

# IPSOS UPDATE

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

December 2019

# WELCOME

Welcome to the December 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 FUTURE OF MOBILITY

Autonomous, electric and shared

As we enter a new era of transport, the latest paper in our *Future of Mobility* series sets out three key mobility trends and explores current consumer reactions across 10 countries.

## NAVIGATING THE ONLINE SAMPLE MARKET

The pursuit of quality as top priority

Market research has transformed over time, with today's studies often powered by a range of different sample sources. Our new white paper unpicks some of the complexities.

## A MORE DANGEROUS WORLD?

The public evaluate threats in today's world

Our 24-country survey explores public opinion on the greatest global threats today and assesses levels of confidence in governments to deal with these challenges.

## A THROWAWAY WORLD

The challenge of plastic and packaging

Consensus is building among consumers that action is needed to tackle the environmental impacts of plastic and packaging, with 7 in 10 favouring a ban on single-use plastics.

## WOMEN'S LEADERSHIP

What helps and hinders gender equality?

We find differences in what people think it takes for someone to 'get ahead', with "Intelligence", "confidence" and "never giving up" seen as particularly important for women.

## GLOBAL INFRASTRUCTURE INDEX 2019

Public satisfaction and priorities

Investing in infrastructure is widely agreed to be important for a country's future. Our 28-country survey reveals the public view on weak spots and priority areas, from road and rail networks to energy supply.

## THE FUTURE WORLD ORDER

Which countries have the most positive influence?

The second part of our world affairs survey finds that people around the globe are split on which economic and political system is best, with many expressing dissatisfaction with how things work in their own country.

## HEALTHCARE SURVEY: RADIOLOGY

The professional view from US, Europe and China

Our report explores the challenges facing healthcare professionals today – in particular radiologists – with a look at how digitisation and AI could help to alleviate them.

# THE FUTURE OF MOBILITY

Autonomous, electric and shared mobility trends are disrupting the way we drive. We find that consumers are ready to accept the new transport paradigm.

The automotive industry promises the consumer cheaper, faster and better mobility options. New technologies will allow the in-app ordering of a driverless taxi that will deliver its customer to a destination and then self-drive to the nearest wireless charge point to prepare for the next booking.

Interest in autonomous, electric and shared mobility technologies varies across countries. While 59% of people in Brazil and 70% in China say they would like to own an autonomous vehicle, this drops to 25% in the UK and Germany. Safety remains a concern for many.

There is strong support for electric vehicles (EVs) worldwide, due to being environmentally friendly and affordable to run. The main barriers to further electrification of transport today are the limited driving ranges of EVs and under-developed charging infrastructure.

Turning to shared mobility, although consumers expect it to evolve, it still has a way to go before becoming a mainstream option.

Our report finds that, although there is a clear big-picture trend towards new forms of mobility, questions remain on how they will work in practice. [Also in Spanish.](#)

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# WOMEN'S LEADERSHIP

New research finds marked differences in the perceptions of men and women on gender equality, particularly in the realm of succeeding at work.

Our 28-country study looks at which factors people think help and hinder gender equality, including women succeeding at work.

It finds that twice as many men than women around the world say that gender equality already exists in their country (18% vs. 9%).

Globally, 'intelligence', 'confidence' and 'never giving up' are considered important factors for women to get ahead – more so than for men. By contrast, connections and personal networks tend to be seen as more important for men.

On average, 15% of people around the world say that women's looks are important in helping them to get ahead. This opinion is strongest in Russia, where 35% think looks matter in this context.

When it comes to the barriers to achieving equality between women and men, people cite a number of issues in different countries, including: police not taking violence against women seriously in Saudi Arabia, women lacking financial independence in India, and men/boys not being educated about the importance of gender equality in Latin America (Mexico, Argentina, Chile and Peru).

But, overall, employers not addressing the gender pay gap emerges as the top factor holding women back around the world.

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# THE ONLINE SAMPLE MARKET

Researchers should not abandon the quest for quality as they navigate the complex online landscape.

Accessing and engaging the right respondents is the foundation of market research, and it has never been as challenging as it is today.

As more fieldwork around the world transitions to online modes, there is an increasing array of providers and sources of respondent “sample” for research studies – not all of which can provide transparency or assure quality of their sources.

Quality is something that everyone wants, but few can define. Yet today, survey specification is often driven by demands for low costs and quick turnarounds, compromising this top priority.

