

IPSOS UPDATE

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

September 2019

Ipsos Knowledge Centre

GAME CHANGERS



WELCOME

Welcome to the September 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

GLOBAL HAPPINESS SURVEY

What makes people happy around the world?

We survey people across 28 countries to find out how many people consider themselves to be happy and understand their greatest sources of happiness, from health to family, hobbies, money and social media.

BEAUTY AROUND THE WORLD

What does beauty look like in your country?

This research looks at our beauty standards, ideals and routines. Our new report looks at the evolving definitions of beauty, including how the industry is adapting to changing perceptions and influences.

WOMEN IN COCOA FARMING COMMUNITIES

A sustainable development programme

Our report, conducted with Mondelēz International, looks at how women can be empowered through sustainable cocoa farming communities in Ghana, Cote d'Ivoire, Indonesia and Dominican Republic.

SPOTLIGHT ON CANADA

Governing past the next election

We look at the first outputs from the Ipsos/Institute of Governance research project on politics in Canada, as well as new research on healthcare technology.

INDONESIA FLAIR 2019

“Now or Never”

In our latest in-depth report on Indonesia, Ipsos' local team share insights into the country, including its entrepreneurial spirit and rapidly developing infrastructure.

LATIN AMERICA OPINION LEADERS

Favourability rankings of the region's presidents

Ipsos' latest survey of prominent and influential figures in Latin American countries looks at the political world, in the form of an approval ranking of the region's leaders.

SOCIAL MEDIA SHUTDOWN

Mixed support for social media bans in times of crisis

Our survey asks people in 27 countries whether they support the government shutting down social media in crisis situations such as a terrorist attack.

WORLD TOURISM DAY

A look at recent travel-related research and analysis

We present a digest of recent research, including a profile of affluent travellers, an analysis of summer holiday destinations and vacation habits more generally.

GLOBAL HAPPINESS STUDY

We find out how happy people are around the world, and ask them what makes them happiest.

Our new survey in 28 countries finds that levels of happiness are receding globally as two-thirds (64%) of people say they are 'very' or 'rather' happy, down from 70% in 2018.

Australia and Canada are the "happiest" countries, with 86% of the population describing themselves as happy. Close behind are China and Britain (both 83%) and France (80%). On a gloomier note, those who say they are "not happy at all" are most prevalent in Argentina (19%), Turkey (14%), and Japan (11%).

Of the survey's 29 possible sources of happiness, the top five that people report as giving them the "greatest happiness" are:

1. Health and physical well-being (55%)
2. Their children (48%)
3. Relationships with spouse/partner (48%)
4. Life having meaning (47%)
5. Personal safety and security (45%).

Time spent on social media is consistently ranked among the lowest of possible sources of happiness across countries.

The study also looks at trends in happiness over time and the correlation between levels of happiness and consumer confidence.

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INDONESIA FLAIR 2019: NOW OR NEVER

Our in-depth report on Indonesia presents the under-appreciated side of a thriving and dynamic nation that is growing in international importance.

Despite the size of its territory, population (over 260 million) and economy, Indonesia remains surprisingly low-profile in conversations outside of the country.

Tsunamis, floods, volcanic eruptions and earthquakes are frequently associated with Indonesia in the world's news-cycle. But, beyond these episodic tragedies, the reality is that Indonesia is an economically thriving, politically stable, and socially dynamic nation.

Since last year, Indonesia has moved up 11 places in the IMD World Competitiveness rankings. Its modern infrastructure makes the country more attractive than ever before for foreign investors.

Further key points from this second Ipsos Flair Indonesia include:

- Entrepreneurialism is strong in Indonesia and social media helps small and medium businesses to set up and grow fast.
- Indonesia's population is healthier and wealthier, but ageing. By 2035, 14% of the population will be over 65.
- Investment in infrastructure is not only focused in Jakarta, its current capital, but Indonesia's main eight cities too.
- A key to success in the Indonesian market is to offer products and services that make the consumer's life easier.

