

IPSOS UPDATE

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

August 2019

Ipsos Knowledge Centre

GAME CHANGERS



WELCOME

Welcome to the August 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**](mailto:IKC@ipsos.com) with any comments or ideas, or if you would like to subscribe to future editions.

Thank you.

IN THIS EDITION

A WOMAN'S WORLD

Understanding gender equality around the world

Our new edition of *Understanding Society* comprises a collection of articles based on research around gender equality, giving diverse accounts of women's lives around the world.

IVORY COAST FLAIR 2019

We find a country that is both robust and frail

The latest in our *Ipsos Flair* series presents our first deep-dive report on an African nation. We summarise the main trends in Ivory Coast society as it adapts to new economic conditions.

THINKING OUTSIDE THE BOX

Sustainable packaging in Japan

Our new paper looks at why consumer action on sustainability in Japan is so low compared to other countries, and considers the role of brands in driving change.

GLOBAL CONSUMER CONFIDENCE

Positive trends from our economic indicators

Our monthly consumer confidence survey in 24 countries shows economic indicators in July to be the highest in nine months. It finds optimism about job prospects to be a driving factor.

THE ILLUSION OF STABILITY

New analysis of our *What Worries the World* survey

Our new white paper takes a look at which are the most worrying issues for citizens in 28 countries today. Our analysis of 100 months of data suggests that changes may be more dramatic than is first apparent.

VIDEO: A NEW TYPE OF DATA

Why video research has ballooned

With the exponential growth of content consumption via video, our report asks why video isn't (yet) a bigger component of market research, and suggests how it can be incorporated into different types of studies.

RUSSIA TRENDVISION 2019

The socio-economic trends of Russia today

Our annual report reviews the consumer landscape in Russia, with a look at the retail sector, the ageing population and evolution of the 'conscious consumer'.

ATTITUDES TOWARDS SPACE EXPLORATION

Marking 50 years since the moon landings

On the 50th anniversary of the moon landings, we look at public opinion of the event itself and attitudes towards space exploration more widely.

A WOMAN'S WORLD

Our latest *Understanding Society* publication brings together expert knowledge and global perspectives on multiple issues facing women across the world.

Achieving gender equality and women's empowerment is one of the UN's Sustainable Development Goals for 2030 and a necessary foundation for a more prosperous future for all.

In the spirit of truly understanding the realities of women's lives, our publication highlights the diverse experiences of women across the globe – ranging from those who have been displaced because of conflict to those at the very top of business and public life.

Grounded in the belief that good data can contribute to policies and programmes with meaningful impact, the articles include studies on the gender pay gap, boardroom diversity, the economic impacts of violence against women, reproductive rights and other barriers including unconscious gender bias and stereotypes.

An interview with Julia Gillard, former Prime Minister of Australia, highlights that it is disproportionately girls who are missing out on schooling in the world's poorest countries, while our research in Ghana, Pakistan and South Sudan reveals that women lose around half a working month as a result of intimate partner violence.

Finally, a look at world population trends shows us that the future will be "a woman's world" in a demographic sense, as soon, every year, there will be more women alive than men.

[READ MORE](#)[DOWNLOAD](#)[CONTACT](#)

Ipsos Public Affairs

IPSOS VIEWS

UNDERSTANDING SOCIETY



< A WOMAN'S WORLD >

THE ILLUSION OF STABILITY

New analysis of our long-running survey on the biggest social and political concerns in 28 countries uncovers long-term trends and new developments.

According to citizens around the world, the five most worrying issues in society are: Unemployment, Poverty and social inequality, Financial/political corruption, Crime and violence and Healthcare.

Looking back on more than 100 months of data from our *What Worries the World* survey, we can see that the headlines are consistent – in fact, the rankings have remained almost unchanged since the survey began.

But our paper argues that this “illusion of stability” masks a more tumultuous reality, as various stories emerge from the data:

- There is a steady and significant decline of unemployment as the dominant global concern since 2010 such that, today, there is little separating the top three or four concerns.
- Although the majority of respondents still think that their country is heading in the wrong direction, there are record levels of optimism today. This correlates with widespread economic improvement, most strongly represented in the U.S.
- We see early indications of increasing concern about environmental issues, which are incrementally moving upwards in the ranks.