Not all sample is created equal, and different research panels will give different results due to a number of factors that have to be understood and controlled from beginning to end.

As sampling is the foundation of the data and insights produced by research studies – and the business decisions that follow – putting expertise and technical capabilities into practice is vital.

This paper reviews the development of the online sample market, sets out some risks and pitfalls, and presents Ipsos’ view on how to overcome them.

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# INFRASTRUCTURE INDEX 2019

This year shows an overall increase in satisfaction with infrastructure among citizens in 28 countries.

Globally, more people say that they are satisfied than dissatisfied with their country's infrastructure, taking into account road, rail and air networks, energy and water, broadband and communications.

But there are variations between regions. In Europe, satisfaction is lower than the 37% global average at 29% (ranging from 49% in France to 12% in Italy). Satisfaction is highest in APAC, at 47%.

More than three-quarters of people around the world agree that investing in infrastructure is key to their country's growth. But 6 in 10 say that not enough is being done to meet their needs.

People are happiest with airports (67% rating them as 'good'), while only 24% were content with electric vehicle charging infrastructure.

Solar energy emerges as the biggest priority for people around the world when it comes to further infrastructure development.

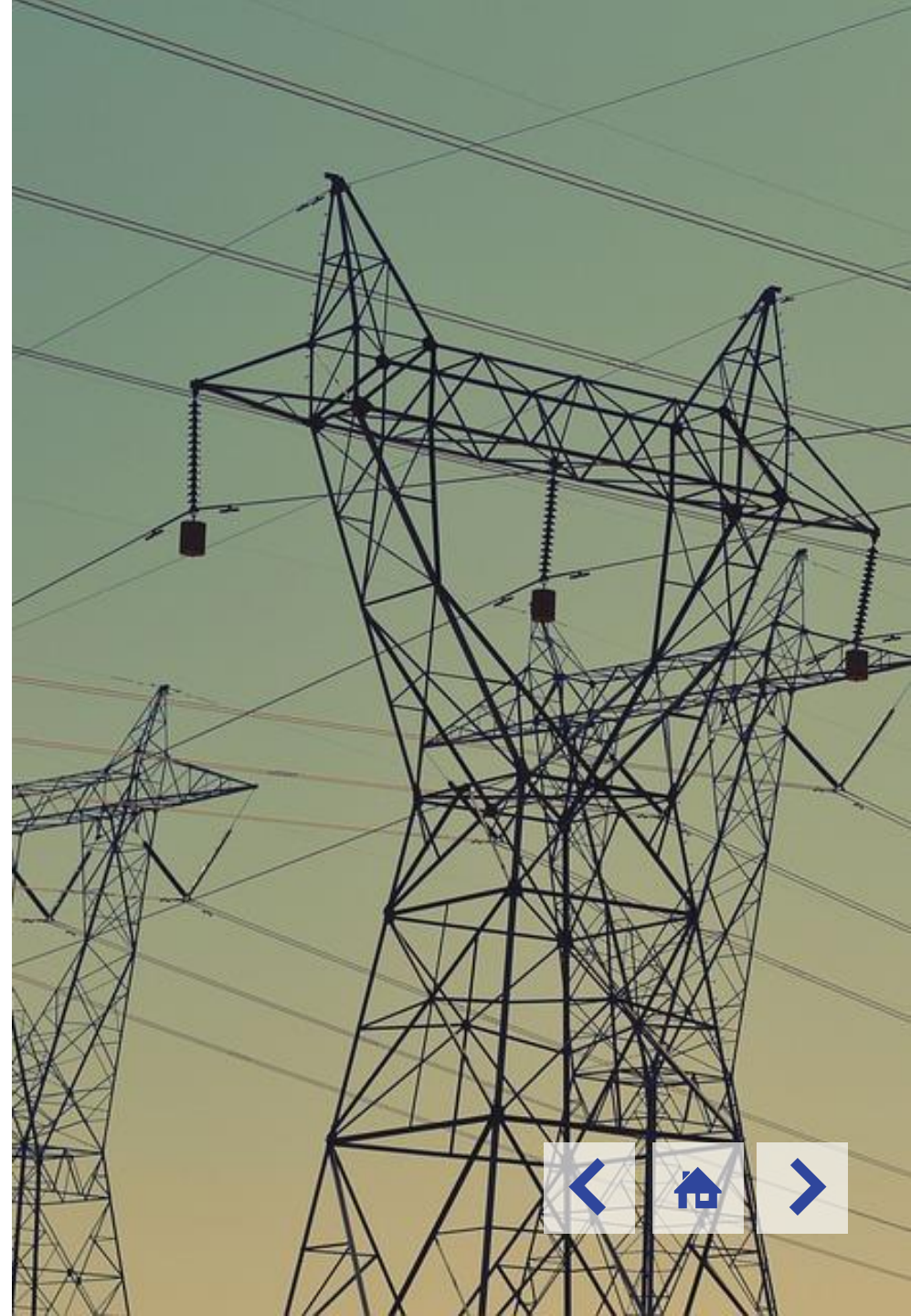
The global public say the environmental impact and quality of new infrastructure are the most important factors to consider, ahead of others such as resilience to future challenges and public ownership.

