

IPSOS UPDATE

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

October 2019

Ipsos Knowledge Centre

GAME CHANGERS



WELCOME

Welcome to the October 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

THE TRUTH ABOUT TRUST

Is trust in crisis, or is it just complicated?

Our new report takes a detailed look at public opinion data from around the world to find out whether the facts match the dominant narrative that trust is in terminal decline.

SOUTH KOREA FLAIR 2020

Customized and connected

The first edition of our Flair reports on South Korea presents the key trends in society today, taking into account culture, technology, beauty and the sharing economy.

BEYOND PRICE PROMOTIONS

How to design new sales strategies

While offering discounts is a popular sales strategy, it is not always the most effective. This white paper shows how to design new 'Point of Sales' activations, based on insights from behavioural science.

WORLD FOOD DAY

A round-up of our recent research on food

Ahead of World Food Day on 16 October, we serve up a selection of our recent research and analysis on food, which looks at different diets around the world and explores current and future trends.

THE FIVE FORCES OF CUSTOMER EXPERIENCE

The science of strong relationships

Emotionally-attached customers are most valuable, but increasingly hard to come by. We present the building blocks of customer-company connections, based on new research across sectors.

POPULISM AND NATIVISM IN 2019

Dissatisfaction with society still prevails

We find out how prevalent populist and nativist opinions are across 24 countries and measure these levels against previous years. It seems that, while populism is a steady force, nativism is increasing in many countries.

UN SUSTAINABLE DEVELOPMENT GOALS

Global views on the SDGs

Our new global survey explores public opinion on the United Nations Sustainable Development Goals and finds marked differences by country and region in terms of which are considered more/less important.

GLOBAL BUSINESS INFLUENCERS

The habits and plans of the top global executives

Our annual survey gives an insight into a segment that represent less than 1% of the population, but has significant spending power across the travel, luxury and media sectors.

THE TRUTH ABOUT TRUST

Is trust really in crisis? Our new report explores whether concern is out of step with reality.

Today, it's hard to avoid the narrative that there is a crisis of trust in society – in politicians, business leaders and the media. We study the survey data from around the world and find a more complex picture.

Yes, trust in politicians is low – but it always has been. When it comes to trusting each other, a different picture emerges. A stable or increasing proportion of people agree that 'most people can be trusted' in many European countries.

We can see that, in a number of sectors, the perceived decline in trust isn't as new or dramatic as we might think. Which is good, because without a degree of trust, society simply wouldn't function.

This isn't to say there aren't problems. For example, populist revolts against elites around the world, concerns about fake news on digital platforms and corporate scandals in the business arena are all issues that threaten aspects of trust in different ways.

Our report makes the case for a more nuanced conversation – one that is less about trust itself, and more about what organisations and individuals need to do to be 'trustworthy' in a particular context.

Based on this thinking, we analyse trust in a variety of contexts and present findings from our first Ipsos Global Trustworthiness Monitor.

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FIVE FORCES OF CX

We present a new framework for driving strong and profitable customer relationships.

The quality of customer experience (CX) is an integral part of an organisation's success, but it is not easy to manage – especially as digitisation has changed many customer-company interactions.

When thinking of CX, many are investing in making their processes more efficient and 'frictionless', focusing on the more functional aspects of the customer experience, such as minimising how much time and effort a customer has to put in to get something done.

But, we know that functional satisfaction isn't enough. Our research across nine sectors shows that emotionally-attached customers are far more valuable and loyal to brands. But, unfortunately, 70% of customers do not feel any such emotional attachment. Organisations themselves admit they could do more: only one in five are confident their customer experience matches their brand promise.

The "five forces" that should be at the heart of CX improvement are:

- **Fair treatment:** Make customers feel that there is a fair exchange in their relationship with you.
- **Certainty:** Make customers feel that things are clear, transparent and working as expected.
- **Empowerment:** Help customers feel in control of the situation.
- **Recognition:** Make customers feel valued and respected.
- **Shared values:** Show that you care about the greater good.

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FLAIR SOUTH KOREA 2020

Our in-depth report presents a society of people that are both independent and dependent: “customized and connected”.

The first edition of our Flair series in South Korea sheds light on a nation that, beyond certain things that make it known internationally – such as music, technology and a troubled geo-political context – is relatively little-known and easy to stereotype.

The unprecedented growth of South Korea’s economy in the 1960s earned it the name of the “miracle of the Han river”. It recently launched the world’s first 5G network service and maintains the world’s largest share in manufacturing of products such as smartphones and display screens. But South Korea is more than just a high-tech factory.

This report identifies the main trends in Korean society today, which include an increasing environmental awareness, a desire to age healthily, and a pioneering sharing economy.

