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April 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 April 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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## FEMINISM AND GENDER EQUALITY: Inequality persists in my country

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Although the majority in 24 countries around the world say they believe men and women should be treated equally, most still think the current situation is one of gender inequality in terms of social, political and/or economic rights.

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## THE NEW FACES OF GAMING: If I ask you to picture a gamer, what do you see?

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The classic gaming demographic of a man, in his 20s, using a games console or computer, is still relevant but there is a growing appetite for gaming across a whole range of age and gender groups.

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## DIGITAL TRENDS IN MENA: Video consumption in Saudi Arabia, Egypt and UAE

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The MENA region has some of the highest internet penetration figures in the world and a proliferation of high end devices. This report investigates what sort of content is being consumed, how and by whom.

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## BRANDED ENTERTAINMENT: What is it and how can you best use it?

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The 'Best Picture' controversy at this year's Oscars means you might have missed *The Receipt*, Wal-Mart's Oscar-style dose of 'branded entertainment'. But what is branded entertainment exactly?

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## THE GLOBAL VIEW ON WORLD WATER DAY: The theme for 2017 is "Why waste water?"

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The UN's World Water Day is a means of focusing attention on the importance of fresh water. This new Ipsos report includes feedback on which countries have the most (and least) confidence in waste water practices.

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## FLAIR PERU 2017: From Informality to Modernity

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The latest in the *Ipsos Flair* series – our focus on a country and its history, values, consumer behaviour and visions of the future. In Peru, we find a certain degree of optimism, as the country looks ahead.

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## MAKING AN EXPERIENCE REAL: What makes good virtual reality, good?

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As more Virtual Reality (VR) content is produced, we present findings from our research on what makes 'good' content good – with the aim being to help us all think about how to create great VR stimulus.

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## AN ALTERNATIVE TO CONCEPT OPTIMIZATION: Why take two steps when you can do it in one?

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Our new White Paper looks at which combination of concept elements will yield the greatest consumer appeal. With this information clients can choose the best possible concept and predict how well it will perform in-market.





## FEMINISM AND GENDER EQUALITY

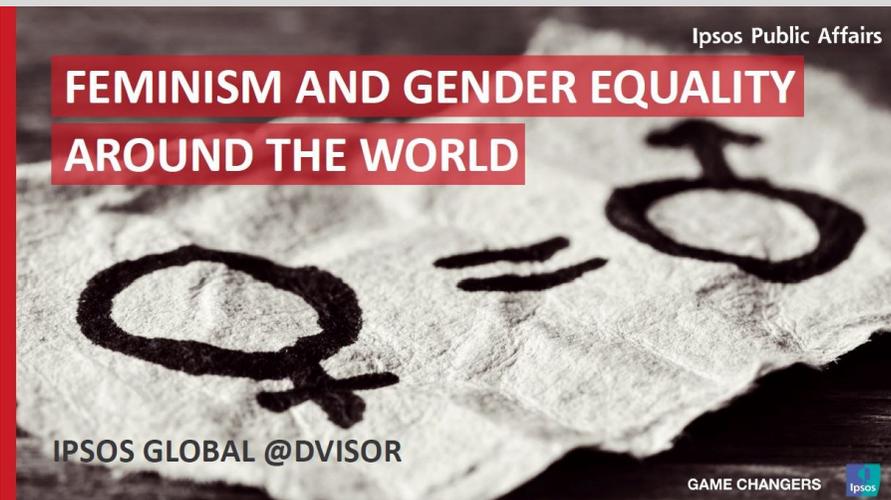
**Three in four people around the world say there are inequalities in their country**

New data from Ipsos Global @dvisor released on International Women's Day, shows that although the vast majority in 24 countries around the world say they believe men and women should be treated equally (88% on average), most still think the current situation is one of inequality in terms of social, political and/or economic rights (72% on average).

- Nine in ten men and women say they believe in equal opportunities
- But three-quarters of women say inequality still exists in their country
- One in five men and women think women are inferior to men, which increases to almost half in India and Russia

### Views on abortion

Also new from Global @dvisor is a new poll on people's views on the subject of abortion, including the figure that 71% of people around the world believe abortion should be permitted when a woman decides to have one or in special circumstances. [Download the report.](#)



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## FEMINISM AND GENDER EQUALITY

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## THE NEW FACES OF GAMING

If I ask you to picture a gamer, what do you see?

The classic gaming demographic of a man, in his 20s, using a games console or computer, is still a key component of the market. And this shows no sign of losing interest in the medium.

