

IPSOS UPDATE

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

January 2020

Ipsos Knowledge Centre

GAME CHANGERS



WELCOME

Welcome to the January 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.

IN THIS EDITION

SLOWING DOWN TO BE FASTER

Innovation and creativity against the clock

Creativity can take time, but we live in a world that demands immediacy. Our latest Ipsos Views paper argues that investing time early on to find the right ideas will ultimately be most effective.

THE STATE OF THE UK

The mood of the nation ahead of Brexit

Our UK team looks at what Ipsos' latest research tells us about the country's vital signs as a new government takes office. The *Almanac* covers topical issues including the climate, gender and entertainment.

FLAIR RUSSIA 2020

Consumers and brands in search of sustainability

Greater awareness about environmental issues is driving change in Russia today as individuals and companies adopt more responsible patterns of behaviour. Our new Flair report on Russia focuses on this topic.

GENERATION Z IN MENA

What is unique about the region's youth?

Young people in MENA share many characteristics with their international counterparts, but have their own distinct identity. This report tells us more about them and how they differ from the Millennials who came before.

FLAIR BRAZIL 2020

Watercolour or mosaic?

Our latest Flair report on Brazil explores the latest trends in terms of politics, technology, brands and generational change while the country grapples with a series of crises.

UNDERSTANDING AUSTRALIA

Where to from here?

Based on our 20 years of research on the Australian population, this report looks at how the country can respond to the pressing challenges of population growth and urbanisation.

PERCEPTIONS OF NATO

Levels of support for the security alliance

Do people see NATO as a force for good? Our survey looks at what the public in member states and beyond think about the organisation, its objectives, and how it is funded.

HACKING HACKS

How users are leading innovation

Consumers themselves often develop innovative solutions – or hacks – ahead of anyone else. We show how these 'lead users' can inform research and development for new products.

SLOWING DOWN TO BE FASTER

Why investing time at the start of the creative development process produces better results.

Our expectations and perceptions of time have profoundly changed so that today everything has to be fast, immediate, even anticipated.

This can be seen in the way that we live and work: aided by technology we multi-task at the office and our idle time is dominated with online activities such as reading, watching and chatting.

Innovation and creative development processes have also accelerated, and this need for speed impacts research. Instead of testing before launch, many prefer to launch and learn in the market, removing the products or content which don't stick.

This paper presents new Ipsos research on the relative value of speed and time vs creativity and innovation.

Conversations with industry professionals show us that people recognise that creativity takes time. Most important is to properly understand the brief, the business question, the target, and then spend enough time on the strategy and big idea.

Both the evidence and expert view points towards the benefits that come from taking your time at the beginning of the development process. The real challenge being how to get to the right answer faster.

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FLAIR BRAZIL 2020

Polarisation, technology and spirituality are among the main forces shaping Brazilian society today.

In “Watercolour or Mosaic”, this year’s *Ipsos Flair* report on Brazil, our local experts look at society, markets and people to offer the latest insights on what is happening in the country today.

The key trends include a noticeable growth of political extremes in Brazil, reflecting long-existing social divisions and profound income inequality. One third of the population don’t think it is worth trying to talk to people with a different political view, and four in 10 doubt that anyone with opposing political views will change their mind, regardless of evidence.

The voice of social and political conservatism is becoming louder. but this doesn’t reflect a dramatic shift in public attitudes as a whole. Brands shouldn’t concede too much to it and remember that strong brand purpose is still a good way to catch attention in advertising.

As well as providing good services and products, brands are now expected to contribute positively to society: more than three-quarters of Brazilian consumers think that this is more important today than in the past.

Brazil is an online superpower, ranking second in the world for time spent on the internet and third for social media and dating apps.

See the full report in [Portuguese](#).

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THE STATE OF THE UK

In this year's edition of *The Almanac*, our UK team explores the national mood going into 2020.

December's decisive general election result, with Boris Johnson's Conservative party gaining a strong majority, could mark a change in direction for the UK. Our annual report sees Ipsos experts set the scene as the country prepares for Brexit.

