
March 2017

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 March 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.

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GETTING STICKY: Emotional attachment and customer relationships

This new Ipsos white paper reveals that brand managers want emotionally attached customers, and shows how this can be achieved.

IPSOS FLAIR: Thailand 2017, Beyond the Concerns

The latest report in our *Ipsos Flair* series is on Thailand, a country in mourning but also where the prospect of hope and renewal exists, despite a weak economy.

A HEALTHY UNDERSTANDING: Understanding Society

Our international review covers a range of health issues including patient experience and expectations, behavioural interventions, the importance of health literacy, and the opportunities and challenges of ageing populations.

WHO CARES WHAT YOU THINK? Understanding Sustainable Development

Sustainable development is the great challenge of our time. Can we end extreme poverty and reduce inequality while conserving the Earth's limited resources?

TARGET-SETTING ANALYTICS: Driving the right behaviours

Our new white paper addresses the importance of determining the right overall 'voice of customer' measures and laying the right foundations.

THE FUTURE OF RADIO: The age of streaming

Since Napster appeared in 1999, music streaming has had a significant impact on audio consumption. But as this new Ipsos paper shows, the future of radio is not quite as bleak as many believe.

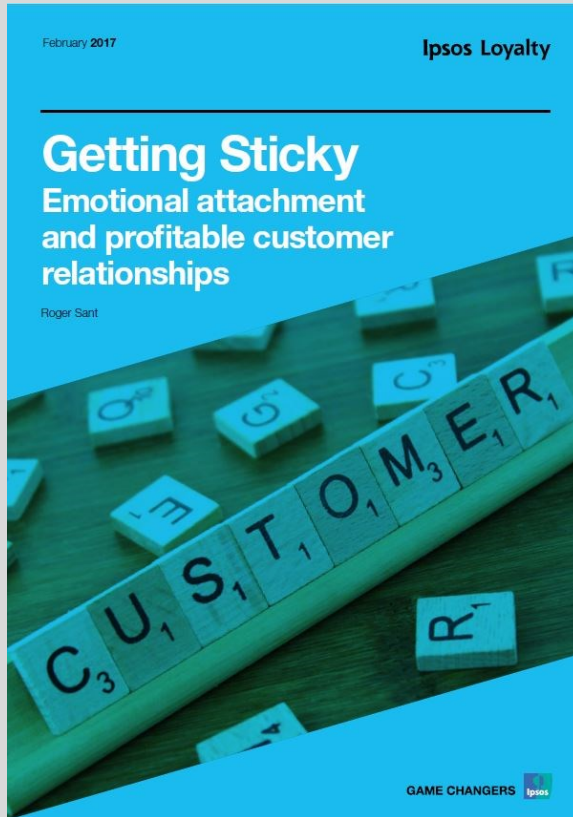
AFFLUENT AMERICANS: The outlook for 2017

The Ipsos Affluent Survey USA has been tracking the lifestyles, media habits and purchase patterns of Affluents for 40 years. This latest report includes a focus on the outlook for the coming year.

GLOBAL YOUTH SURVEY: Economic prospects and expectations

This Ipsos survey for Citi Foundation builds on existing research to gauge the economic prospects and pursuits of young people in 45 cities across 32 countries around the world.



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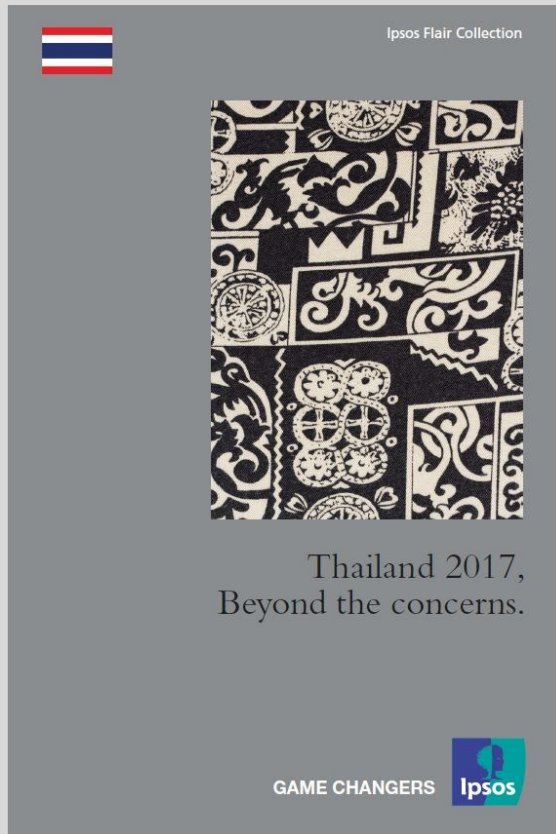
GETTING STICKY

