



April 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 April 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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CONNECTED HEALTH

A roadmap to success

Connected Health – the use of technology to provide healthcare services remotely – is going mainstream. Our healthcare team give an overview of current developments and future opportunities.

CORPORATE REPUTATION COUNCIL

The most international report yet

The latest thinking and practice in corporate reputation management from Ipsos' Reputation Council, involving over 150 senior communicators in 20 countries.

A WORLD APART

Do we live in social bubbles?

Our new study for the BBC Crossing Divides series highlights how people around the world are split over whether differences in political opinions in their country are healthy or dangerous for society.

WHO OWNS THE ENVIRONMENT?

The state of Green party politics around the world

Are environmental concerns driving up the Greens' vote-share globally? If not, why might this be? Our white paper gives a comprehensive picture of the political tensions in Green party politics in 8 countries.

INDIA'S TRANSFORMING FOODSCAPE

Changing fast or changing slow?

Our new briefing on India gives seven key insights into food and beverage trends in the country, drawing on historical, social and scientific perspectives on how Indian cuisine is changing.

SIX CONCEPTIONS OF NATIONALITY

A global segmentation of inclusivity

New analysis based on the Global Advisor 'Inclusiveness of Nationalities' report segments the population of 25 countries into six groups according to their ideas of what nationality means.

VIRTUAL REALITY

Hype or the future?

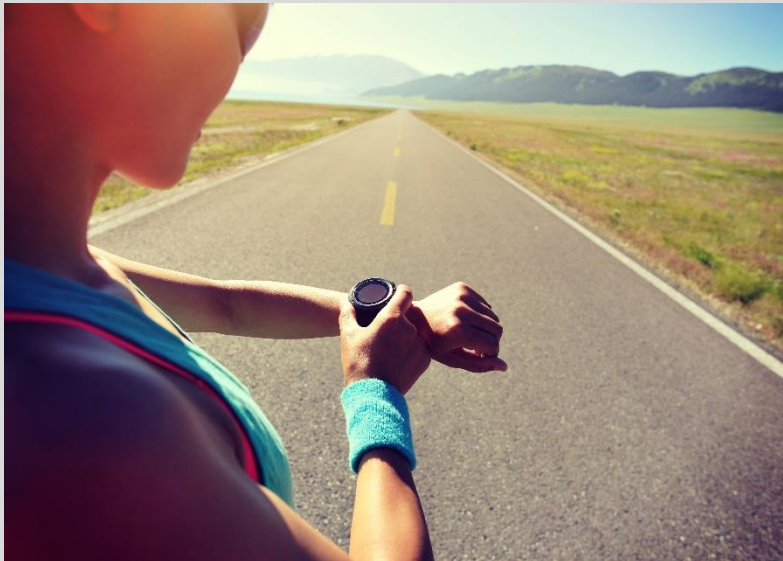
How can Virtual, Augmented and Mixed Reality make research better, faster, cost effective, and even more engaging for participants and clients? Our new paper measures expectations and possibilities of these emerging technologies.

HIGH HOPES

Tips for ensuring successful text analytics

Ipsos' latest white paper on Text Analytics looks at what can be done to ensure more success using these increasingly powerful tools and provides five rules to follow in order to get the most out of it.





CONNECTED HEALTH: A ROADMAP FOR SUCCESS

What are the opportunities and challenges for Connected Health, and how might it change the traditional structure of healthcare?

Connected Health has been propelled into the mainstream by Apple Watch and Fitbit. But healthcare technology is constantly evolving and offering more, including telemedicine, digital therapeutics and population health management.

Our new white paper argues that Connected Health is at the beginning of its integration into everyday healthcare.

It can redefine the patient-doctor relationship by giving the patient more ownership. And the potential economic benefits of taking the strain off of overloaded healthcare systems are already clear.

But there are barriers to overcome, including education and endorsement. For example, 70% of survey respondents in 28 countries say they would use a Connected Health device if recommended by their doctor.

The paper also gives recommendations for developing a successful Connected Health product: it must have a clear and scaled-back purpose and be tested with the user for design and functionality.

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THE TRANSFORMING FOODSCAPE OF INDIA

What new opportunities are there in the food and beverage market in India?

Indian cuisines have been in a constant state of transformation through the ages, but today's interconnected world is further shifting India's 'foodscape'. This briefing paper gives insights into where this transformation is heading, and how quickly.

While the science of food preferences predicts that cuisines change gradually over time, environmental factors such as increasing incomes, growing urbanization and technology adoption are accelerating transformation.

This means that the broad flavour bouquets of India will largely remain the same, and change will likely come in the form not flavour of food.