It finds the public to be worried about the state of the country as a whole: in 2019, Britons were among the most negative in the world about the future with 79% saying the country was heading in the wrong direction. And while only 12% of Britons thought their children would have a worse life than them in 2013, this now stands at 45%.

Looking ahead, less than one in five trust the 'British Establishment' to put the needs of the nation first when it comes to Brexit. Meanwhile, the jury is out on whether the economy will suffer.

On a positive note, the British public continue to believe that there is more that unites than divides them. And they have become significantly more liberal on moral issues over the last 30 years.

The report also presents some [favourite facts from 2019](#), including:

- 13% of new current accounts opened in the first half of 2019 were with digital-only banks.
- Three in four (73%) think that Britain is already feeling the effects of climate change.

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UNDERSTANDING AUSTRALIA

Ipsos in Australia builds a picture of what life is like in the country today and asks: where to from here?

Our report presents Australian citizens' perspectives about their local area, their concerns, and their values in the context of population growth, infrastructure, liveability, health and climate.

More and more Australians are thinking about the quality of their own lived experience, the top drivers of this being “feeling safe” and “access to great healthcare”.

The country has much to celebrate, such as its vibrant cities and the quality of healthcare, But there are dynamics and demands today that create challenges for society, including its uniquely high levels of population growth. Melbourne's population has increased by nearly 1 million in a decade, for example.

Looking at typical attitudes, if Australia were a town of 100...

- 80 believe Australia has a responsibility to be a moral leader in the world,
- 61 agree that achieving gender equality is important to them personally,
- 24 are dissatisfied with their standard of living,
- 4 believe there is no such thing as climate change.

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FLAIR RUSSIA 2020

Awareness around sustainability and social responsibility is a prominent consumer trend in Russia. This year's report takes a closer look.

The second edition of *Ipsos Flair* in Russia shows how changing social and ethical attitudes around sustainability are affecting consumer behaviour in the country and encouraging innovations.

Consumers want to project responsible behaviours, but it takes time to change habits. This means that many Russians are adopting environmentally-friendly practices that fit in with their existing lifestyles.

While 80% of Russian consumers express concerns about environmental issues, less than half are willing to pay a higher price for more environmentally-friendly products.

Packaging is also affected by sustainability trends. Consumers now search for "eco" labels on the products they buy. When disposing of products, 75% of Russians are willing to sort their waste, but there is a lack of understanding on how to do it properly.

Confidence in brands is in jeopardy. To maintain trust, they must guide and empower consumers in today's new value system.

To help brands to navigate this environment, our report defines four segments of consumers based on their attitudes and health habits.

Flair Russia 2020 is available in full [in Russian](#).

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PERCEPTIONS OF NATO

There is a widespread lack of understanding about how NATO functions, its objectives, and its funding.

Our survey finds that people in NATO countries see the alliance as a force for good, but support is low in key member states.

Across 11 NATO countries surveyed (Belgium, Canada, France, Germany, Great Britain, Hungary, Italy, the Netherlands, Poland, Spain, and the US), 43% of the public who know at least a little about the security alliance have a favourable view of it, while 14% have an unfavourable view and 43% are neutral.

But there is variation between countries: favourability towards NATO is highest in Poland (60%), the US (56%), Canada (55%) and Britain (50%), but lower in the key member states of Germany (30%), France (31%), Italy (35%) and Spain (29%).

People in Russia (72%) and China (68%) are most likely to think NATO's purpose is to protect US interests.

All countries hugely underestimate the United States' financial contribution to the organisation. The average guess is that 39% of NATO funding comes from the US, when the actual figure is 69%.

Member states also overestimate their own nation's financial contribution to NATO – by more than three times the actual figure in France and Germany, twice as much in Great Britain, and 50 times in Hungary.

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UNDERSTANDING MENA'S YOUTH

What is unique about Generation Z in MENA? Our generational study in the region finds out.

Gen Z in MENA are taking inspiration from their global counterparts and adapting it to their local context. Connectivity and the rise of an “influencer generation” have brought people across borders closer. But this younger cohort are building their own distinctive identity.

