



July 2019

IPSOS UPDATE

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

Ipsos Knowledge Centre



CHANGE CHANGERS

WELCOME

Welcome to the July 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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CHANGE CHANGERS

WORLD REFUGEE DAY: Global attitudes towards refugees

To mark World Refugee Day, our global study seeks the views of citizens in 26 countries on the legal rights of refugees and national refugee policy. We also launch a special publication on the global refugee crises.

INTERNET TRUST AND SECURITY: Survey finds fake news is a global epidemic

A survey in 25 countries shows rising concern about online privacy for the fifth consecutive year. Fake news, in particular on social media channels, emerges as a main force driving distrust in the internet.

UNMASKING THE NAIJA LIFESTYLE: Lifestyles of the middle class in Nigeria

Based on Ipsos research in Nigeria and the African continent, and told through the eyes of three Nigerians, our new briefing provides insights into the lived experiences of people living in the country today.

UNPACKING SUBSCRIPTION MODELS: How to deliver what the customer wants

Subscription services are growing in popularity across categories, but how can brands address any lingering customer doubts and make them even more appealing?

HUMAN RIGHTS AND INTERNATIONAL LAW: Do we live in an age of impunity?

A survey on human rights by Ipsos and the Policy Institute at King's College London looks at how much importance citizens in 24 countries place on them compared to other policy issues in international relations.

SUMMER HOLIDAY BAROMETER 2019: Habits of European and American holidaymakers

Looking ahead to the summer holiday season, the 2019 holiday barometer looks at people's holiday plans in Europe, US and Brazil, and how they have changed in recent years.

ON THE MOVE: Measurement for Out of Home advertising

Out of Home (OOH) advertising comprises everything from billboards to bus shelters but now has a wider and more modern offering for marketers, assisted by advances in audience measurement.

SPEED DATING WITH INNOVATIONS: Why marketers need new communication skills

Without the luxury of time to connect with consumers, brands must operate more like speed-daters than story-tellers. A new white paper advises on how to create concise and convincing messages.





WORLD REFUGEE DAY

Our 26-country study finds majority support for the principle of people seeking refuge from war or persecution, but concerns remain.

Six in ten think that people should have the right to seek refuge in other countries – including their own – to escape war or persecution. There is majority agreement for this in 23 of the 26 countries surveyed, the exceptions being France, Hungary and Japan where 43%, 43% and 23% of people respectively support the right to seek refuge.

Opinion is split on whether their country can accept refugees at this time. On average, four in ten across all countries say that their country's borders should be closed to refugees entirely. The proportion of people advocating closed borders has increased most in Mexico, Peru and Serbia since 2017.

Many have doubts that refugees have genuine reasons for entering their country, with over half of people globally suspecting economic motivations instead.

Ipsos has also launched *Project Understanding* – a special publication of *Understanding Society* on refugee crises around the world. In the light of there being nearly 70 million displaced people in the world today – with 25 million of them refugees – the global study seeks to find new ways to build a public consensus for supporting refugees.

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GAME CHANGERS





THE AGE OF IMPUNITY?

Our global survey finds that public opinion is divided on whether human rights should take precedence over trade benefits.

Across the 24 countries covered, nearly four in ten (38%) think their country should never break international laws on human rights. At the same time, one in five (21%) think their country should be able to break these laws in extreme circumstances. A further 22% see international law as just one consideration amongst others.

Half of people around the world (49%) believe countries should intervene to stop war crimes – though they tend to be less supportive if it is their own country doing the intervening.

While Canada, Britain, Hungary and Sweden think that human rights should be most important to their leaders in choosing relations with other countries, only Sweden believes that this actually is the case. The others think that economic benefits currently come first.

Canada emerges as the country that is considered by most to use its influence in the world for good. Around three in ten think Iran, Saudi Arabia, Israel, Russia, and the US are less likely to use their influence for good than ten years ago. Mexicans, Russians and Chileans are most likely to think the US influence is less positive today.

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INTERNET TRUST AND SECURITY

Eight in ten citizens across 25 countries are concerned about online privacy, with over half “more concerned” than they were a year ago.

Social media companies are a leading cause of distrust in the internet, second only to cyber-criminals, according to our respondents: three-quarters blame social media companies for contributing to a lack of trust.

Fake news has a large part to play: the vast majority think that it is made worse by the internet (87%) and a similar proportion (86%) admit to having fallen for fake news at least once. One in ten users of Facebook and Twitter say they have closed their account in the past year as a direct result of fake news.

Nearly half of those surveyed say their distrust has caused them to disclose less personal information online, while around one in four take other precautions such as securing their devices and using the internet more selectively.

The survey also reveals global attitudes towards new and less well-known technologies, such as the Dark Web, cryptocurrencies and blockchain technologies ([see part 5](#)).

See the specific reports on: [Internet security, online privacy and trust](#) and: [Social media, fake news and algorithms](#).

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SUMMER HOLIDAY BAROMETER 2019

A report on summer holiday habits in Europe, the US and Brazil includes plans, destination preferences and fact sheets for each country.

Findings from the Ipsos/EuropAssistance report include:

- The average summer holiday budget is increasing in Europe but decreasing in the US and in Brazil.
- The nationalities most likely to holiday in their own countries are France (56%), Poland (52%), Spain (51%) and the US (50%).
- France and Brazil are the only countries to take two weeks or more of summer holidays, on average.
- The seaside remains the top holiday destination, but in Europe there is a growing preference for “natural” holidays to the mountains and countryside.
- 69% of Europeans but only 54% of Americans intend to completely disconnect from work on holiday, with Britons, French and Germans most likely to switch off.
- Behaviours vary between age groups. For example, under-35s are much more likely to check traveller reviews and more likely to plan trips at late notice.

