May 2019

IPSOS UPDATE

A selection of the latest research and thinking from Ipsos teams around the world

Ipsos Knowledge Centre

GAME CHANGERS

Ipsos

WELCOME

Welcome to the May edition of *Ipsos Update* – our round-up of the latest research and thinking from Ipsos teams around the world.

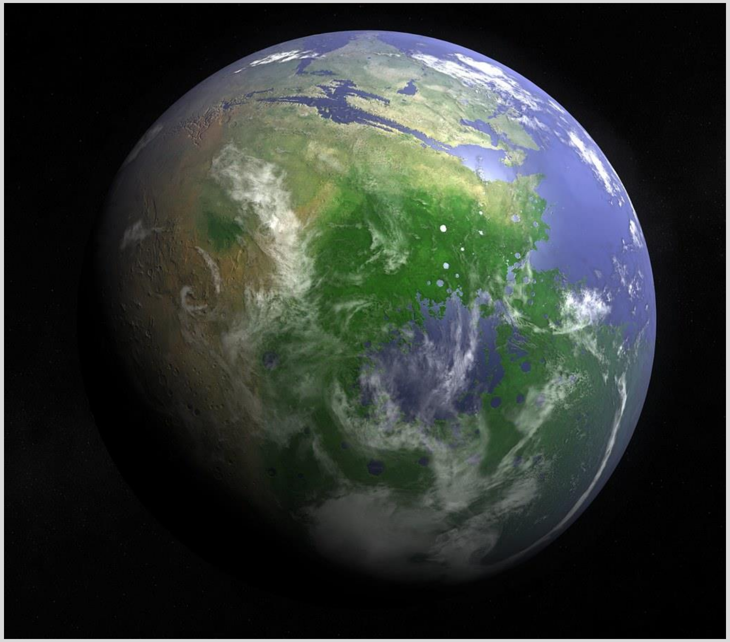
The underlying idea of *Ipsos Update* is simple: to present aspects of the “Best of Ipsos” in an easily digestible format. We have not tried to be comprehensive; the focus is on content which will be relevant to more than one market or specialist research area.

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



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EARTH DAY 2019

Levels of concern about environmental issues are up from last year, but people are less certain about *how* to tackle these problems.

Our survey for Earth Day, which fell on 22 April this year, finds that the top environmental issues reported by people in 28 countries are *climate change*, *air pollution*, and *dealing with the amount of waste we generate*.

People tend to believe that there is a shared responsibility between companies, governments and consumers to act on environmental issues; there is no majority support for one particular policy action.

When asked specifically about packaging, more than 8 in 10 globally think that disposable and non-recyclable products pose a problem to the environment. But only 9% think that consumers should lead efforts to reduce unrecyclable product waste.

On individual actions, more than one in two say that they re-use disposable items and buy products made from recycled materials, but only 14% say they would pay more for products with non-recyclable packaging.

The most popular policy action for tackling the problem of product waste is allocating government spending to improve the range of items that can be recycled.

SELLING CREATIVE RESEARCH SHORT?

How to apply the right metrics to the right business objectives, in the right way.

Creativity is unquestionably central to brand success: finding original and thought-provoking ways to capture customers' attention is a key business objective.

By evaluating and optimising ads, research and pre-testing services help organisations to formulate the best creative approaches. But lasting results are not guaranteed.

In fact, we observe the problem that campaign effects begin to fall short in the longer-term. Focusing too much on the immediate impact is one reason, but many factors can help or hinder the success of advertising campaigns.

The paper argues that in some ways, having the metrics and insights is the easy part. It is *how they are applied* that makes the difference.

To create lasting impact, brands must make the most of creative research services. They can do so in the following ways:

- Have a clear business objective in the creative brief.
- Create the right conditions for collaboration.
- Use the data as a spotlight, not a crutch.

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WHAT THE FUTURE? VICE

What we consider to be "morally acceptable" behaviours are constantly shifting, and vary greatly between different countries.