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BEAUTY AROUND THE WORLD

Our global study looks at the complicated and changing portrait of beauty, including ideals, influences and trends in the beauty industry.

This survey in 27 countries highlights the central tensions in the concept of beauty today. It finds that intrinsic beauty characteristics such as “happiness”, “kindness” and “confidence” are generally valued more highly than physical traits.

Nevertheless, “ideals” do still exist, and they vary significantly across countries as well as between genders. This can be seen in our rankings of the attributes that people say make both women and men beautiful, and our artist recreations of them.

Based on these survey findings, the latest edition of our [What the Future](#) publication reviews beauty trends, including:

- The push for an expanded, more inclusive idea of beauty.
- Sustainable, natural and clean ingredients in beauty products.
- The role of social media users/bloggers in defining ideas of beauty – diminishing the influence of big beauty brands.

The research also suggests that we may overstate Instagram’s impact on beauty. More women around the world (twice as many in the U.S.) say that family members – in particular their mothers – influence their beauty routines compared to media sources.

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LATAM PRESIDENTIAL APPROVAL

Our opinion survey across Latin America provides a favorability ranking of the region's presidents.

Sebastián Piñera, president of Chile, has the highest approval rating of all heads of state in Latin America (68%) according to the region's "opinion leaders". These are 400 of the most informed and influential individuals across 14 Latin American countries who regularly share their views in the media.

Tabaré Vázquez, president of Uruguay, also enjoys a favourable image amongst our respondents. With 65% approval, he is now the second most popular president, after having occupied the top spot in the previous survey in November 2018.

After him are Iván Duque, president of Colombia (53% approval), Peru's Martín Vizcarra (51%) and Ecuador's Lenin Moreno (51%).

At the other end of the scale, Nicolás Maduro, president of Venezuela, continues to have the lowest approval ratings in our study, with 93% saying they disapprove of him.

Brazil's president, Jair Bolsonaro, is also one of the most negatively perceived Latin American leaders: 68% of our opinion leaders state that they disapprove of him, compared to 29% who approve.

Meanwhile, in Argentina, Mauricio Macri's standing in the rankings has declined over 18 months, from 72% approval to just 50%.

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EMPOWERING WOMEN IN COCOA COMMUNITIES

Cocoa Life, a holistic cocoa sustainability program, promotes women's empowerment across its activities and addresses the challenges faced by women in cocoa growing communities.

The program – an Ipsos and Mondeľz International partnership – aims to amplify its sustainability and development impact more broadly by engaging women in its implementation.

But what does women's empowerment mean for development interventions, and how will we know when it has been achieved?

Women's empowerment doesn't typically progress in a linear fashion, and women do not simply become empowered by receiving training or access to new platforms.

Instead, structural societal issues and norms must be addressed. This takes time, and progress happens at different rates in different places, according to local contexts and circumstances.

Featuring insight into data collected across cocoa farming communities in Ghana, Cote d'Ivoire, Indonesia and Dominican Republic, this report delves into how and why interventions impact local women, and how the whole community can be affected by programs that target women's empowerment.

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SOCIAL MEDIA SHUTDOWN

Global citizens are divided on whether it is right for the government to temporarily shut down social media platforms in times of crisis.