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UNMASKING THE NAIJA LIFESTYLE

An insight into society as told through the day-to-day lives of three typical Nigerians.

The Ipsos team in Nigeria introduce the broad segment of the African middle class by relaying the realities of their home, work and social lives from their own perspectives.

These stories build on and bring to life the findings from *Naija Lens*, Ipsos' bi-annual general opinion survey in the country, and *African Lions*, a research study into the African middle class across the continent.

Key findings from the briefing include:

- Nigerians tend to be entrepreneurial through the need to overcome challenges in their environments, such as the hot climate.
- They are also hard-working, and prioritise education and career advancement for themselves and their families.
- Society is increasingly well-connected, with people spending large amounts on data and consuming media in a range of channels.
- A serious economic downturn in recent years has reversed Nigeria's long-term positive growth trend and plunged many into poverty.

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GAME CHANGERS





ON THE MOVE: OUT OF HOME MEDIA

With Out of Home advertising developing fast, our new white paper scans the territory of ad placement and how to measure what works.

While Out of Home (OOH) advertising may conjure up images of men in boiler suits with buckets of glue pasting up billboards in the middle of the night, digital has brought this medium into the modern day.

It now offers interactivity, time-based buying and increasingly sophisticated audience analysis. Messaging on digital panels can be programmed to change according to external data such as traffic conditions, interest rate movements, the pollen count or the weather, and promote different products to fit the present environment.

OOH advertising has a lot of good things going for it, and growth forecasts are better than for more traditional media, such as TV and radio.

But success rests upon proper placement – which is where audience measurement comes in. Data collected from hand-held meters or smartphone apps can build a picture of pedestrian footfall and even customer profiles to pinpoint the best locations for OOH advertising.

This paper introduces the core components of an audience measurement system and how to implement and adapt it.

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UNPACKING SUBSCRIPTION MODELS

Most people are aware of and interested in the booming business model of subscription services. But barriers to adoption remain.

Subscription services have been around for many generations, primarily for newspapers and magazines and more recently in media and entertainment, with Netflix and Spotify, for example. But the business model has expanded across categories and subscriptions are now available for food, clothing, personal care, pet care, toys and more.

This new paper suggests that to succeed with consumers, innovations should perform well on the three counts: “enhance my life”, “do it for me” and “make me confident”.

Whereas box subscriptions and replenishment models deliver on two or three of these – scoring highly on convenience and time-saving – both fall short on inspiring confidence.

Based on these findings, the paper gives suggestions for how brands can improve their subscription models. It notes that although today’s consumers tend to be more open to trying new solutions, their expectations are also higher. This requires a continuous thread of customer-centricity to run through the whole experience.

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SPEED DATING WITH INNOVATIONS

In a world of distractions, research designs must reflect consumers' mental processes and market realities.

In the past, marketers strived to be good storytellers – explaining why their innovation should be purchased. This was a world where consumers were more receptive to long messages, giving marketers the luxury of time to sell their innovation.

But in the hyperconnected world of 2019, consumers are constantly bombarded with advertisements and standing out among an estimated 30,000 new consumer products launched annually is challenging. So, as consumers are changing, marketers must change too.

Marketers must now have the ability to attract and persuade in a few seconds, with skills more akin to speed-dater. This involves identifying which core messages are most effective, allowing them to transform full concepts into “Tweetified” concepts.

This white paper explains how communication around innovations has changed drastically and how consumers have adapted to this new reality.

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SHORTCUTS

Global Advisor: Trust in Media

Our new study in 27 countries finds that opinion is currently split on whether traditional media (newspapers, magazines, television and radio) can be trusted to be a reliable source of information. But one-third of respondents say that they now trust it less than five years ago.

The prevalence of fake news contributes towards this distrust. More than half (52%) believe there is a great deal or a fair amount of fake news in traditional media sources. This rises to nearly two-thirds (62%) for online news websites and platforms.

Trust in media varies greatly across individual countries, with India, Saudi Arabia, Malaysia, and South Africa reporting the highest levels of trust in media sources and Hungary, Serbia and Poland the lowest.

Alongside the overall decline in media trust, interpersonal relations are gaining as people are most trusting of news and information they receive from people that they know in person.

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AI: Four Points of Vigilance

70% of companies worldwide will have adopted AI-powered initiatives by 2030 and the global AI market is expected to more than double between 2017 and 2020.

Helen Zeitoun, Managing Director of Ipsos France and CEO of Ipsos Sciences presents four “points of vigilance” for companies, the government and the media in relation to their responsibilities for managing the transformational potential of AI. These relate to key areas in which AI can be seen as a threat and an ethical problem:

1. Individual freedoms
2. Employment
3. Social cohesion
4. Human intelligence

The article argues that AI is simply a tool, and a matter of human, organisational and cultural change that can be used to further enhance human intelligence.

This article first appeared in [Stratégies magazine](#) (in French).

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Gen Z and Corporate Sustainability

New Ipsos-Innovation Forum research explores how younger consumers, who tend to be more socially-conscious, engage with corporate sustainability issues.

It finds that consumers face barriers to shopping ethically. Competing priorities and factors such as price and convenience cause an intention-behaviour gap when it comes to sustainable consumption.

Most consumers (55%) say it is too expensive to buy ethically. And, while the number is slightly lower among Gen Z consumers (25%), almost a third complain that they don't have enough information about how and where products are made.

Research shows that consumers tend to put the onus of responsibility for sustainability on business and on government – especially in the view of younger consumers.

[Listen to the Innovation Forum podcast](#) with Tamara Anson, Behavioural Science Consultant at Ipsos.

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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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