This report describes MENA's Gen Z as an educated, principled, and ambitious generation that is proud of their heritage.

Eager to take on opportunities, Gen Z aspire to independence and status so that they can make their mark on society and affect change. They share the entrepreneurialism of the Millennial generation, seeking not only financial stability but a deeper sense of freedom and leadership.

However, young people still confine themselves to what is socially acceptable, respecting more traditional cultural norms. They adopt a “live and let live” mentality, showing a progressive attitude.

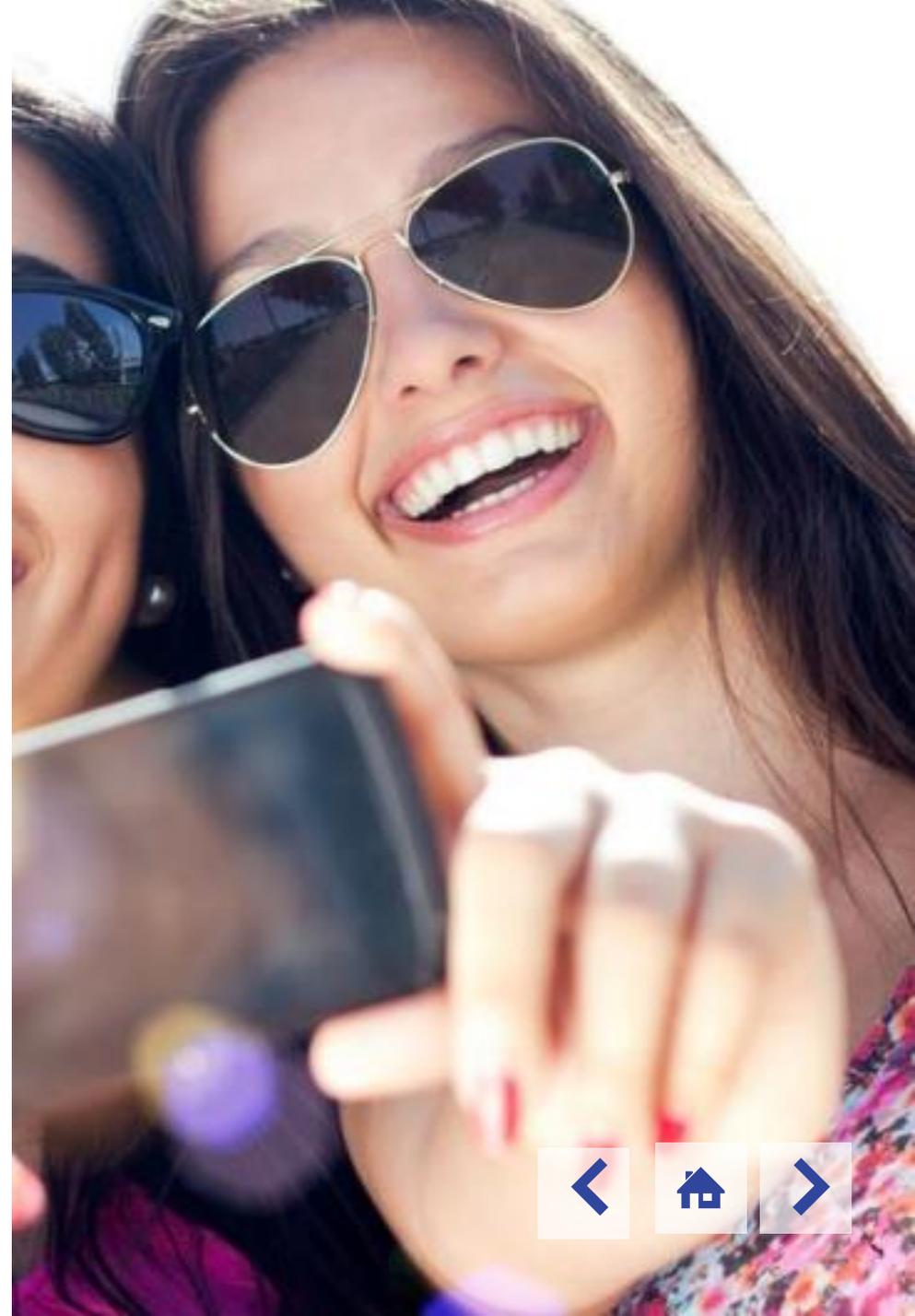
There is a strong “digital-first” attitude among Gen Z that dictates the way they do almost everything. This is a key differentiator between this generation and the Millennials that preceded them.

