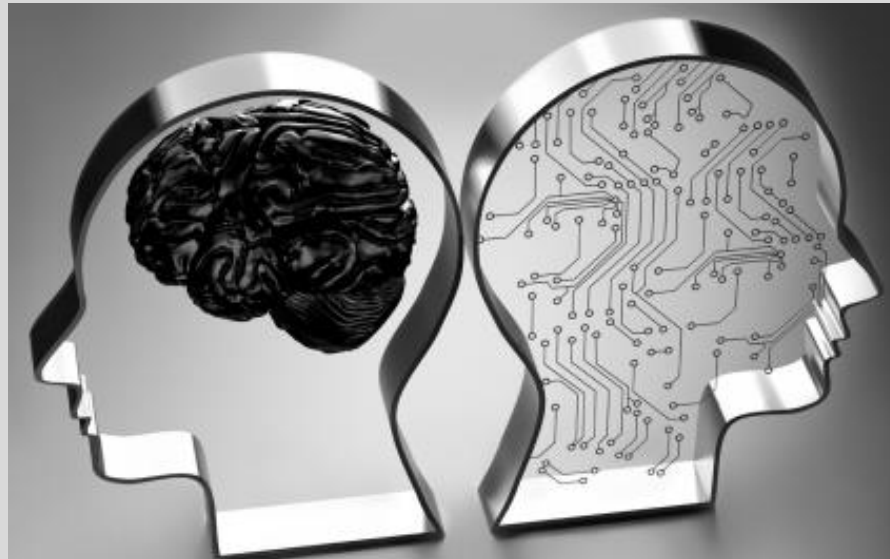
Our 37-country study reveals misperceptions across a range of issues including crime, climate change and the economy.

Our annual survey uncovers some considerable differences between our perceptions and reality, including:

- Estimates of the proportion of people unemployed and seeking work in each country are 5 times greater than the actual (34% vs. 7%).
- On average, people think 54% of the population of their country will be 65+ in 2050 but the actual projection is less than half of that, at 25%.
- Across all countries, people guess that 28% of their population are immigrants when the actual figure is less than half that, at 12%.
- Of the 13 countries where there is data, people think 39% of women have experienced harassment, when in fact 60% have.

Aggregate scores show Thailand to be least accurate in its perceptions, followed by Mexico and Turkey.

Conversely, Hong Kong is the most accurate, followed by New Zealand, with Sweden in third.



HUMAN CURATION IN AN AI WORLD

Businesses today are confronted with a veritable explosion of data. The result: we are often information-rich but knowledge-poor.

In this new white paper, we argue that human curation is more important than ever in an age of 'Infobesity' as it offers uniquely human qualities.

Human curation:

- is fuelled by curiosity
- can take into account even those things that cannot be measured
- can explore possibilities and opportunities.

But it is most effective when employed alongside what modern technology can offer.

This paper demonstrates a three-stage framework for curation – from distillation to socialisation and activation – which brings together the skills of human experts and the capabilities of technology to drive business impact.

“We start where machines stop by bringing in the deep human connection to data”, writes Radhecka Roy, Global Service Leader, Strategic Curation.

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WHAT THE FUTURE: FOOD

The latest edition of *What the Future* presents research and analysis from the US, Canada and beyond on an integral area of consumer spending: the food we eat.

What does the future hold for producers, consumers and marketers of food? This question centres around the role that food plays in people's life and how such trends affect food choices and diets, as well as packaging and convenience.

Key findings include:

- Globally, 63% prefer to eat locally even if this means having fewer foods to choose from.
- Australia, Canada, Japan and the United Kingdom are amongst those least optimistic about the affordability of food in the future.
- China, India, Saudi Arabia and Peru are most optimistic that the quality of the food they will eat will improve.
- Despite living in a time of abundance, projections show that due to climate change, world hunger will increase disproportionately in some developing countries.
- Most Americans would like more packaging to be made of recycled (87%) and recyclable (89%) materials.

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BEHAVIOURAL SCIENCE AND CPG

As brands continue to digitally transform, they should consider how the customer experience also changes in the process.

Our new white paper introduces five 'Mind Economy' trends and suggests how consumer packaged goods (CPG) brands can use them to achieve growth in today's "digital reality".

1. **Personalisation:** Moving from one-size-fits-all to services that meet our individual needs.
2. **Engineered environments:** Increasingly designed and immersive environments mean external cues (rather than internal factors such as opinions or attitudes) will shape our decisions.
3. **Moment optimisation:** The time gap between the desire and its fulfilment is shrinking.
4. **Hyper-rationalisation:** Rather than relying on the brand as a marker of quality, we increasingly look at product and service features – and how they are assessed by others.
5. **Experientialisation:** There is a continued move away from products and towards services which offer richer experiences.

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TOWARDS A SAFER WORLD?

A global perspective on international affairs from citizens in 27 countries who assess security, free trade, multilateralism and more.