However, new insights gathered from **GameTrack** by Ipsos Connect, in conjunction with the **International Software Federation of Europe (ISFE)**, show there is a growing appetite for gaming across a whole range of age and gender groups.

The report finds that:

- 45-64-year-olds play 7.5 hours per week (vs 6.2 hours for 25-35s);
- in Europe, 44% of females play games; and
- in Q3 of 2016, 40% of 18-24-year old males were playing games on their smartphones.

It's clear that to be successful, manufacturers and content producers will need to adjust their message, in order to appeal to the full spectrum of their potential audience.

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A CONSUMER PERSPECTIVE

# OTT AND PREMIUM ONLINE VIDEO

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## DIGITAL TRENDS IN MENA

### A consumer perspective of services in Saudi Arabia, Egypt and United Arab Emirates

The MENA region has some of the highest internet penetration figures in the world and a proliferation of high end devices. In parallel, operators have invested heavily in fixed and mobile broadband services to be able to deliver high quality experiences to customers.

To date, the distribution of video content in the region has been dominated by satellite TV operators. The appetite for video content is phenomenal, with Saudi Arabia famously having some of the highest per capita consumption figures for online video anywhere in the world.

Key facts from this report:

- 62% paid for digital content in 2016 (vs 59% in 2015)
- 38% cited **movies** as the content type paid for by subscription in 2016, ahead of sports (34%) and TV series (25%)
- Of those that mention a brand for consuming video content, **YouTube** is most mentioned with 73%
- 71% use their **smartphone** to consume content



# BRANDED ENTERTAINMENT OSCAR STYLE

## How to win at Branded Entertainment

The controversy over the announcement of the Best Picture at this year's Oscars means you might have missed *The Receipt*, Wal-Mart's Oscar-style dose of 'branded entertainment'. But what is branded entertainment, exactly?

The Ipsos definition of 'branded content' is: "... content fully or partly funded by a brand which promotes its values and provides something of value to audiences – often by entertaining, informing and/or educating."

Despite several impressive examples of branded entertainment, it appears that many are still trying to determine what it offers that traditional media channels do not, and how it can be best used to build a brand, especially as most non-marketing people may describe it as "advertising".

This short paper explores the issues at hand, concluding that the best way to 'win at Branded Entertainment' is to:

- understand what people feel about it;
- create content that genuinely engages people; and
- effectively use the power of amplification to share the content.

**#NotaJoke. Branded Entertainment Oscar Style**  
Eleanor Thornton-Finkel & Leah McTiernan

February is a prime month for American brands looking to capitalise on two of the largest television audiences of the year – the Super Bowl and the Academy Awards. Unfortunately for the teams behind Best Picture winner *Moonlight*, and the incorrectly announced Best Picture winner *La La Land*, Price Waterhouse Coopers' mishandling of the Best Picture Award winner envelope has overshadowed most all of the stories to emerge from the evening's events.

The controversy means you might have missed *The Receipt*, Wal-Mart's Oscar-style dose of 'branded entertainment'. 2018 marked the first year of Wal-Mart's multiple-year sponsorship of the Academy Awards, and to kick the partnership off in Hollywood style, the retailer sought out four well-known Hollywood directors, Marc Forster (*Monsters Ball*, *The Kid* Runner), Antoine Fuqua (*Training Day*), Evan Goldberg and Seth Rogen (*Superbad*, *Neighbors*) to create three one-minute branded entertainment films. The challenge to the filmmakers was simple: take a Wal-Mart receipt and integrate the six items into a compelling narrative. The platform guiding the film's development was "Using every receipt, there's a great story."

Despite several impressive examples of branded entertainment, like Red Bull's events, SC Johnson's 'Glade Museum of Feelings', and even the latest installment in the Lego movie series (*Lego Batman*), it appears that many are still trying to determine what it offers that traditional media channels do not, and how it should be used to build a brand, especially as most non-marketing people will describe it as advertising. Recognising it is not, lets start with a definition. Our working definition (through Ipsos' partnership with Oxford Brookes University and The Branded Content Marketing Association) is:

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## THE GLOBAL VIEW ON WORLD WATER DAY

**The theme for World Water Day 2017 is “Why waste water?”**

Every year since 1993, the United Nations has held **World Water Day** as a means of focusing attention on the importance of fresh water and advocating for the sustainable management of fresh water resources.

Globally, the vast majority of all the wastewater from our homes, cities, industry and agriculture flows back to nature without being treated or reused and global citizens seem very well aware of the problem.

The countries that express the most confidence in current waste water practices are Hungary (67%), Germany (60%) and Great Britain (52%), while the least confident are Italy (24%), Russia (22%) and Turkey (22%).