Our definitions of "what constitutes vice" today are very different to 100, 30 or even five years ago. While attitudes towards drugs, alcohol and gambling may have softened, there is also rising stigma attached to activities such as social media usage, sugar consumption, even productivity – an addiction to getting stuff done.

Our latest *What the Future* report gives a global view on vice both today and 10 years from now, helping us to respond to the sometimes unpredictable changes in societal norms and how they impact different industries as well as the regulatory environment.

Our research finds the U.S and Canada to be more accepting of cannabis than anywhere else in the world (51% vs 28% global average), and there is an emerging market for products containing CBD (a cannabis derivative). But studies show that attitudes and behaviours regarding cannabis are slow to shift after legalization.

Looking 10 years ahead, 55% globally believe that marijuana for medical use will be legal, and 33% for recreational use.

Some 48% think that usage of e-cigarettes/vaping will be higher, and 47% think that both usage of illegal drugs and consumption of alcohol will be higher than it is today.

GAME CHANGERS Ipsos

DRIVERLESS FUTURES?

The rules of the road, the shape of our cities and our ways of life could all be about to change.

Less than a decade ago, self-driving cars seemed impossible. Now, we are told, they are inevitable.

The benefits and the risks are not yet clear, but Ipsos research gives some early indications of public reactions to inform both business and policy-makers.

People are generally interested but sceptical about self-driving car technology, although enthusiasm varies from place to place. In the United Kingdom and Germany, around half worry about too much control being taken from the driver and would choose to drive themselves. But others – especially those in India, China and Japan – are more prepared to let the car do the driving.

Trust and safety are big considerations for the public, as with all emerging technologies. In relation to autonomous vehicles, 40%-60% of people (depending on the country) say they are concerned about data protection and security.

There are also generational differences. Older drivers make up a larger portion of new car buyers, but they are much less interested than younger drivers in features like automated parking, fully autonomous driving, connected route services and tele-diagnostics.

SHOPPER, E-COMMERCE AND OMNICHANNEL

Tools and theories for understanding consumer behaviour and improving shopper marketing.

Faster and more agile shopper marketing tools are necessary to compete in today's omnichannel world.

A presentation of Ipsos' virtual shopper solutions shows how new technology can help to glean a better understanding of how shoppers make decisions. It brings on stream different ways to improve store navigation and package designs.

Read or watch more in the 'Let's Get Phygital: The future of shopper research' webinar.

Looking at the online customer journey, a variety of tools such as machine learning, biometrics and text analytics are now available, helping brands to optimize digital communications, personalize messages and win share in today's omnichannel environment.

But it is also important to contextualise these consumer insights within a wider framework that understands human behaviour, and this article for Quirks takes a new look at the online purchase journey.

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MENA: DECODED

A look at the Middle East & North Africa, as society becomes more educated, urbanised, influenced by women and driven by technology.

MENA has experienced the highest rate of population growth of any region in the world in the past century. Our report shows how the region is being shaped by a series of key trends:

- **Demographics:** A more urbanized, ageing population, with a smaller household size that is more educated and more informed.
- **Women:** Their growing influence in society, much higher future levels of involvement in the workforce; the ultimate decision makers for brand selection.
- **Digital First:** The online space has moved from being a source of information to a channel of purchase, fuelled by the e-commerce boom.

Watch the presentation here.

Another report on MENA highlights the impact of its digital transformation for business and encourages CEOs to participate in social media.

With 94% of people in the region using social media platforms, it is important that, to get close to their customers, business leaders are present in this space. Read: Social CEOs in the Digital Transformation Era

SPOTLIGHT ON AUSTRALIA

A digest of recent reports on Australian public opinion ahead of May's federal election.

The annual Australian Climate Change Report reveals the country's growing momentum for action on climate change, which stands at its highest level since 2010. We find that 46% of people in the country accept that humans are solely or mainly responsible for global warming.