The ninth wave of Ipsos's annual poll for the Halifax International Security Forum finds that:

- 74% of global citizens agree the world is becoming more dangerous. But this has dropped from 81% in 2017.
- Just three in ten (29%) believe US President Donald Trump's approach to foreign affairs has made the world a safer place.
- A majority feel that their government should focus less on the world and more at home (73%), in the interest of the economy.
- Three-quarters say their country has a responsibility to be a moral leader and set an example for others.
- "Multilateralism" is also favoured by 75%: in other words, collectively working towards global goals, even if their country does not get exactly what it wants.

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IPSOS MORI ALMANAC 2018

A review of life, society, business, media and politics in 2018 from a British perspective.

In an environment where Brexit dominates (48% of citizens say it is now the top issue facing the country), a huge 85% of Britons think the country is divided, nine points higher than the global average across 27 countries.

Our annual Almanac's diverse chapters cover health and social care, gender diversity, voice technology, sugar tax and more.

Key points include:

- Some 85% of the British public are concerned about the impact of plastic waste on the environment. 'Single-use' was the word of the year.
- Half (wrongly) think social care services are free, and 82% would support increased funding for social care.
- Two in three do not trust social media companies with their personal data, compared to 55% globally.
- On a positive note, 70% of Britons think that people across the world have more in common than things that divide them



IN MEDIA WE TRUST?

As chants of “fake news” ring out around the world, this paper asks: is there *really* a crisis of trust?

The key findings from our white paper *In Media we Trust?* indicate that the notion of a crisis of trust is possibly overblown, but there is certainly a problem with the public's trust in the media.

Looking at data from across 28 countries, our paper unpacks the dynamics of this “crisis of truth” and suggests contributing factors of media scepticism.

In established markets it appears that there is indeed an issue with trust, even if it is not a crisis. Concerns are particularly focused on digital platforms. Globally, people under 35 are far more likely to trust digital platforms than are those over 50. Meanwhile baby boomers tend to rate trust in TV/radio more positively than millennials.

However, when it comes to trust in *print* media (newspapers/magazines), trust is consistent across all ages.

We explore some of the forces at play that are contributing towards this media scepticism.

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UN WOMEN: GENDER AND DISPLACEMENT OF SYRIAN REFUGEES

The Syria crisis continues to forcibly displace hundreds of thousands of people, putting women at heightened risk of exploitation.

On behalf of UN Women, Ipsos conducted research into the lives of female Syrian refugees being hosted in neighbouring [Lebanon](#), [Iraq](#) and [Jordan](#).

The studies show that in all three countries, women's lives are characterized by economic insecurity, limited employment opportunities, challenges in accessing aid, acute isolation and increasing levels of violence.

- 79% of Syrian women in Lebanon report being unable to meet their basic needs.
- In Iraq, while 25% of Syrian women expressed a desire to work, only 4% of women had access to employment.
- In Jordan, three-quarters of Syrian refugees live outside refugee camps and are highly or severely shelter-vulnerable.

The report's recommendations include:

- Ensuring humanitarian and resilience programming prioritizes women's empowerment.
- Increasing access to employment services and financial resources for female Syrian refugees.

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SHORTCUTS

Are you looking at me?

Oliver Sweet, Head of Ethnography at Ipsos, has been looking at cultural influences in the formation of self for The Association for Qualitative Research.

He outlines an Ipsos research study on 'How People Live' which seeks to understand who people are by how they construct their home. Among the cultural differences observed: the universalist values of Indonesia allow people to drop in on each other at all times of day. Whereas the values of conformity and tradition mean that house visits in Saudi Arabia are well planned and ritualised.

He also discusses cultural marginalisation in society, in particular towards LGBT communities and the ageing population.

Read more from Oliver Sweet on the principles and practice of ethnographic research in: [Ethnography, an Unfiltered View of Reality](#).

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Populism in Europe and the political right

In recent years, Europe has seen increasing levels of populism. This is common to all Western social democracies and has been well documented, but less so in relation to what it means for the political right.

This analysis by Chloé Morin and other Ipsos experts traces the link between immigration worries and political developments across Europe, arguing that immigration has created a fertile ground for populist parties to prompt a reconfiguration of historical right-wing parties.

Drawing on Ipsos' *What Worries the World* surveys, it finds that:

- Immigration is in the top 3 concerns for 43% of the population in Germany, 35% in Italy and 33% in Sweden.
- In the last national elections, populist parties won over 25% of the vote share in Poland, Switzerland, Austria and Hungary.
- 4 out of 10 think that it is "a risk" to elect a party with extreme views.

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We British: True Europeans?

Simon Atkinson shares 10 things that the UK has in common with its European neighbours, and what makes it different, in an article for the Market Research Society's *Research Live* site.

- 49% Britons say the country is in decline, similar to the 47% recorded in France and Italy but higher than the optimistic Germans at 25%.
- Half of Britons say the country needs a 'strong leader to break the rules', close to the global figure of 52%. This is a view shared by 61% of the French, but only 17% of Germans.
- A free market economy is popular with 62% of Brits. This is ahead of the Germans (49%) and French (43%). But it is the Italians that are most keen, with 72%.
- Britons' assessment of the UK economy since Brexit has remained broadly stable while in many European countries ratings are now improving.

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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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