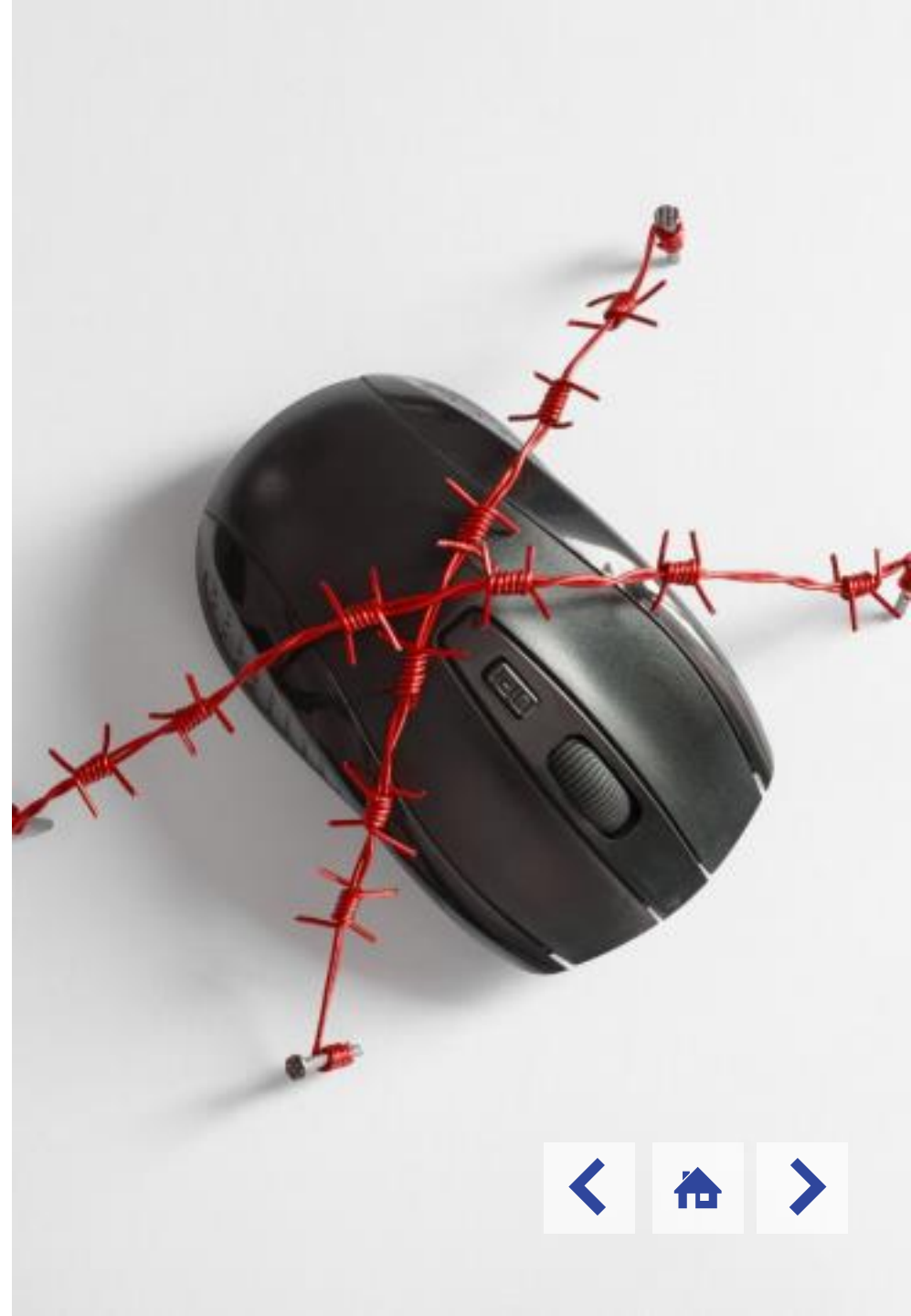
Following a terrorist attack that killed 300 people in April, the Sri Lankan government temporarily shut down access to social media to stop misinformation spreading.

Our survey asked people in 27 countries whether they would support this kind of action. It finds that six in ten (60%) globally think temporarily cutting off social media platforms is acceptable – both in times of crisis and in the event of a terrorist attack – to stop the spread of false information.

The countries most supportive of these measures include India (88%), Malaysia (75%), Saudi Arabia (73%), China (72%) and Great Britain (69%), while the least supportive are Argentina (47%), Serbia (49%) and Japan (50%).