[READ MORE](#)[DOWNLOAD](#)[CONTACT](#)

IVORY COAST FLAIR: ROBUST AND FRAIL

Our first edition of *Ipsos Flair* on Ivory Coast provides insights about society, markets and people in the “central nervous system” of Francophone Africa.

Analysis by Ipsos experts in the country reveal the key things to know about Ivory Coast, the African nation that is both robust and frail. These include:

- The Ivorian economy has been bouncing back over the past seven years. It is now known as the “fastest growing in Africa”, despite recent and recurring crises.
- However, Ivory Coast must diversify its economy. It is dependent on cocoa, which represents 40% of the country's GDP and the recent fall in cocoa prices served as a reminder of the economy's fragility.
- It is a society of extremes: 40% of the population lives below the poverty line and the middle class amounts to barely 15% of the total population. Influential families dominate politics and business.
- Gender inequalities are strong: A woman's average income is 59% lower than men and 71% of illiterate Ivorians are women. Many women are also denied the right to inheritance and land ownership.
- The youth are growing impatient. This “hurried generation” of 15-34 year-olds, accounting for 36% of the population, are looking for a shortcut to affluence.

[READ MORE](#)[DOWNLOAD](#)[CONTACT](#)

VIDEO: A NEW TYPE OF DATA

Video content is now the biggest component of consumer internet traffic. Our new report suggests that it should play a larger role in consumer research.

As consumer insights need to be grounded in reality, video can help by capturing real situations, language and emotions to give a more rounded evaluation of consumers' experiences.

But video is not only a great qualitative tool, but it also provides a rich source of quantitative data. It gives a better word count, and a 30-second video contains more data points than any text or scale question response.

Luckily, developments in smartphone technology means that video is more accessible and familiar to consumers, so are they becoming more comfortable providing feedback in this way.

Used well, video responses can replace most closed-ended questions, but not all of them. So, the combination of data from closed and open video questions increases the potential for insight.

This report explores the benefits and applications of video and how it can be incorporated into market research. We see how it can enable agile research designs, reduce the 'time to insight' and provide a resource to re-mine and explore. In this way, video *is* the data, not just an add-on which brings the findings to life.

[READ MORE](#)[DOWNLOAD](#)[CONTACT](#)

THINKING OUTSIDE THE BOX, BAG AND WRAPPER

Our briefing paper explains why now is the time for brands to act on sustainable packaging in Japan.

Japan is the world's second biggest producer of single-use plastic waste per capita, yet we find that its population is the least willing of 27 countries to take personal actions to address the problems caused by excess plastic and packaging waste.

Only 17% of those in Japan say they are willing to stop buying goods that have non-recyclable packaging (vs. the 34% global average). And less than three in ten Japanese would buy products made from recycled materials (vs. over half across all countries).

This paper explains that inaction from Japan's consumers is likely due to a lack of awareness about environmental impacts as well as a lack alternatives. It seems that the Japanese are in need of leadership to tackle the issues of plastic and packaging.

As international pressure is mounting to meet global sustainability targets, public attention is increasingly turning towards environmental issues in Japan. In this context, there is a growing opportunity for brands to provide environmentally-friendly products and services for the Japanese consumer. And those who act first in this area will benefit most, both in sales and brand equity.

[READ MORE](#)[DOWNLOAD](#)[CONTACT](#)

RUSSIA TRENDVISION

This annual publication from our local team in Russia outlines the country's current socio-economic situation and consumer trends for 2019.

Presenting their typical traits, we find that the modern Russian consumer values time, feels positive about technology, seeks simplicity and cares about personal wellness and the environment.

Our report outlines key consumer trends in Russia today along with how brands in Russia are responding to them. These include:

New retail: The time-conscious, online shopper requires omnichannel retailing, so fluidity is the new currency. Physical stores are changing to satisfy the need for social and experiential shopping.

Ageing consumers: As seniors have increasingly greater purchasing power, 60 is considered the new 40, so society and companies are moving towards being age-agnostic.

Conscious consumers: People care about the future and are thinking about more about responsibility, so are beginning to expect companies to have ecological production processes.