Some key points about South Korea from the report include:

- The “Korean Wave” has spread cultural influence across Asia, and increasingly in the West. It began with K-pop, but is now extending into areas such as K-food and K-beauty.
- South Korea is image-conscious and personal care is a fast-growing segment. The market for these products is growing by over 10% every year, with more continuously being launched.

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POPULISM AND NATIVISM IN 2019

Our survey in 27 countries shows that populist and nativist sentiment is growing in some countries while receding in others.

Overall levels of populism around the world today remain in line with 2016. During the same period, our latest global survey finds that nativism has increased. But there are differences between countries.

Looking over data from the past three years, there has been an uptick in populist opinions such as ‘fixing a country requires a strong leader willing to break the rules’ or ‘experts in this country don’t understand people like me’ in Sweden, South Africa, Argentina and India.

Nativist opinions, such as ‘immigrants take important social services away from real nationals’ and ‘employers should prioritise people from this country over immigrants’ are now shared by more people in Mexico, Sweden again, and Japan than in 2016.

On the other hand, we find our measures of populism and nativism have dropped in Israel, Italy, Hungary and the United States.

The survey also reveals that a majority of citizens across the world feel left out of the “normal order” of life in their country:

- 70% say the economy is rigged to favour the rich and powerful.
- 66% feel that traditional parties and politicians don’t care about people like them.

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BEYOND PRICE PROMOTIONS

How to design new approaches to Point of Sales (POS) activation – other than offering discounts.

Today's omnichannel world is changing how shoppers behave and making it more difficult for retailers and marketers to know how they can best influence consumer decision-making at the point of sale.

Despite their popularity, price promotions are becoming a less effective strategy for POS activations and they are not relevant for all consumer pathways. Marketers need to develop new ways to drive sales.

The first step is to map and identify the dominant customer journeys in your category – helping you to understand what approach would work for them. Then, certain behavioural science concepts can be applied to “nudge” shoppers towards desired behaviours.

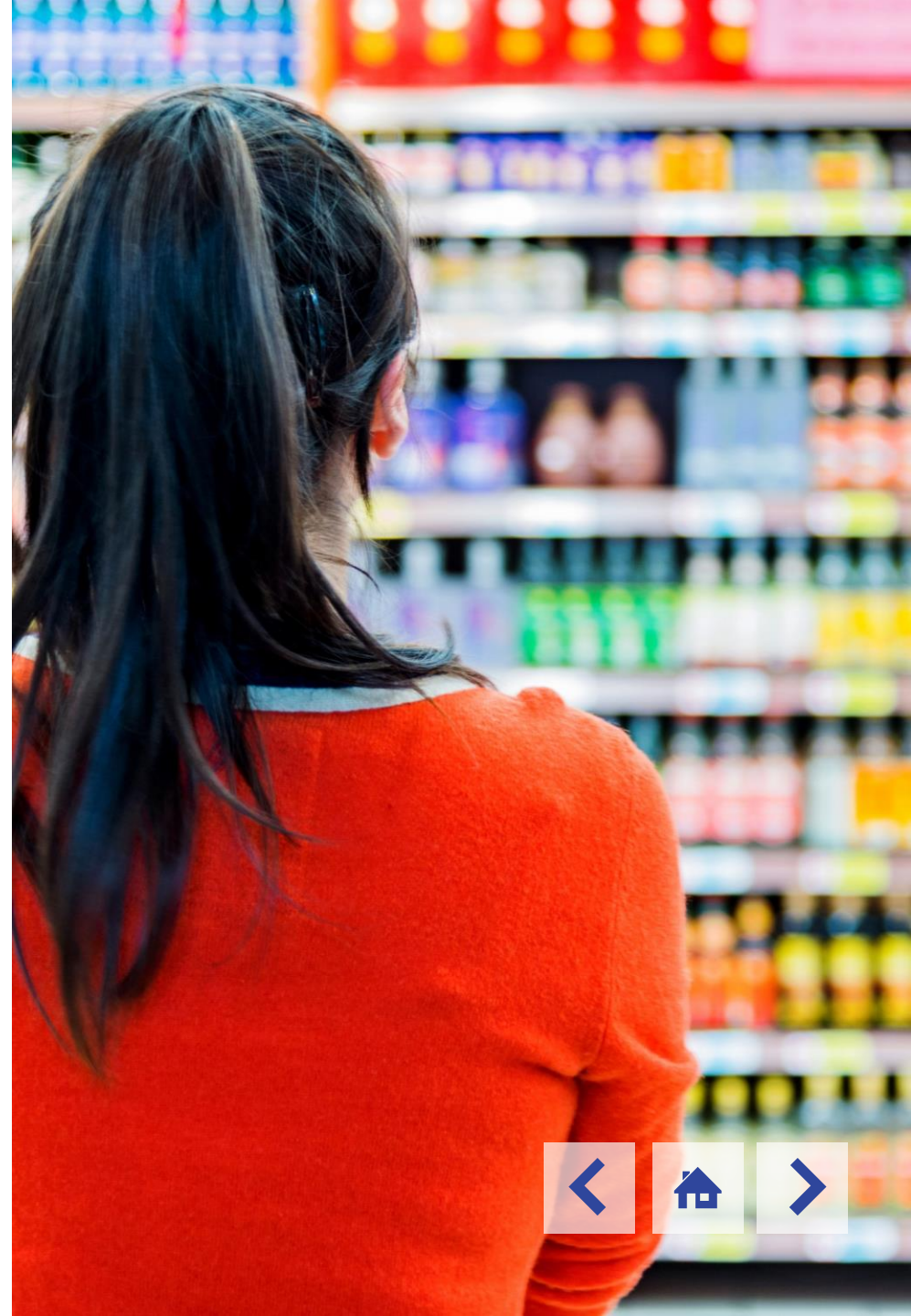
Some examples include:

- **Vicarious goal fulfilment** – where the mere presence of healthy food options gives consumers the license to indulge.
- **Priming** – (nonconscious) exposure to a product can encourage consumers to choose it over others.
- **Ordering** – the way that products are presented can shift attention away from price and towards quality, for example.
- **Framing** – by thinking of a store aisle as a “frame”, we can alter the way in which products are perceived.

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SUSTAINABLE DEVELOPMENT GOALS

Global views on the importance and priorities of the United Nations Sustainable Development Goals.

Our survey in 28 countries finds that, overall, three-quarters of adults have at least *heard of* the UN Sustainable Development Goals (SDGs). But there are big differences between countries, and familiarity tends to be higher in emerging countries. In Great Britain, the US, Canada and Australia, one in two respondents say they are unaware of them.

The SDGs are the 17 benchmarks that world leaders set in 2015 in order to tackle global problems such as poverty, inequality and a range of environmental issues such as climate change and clean energy.

When asked how important they consider each of these goals to be, the following emerged as the global top three:

1. **Zero Hunger:** ranking first in Belgium, Chile, Hungary, Italy, Mexico, Russia and South Africa.
2. **Clean Water and Sanitation:** ranking first in Argentina, France and Turkey.
3. **Good Health and Wellbeing:** Ranking first in Australia, Japan, the Netherlands and the United States.

Gender equality comes bottom of the list, although it is considered the most important goal of all for people in Sweden.

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WORLD FOOD DAY 2019

To coincide with World Food Day on 16 October, we present some of our latest research and reports on the topic of food.

Diets around the World: An exploration – Over recent years it has felt like people are becoming increasingly focused on their diet and eating healthy. This report – across 28 countries – explores consumers' current diets and highlights how their choices are changing.

Food for Thought: Would you like real or fake meat with that? – With all the current hype around vegan and vegetarian options, how likely are you to try a meat substitute? This report presents results of a global study across 29 countries – finding that more than four in 10 people (42%) would eat a plant-based substitute for meat.

What the Future: Food – This report asks global consumers about their expectations for the future access, affordability and quality of food, as well as finding out about their food preferences and habits.

'Natural' Food: What does it mean to consumers? – Consumers are more conscious than ever about the safety and trustworthiness of food and drink, which has led to an increase in the use of terms such as 'natural' on packaging. This report examines the trend.

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GLOBAL BUSINESS INFLUENCERS 2019

Our annual survey tracks the media, business, financial, luxury and travel habits of the most senior global business executives.

The individuals surveyed in our Global Business Influencer (GBI) study span 30 countries and represent over 75% of the world economy, making them a key target group for a number of sectors.

Looking at profile information, the majority (72%) are male and are more likely to be 35–55 years old. The average income is almost US\$400,000, and one quarter are millionaires. The findings include:

- Global business influencers are avid consumers of media across all platforms, and not only digital media. Nine in ten accessed print content in the past 30 days.
- On average, they have taken 14 air trips for business in the last year, with more than half flying first or business class.
- Travel and technology are the most popular hobbies and interests amongst this segment.
- One-quarter intend to invest in property in the next year, while 36% do not and 39% are still undecided.
- One-third say they will buy high-value items including a watch, fine jewellery and luxury clothing or footwear in the next year.

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SHORTCUTS

MEDIA IN MENA

In an article for Khaleej Times, Ipsos media expert Elie Aoun outlines the media landscape in the UAE region, which he says is one of the biggest markets for local media organisations.

Surprisingly, despite widespread digitization across the region, a roadside billboard here costs more than a TV campaign.

Outdoor has taken the lead as the main media channel in the UAE, followed by digital, which is growing exponentially. Third in terms of advertising expenditure is radio, which is now considered by many to be an influential medium in the UAE. Newspapers come next.