But concern remains about whether it is acceptable to cut off what may be the primary source of news and information for people.

Other questions remain, seven in ten (71%) think that shutting down social media in times of crisis is an ineffective policy option and less than half (48%) do not trust their governments to decide if and/or when it is appropriate to do this.

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SPOTLIGHT ON CANADA

We present a new series examining the critical challenges facing Canada and the new government as well as recent research on healthcare.

Governing past the next election: Taking place throughout the federal election campaign until October, Ipsos and the [Institute on Governance](#) (IOG) are producing a series of research-based thought pieces related to public sector governance in Canada. Each one will examine major issues: public sector governance, health care, immigration, youth engagement, the environment, housing, and fiscal policy - while exploring positive strategies of how to strengthen social cohesion, democratic participation and the perceived value of government.

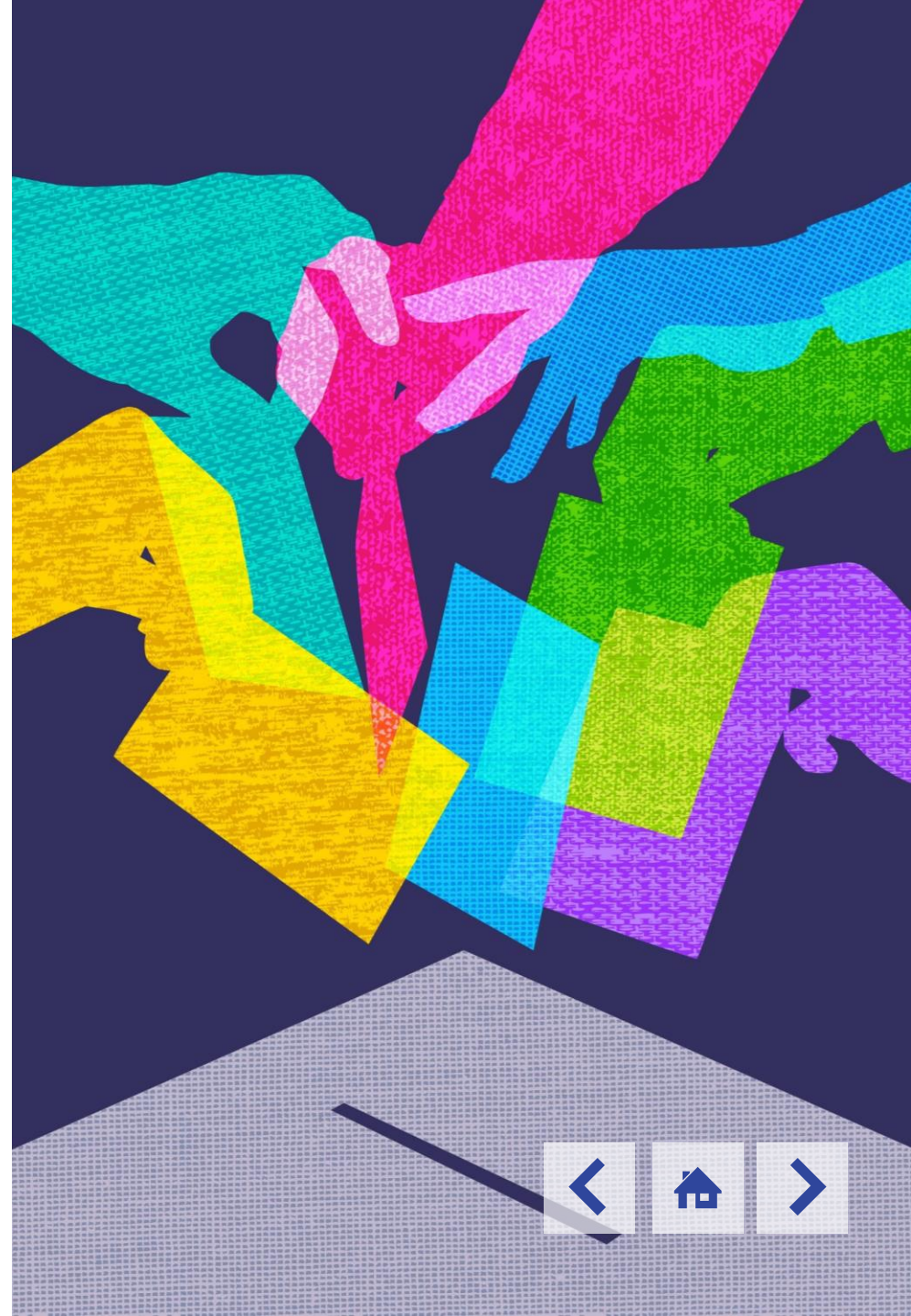
Two thought pieces have already been released, [The Elephant in the Vault](#) and [Does Canada Need More Canada?](#), with more to follow.

