
October 2016

IPSOS UPDATE

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

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GAME CHANGERS



WELCOME

Welcome to the October edition of *Ipsos Update* – a 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.

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WHAT WORRIES THE WORLD: The Top 3: Unemployment, corruption & inequality

This new monthly Ipsos monitor sets out the public's key concerns in 25 countries around the world.

BUILDING STRONGER BRANDS: An Ipsos Views white paper

A checklist for what you need to do to strengthen your brand, based on the latest Ipsos thinking and analysis.

SHE SPEAKS: Understanding women in MENA

New research looking at the role women play as consumers – including household dynamics, brand loyalty and the decision-making process.

MICRO-TARGET OR TARGET EVERYONE? Balancing reach with precision in media strategy

What is the right media strategy for your brand? The answer is: "it depends". Whatever you do, don't neglect the creative side of things.

MARKETING PARTNERSHIPS And how to realise the full potential

Well-executed campaigns can achieve exceptional outcomes for brands and rights holders – provided the necessary building blocks are in place.

YOUNG MOTHERS IN CHINA: From our latest 'China Pulse' report

Marketing to the new generation of mothers in China: new perspectives on a range of topics, including housing, car ownership and internet use.

MORE THAN WORDS: Harnessing the language of images

Adapting to the rise of "visual language" – in a world where six billion emoticons are now sent every day.

GLOBAL INFRASTRUCTURE: Public priorities

People around the world give their assessments on a range of topics including airports, broadband services and housing supply

BREAKTHROUGH INNOVATIONS: Adapt your research and marketing accordingly

New thinking on how to nurture promising innovations – from engaging with the consumer through to forecasting their potential success.

THE YEAR OF DISRUPTIVE ELECTIONS: The US and France in the spotlight

Our latest briefing on the climate of public opinion ahead of the forthcoming American and French elections.

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WHAT WORRIES THE



SEPTEMBER 2016

Ipsos Public Affairs

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WHAT WORRIES THE WORLD

A new 25-country Ipsos study of world opinion finds most people (62%) saying things in their country are on the “wrong track”.

The What Worries the World study will provide a monthly update of the national mood in countries around the globe. It goes on to ask: “Which three of the following topics do you find most worrying in your country?”

The headlines:

- **Unemployment** is the biggest worry across the world, followed by financial/political corruption and poverty/social inequality.
- **Spain** is the country most worried about unemployment, with Italians and South Africans also particularly concerned.
- **South Africa** is the nation most worried about financial/political corruption, followed by Hungary and Spain.
- **Russians** are most concerned about poverty/social inequality, an issue which is also at the top of the “worry list” for Hungarians and Germans.

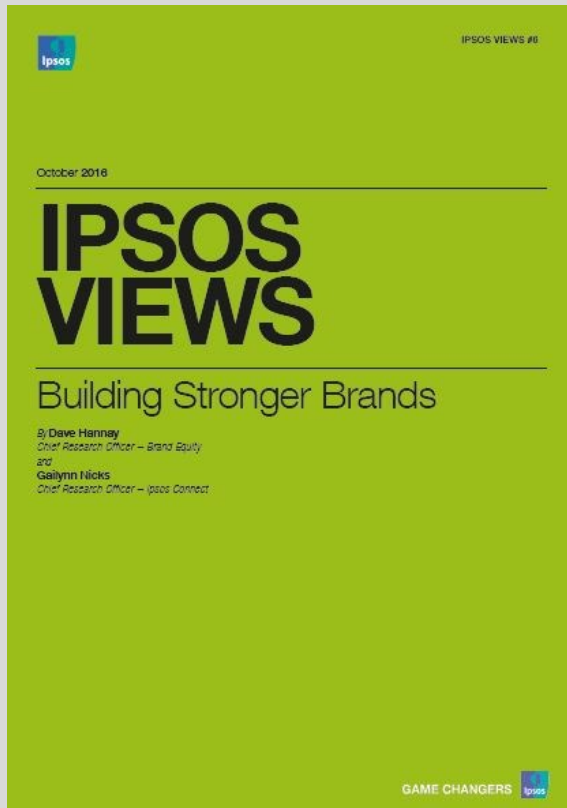
To find out more, click on the links to the left.

