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Jan/Feb 2017

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# IPSOS UPDATE

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

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# WELCOME

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Welcome to the January/February 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.

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## POLITICAL UNCERTAINTY: And global study shows potential for more ahead

This new international Ipsos study reveals that many around the world believe their country is in decline, that experts do not understand their lives and that the system is rigged against them.

## IPSOS FLAIR: Colombia 2017, Reviving

The latest report in our *Ipsos Flair* series is on Colombia, a country which faces a new future in the wake of the Peace Agreement.

## CONFESSIONS OF THE ADMEN: Do media planners see the world as others do?

This new Ipsos Connect white paper finds advertising professionals somewhat out of step with how ordinary people are consuming TV programmes.

## SELECTING A CELEBRITY ENDORSER: How brands in China are finding the right people

At a time when many are overwhelmed by entertainment and socialising, the public pays far more attention to celebrities and stars than ever, Ipsos in China has been finding out how to maximise results in marketing.

## INCREMENTAL VS MONUMENTAL DECISION- MAKING: Keeping up with the pace of business

The world has changed. And these changes are driving the need for new ways to identify and react to consumer insights. This paper describes an alternative, incremental approach to decision-making.

## AUSTRALIANS ON CLIMATE CHANGE: Results of the annual Ipsos report

Since 2013, climate change has been a top priority for Australians, a trend which accelerated in 2016. Our research finds two in five (43%) believing it to be a top priority for action.

## DIGITAL INNOVATION IN BANKING: Outsource and let the pros take the reins

Banking executives say it doesn't make solid financial sense to pour dollars into risky innovation in-house. Our new report explores how the sector is adapting.

## PRESIDENTIAL APPROVAL RATINGS: Obama leaves office with high ratings

The world has a much more positive view of President Obama's time in office than they do of Donald Trump's impending term, according to a new global Ipsos poll.





## POLITICAL UNCERTAINTY

**Going into 2017, many around the world believe their country is in decline and the system is “rigged against them”**

After a year of historic political events such as the election of Donald Trump, Brexit and the Italian constitutional referendum, a major new Ipsos survey across 22 countries paints a picture of a global public feeling left behind by the traditional system of politics and government. In several countries this translates into high levels of support for a strong leader “willing to break the rules”.

Highlights:

- On average, 57% across the 22 countries believe their country is in decline
- Two in three (64%) say traditional parties and politicians don't care about people like them
- Seven in ten (69%) believe that their country's economy is rigged to advantage the rich and powerful
- There are real splits by country in the desire for a strong leader who is “willing to break the rules”. Just 21% in Germany like the prospect, rising to 80% in France.

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Ipsos Flair Collection



## Colombia 2017, Reviving.

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## IPSOS FLAIR: Colombia 2017, *Reviving*

The latest report in our *Ipsos Flair* series,  
written collectively by our local experts

“Reviving” is the word of the year in Colombia and its people’s hopes and dreams. Despite 28% of the population living in poverty, conditions are now more conducive to open a new way. Moving from wartime to peacetime consumption will influence Colombians and accelerate their maturity in respect of brands and communications.

1. **Colombia is reviving.** The Peace Agreement between the Government and the FARC put an end to 52 years of war and violence.
2. **Colombia is on the right track to become a leading nation in the region.** The Peace Agreement creates opportunities to develop road infrastructure and to reactivate agriculture and ecotourism in a country with such ecological diversity, to attract domestic and foreign investment.
3. **Colombia has adapted well to technological advances.** Together with Argentina and Chile, they are the leaders in penetration of cell phone technology: in 95% of homes, at least one person now has a mobile phone and 75% of people in urban areas have one.

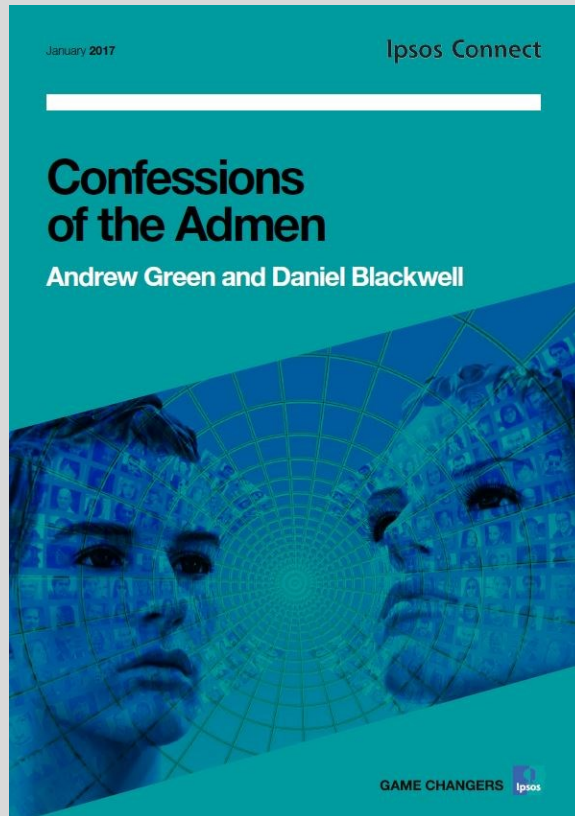
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## CONFESSIONS OF THE ADMEN