But opportunities for innovation include:

- The emergence of regional cuisines, as opposed to the typically 'metro-centric' food scene.
- Nutritional content as a successful marketing premise for mass-produced food.
- Increasing popularity of food services over ready-to-eat food.

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IPSOS REPUTATION COUNCIL REPORT 2018

The last year has seen a welter of high-profile reputation scandals affect businesses, their leaders and even whole industry sectors.

This year's Reputation Council report gathers knowledge from 154 senior communicators in 20 countries on how to distinguish a genuine reputational crisis from day-to-day turbulence – and how to build resilience.

The majority of Council members (85%) agree that reputation affects financial performance. It is critical for consumer preference, stakeholder support and the battle for talent – all of which drive commercial success.

They think that the industries facing the biggest reputational challenges globally are *finance* and *energy*. But in North America, *media* and *technology* come top.

Council members share experiences and lessons for dealing with the recent phenomenon of 'techlash', caused by concern around privacy, data leaks, AI and automation.

Report findings include:

- Three in five Council members *disagree* with the notion that trust in companies is at an all-time low.
- Seven in 10 *disagree* that politics is so divisive that companies need to choose a side.
- 86% of Council members expect data and privacy issues to affect their own company.

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NATIONALITY: WHO IS IN, WHO IS OUT?

Our study finds six perceptions of nationality that exist across the world, and often co-exist in the same country.

To better understand nativism around the world, an Ipsos survey in 25 countries asks people who they consider “real” nationals of their country, based on religion, language, ethnicity, legal or employment status and more.

Six perceptions of nationality emerged from our analysis, along a spectrum of inclusivity. At one end of the scale, *Post-Nationalists* have an unconditional and all-inclusive view of nationality and at the other, *Ethnic Nationalists* restrict nationality to those born in the country, from local stock and belonging to the dominant religious group(s).

Some geographical differences in these perceptions include:

- The U.S. and Canada rank as the countries with the most inclusive conception of nationality, with 57% classified as *Post-Nationalists* or *Legalists*.
- Many Europeans fall in the least inclusive groups, with significant proportions of *Ethnic Nationalists* in Hungary (35%), Italy, Poland, and Germany (all 21%).

This segmentation is based on the [2018 Inclusiveness of Nationalities Global Advisor survey](#).

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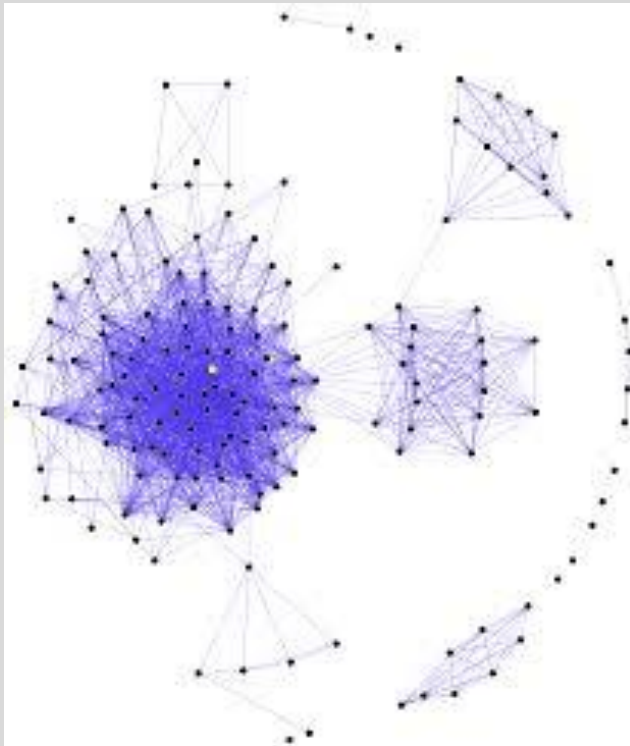
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A WORLD APART?

Ipsos research for the BBC explores the diversity of people's social circles across 27 countries and how they embrace differences.

More than 80% of respondents perceive political divisions in their social circles, but they are split over whether they consider these differences to be positive or detrimental.

A third of people around the world think political divisions are healthy for society, but a similar proportion thinks they are so divisive that they are dangerous for society.

Further findings include:

- One in two people globally say it is important to listen to people who are different from themselves.
- On the other hand, one quarter of respondents think it is not worth trying to have a conversation with people with different political views.
- Two in five say they feel more comfortable in groups of people who are similar to them. People in China are much more likely to say this, with those in Japan, Italy and Belgium the least.

[Take the quiz](#) to find out whether you live in a social bubble or are part of a group with diverse outlooks.

