
March 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 March 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. Everything here is in the public domain, so it can be shared widely with colleagues and clients.

We hope you find it useful. Please email IKC@ipsos.com with any comments or ideas, or if you would like to subscribe to further issues.

To download previous editions of *Ipsos Update*, please visit www.ipsos.com/ipsosupdate

Thank you.

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COUNTRY BRIEFING: Consumers Book of Pakistan

Based on in-depth research across urban and rural Pakistan, this book gives global businesses a unique insight into Pakistan's huge consumer market.

US ELECTIONS: The Inside Track

With the US presidential election approaching, this webinar series provides a thought-provoking examination of the key election dynamics and players.

IPSOS VIEWS: Big Data: A Guided Tour

Big Data can be mysterious and hard to pin down – this *Ipsos Views* paper takes us on a tour of what it is and how it should (and shouldn't) be used.

WORLD LUXURY TRACKING: Expanding Luxury Horizons

Our new report provides a wealth of data on topics including travel, shopping and social media to provide a unique view of the luxury market.

LATIN AMERICA: Opinion Leaders on the Economic Situation

A study showing a series of contrasts between the assessment of the current situation and future outlook in journalists' and opinion leaders' perceptions.

AFFLUENCE IN INDIA: The Wealthiest 20%

New research exploring the mass affluent in India – helping marketers gain a better understanding of their personal values, attitudes and digital habits.

GLOBAL @DVISOR: Zika virus

In light of the most recent news about the spread of the Zika virus, this poll of 27 countries gauges the level of concern among global citizens.

LOYALTY: Are Your Customers Working Too Hard?

A new white paper showing that simply measuring customer effort in isolation is not enough – it is the Customer:Company Effort Ratio that really matters.





COUNTRY BRIEFING: Consumers Book of Pakistan

As one of the least documented economies in the world, but with a population of 180 million across 500 cities and 45,000 villages, the *Consumers Book of Pakistan* realises the need for authentic data for such a big and diverse market.

Based on in-depth research across urban and rural Pakistan, the book enables global businesses to gain a wider understanding of Pakistan's consumer market.

The data and analysis presented here provides businesses with the opportunity to see beyond the 'smoke screen' and learn new things about the country's highly fragmented society, in order to make bolder marketing decisions.

The topics covered are targeted particularly at global investors and brand owners: they include media consumption, shopping patterns, psychographic orientation and more. The book also presents a snapshot of the evolving multimedia landscape in Pakistan.

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US ELECTIONS: The Inside Track

With the US presidential election taking place later this year, the Ipsos political polling team are hosting a monthly complimentary webinar series timed with key events in the electoral cycle and offering analysis on the main issues as they emerge.

From now until the election in November, this webinar series is providing a thought-provoking examination of the key election dynamics and players, and includes predictions and analysis from our team of political experts.

Previous webinar recordings are available to view now, or you can register to watch future ones live.

In addition to *The Inside Track* webinar series, the [Ipsos Ideas Spotlight blog](#) and Ipsos NA website also have regular articles about the election.

This includes analysis of [Donald Trump's climb in delegate numbers](#) following Super Tuesday and, more recently, the [decline in his favourability scores](#).

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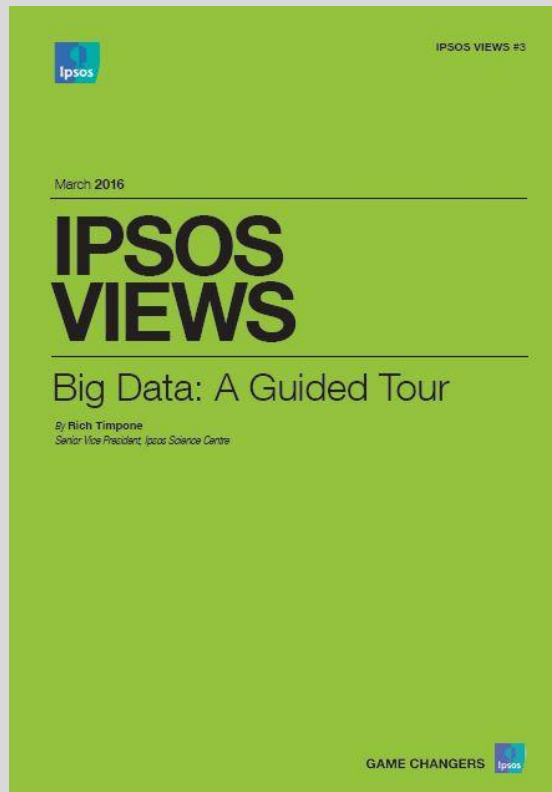
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IPSOS VIEWS: Big Data: A Guided Tour