We also find a preference for technical experts making decisions about new infrastructure projects over politicians (59% vs. 21%).

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# A MORE DANGEROUS WORLD?

We explore public opinion in 24 countries on the state of the world, the greatest global threats and levels of confidence in governments to deal with them.

The majority of people around the world (80%) think that the world has become more dangerous in the past 12 months, a 6 point increase on last year. This sentiment is highest among Latin American countries (Peru, Columbia, Mexico and Chile).

Overall, less than half of people (46%) say that, on balance, things around the world are getting better, with Malaysia, Chile and Great Britain showing the greatest declines in optimism since last year.

The most commonly cited threat by respondents around the world is being hacked (75%), followed by nuclear or chemical attacks (68%). People also show a heightened lack of confidence that governments can provide security and protection from these dangers.

The occurrence of a major natural disaster has become an increasingly real threat in the public's mind in recent years, with 66% worried about this event, up 11 percentage points since 2010. Meanwhile, we find that fewer than half of people around the world (45%) think that most countries are doing what is 'appropriate and reasonable' to fight climate change. This drops to less than a third in European countries and Canada.

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# THE FUTURE WORLD ORDER

In the second part of our world affairs survey, citizens give their view on the current and future world order and rank countries by their perceived impact.

Canada comes out in front when people are asked which country is likely to have a positive influence on world affairs in the next decade, with 4 in 5 saying it will be a force for good. Germany and France occupy second and third place.

There is a global split between whether people think their country should follow the US or China's political and economic model. Meanwhile, 81% say that free trade is beneficial for their economy, the biggest advocates being Mexico, China and Great Britain.

Only 27% of people across our 24 countries think that their political system does a good job of representing the views and interests of its citizens. Scores are especially low in Italy, Chile and France.

The survey reveals huge differences in whether people expect their children to live in a better democracy than they do today, ranging from 90% and above in Argentina, Mexico, Columbia, Peru and Chile to less than 20% in Belgium, Germany, Japan and France.

Compared with other countries, the survey shows strong agreement in South American countries (and South Africa) that the political system is run by an elite that is corrupt and incapable of reform.

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# A THROWAWAY WORLD

Consumers around the world want change and are calling for action to tackle the mounting challenge of plastics and packaging waste.

Our global survey on packaging and waste finds that 7 in 10 people around the world say single-use plastics should be banned and 8 in 10 believe manufacturers should be obliged to improve recycling and reuse of the packaging that they produce.

Across the 28 countries surveyed, 75% of people now say they want to buy products with as little packaging as possible, rising to over 80% in Great Britain, Hungary and Peru and 86% in Serbia.

There are incentives for companies to act as three in four respondents say that they feel better about brands that make changes to achieve better environmental outcomes.

But consumers are prepared to help, as we also find that 6 in 10 are willing to change where they shop to reduce the amount of packaging they use. There is greater reluctance in some more developed markets, however, such as in the US, where less than half say they would be willing to make this change.

Our survey also finds barriers to meaningful action as barely more than 50% of people around the world think that their local recycling services are good and that the recycling rules for household waste where they live are clear.

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# HEALTHCARE SURVEY

Harnessing technology for health. We take a closer look at the challenges faced by radiologists.

The latest in our Medical Devices & Diagnostics survey focuses on radiology in markets across the US, Europe and China. It explores professionals' views on the main challenges in the field and the impact of digitisation/AI, including changes since 2017.