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VIRTUAL REALITY: HYPE OR THE FUTURE?

Virtual reality (VR) has gone from sci-fi to sci-fact, but it hasn't yet hit mass adoption. Is this about to change?

The commercial promise of Virtual Reality has in the past fallen short of predictions. While people thought it would deliver \$4.4 billion in revenue in 2016, this was significantly more than the actual figure of \$1.8 billion.

But our new white paper argues that we are just at the beginning of the VR journey. With 2.9 billion smartphone users in the world by the year 2020, mobile technology could offer the potential for mass consumer adoption.

Today there are potentially ground-breaking opportunities for Virtual, Augmented and Mixed Reality technologies in the research sector. Shopper immersions, multi-sensory testing, ethnographic study and broadcasting or prototype testing, for example, can all gather rich consumer insights.

And these technologies are providing the foundation for developments in Artificial Intelligence, 'Internet of things' and 3D modelling.

Innovative partnerships using these developing technologies make it possible to be constantly pushing the boundaries of our reality.

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GREEN PARTY POLITICS AROUND THE WORLD

Concern about climate change has notably increased since 2011. But is this translating into growth for Green parties globally?

Growing concern about environmental issues such as climate change, coupled with low levels of trust in the political establishment, can be seen as creating fertile ground for a new era of Green politics.

An analysis of Green party politics around the world explores the complex and not necessarily causal relationship between public opinion and the Greens' vote-share, looking closely at the situation in 8 countries in Europe and North America.

It finds that there are many shades of Green: Voting Green is not just a vote for the environment but can also be a protest vote, an elite vote, or just a vote for the Left.

But the Greens have lost their monopoly on climate change and the environment as a voting issue and can be challenged by centre-left parties that co-opt their policies.

So, Green political leaders may face a strategic decision between remaining a single-issue party or adopting a more "mainstream" approach.

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HIGH HOPES FOR TEXT ANALYTICS

Five ground rules to ensure success in using text analytics tools.

Text analytics (TA) is now an established component of many market research programmes. However, as its popularity has increased, so have expectations of what it can deliver.

The bar has been set high for TA, but there are inevitably some disappointments amid the success stories.

With this in mind, the paper sets out five tips for ensuring successful text analytics:

1. Challenging TA providers to give a realistic view of what is and isn't possible.
2. Defining upfront what the TA should deliver.
3. Putting forward larger datasets for analysis.
4. Making sure that data is actually relevant to the research objectives.
5. Considering TA in the context of other data sources.

The paper urges a sense of cautious realism, reminding us that TA tools are not perfect, and they are machines, so cannot replicate or replace human skill.

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SHORTCUTS

International Women's Day 2019

To mark International Women's Day on Friday 8th March 2019, an Ipsos study reveals attitudes to gender equality in 27 countries around the world.

Key findings include:

- Half of all respondents (52%) believe there are more advantages to being a man than a woman in society today.
- One in three would describe themselves as a feminist. Agreement is highest in South Africa and Spain, and lowest in Japan, Hungary and Russia.
- On average, 75% disagree that a man who stays at home to look after his children is less of a man, but opinions vary greatly between countries.
- More people disagree than agree (49% vs. 42%) that, when it comes to giving women equality, things have gone far enough.

[The report is also available in Spanish.](#)

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Flair Italy 2019: Ten things to know

The 2019 edition of Flair Italy is now available. *Communitarian and Cosmopolitan: The new divides* gives a picture of the mood of the country following its dramatic political and economic developments.

Fear of recession looms as economic indicators turn negative at the end of 2018. Also apparent is a slowdown in consumer spending and increased desire to save.

The new government marks a change in political climate and has seen surge in public optimism. The 10 key points from the Flair report cover aspects of Italy today, including the elite-people gap, ideas of identity and community, immigration and attitudes towards the EU.

Turning to consumer trends in Italy, brands are using simplicity in advertising, enhancing purchasing experiences and using customisation to build customer loyalty.

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Nigeria: Now and in the Future

The first wave of a detailed survey in Nigeria discovers insights about citizens' perception of the nation, economy, lifestyle, and more.

Findings include:

- Nigerians are still extremely loyal to open markets despite the massive investment in new retail formats over the past two decades.
- Smart phones are owned by a large majority of Nigerians and are by far the main way of accessing the internet.
- Data is a close second to food in terms of what Nigerians spend their money on, above transport and electricity.
- Nigerians get their news mainly from radio, with TV second. The internet is far behind in this respect, as Nigerians access it mainly for entertainment.
- Nigerians believe the economy and inflation are by far the most serious problems facing the country.

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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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