Emotional attachment and profitable customer relationships

Brand managers want emotionally attached customers. They know intuitively that an emotional connection signifies a 'higher level' of relationship; it equates to more valuable customers – who stay longer, spend more and recommend the brand to others.

In this new white paper, Roger Sant shows:

- that *functional* and *emotional* form a hierarchy – functional satisfaction is a pre-requisite for emotional attachment;
- there are returns to be had – creating that emotional connection is at least as rewarding as eliminating dissatisfaction; and
- the drivers of attachment are not necessarily the same as the drivers of satisfaction – one of the biggest opportunities to create an emotional attachment is via exceptional customer-staff interactions.



FLAIR THAILAND 2017: BEYOND THE CONCERNS

The latest report in our *Ipsos Flair* series is on Thailand, a country in mourning.

Thailand is in sorrow

The prevailing sentiment has latterly been one of deep sadness following the recent death of His Majesty King Rama IX and an end to the seven decades of stability he reigned over. The accession of His Majesty King Rama X signifies the prospect of genuine hope and renewal.

Thailand is coming under strain

The future of 'Thainess' is under threat, with various indicators giving cause for concern: falling exports, declining automotive production, the proposed protectionist policies of Donald Trump, an ageing population, the small proportion who can speak English, and regional competition for both investors and tourists.

Thailand is experiencing a crucial year

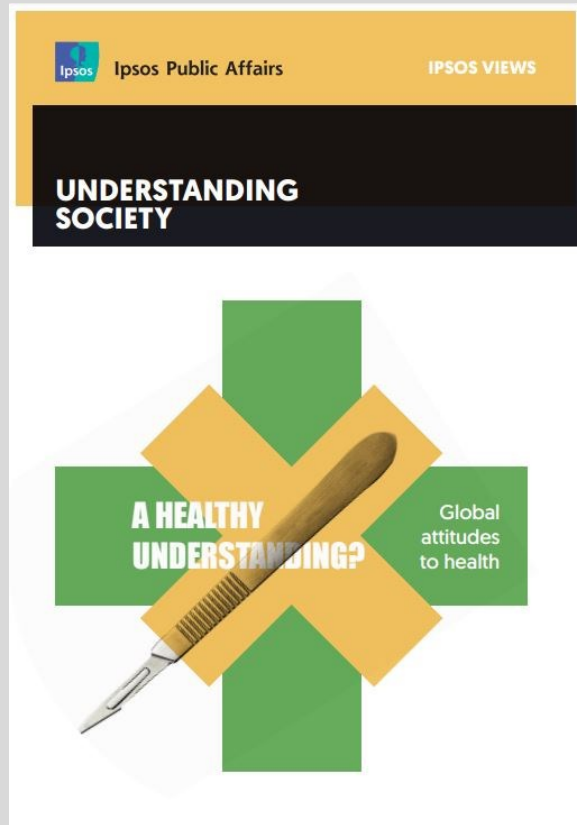
The Thai economy has recently suffered from weak growth. The government has vowed to deliver "Thailand 4.0", a value-based economy focused on innovation and sustainable technology, demonstrating a clear ambition to move the country ahead. However, without supporting details, it remains unclear how this will be achieved.

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A HEALTHY UNDERSTANDING?

This publication presents research carried out by our Ipsos colleagues in 30 countries and across five continents

This international edition of *Understanding Society* covers a wide range of health issues: patient experience and expectations, behavioural interventions, the importance of health literacy, the increasing reality of exporting healthcare, the opportunities and challenges of ageing populations – and how Sustainable Development Goals (SDGs) tie many of these themes together.