Findings include:

- Patient volumes and long working hours remain the biggest challenges for radiologists globally.
- Administrative workload is still an issue in the US and Europe.
- Affordability is cited as a challenge in the US and China.

The radiologists surveyed think that faster and more efficient processes will be the key positive impacts of digitisation – particularly in the US and Europe. Easier sharing of data also comes up, particularly in America.

There is also an increasing belief that AI/automation will have a significant and positive impact in the field, especially in China where more than practitioners half expect it to ease their workload and 4 in 10 say it will increase the accuracy of diagnoses.

For a broader view on using technology to improve healthcare outcomes, see our webinar on [Self Care 2.0](#).

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# SHORTCUTS

## REPRESENTING DIVERSITY

In the latest “Pillars of Popular Culture” piece, our media, technology and culture experts explore how best to represent diversity and inclusivity, taking learnings from the launch of the American show *RuPaul’s Drag Race* in the UK.

Diversity and inclusion has been high on the agenda for 2019, and while it is not necessarily everyone’s cup of tea, *RuPaul’s Drag Race* is an important example of this.

What makes the show so resonant at this point in time? The report offers some lessons on inclusivity for broadcasters, including:

- Portray unique personal journeys with transcendent values
- Champion empathy
- Offer the audience an awakening
- Beware of the mainstream gaze
- Ground in cultural relevance

Our authors conclude that it is important that other programmes that may not have the same show-stopping drama as *Drag Race*, but are equally authentic, are also given airtime.

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## THE FALL OF THE BERLIN WALL

November 2019 marked 30 years since the fall of the Berlin Wall and the collapse of communism in Europe. We asked people in 16 countries how they feel about the historical moment and its impact on life in their countries/Europe today.

Key findings include:

- More people disagree than agree (31% vs. 29%) that Europe has become a safer place since the fall of the Berlin Wall, with Belgians, Russians and Germans the least likely to agree.
- Across Germany, Hungary, Poland, Romania, Russia and Turkey, 30% agree that life in their country has changed for the better since the collapse of communism, while 38% disagree.
- There are differences in opinion on whether Germany has become too powerful in Europe. Strongest agreement is recorded in Turkey and Spain (60%) and lowest in the non-European Western countries (Australia, Canada and the US), where only 1 in 7 agree.

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## IPSOS PODCASTS

The latest episode of our *Insight Out* podcast explores how researchers can connect with the people they need to talk to most

April Jeffries, Global Leader of Ethnography and Immersion, speaks to Jim Legg, Global Head of Operations at Ipsos UU about the challenges and opportunities of microtargeting.

He says that finding the right representatives of a target group can be like trying to find a purple unicorn (!). But if successful, it allows a greater understanding of their specific wants and needs, as well as the language they use.

In political podcasts, our UK team’s new *2019 General Election* podcast series analyses the polls and election campaign activity, with Keiran Pedley, Directory of Politics & Society.

*The Point Being*, the weekly podcast series by Ipsos’ US Polling Team sees Chris Jackson, Mallory Newall and guests discuss the latest news on American public opinion. Recent discussions cover impeachment and the 2020 Presidential elections.

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# LINK SUMMARY

## THE FUTURE OF MOBILITY

**Read more:** <https://www.ipsos.com/en/future-mobility-autonomous-electric-and-shared>

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**Download (in Spanish):**

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## NAVIGATING THE ONLINE SAMPLE MARKET

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**Contact:** [Jeremy.McNamara@Ipsos.com](mailto:Jeremy.McNamara@Ipsos.com)

## WOMEN'S LEADERSHIP

**Read more:** <https://www.ipsos.com/ipsos-mori/en-uk/men-less-likely-women-need-intelligence-and-hard-work-get-ahead-public-say>

**Download:**

<https://www.ipsos.com/sites/default/files/ct/news/documents/2019-11/what-helps-or-hinders-women-s-equality.pdf>

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## GLOBAL INFRASTRUCTURE INDEX 2019

**Read more:** <https://www.ipsos.com/en/global-infrastructure-index-public-satisfaction-and-priorities-2019>

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## THE FUTURE WORLD ORDER

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## HEALTHCARE FOCUS

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**UK 2019 General Election:** <https://www.ipsos.com/ipsos-mori/en-uk/ipsos-mori-election-2019-podcast>

**The Point Being:** <https://www.ipsos.com/en-us/knowledge/society/the-point-being>

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

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