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BUILDING STRONGER BRANDS

This new white paper provides the definitive Ipsos View on how brands can grow, based on our latest thinking and research.

A lot of discussion and debate exists within our industry as to how marketers can build stronger brands. So what makes a brand successful? **Dave Hannay** and **Gailynn Nicks** review the evidence.

- **Salient brands** come readily to mind in the moments that matter. They have strong brand networks or associative memory structures, so they are naturally retrieved in a fast-processing, automatic decision environment.
- Brands must fulfil the key motivational criteria for selection, which include meeting functional and emotional needs and **creating connections**.
- And they must have the highest perceived value **at the moment of choice**, compared with alternatives.
- This includes being perceived as the **choice of least effort**. One of the basic shortcuts people use in choosing brands is availability. The more easily people perceive that they can obtain one option vs. another similar one, the more likely it is to be selected.

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SHE SPEAKS

This multi-country survey seeks to understand the attitudes, aspirations, lifestyles and interests of women in the Middle East and North Africa (MENA).

Women are the main influencers when it comes to purchase decisions relating to the household, and that influence extends across categories.

Here are five findings from the report:

1. Women rely on “traditional” media rather than the internet for most news on products or brands
2. Only 14% have bought products online
3. Social media is very popular, with 86% of internet users using one platform or another, with the most used being YouTube.
4. 40% of women always buy things they didn’t originally plan on buying
5. Exactly half of the women surveyed say they show loyalty by sticking to the brands they know



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MICRO-TARGET OR TARGET EVERYONE?

How to balance reach with precision in media strategy.

Some marketers are seduced by the promise of micro-targeted precision through digital media spend. Others go broad and target everyone. What is the right balance for your brand? Frustrating though it may be – the answer is “it depends”.

Keith Glasspoole looks at this question of how to balance reach with precision in media strategy. The key takeouts from the analysis are:

1. Reach is more important than frequency

Excessive targeting can lead to excessive frequency. And excessive frequency leads to diminishing returns, poor ROI – and increased use of ad blockers.

2. Creative is king

Unlike the content that surrounds it, advertising does not have an in-built audience – even when micro-targeted. It needs to earn the right to a place in people's dwindling attention spans. Learn how to harness emotions to gain and retain that attention.



RAISING YOUR GAME

REALISING THE FULL POTENTIAL OF MARKETING PARTNERSHIPS

Thought Piece
2016

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REALISING THE FULL POTENTIAL OF MARKETING PARTNERSHIPS

Well-executed marketing partnerships are capable of achieving exceptional outcomes for brands and rights holders.

Marketing partnerships, or sponsorships, have been at the forefront of our lives over the last few months whether we realise it or not. From Andy Murray at Wimbledon, the Tour de France, the Ryder Cup and the Rio Olympics, the opportunities for brands in this area are immense... and expensive.

How to realise your full potential:

- **Examine fan status** - an individual's relationship with the property will drive the overall strength of response
- **Understand connections** - the type and strength of connection will determine the scope and content of the narrative
- **Partnership amplification** - developing an effective and appropriate approach to amplifying or activating the association will bring the role of the brand to life



How to Seize the
Heart of
Yummy Mummy?



YOUNG MOTHERS IN CHINA

Marketing to the new generation of mothers in China: a key target for many FMCG and maternal-child brands.

There is a new generation of mothers in China, mainly comprising those born after 1985, who have grown up in the era of internet.

How do these groups use the media? What are their considerations when making purchase decisions? And how should a brand respond to these habits?

Among the findings of this report from Ipsos in China:

- 38% of young parents plan to exchange their house or buy a new one
- 47% want to replace their car
- 22% of new mothers used their smartphone to access the internet more *since birth* than before being pregnant

Click on the 'READ MORE' link to download the latest *China Pulse* report, which also includes new research on beauty and skincare, car buying habits of Millennials, cashless mobile life, and a look at the effects in China of brand sponsorship at the Rio Olympics.