Our research into Australia's energy policy finds that two-thirds of respondents believe that increasing renewable capacity should be prioritised. Only 24% believe a switch to renewable sources will negatively impact economic growth.

Meanwhile, Ipsos' Life in Australia report ranks Australian states according to a "liveability index" based on what residents think makes an area a good place to live.

The five most important attributes for a place to live are:

1. Feeling safe (67%)
2. High quality health services (60%)
3. Affordable, decent housing (58%)
4. Good job prospects (41%)
5. Reliable and efficient public transport (33%)

This indexing finds that, despite Melbourne often being considered the best city to live in, it is Canberra which emerges as the "most liveable" Australian city.

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WHAT WORRIES THE WORLD?

Our monthly survey reveals the latest overall ranking of global concerns, recent fluctuations and levels of optimism.

The four major worries for global citizens, in order of urgency, are: *Financial/Political Corruption*, *Poverty/Social Inequality*, *Unemployment* and *Crime & Violence*.

The survey shows that, out of the 28 countries surveyed, South Africa, Peru and Hungary are the most worried about corruption. At the other end of the scale, citizens in Germany, Great Britain and Sweden do not see this a pressing issue for their country. Meanwhile, Canada saw an 11-point surge in worry about this since last month.

The majority of people surveyed globally (58%) think that their nation is on the "wrong track".

This sentiment is currently strongest in South Africa and France, where just 23% think that their respective countries are heading in the right direction. Similarly low levels of optimism are also recorded in Spain, Turkey and Belgium.

India and Sweden show the greatest month-on-month increases in positive sentiment, with both registering an eight-point increase in the proportion saying their country is heading in the right direction.

SHORTCUTS

Democratic Resilience in an AI Age

A presentation by Ipsos Global Affairs on AI and democracy for the World Leadership Alliance argues that the potential threats of AI are a certainty, but the boons of AI are still something we need to work hard for.

The "darker side" of AI means that it has the potential to curtail freedoms, magnify inequality and dismantle trust.

That said, whether due to distrust in the establishment or a certain trust in AI, one in four Europeans would allow an artificial intelligence system to make decisions about the running of their country.

Indeed, we find that the public's perception of the impact of various automated technologies upon our lives skews positive.

Our report offers a framework and best practice ideas for democratic resilience. This looks towards creating humanistic AI solutions, improving AI literacy and regularly measuring societal perceptions.

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Spotlight on Canada

At 40%, Prime Minister Trudeau's approval rating is now lower than President Trump's in the US (43%). Read more in Darrell Bricker's piece about how Liberals are losing ground to the Conservatives.

Canadian society is currently in a state of mild to moderate social, economic and political instability, according to Ipsos Canada's latest "Disruption Barometer". Mike Colledge tells us that amongst other things, this means they are likely to vote for change.

The legalisation of cannabis in Canada in October 2018 has turned attention towards the growing cannabis industry. Tilray, a Canadian producer of cannabis for medical purposes, was valued at a similar price to Tiffany. Michael Rodenburgh discusses the impact of the evolving cannabis culture in "Beyond the Haze", and asks whether it will disrupt the alcohol market in *Vice*, the latest edition of *What the Future?*.

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Affluence in Russia

A new report on affluent Russian consumers by Tatyana Gerasimenko sketches a profile of these wealthy individuals, defined by their high income, high education level, property ownership and disposable income.

This segment is likely to purchase goods ahead of their peers and have a certain influence over others. They use their purchasing power in a number of ways:

- 96% have a car in their household
- 59% drink premium spirits
- 47% buy clothes from luxury brands

But, they are not fans of demonstrative luxury and mix brands/price segments, preferring "affordable luxury" and "budget premium".

Another trend for this affluent consumer is their preference towards experiences over things. This means that travel, entertainment and family time are both priorities and ways to express their personality.

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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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