These changes carry large implications for the industry, and also for the way that media is measured, as it is important that advertisers are able to evaluate the return on investment of their media spends.

It is well-known that digital has taken a lot of revenue from print advertising, but also from TV. The effect has been particularly pronounced in the UAE which has seen a 35% drop in value over the past three years.

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FLAIR INDONESIA 2019

The full report of Ipsos Flair Indonesia, “Now or Never” is now available, building on the [10 key points summary report](#).

Our local Ipsos team share insights into society, markets and people in Indonesia, covering topics such as demographic changes, smart cities vs. sustainable cities, e-commerce, industry 4.0 and entrepreneurialism.

Soeprapto Tan, Managing Director of Ipsos in Indonesia, writes about the competitive advantages of Indonesia in the ASEAN region, the importance of connectivity in terms of digital and physical infrastructure, as well as how values and behaviours are changing. For example, having a big family is a thing of the past as other matters begin to take priority with the ‘rise of the individual’.

The fast-moving changes outlined in the report reflect a key ‘now or never’ moment in Indonesia’s history and its transition to developed country status, as it shifts from a traditional system into the modern world.

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ESOMAR MARKET RESEARCH REPORT 2019

ESOMAR recently published its annual market research industry report for 2019 which includes a series of contributions from Ipsos.

In “*Is Market Research Having a #MeToo moment?*”, Didier Truchot, Ipsos’ Chairman and CEO, shares his view on female empowerment within Ipsos and the targets within the company to improve female representation in the most senior jobs to 45% by the end of 2020, up from 30% today.

Didier says: “We’re doing our best to contribute to a necessary movement. Words are great, but actions are better”

Henri Wallard, Ipsos’ Deputy CEO, discusses the challenges of political polling, including the (untrue) perception that they are always wrong and the answer to the thirst for ‘magic’ methods, which is to continually innovate and adapt.

Bart Langton, Research Director at Ipsos in New Zealand, has his say on AI and machine learning in market research, including both unstructured, qualitative data and more structured, big data.

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LINK SUMMARY

THE TRUTH ABOUT TRUST

Read more: <https://thinks.ipsos-mori.com/trust-the-truth/>

Download:

<https://www.ipsos.com/sites/default/files/ct/publication/documents/2019-09/ipsos-thinks-trust-the-truth.pdf>

Contact: Gideon.Skinner@Ipsos.com

FIVE FORCES OF CX

Read more: <https://www.ipsos.com/en/five-forces-customer-experience-science-strong-relationships>

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<https://www.ipsos.com/sites/default/files/ct/publication/documents/2019-09/five-forces-of-customer-experience-ipsos.pdf>

Contact: Jean-Francois.Damais@Ipsos.com

FLAIR SOUTH KOREA 2020

Read more: <https://www.ipsos.com/en/flair-south-korea-2020-customized-connected>

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<https://www.ipsos.com/sites/default/files/ct/publication/documents/2019-09/flair-south-korea-2020-web.pdf>

Contact: Eunhae.Yoo@Ipsos.com

POPULISM AND NATIVISM IN 2019

Read more: <https://www.ipsos.com/en/populist-and-nativist-views-still-prevail>

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https://www.ipsos.com/sites/default/files/ct/news/documents/2019-08/populism-and-nativism-2019_0.pdf

Contact: Chris.Jackson@Ipsos.com

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BEYOND PRICE PROMOTIONS

Read more: <https://www.ipsos.com/en/beyond-price-promotions>

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<https://www.ipsos.com/sites/default/files/ct/publication/documents/2019-10/beyond-price-promotion-2019-ipsos.pdf>

Contact: Hans.Raemdonck@Ipsos.com

SUSTAINABLE DEVELOPMENT GOALS

Read more: <https://www.ipsos.com/en/awareness-united-nations-sustainable-development-goals-highest-emerging-countries>

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https://www.ipsos.com/sites/default/files/ct/news/documents/2019-09/global_advisor-un_sdgs-report_-2019-09-06_0.pdf

Contact: Supriya.Chabria@Ipsos.com

WORLD FOOD DAY 2019

Read more: <https://www.ipsos.com/en/diets-around-world-exploration>

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GLOBAL BUSINESS INFLUENCERS

Read more: <https://www.ipsos.com/ipsos-mori/en-uk/global-business-influencers>

Download: https://www.ipsos.com/sites/default/files/2019-09/gbi_2019_brochure.pdf

Contact: James.Torr@Ipsos.com

SHORTCUTS SUMMARY

MEDIA IN MENA

Read more: <https://www.khaleejtimes.com/bigger-the-screen-better-the-audience-recall>

FLAIR INDONESIA

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

ESOMAR MARKET RESEARCH REPORT 2019

Read more: <https://ana.esomar.org/documents/global-market-research-2019>

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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