Find out more about [online streaming habits in MENA](#).

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HACKING “HACKS”

Consumers themselves are ahead of the curve, developing innovative solutions – or hacks – to better meet their needs.

The lead users of different categories have been an important source of innovation for decades, helping businesses to generate new, marketable ideas.

However, the conventional lead-user technique is time and resource intensive, and it requires us to have a clear idea of what we are looking for at the outset. As markets are changing so rapidly, the pressure is on to find faster and better ways to uncover truly disruptive innovations.

Any successful disruption will solve a fundamental consumer problem and deliver the solution in a convenient way from the point of view of user experience.

A method developed by Ipsos and the MIT uses the power of the internet to identify ‘lead-user innovations’ before anyone else. The four-stage process applies text analytics, expertise and trend analysis. A pilot study in the field of kitesurfing produced six innovations with the potential to become mainstream in the sport. Applied to other categories, it is also able to surface novel ideas.

Read more in our paper [Decoding the Innovation Landscape](#), which sets out the lead user innovation research method and pilot study in greater detail.

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SHORTCUTS

A WORLD OF RESEARCH: 2019 IN REVIEW

In *A World of Research*, we present a month-by-month overview of Ipsos research during 2019, picking out some of key facts and figures.

We started the year by looking at how people's perceptions about the societies they live in match up to reality, touching on issues such as ageing populations, gender equality and climate change.

Other prominent themes from our research in the past 12 months include trust, technology, happiness, health and mobility.

Some key stats from our year in review:

- Only one-third of people around the world are looking forward to old age.
- On average, 52% think that there are more advantages to being a man than a woman in society today.
- Four in five of our global Reputation Council members expected their businesses to be hit with data and privacy issues in 2019.
- 66% of people around the world say that traditional parties and politicians don't care about people like them.

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MOBILE-FIRST SURVEYS

As smartphones become the go-to device for using the web, we have seen a similar rise in completing online surveys this way.

Instead of device-agnostic surveys, a mobile-first approach begins with considering the look, feel and usability of questionnaires on smartphones, then on other devices.

Our best practice guide outlines the benefits of mobile-first survey design and the simple rules to follow when designing or reviewing an online survey. These include:

- Minimise clutter
- Keep it concise (140 characters max for the question stem)
- Keep consistent visuals, layout and text
- Minimise respondent burden by limiting lists and open-ended questions

Surveys created in this way will improve the overall responses, the sample composition, respondents' survey experience and the quality and validity of data collected.

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LATIN AMERICA'S MOST ATTRACTIVE COUNTRIES

How do Latin American countries compare on different measures of 'attractiveness'? Our latest survey of Latin American opinion leaders shows perceptions of what the diverse region has to offer in terms of history, nature, culture, gastronomy, musical attractions, and the friendliness of their people.

The country that stands out for its historical attractions is Mexico (in 88% of respondents' top 3), followed by Peru (78%). Mexico also leads the ranking for cultural activities, scoring 79%, followed by Argentina (76%).

Brazil comes top for natural beauty, as 72% of opinion leaders put it in their top three for the attractiveness of its landscapes. But we also find that respondents tend to rate their own country highly on this measure.

Columbia is seen to have the friendliest people – almost two-thirds select the country for this. Mexico and Peru join them in the top three.

A [previous edition](#) of the survey looked at how various international organisations are perceived in Latin American countries.

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SLOWING DOWN TO BE FASTER

Read more: <https://www.ipsos.com/en/slowing-down-be-faster-why-it-paramount-invest-front-end-development-process>

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HACKING HACKS

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Content is also regularly updated on our website and social media outlets.

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