Connected Health in Canada: Another report this month shows that [Canadians are optimistic over the role technology will play in the healthcare system of the future](#). The poll, conducted on behalf of the Canadian Medical Association, found that 84% of Canadians are interested in the ability to access all of their health information from one platform, while 55% think it is likely that AI programs will be able to accurately diagnose various diseases and conditions in the future.

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WORLD TOURISM DAY

Looking ahead to World Tourism Day in September, we review some of Ipsos' latest research and analysis on the topic of travel.

World Tourism Day – held on the 27 September – is a chance to raise awareness of the role of tourism within the international community and to demonstrate how it affects social, cultural, political and economic values worldwide.

To mark the occasion, we present a selection of our recent travel-related reports:

- [Segmenting US Affluent Travellers](#) – A deep dive into our latest Affluent Survey data, providing a quick snapshot of five easily targetable US Affluent Traveller segments.
- [Holiday Barometer for Europeans and Americans](#) – A report on summer holiday habits in Europe, the US and Brazil, including plans and destination preferences.
- [Engaging China's Affluent Consumer](#) – A paper looking at how to engage the 91% of affluent Chinese who are eager to explore the latest trends when they travel abroad.
- [A Way to Get Away](#) – A 27-country Global Advisor study about taking time off work. Do people in different countries take all of their available vacation days? And do they fully disconnect?

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SHORTCUTS

INNOVATION AND PUBLIC ATTITUDES

Innovation is crucial for our economic future. Arguably, we are now at the beginning of a “fourth industrial revolution” based around the implementation of a range of new technologies, including artificial intelligence, robotics, nanotechnology (among others). But innovation and economic growth are about people as much as they are about technologies – public attitudes and perceptions will also be key to their success.

Previous economic transformations have had serious and sustained negative impacts on communities and individuals. In the past, governments and policy-makers have failed to plan for and manage change or ensure that benefits are widely distributed and mitigate negative impacts. Can we do better this time?

In this paper – a collaboration between King’s College London, Ipsos MORI and the Centre for London – we set out the challenges in developing Artificial Intelligence, review public attitudes to innovation, and summarise the key challenges for policy-makers.

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GLOBAL CONSUMER CONFIDENCE INDEX

Ipsos’ monthly 24-country Consumer Confidence Index remains unchanged (50.2 points) at its highest level so far in 2019.

This global index, reflecting consumer attitudes on the current and future state of their local economy, shows signs of stability with a score above the 50-point mark for a second consecutive time this year.

Seven of the countries surveyed register significant three-month gains in optimism – Argentina (+5.7), Turkey (+5.2), mainland China (+3.4), France (+3.2), Saudi Arabia (+2.7), Canada (+2.5), and Poland (+1.9).

On the other end of the spectrum, Japan (-2.2), Spain (-2.0), India (-1.7), and Sweden (-1.5) show the biggest three-month declines.