Examining the state of health at both a national and global level, it also includes exclusive interviews with **Dr Flavia Bustreo**, Assistant Director-General for Family, Women's and Children's Health at the World Health Organization (WHO) and **Duncan Selbie**, Chief Executive of Public Health England (PHE), an executive agency of the UK's Department of Health that focuses on health improvement.

Among the case studies is The Tamil Nadu Health Systems project in India, where \$211m was invested over a decade, which improved the effectiveness of healthcare in the area.

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WHO CARES WHAT YOU THINK?

Sustainable development is the great challenge of our time. Can we end extreme poverty and reduce inequality while conserving the Earth's limited resources?

As the world embarks on the Sustainable Development Goals (SDG) era, efforts abound to improve development planning and measure impacts. The talk is of a "data revolution".

But does the sector that once talked endlessly of participation and ownership care any more about the voices of citizens and beneficiaries? Or has a focus on value-for-money and efficiency obscured this previously central mantra? Of the 230 SDG progress indicators, only four relate to people's perceptions.

At a recent event in London which also launched the global Ipsos Sustainable Development Research Centre, Ipsos gathered experts in Sustainable Development to ask if the international development community has de-prioritised listening. Among the presenters were **Ola Rosling**, Director and co-founder of **Gapminder**, and **Claire Melamed**, Director of **Global Partnership for Sustainable Development Data**.

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TARGET-SETTING ANALYTICS

How good are your Voice of Customer targets?

Customer satisfaction management has long been a strategic imperative for many firms. Your company may be heavily invested in Voice of Customer (VOC) survey programs that track customer sentiment at multiple touchpoints of the customer's journey. But how good are those VOC targets, and do they drive the right behaviours?

This white paper by Bharath Vijayendra and Sherri Loweke outlines key tenets of the roadmap for target-setting success. It addresses the importance of determining the right overall VOC measures and laying the right foundations. This includes establishing a target time horizon for corporate VOC targets, determining relevant KPIs, cascading targets to operational units – and then tracking performance against targets.

A roadmap for success:

- Establish a corporate target for overall VOC measure
- Link the corporate target to business units and KPIs
- Track performance to targets



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RADIO'S RELEVANCE IN THE AGE OF STREAMING

LATEST THINKING

Thought Piece
2017



RADIO'S RELEVANCE IN THE AGE OF STREAMING

The future of radio is not quite as bleak as many believe

Since Napster first appeared in 1999, music streaming has had a significant impact on audio consumption. But has it had the damaging effect on radio once foretold?

Based on Ipsos data collected from RAJAR, Midas and Touchpoints, **Graeme Griffiths** shows that the future of radio is not quite as bleak as many believe.

Key points from the report:

- the proportion of the UK population listening to some form of live radio is the same as it was 25 years ago;
- between 2013 and 2016 the time spent listening to live radio by 15-24-year-olds has decreased by 1h 25m while on demand music time has increased by 4h 08m;
- streaming is changing the way people consume audio but not totally at the expense of radio;
- the variety of output offered by radio and its ease of access that remain its strength; it reaches 90% of the population, almost the same level as in 1991.

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AFFLUENT OUTLOOK 2017

Our industry-leading perspective on what 2017 will hold for Affluent Americans

The Ipsos Affluent Survey USA has been tracking the lifestyles, media habits and purchase patterns of Affluents for 40 years. To complement the launch of the Q1 2017 Ipsos Affluent Barometer, Steve Kraus recently presented a webinar on the outlook for 2017.

With a particular focus on the emerging trends that offer the biggest opportunities for media and marketers, this 60-minute session covers a wide range of topics.

Affluents felt 2016 was good for:

- My family: 63% (vs 55% of the general population)
- My career: 58% (vs 42%)
- Me personally: 57% (vs 54%)

The outlook for 2017 is largely positive:

- 50% feel there is no threat to their job
- 57% are very or somewhat optimistic about the economy
- 79% have a 'glass half full' outlook

Follow the 'Read more' or 'Download' links to find out more insight into what 2017 has in store for this vitally important consumer segment.