Meanwhile, **The European Perceptions of Climate Change** survey from Ipsos MORI shows many think there is a ‘man-made’ versus ‘natural’ debate among the scientific community; only 24-33% in the UK, France, Germany and Norway believe the vast majority of scientists agree that climate change is happening and that humans are largely causing it. A further 25-31% believe half or fewer of scientists agree on this.

[Read more about this climate change research.](#)

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Ipsos Flair Collection



## Peru 2017: From informality to modernity

10 key points

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## FLAIR PERU 2017: FROM INFORMALITY TO MODERNITY

The latest report in our *Ipsos Flair* series is on Peru, a country looking to the future.

### Peru is quite optimistic

A new president for Peru was elected in July 2016 and it seemed that everything might (finally) be possible! In September, 61% thought things were heading in the right direction; three months later, the score had fallen to 50%. But it's not so bad! The world average indicates that 63% believe their country is on the wrong track.

### Peru is trying to review the informal areas of its economy

Almost 70% of the working population form part of this "informal economy". In the short term there are some issues that could be addressed through incentives to form registered legal businesses that could create more jobs for low-skilled workers with a low impact on the public budget.

### Peru wants to be happy

70% of Peruvians claimed that they felt happy most of the time, amongst which the people of Lima and the eastern regions of the country stood out. Peruvians are happy if we are in good health, if things are going well at work, in love and friendship, if the family is doing well and there is peace, emotional stability and if we are satisfied with our income.



## MAKING AN EXPERIENCE REAL

### What makes 'good' VR content good?

As more Virtual Reality (VR) content is produced, Ipsos has been pondering a simple question: What makes 'good' VR content good, exactly?

This may become increasingly important, not least as clients want to test VR stimuli to show participants. For instance, one VR online community platform allows you to upload VR content for participants to evaluate.

Building on our research, our team has prepared a short summary of what makes 'good' content good, to help us all when thinking about how to create great VR stimulus.

- Show the viewer and don't tell them.
- Err on the side of subtlety, less is more.
- Let the viewer explore and follow their interest.
- Use light and darkness in smart ways.
- Pay attention to soundscapes.
- Mix up your media palette.
- Tell interesting and thoughtful stories.

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## AN EFFICIENT ALTERNATIVE TO CONCEPT OPTIMIZATION

**In real life, who has time for two steps when you can do it in one?**

You've narrowed down the best insights, benefits, and reasons to believe to include in your concept. What you need to know is *which combination* of these elements will yield the greatest consumer appeal – without relying on methods that favour close-in ideas.

This Ipsos white paper presents the findings of our research on this subject, setting out a roadmap for finding the best combination of elements for a concept.

Armed with this information, our clients can choose the best possible concept to move forward with, understand its strategic role in the innovation portfolio (through its Archetype profile), and predict how well it will perform in-market.

You can **Read More** or **Download** the paper using the buttons to the left, or [download the infographic here](#).

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# SHORT CUTS

## Junior Connect

Junior Connect is a major study on media use among children and young people under the age of 20 in **France**. The study highlights an open and curious youth, who like to read, something which still endures in today's well-developed and constantly changing digital environment.

Key figures from the study:

- 67% of children and teenagers choose their books themselves, with most reading several books per month.
- 81% of 13-19 year olds own their own smartphone (vs. 77% last year).
- The 1-6 year olds spend an average of 4H37 on the Internet per week (compared with 2H10 in 2012).
- 79% of 13-19 year olds are registered on YouTube (vs 45% in 2016), making it the social network most frequented by this age group, followed by Facebook (77%).

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## Election season

In the **Netherlands**, our final exit poll for the recent election was no more than 16 seats different to the actual result. Compared to other pollsters, it was the closest to the election outcome.

[Read more about how Ipsos predicted the most important trends in this election.](#)

Meanwhile, with only four weeks until the **French Presidential election**, Marine Le Pen leads the field in the first round voting, according to the latest Ipsos/Sopra Steria poll. But as the campaign enters its final weeks, Emmanuel Macron is the front-runner in the second-round vote which takes place on 7 May and determines who wins the presidency.

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## Russia: Travel habits

Ipsos in Russia's new RosIndex survey finds that the overall number of outbound tourists in Russia has almost halved within the last three years. However, an improvement in economical indicators provides hope of a revival in 2017.

The number of independent travellers (i.e. those not using travel agents) fell in 2016. However, their share of market increased, as the number of travellers who used travel agents fell by even more.

Analysis of the factors of choice of independent travellers shows that the top priority is getting the most value for money.

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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.

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

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