Look at its power. Imagine the potential. Big Data has become a feature of so many discussions about strategies and business plans, but it also brings with it risks and responsibilities – as witnessed by growing consumer concerns about data protection and information security.

Big Data can be hard to pin down – a little mysterious, even. In this *Ipsos Views* white paper, **Rich Timpone**, Senior Vice President at the Ipsos Science Centre, gives us a guided tour of the subject.

The paper provides some clear guidelines for researchers to follow in order to make sense of this critical topic.

The tour includes:

- A definition of Big Data
- The characteristics and types of Big Data
- The risks of Big Data
- How Big Data should (and should not) be used
- Why Big Data needs big theory

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WORLD LUXURY TRACKING 2016

World Luxury Tracking was launched in 2007 by the International Luxury Business Association and Ipsos to offer a unique analysis of the expectations, attitudes and behaviours of the luxury market.

The 2016 report delivers data on key topics, including travel, shopping and social media, as well as exploring sociological changes and looking at how the growing “millennials’ culture” is influencing luxury strategies and communications.

Highlights include:

- By 2026, the main luxury consumer will be a millennial (as opposed to a Baby Boomer).
- Positivity is on the up – 15% believe they will indulge themselves by spending more in 2016 (slightly higher than the 12% recorded in 2013).
- In 2015, just 15% of luxury consumers say they downloaded a luxury brand app – a reminder to businesses that success in mobile commerce will require a multi-faceted approach.

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THE ECONOMIC SITUATION IN LATIN AMERICA

THE OPINION OF THE LATIN AMERICAN MEDIA

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LATIN AMERICA: The Economic Situation

A study of journalists and opinion leaders in 16 Latin American countries paints a very mixed picture of economic prospects in the region.

Results from the study (carried out in an online survey of journalists between November 2015-January 2016) include:

- Chile and Uruguay came out on top for the best current economic situation, while Argentina and Cuba lead the perceptions of countries with the best 12 month outlook.
- In general, the present and future of the Pacific Alliance countries' economies - Chile, Colombia, Peru and Mexico - received a more favourable assessment than Atlantic states.
- Venezuela's economy is viewed with the greatest concern and received the most negative outlook, but there are also fears about Brazil, Central America and the Caribbean.



UNDERSTANDING INDIA'S AFFLUENTIALS

New research shows that 87% of the mass affluent in India are on Twitter and use it on a regular basis.

India's affluent audience – highly sought-after by brands – has proved challenging for marketers to reach and engage through traditional channels.

This **Ipsos/Twitter study** explores the world of the mass affluent to help marketers gain a better understanding of their personal values, attitudes, digital and social media habits, and how they spend their money.

Highlights include:

- 74% are looking for environmentally friendly products.
- 46% engage with brands for latest news about products and services.
- 75% say that affluence brings with it a "greater responsibility".

Download the report for more perspectives, including from "affluentials" in Indonesia, Saudi Arabia and Singapore.