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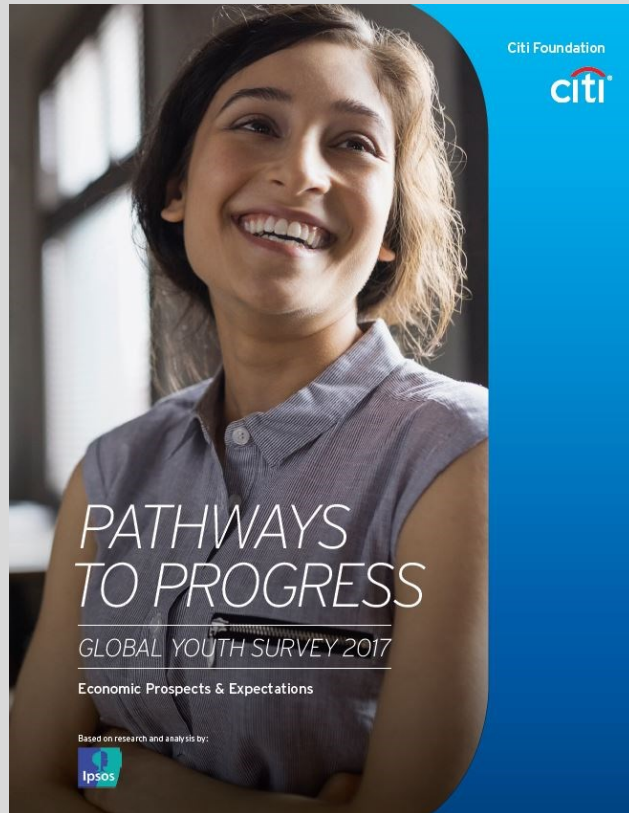
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GLOBAL YOUTH SURVEY

The economic prospects and expectations of young people in the world today

We live in a time full of opportunities and uncertainties. These rapid changes present a challenging new landscape for today's young people to navigate. Young people (here defined as 16-24 year olds) are a significant population representing about 1.2 billion individuals and 16% of the world's population.

They are the largest single generation in human history and face unprecedented technological, social and economic changes.

Citi Foundation commissioned a survey with Ipsos to build on existing research and further gauge the economic prospects and pursuits of young people in 45 cities across 32 countries. The results are based on the voices of the more than 7,000 young people surveyed.

Key findings:

- 70% say they have "many opportunities" to succeed in their preferred career
- 55% work in an industry they don't aspire to be in
- 69% dream of starting their own business

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SHORT CUTS

US: President Trump's approval rating

As February draws to a close, the latest Ipsos – Reuters ratings paint a picture of a divided nation.

Some 45% of all Americans approve and 50% disapprove of the job President Trump is doing at the White House.

There is a sharp party divide with 19% of Democrats expressing approval, and 79% disapproving. On the Republican side, 82% approve of how Trump is doing his job, while 16% disapprove.

Meanwhile, 55% of all Americans think the country is going in the wrong direction. Democrats take that to a new level with 72% expressing concern about where the country is heading. Republicans disagree: 55% think the US is going the in the right direction.

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Lebanon: TV audience measurement

Ipsos and Nielsen recently released their official results for Television Audience Measurement (TAM) for 2016 in Lebanon.

The annual results shed light on TV viewership in comparison to other media. They also cover the share of audience of different TV stations.

As every year, the results were segmented based on different regions around the country and various demographics.

Key stats:

- TV penetration is at 92% in Lebanon vs 80% for smartphone penetration
- Both reach and average time spent watching TV is growing
- Peak viewing time is 9.30pm

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UK: Captains of Industry

The annual Ipsos Captains of Industry study find that 58% of UK business leaders feel that the referendum decision to leave the EU is already having a negative impact.

A third of Captains (31%) don't feel that Brexit has made any difference to the business situation for their company, while 11% feel it has made a positive impact.

And these business executives from the FTSE 500 anticipate a more negative situation in the next 12 months. Two-thirds (66%) feel the business situation of their company will be more negative post Brexit.

However, the data suggests that this could improve in the longer term, with a third of those interviewed (32%) feeling they would see a positive impact in *five years' time* and 45% expected to feel a negative impact.

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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 website and social media outlets.

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