**Do media planners and buyers see the world as others do, and does it affect the decisions they make?**

People working at advertising, creative and media agencies are responsible for making multimillion pound decisions about where money should be invested. They tend to be younger, more urban and more digitally savvy than the population as a whole. They think about media and behave differently from the rest of the population.

The question is: do media planners and buyers see the world as others do, and does it affect the decisions they make?

This new **Ipsos Connect white paper** by **Andrew Green** and **Daniel Blackwell** separates myth from reality by investigating the 'perils of perception'. Andrew and Daniel analyse a number of different data sources, and find that the ad community is out of line with how real people consume content – one example being their huge underestimation of how much TV is watched live.

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## SELECTING THE RIGHT CELEBRITY ENDORSER

**The latest edition of research highlights from Ipsos in China**

In a climate overwhelmed by entertainment and socialising, the public pays more attention to celebrities and stars than ever. The question is: how to select the right star spokesperson in marketing activities to maximise results?

In the latest edition of *China Pulse*, Ipsos Connect has analysed its advertising database to discover that 40% of ads have used celebrity spokespeople. Using the RAPP Index – Recognition, Attraction, Presence, Polarisation – Ipsos assesses how the stars affect the popularity of the ads.

Also in this month's Pulse report:

- eye tracking techniques in advertising – TV still attracts the most consumers, with online video growing quickly
- reflections on marketing at the Rio Olympics – the *popularity* of the brand spokesperson makes the difference
- macro economic data from Q4 of 2016 – there was year-on-year GDP growth of 6.7% for China.

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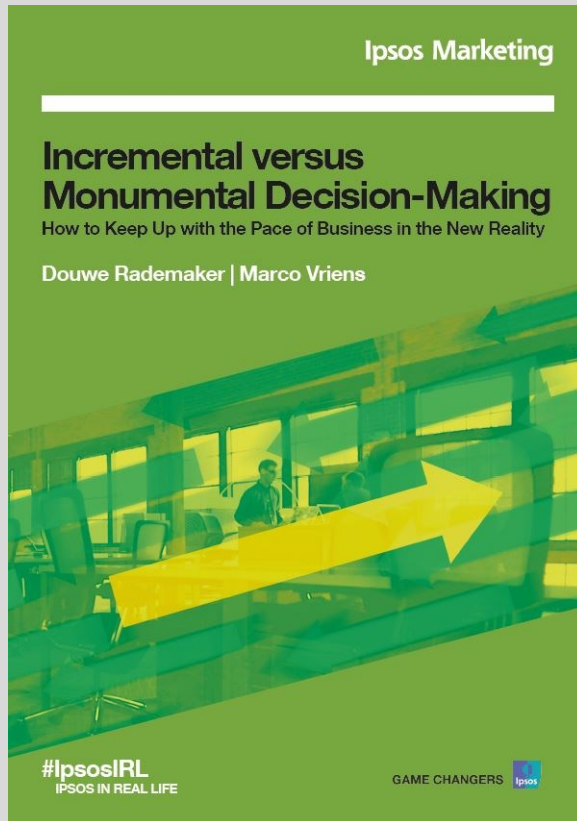
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## INCREMENTAL VS MONUMENTAL DECISION-MAKING

### How to keep up with the pace of business in the new reality

The world has changed. And these changes are driving the need for new ways to identify and react to consumer insights.

In this Ipsos Marketing white paper, **Douwe Rademaker** and **Marco Vriens** describe an alternative, incremental approach to decision-making.

They set out how the new reality is impacting marketing and market research:

1. **Consumer connectiveness.** If you want to understand how consumers behave, you have to be in-the-moment where behaviour takes place.
2. **Availability of data.** Connected households and cars, wearables, biometric devices and implants will further expand the amount of available consumer behavioural data and will help us to paint a more precise picture of consumers.
3. **Need for speed and action.** With new, disruptive competitors, there is a need for quick actions based on deep consumer insights.