While population growth in Russia is expected to decline, life expectancy is expected to increase – from 78 to 81 years for women and 67 to 73 years for men – by 2030. The government will gradually increase the retirement age in line with this – from 55 to 60 years for women and 60 to 65 for men by 2028.

[READ MORE](#)[DOWNLOAD](#)[CONTACT](#)

GLOBAL CONSUMER CONFIDENCE

Our survey in 24 countries finds that consumer confidence today is at its highest level for 9 months.

In July 2019, our monthly global consumer confidence tracker reached its highest overall level since October 2018. The index rose above 50 points, the level which is considered to mark the median historical economic conditions.

The global index, now at 50.2 points, reflects consumer attitudes on the current and future state of their country's economy, their personal finances and their confidence to make large investments. But – according to our researchers – how people feel about their jobs is usually the most powerful single indicator of confidence,

Eleven of the 24 countries surveyed saw significant three-month gains on the global index, with only Japan showing a significant three-month decline. Despite still having the lowest scores in the index, consumer confidence in Turkey and Argentina rose by 5 points and 4 points respectively over the past three months.

The countries with the highest scores on the index are currently China, India, Saudi Arabia and the U.S. Slightly above Turkey and Argentina at the lower end of the index are South Korea, Japan, Russia and South Africa. [Visit our interactive portal.](#)

READ MORE

DOWNLOAD

CONTACT



ATTITUDES TOWARDS SPACE EXPLORATION

On the 50th anniversary of the moon landings, our UK and US teams asked what people think of the event in hindsight, and of space exploration more widely.

Our US survey finds that over three-quarters of Americans have a favourable view of NASA and two-thirds think space exploration is a necessity. One third of Americans would travel to space if given the opportunity.

When considering what should be the priority aims of space exploration, 'monitoring the earth to understand environmental changes' comes out on top. A large proportion of respondents also agree that space exploration promotes scientific discoveries (80%), inspires young people to study science and maths (77%), and helps monitor natural disasters (73%).

Meanwhile, 70% people in Great Britain approve of the Americans landing a man on the Moon, while only 4% disapprove. A third of Britons think that it is a good thing that it was the Americans who put a man on the moon first, but 6 in 10 think it makes little difference who got there first.

When asked which politicians they would most like to send on a one-way trip to the moon, Britons named Donald Trump, Kim Jong-un and Vladimir Putin as their top three, with new Prime Minister Boris Johnson and Labour leader Jeremy Corbyn receiving equal nominations to be next in line.

[READ MORE](#)[DOWNLOAD](#)[CONTACT](#)

SHORTCUTS

A REVIVAL OF THE LEFT?

Looking at the current state and future prospects of the left in France, Chloe Morin presents a comparative study of political parties on the left across Canada, Germany, Italy, Spain, the UK and Sweden.

She states that the left, defined as the main centre-left government party, has had very different trajectories over the past decades. But in most countries, its share of the electorate has tended to decline – though nowhere more dramatically than France.

French citizens feel strongly about equality and social justice, which matters to them more than individual liberty. Yet, socialism is not currently popular in France, and the left is fragmented.

Common factors contributing to a weakening of the left include the disappearance of the “centre” and rise of radicalism, party disaffiliation, and the emergence of new issues on which the left/right divide is less clear, e.g. globalisation.

Looking at these challenges as well as points of resilience, the article sets out possible strategies for political renewal on the left.

[READ MORE](#)

IPSOS AFFLUENT SURVEYS

The European Affluent survey measures the media and marketing behaviour as well as product and services use of Europe's most affluent and influential consumers across 21 countries. Our 2019 report finds:

- Podcast listening growth is not a millennial only phenomenon as those aged 35-44 are keeping pace with this trend. But there is a significant drop off at 55.
- European affluents are more than four times as likely to take six or more international air trips a year than the average person. They are also twice as likely to use online dating sites.

A general profile of American ‘Affluencers’ are presented in this [infographic report](#).

It shows how their attitudes and behaviours compare with other affluent consumers, including breakdowns by generation on their online presence and media consumption.

Recent reports on American affluencers include a focus on the phenomena [OTT binge watching](#), [video subscriptions and streaming services](#).

[READ MORE](#)

OPEN BANKING

Open Banking has the potential to transform the banking landscape, giving consumers greater control of who has access to their financial information.