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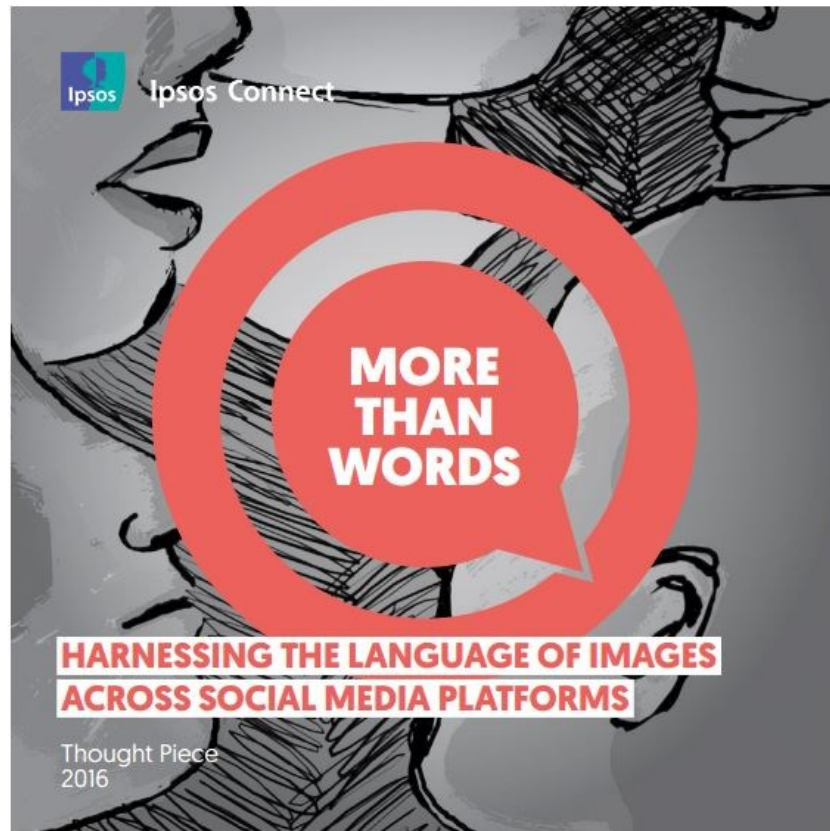
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MORE THAN WORDS

Six billion emoticons and stickers are sent around the world each day. With the rapid rise of visual language, researchers and brands need to understand how to unpick and analyse this new vocabulary: deconstruct the discourse, and stay ahead of the curve.

The challenge for brands and media owners is clear. Deliver the most impactful content and campaigns on the most suitable platform at exactly the right time and you will engage consumers. Successful campaigns inspire audiences with beautiful imagery and tell culturally relevant stories.

This Ipsos Connect thought piece suggests brands and media owners follow these four rules to ensure success:

- **Tailor content** to fit the platform
- Harness **social media platforms** in creative and visual ways to effectively communicate with consumers
- Tone of voice can differ by platform, but brand values and personality must remain **consistent** and **authentic**
- **Avoid getting lost** in a sea of algorithms by investing in a social media strategy and partnering with influencers



Global Infrastructure

Public satisfaction and priorities

October 2016

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GLOBAL INFRASTRUCTURE

A new global survey from Ipsos on public attitudes towards their country's infrastructure.

This study provides new insights on public views across infrastructure categories: road, rail and air networks, utilities such as energy and water, as well as housing and broadband.

Around the world, the highest ratings go to:

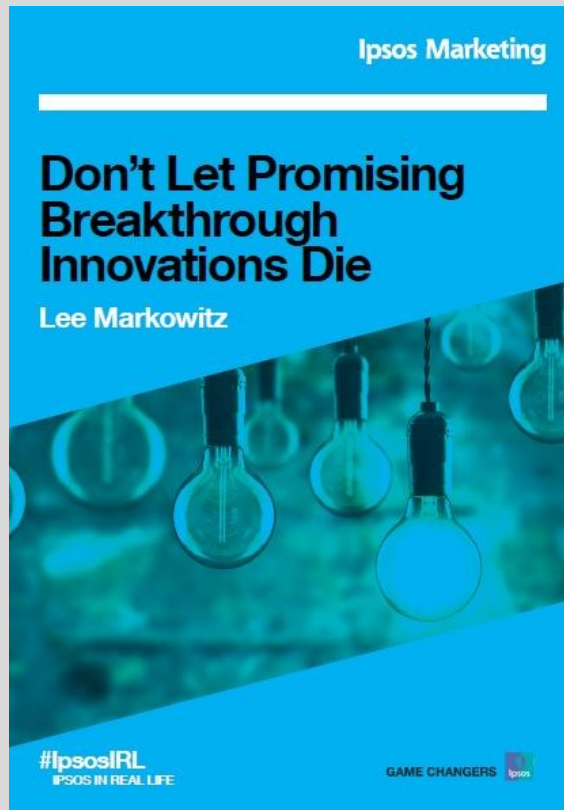
- Airports: 67% ('very/fairly good')
- High speed broadband: 54%
- Water supply and sewage: 53%