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## Ipsos Climate Change Report 2016



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# AUSTRALIANS WANT MORE ACTION ON CLIMATE CHANGE

## The latest Ipsos Climate Change Report

The 2016 edition is the tenth consecutive year Ipsos has asked Australians their views on environmental topics with a focus on climate change.

Since 2013, climate change has been a top priority for Australians, and in 2016 it has accelerated with more than two-in-five (43%) now believing it to be a top priority for action.

Key facts and figures:

- 42% believe that human activity is 'mainly or entirely' responsible for climate change, while 39% believe that climate change is 'partly caused by natural processes and partly caused by human activity'
- 67% agree that climate change poses a serious threat to our way of life over the next 100 years
- 59% said that Australia should be doing more to address climate change
- 65% said other countries should be doing more to tackle the issue

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## DIGITAL INNOVATION IN BANKING

### Outsource and let the tech pros take the reins

Today's banks are feeling the squeeze from Silicon Valley's fast-moving Financial Technology pioneers.

Whether it's investing directly, staging special events or supporting promising start-ups and idea incubators, banks can stay ahead in the race to please customers, grow accounts and operate seamlessly by outsourcing innovation processes.

This white paper examines the trend of outsourcing, seen as the future of the banking industry, in which new tactics are being developed to externalise the innovation process.

Farming out innovation gives banks access to all the cutting-edge, customer-centric digital technology, bells, whistles and tools without sacrificing focus on their top priorities: security, regulation and integration of legacy systems.

Banking executives know their business best, and they say it doesn't make solid financial sense to pour dollars into risky innovation in-house. According to the bankers, **the best solution is to outsource it.**

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## PRESIDENTIAL APPROVAL RATINGS

### President Obama left office with high worldwide approval ratings

The world has a much more positive view of President Obama's time in office than they do of Donald Trump's impending term, according to a new global Ipsos poll.

President Obama departed the White House with high worldwide approval ratings: an average of 76% say he has been a good president of the USA. Russia stands out as the only country with an overwhelming negative opinion (87% think he was a bad president).

Americans themselves are much more split - 56% think Obama was a good president and 44% give him a "bad" rating. US citizens are divided about their new president – 52% think Donald Trump will make a good president while 48% take a negative view.

Outside the US, people are much less sure of Donald Trump – only a minority in most countries (34% on average) predict he will make a good president. Russia again stands out from worldwide opinion: 74% think he will be good, as do two in three Indians (65%).

*Poll conducted in 24 countries between 23 December 2016 and 7 January 2017.*

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# SHORT CUTS

## Economic Pulse of the World

In our monthly report, citizens of 25 nations assess the current state of their country's economy.

The national economic assessment average is up two points since last month, with 42% saying their country's economy is in "good" shape. North America (58%, +9 pts) leads the way as both the United States (55%, +10 pts) and Canada (61%, +8 pts) are posting significant gains.

People in China, India and Saudi Arabia are most positive about the current economic state of their individual country with 79% in each country describing it as "very good or somewhat good".

Meanwhile, the least positive countries are South Africa (15%), South Korea (also 15%) and Brazil (13%).

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## The top 10 behavioural science drivers

As advertising creativity also grows in complexity to acclimate to new environments, how do you make effective digital creative in a "MAdTech" world?

In his latest piece in *Marketing Land*, Peter Minnium of Ipsos Connect shares his top 10 behavioural science drivers of effective digital creative:

1. Keep it simple
2. Make a strong first impression
3. Make it beautiful
4. Compress your story
5. Aim for the bull's eye
6. Slow it down
7. Personalise your creative
8. Account for attention context
9. Trigger a feeling
10. Test, test and test

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## UK's reputation among EU nations

An Ipsos MORI survey of 18-34 year olds across the G20 nations on behalf of the British Council measured perceptions of the UK pre- and post-Brexit.

Overall, the largest group of respondents either say that the Brexit vote makes no difference to their views of the UK, or they have no opinion either way.

However, the UK's decision to leave the European Union will have consequences, according to many respondents:

- 32% say that they are less likely to do business with the UK
- 41% say that Brexit has a negative impact on their trust in the British government
- 36% say that Brexit has a negative impact on the UK's attractiveness

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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](mailto:IKC@ipsos.com) with any comments, including ideas for future content.

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