Under the new regulations, individuals have the ability to grant permission to third parties – i.e. companies that are not their bank – to access their banking data, so those businesses can offer them products and services.

It is currently being trialled in the UK – where it was introduced 18 months ago – but other markets, including Australia, Hong Kong, Singapore and Canada, have shown interest in its arrival.

Open Banking sits within the broader picture of the ‘Personal Information Economy’, whereby people have greater control of their data, share it with who they like and even potentially profit from it.

In this video, Paul Stamper, Senior Client Officer at Ipsos in the UK looks at the potential uses for Open Banking and what it means for the industry and consumers.

[READ MORE](#)

IN THIS EDITION

A WOMAN'S WORLD

Read more: <https://society.ipsos-mori.com/>

Download:

<https://www.ipsos.com/sites/default/files/ct/publication/documents/2019-07/ipsos-mori-understanding-society-a-womans-world.pdf>

Contact: Kelly.Beaver@Ipsos.com

THE ILLUSION OF STABILITY

Read more: <https://www.ipsos.com/en/illusion-stability-what-worries-world>

Download:

https://www.ipsos.com/sites/default/files/ct/publication/documents/2019-07/what_worries_the_world.pdf

Contact: Paul.Abbate@Ipsos.com

VIDEO: A NEW TYPE OF DATA

Read more: <https://www.ipsos.com/ipsos-mori/en-uk/new-type-data-why-video-research-has-ballooned>

Download:

https://www.ipsos.com/sites/default/files/ct/publication/documents/2019-07/video-integrated_research_-_web.pdf

Contact: Alex.Baverstock@Ipsos.com

THINKING OUTSIDE THE BOX, BAG AND WRAPPER

Read more: <https://www.ipsos.com/en/thinking-outside-box-bag-and-wrapper>

Download:

https://www.ipsos.com/sites/default/files/ct/publication/documents/2019-07/thinking-outside-box-bag-wrapper_sustainable-packaging-japan-briefing_web.pdf

Contact: Deanna.Elstrom@Ipsos.com

LINK SUMMARY

RUSSIA TRENDVISION

Read more: <https://www.ipsos.com/en/russia-trendvision-2019>

Download:

<https://www.ipsos.com/sites/default/files/ct/publication/documents/2019-06/trendvision-russia-2019.pdf>

Contact: Mila.Novichenkova@Ipsos.com

IVORY COAST: ROBUST AND FRAIL

Read more: <https://www.ipsos.com/en/flair-ivory-coast-2019-are-we-one-10-key-points>

Download:

<https://www.ipsos.com/sites/default/files/ct/publication/documents/2019-08/ipsos-flair-ivory-coast-10-key-things.pdf>

Contact: Yves.Bardon@Ipsos.com

GLOBAL CONSUMER CONFIDENCE

Read more: <https://www.ipsos.com/en/consumer-confidence-hits-highest-level-2018-jobs-driving-gains>

Download:

https://www.ipsos.com/sites/default/files/ct/news/documents/2019-07/july_2019_-_global_consumer_confidence_index_-_revised_2019-jul-24.pdf

Contact: Nicolas.Boyon@Ipsos.com

ATTITUDES TOWARDS SPACE EXPLORATION

Read more: <https://www.ipsos.com/en-us/news-polls/cspan-space-exploration-2019>

Download:

<https://www.ipsos.com/sites/default/files/ct/news/documents/2019-07/cspan-space-program-topline-2019-07-10.pdf>

Contact: Chris.Jackson@ipsos.com

SHORTCUTS SUMMARY

IPSOS AFFLUENT SURVEYS

Read more:

<https://www.ipsos.com/en/24th-annual-european-affluent-survey>

<https://www.ipsos.com/sites/default/files/IAI 2019 Annual Report-v2-resize.pdf>

A REVIVAL OF THE LEFT?

Read more:

https://www.ipsos.com/sites/default/files/ct/news/documents/2019-08/a-revival-of-the-left_final.pdf

OPEN BANKING

Watch the video:

<https://www.youtube.com/watch?v=E8sleJ7EJNA>

CONTACT

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.

www.ipsos.com
[@Ipsos](https://twitter.com/Ipsos)