Meanwhile, the lowest scores are given to:

- New housing supply: 41%
- Nuclear energy: 32%
- Flood defences: 29%

The countries which are most critical about their national infrastructure are Brazil (62%), Hungary (51%) and Argentina (46%).

The survey was conducted with more than 18,000 people in August/September 2016, across 26 countries, using Ipsos' Global @dvisor vehicle.



DON'T LET PROMISING BREAKTHROUGH INNOVATIONS DIE

Breakthrough innovations are critical to the future success of your organisation. Not least as they can yield more than double the returns of other innovations.

To introduce a breakthrough innovation effectively, marketers must recognise that the research and marketing behind the innovation will be different from a traditional product. **Lee Markowitz** reminds us that, before moving forward, marketers must first **confirm with consumers** that they really do have a breakthrough product.

Second, they need to understand the potentially wide **competitive set**.

Third, they need to modify their **research approaches** to ensure that they use the right stimulus and ask the right questions.

Finally, they have to rethink **how they forecast** the success of these products (taking into account the newness of the innovation along with the role played by influencers) and build their marketing plans accordingly.

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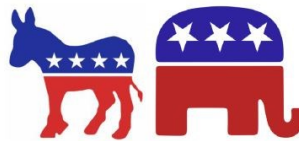
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2016-2017: The Year of Disruptive Elections

Embassy of the United States of America
Paris, October 4, 2016



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THE YEAR OF DISRUPTIVE ELECTIONS

Ipsos presented on the climate of opinion before the presidential elections in the US and France at the American Embassy in Paris.

This seminar saw Ipsos experts present the prevailing mood in the two countries. What are the implications for the upcoming elections – and afterwards?

Some of the key figures from France:

- 88% think the country is going in the “wrong direction”
- 88% agree that “a true leader is needed to put things in order”
- 57% estimate there are now “too many immigrants” in the country

Meanwhile, in the US, ‘America First’ and economic populism are on the rise. November’s election will shape the future direction of economic policy and the business climate. What’s clear is that Donald Trump has tapped into a rich seam of public concerns. [For more, see Cliff Young’s paper on Nativism.](#)



SHORT CUTS

Making the Most of Text Analytics

While many tools or suppliers use generic frameworks or templates for text analytics, Ipsos believes that a customised approach is the best way to deliver insight.

In this succinct guide to the topic, **Fiona Moss** explains that text analytics is a fantastic tool for delivering insight over high volumes of text data, and multiple sources. And its automated brain allows it to do this in a quick and scalable manner. However, it still needs a human heart to deliver meaning and interpretation to the results.

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Pulso Brasil

Every month, Ipsos produces a snapshot on what has been happening in Brazil. *Pulso Brasil* covers politics, the economy, consumer behaviour and the social agenda.

Key points from this month:

- The Consumer Confidence Index reached 74 points and signals a gradual upturn, but not necessarily in relation to politics.
- Perceptions regarding the country's direction has stagnated: 87% say Brazil is on the "wrong track".

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Diamonds are No Longer Forever

The Diamond Producers Association recently released a new set of ads. The new theme is about honesty, authenticity and truth. The campaign moves away from "A Diamond is Forever" which was used by De Beers from 1947, to the new, "Real is Rare. Real is a Diamond" theme.

The new campaign is emotional and uses storytelling in traditional and digital media to appeal to Millennials, for whom 'forever' has become a meaningless concept.

Gailynn Nicks and **Yannick Carriou** show how brand campaigns today can leverage the interplay of attention, memory and emotion to influence people's choices.

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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 internet sites and social media outlets.

Please email IKC@ipsos.com with any comments, including ideas for future content.

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