For full graphic comparisons and trended data, visit our interactive portal:

[Ipsos Consolidated Economic Indicators](#)

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UK AVIATION INDEX

Our Aviation Index survey for National Air Traffic Services (NATS) finds that the UK public are more likely to anticipate adverse Brexit-related impacts on flying, and are keen on the industry delivering sustainable flying.

Seven in ten say that they would never choose to fly with an airline with a bad reputation. But only 38% would be willing to pay more to fly with a particular airline.

One in five say they are less likely to travel to EU destinations in the future because of Brexit (twice as many as last year). And seven in ten expect flights between the UK and EU countries to become more expensive.

More agree than disagree that airport expansion in the UK is the right thing to do; 57%, up from 48% last year.

Three in five say that reducing emissions should be a priority for the aviation industry. But – even if it has a negative impact on the environment – the British public do not think that people should be discouraged from flying if they want to.

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IN THIS EDITION

GLOBAL HAPPINESS STUDY

Read more: <https://www.ipsos.com/en/what-makes-you-most-happy-hint-its-not-what-you-may-spend-most-time>

Download:

<https://www.ipsos.com/sites/default/files/ct/news/documents/2019-08/Happiness-Study-report-August-2019.pdf>

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INDONESIA FLAIR: NOW OR NEVER

Read more: <https://www.ipsos.com/en/flair-indonesia-2019-now-or-never>

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<https://www.ipsos.com/sites/default/files/ct/publication/documents/2019-09/flair-indonesia-2019-10-things.pdf>

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BEAUTY AROUND THE WORLD

Read more:

<https://www.ipsos.com/sites/default/files/ct/news/documents/2019-08/global-advisor-beauty-august-2019.pdf>

Download:

https://future.ipsos.com/downloads/Ipsos_WTF_6_Beauty.pdf

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LATAM PRESIDENTIAL APPROVAL

Read more: <https://www.ipsos.com/es-ar/encuesta-lideres-de-opinion-de-latam-aprobacion-presidencial>

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https://www.ipsos.com/sites/default/files/ct/news/documents/2019-08/informe_ipsos_lideres_de_opinion_aprobacion_presidencial_agosto_2019.pdf

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LINK SUMMARY

EMPOWERING WOMEN IN COCOA COMMUNITIES

Read more: <https://www.ipsos.com/en/empowering-women-more-sustainable-cocoa-communities>

Download:
<https://www.ipsos.com/sites/default/files/ct/publication/documents/2019-08/empowering-women-for-more-sustainable-cocoa-communities-2019.pdf>

Contact: Meghann.Jones@ipsos.com

SPOTLIGHT ON CANADA

Read more: <https://www.ipsos.com/en-ca/knowledge/society/governing-past-next-election>

Download: <https://iog.ca/docs/Does-Canada-Need-More-Canada.pdf>

Contact: Mike.Colledge@ipsos.com

SOCIAL MEDIA SHUTDOWN

Read more: <https://www.ipsos.com/en/social-media-should-governments-shut-it-down-times-crisis>

Download:
https://www.ipsos.com/sites/default/files/ct/news/documents/2019-08/global_advisor_-_social_media_ban_-_final.pdf

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WORLD TOURISM DAY

Read more: <https://www.ipsos.com/en/segmenting-us-affluent-travelers>

Download: <https://www.ipsos.com/en/way-get-away-0>

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SHORTCUTS SUMMARY

INNOVATION AND PUBLIC ATTITUDES

Read more:

<https://www.kcl.ac.uk/policy-institute/assets/innovation-policy-briefing.pdf>

Contact: Kelly.Beaver@Ipsos.com

GLOBAL CONSUMER CONFIDENCE INDEX

Read more:

<https://www.ipsos.com/en-us/consumer-confidence-august-2019>

Contact: Chris.Jackson@Ipsos.com

UK AVIATION INDEX

Read more:

<https://www.ipsos.com/ipsos-mori/en-uk/aviation-index-2019-public-attitudes-towards-aviation-uk>

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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.

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