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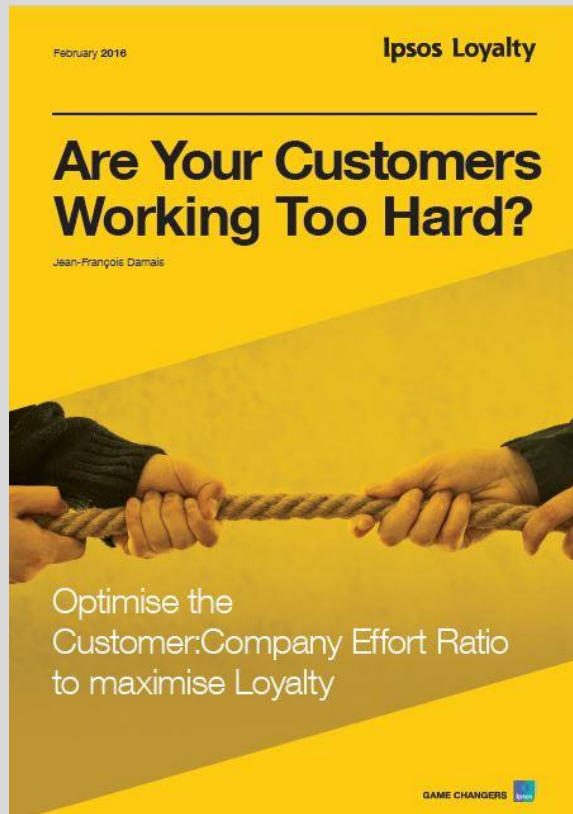
GLOBAL @DVISOR: Zika virus

In light of the most recent news about the spread of the Zika virus, Ipsos has conducted a poll to gauge the level of concern about the virus among citizens of 27 countries around the world.

Our research finds that just under half (45%) of all respondents are concerned about the Zika virus. One in ten said they have not heard of the Zika virus at all.

Other key findings include:

- The highest level of concern is in Latin America (71%), followed by the Middle East and Africa (45%), and Asia Pacific (43%). Europe (33%) and North America (34%) are notably less concerned.
- In terms of the impact on travel, four in 10 (36%) say they are less likely to travel to Mexico, Puerto Rico or South America in the next 12 months because of the Zika virus. Only 4% say they are likely to travel more, while one third (31%) say the chances of travel to those countries is about the same.



IPSOS LOYALTY: Are Your Customers Working Too Hard

In *Are Your Customers Working Too Hard?*, Jean-Francois Damais shows that measuring customer effort in isolation is not enough. While it does link to customer outcomes, it is the Customer:Company Effort Ratio that really matters.

This new white paper follows an Ipsos study that found that over half of customers believe they are working harder than companies to fix problems following a negative complaint or incident. It outlines what companies need to do to optimise the Customer:Company Effort Ratio to maximise Loyalty.

The Customer:Company Effort Ratio, which takes both perceived customer and company effort into account, is three times more predictive of a customer's propensity to use the company again following a negative experience than the customer effort score alone.

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SHORT CUTS

Internet Security & Trust

At a time when the balance between protecting national security and the privacy rights of individuals online dominates headlines around the world, a new Ipsos poll shows that most global citizens favour enabling law enforcement to access private online conversations if they have valid national security reasons to do so.

The **2016 CIGI-Ipsos Global Survey on Internet Security and Trust**, conducted by Ipsos across 24 countries, found that 70% of global citizens believe law-enforcement agencies should have a right to access the online communications of its citizens, especially those suspected of a crime (85%).

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Digital Ad Breakthrough

With the **overflow of digital content** today, it's harder than ever for adverts to break through to viewers.

There is **more content, more media, more devices, more multi-tasking, more ads and more ad types** - yet the human brain has not increased its capacity for attention. While there is no one-size-fits-all formula, some best practices have emerged over the years.

In this article for [Marketing Land](#), Peter Minnium, President of Ipsos Connect US, describes the **10 best practices** for cutting through the noise and getting viewers' attention.

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The Value of Media Space

'A cynic', said Oscar Wilde, is 'a man who knows the price of everything and the value of nothing.'

Echoing the famous writer in his latest blog, Andrew Green, our Global Head of Audience Measurement, suggests the value of media space to an advertiser lies in its potential to carry a message to an impressionable consumer.

Green writes: "We cannot doubt the effectiveness and superior targeting ability of much digital advertising. On the other hand we cannot claim that all the challenges around targeting and advertising exposure have been solved... the value of the digital advertising space bought can still be debated."

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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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