



November 2015

IPSOS UPDATE

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

Ipsos Knowledge Centre

GAME-CHANGERS



WELCOME

Welcome to the November edition of *Ipsos Update* – a round-up of the latest research and thinking from Ipsos teams around the world.

The underlying idea 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 relevant documents, information sources and Ipsos colleagues. Everything is in the public domain and is therefore intended for both Ipsos colleagues and clients.

We hope you find this useful. It’s our fifth edition, and forms part of a broader programme designed to showcase the latest work Ipsos has been doing across the world. So, if you have any feedback on how the approach could be improved, we would love to hear it.

Please email the Ipsos Knowledge Centre with your ideas, or if you would like to subscribe to further issues.

Thank you.

Ipsos Knowledge Centre

GAME CHANGERS



GLOBAL @DVISOR: Public attitudes following the Paris attacks

Our new Global @dvisor survey captures public opinion towards refugees, immigration and security before and after the tragic events in Paris.

SIDE-BY-SIDE INTELLIGENCE: The power of social data in managing brand equity

A new approach combining representative survey-based insights and social data to better understand the dynamics of changing attitudes.

DIGITAL MIGRATION: Spotlight on Kenya

This presentation from the recent PAMRO conference explores the migration from analogue to digital TV in Kenya and the challenges around it.

GENERATION NEXT: Beating the attention deficit for young audiences

In a constantly evolving digital landscape, how do brands compete for the attention of young audiences?

ASIA PACIFIC AFFLUENCE: Surveying the region's top income earners

The latest data on media consumption and product usage for APAC's affluent adults, representing a population of over 10 million people.

PAYPAL CONSUMER RESEARCH: How online commerce is evolving

A 29-market survey presenting a global insight into how people shop online from websites in other countries.

WISDOM OF THE CROWD: #SocialEthics

This report calls for better ethical standards in social media research and proposes a series of positive and practical recommendations.

EUROPE AT WORK: European Working Conditions Survey

Exploring working conditions across 28 different European countries to provide a rich portrait of workplace trends.





PUBLIC ATTITUDES AFTER PARIS

A new Global @dvisor survey reveals public attitudes across Britain, America and Canada in the wake of the tragic events in Paris.

Key findings include:

- The vast majority (95%) of Britons think there is a “very” or “somewhat” real **threat of a terrorist attack in Britain**, a ten point increase from the month before the Paris attacks. This compares to 91% of Americans (up 10 points) and 75% of Canadians (up 14 points).
- In the US, 39% of people say they have confidence in the security forces to **identify potential terrorists** (down 5 points since last month). This compares to 48% of Canadians (down 2 points) and 34% of Britons (down 6 points).
- 66% of Canadians see a real threat of Canada being involved in an **international war** in the next 12 months (up 16 points from October). This compares to 84% of Britons (up 15 points) and 89% of Americans (up 8 points).

[READ MORE](#)

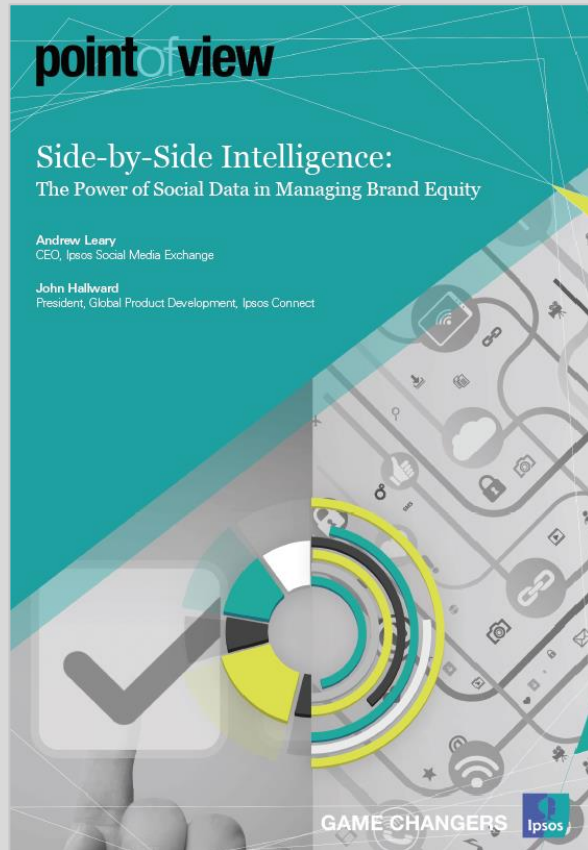
[DOWNLOAD](#)

[CONTACT](#)

Ipsos Knowledge Centre

© Ipsos Version 1



[READ MORE](#)[DOWNLOAD](#)[CONTACT](#)

SIDE-BY-SIDE INTELLIGENCE: The power of social data in managing brand equity

Co-authored by Andrew Leary (Ipsos SMX) and John Hallward (Ipsos Connect), this latest point of view paper examines how “side-by-side intelligence” can lead to more comprehensive insights.

Based on the premise that social data and survey data come from very different sources and that they are not intended to align, *Side-by-Side Intelligence* is a hybrid blend of **Brand Health Tracking** and **Social Intelligence**.

This approach provides clients with actionable early warning data, within the context of their own validated frameworks.

By combining representative **survey-based insights** and **social data** to track the changes in trends over time, the new approach optimises costs and improves the speed of insight.

Ipsos Knowledge Centre

© Ipsos Version 1



[READ MORE](#)[DOWNLOAD](#)[CONTACT](#)

DIGITAL MIGRATION: Spotlight on Kenya

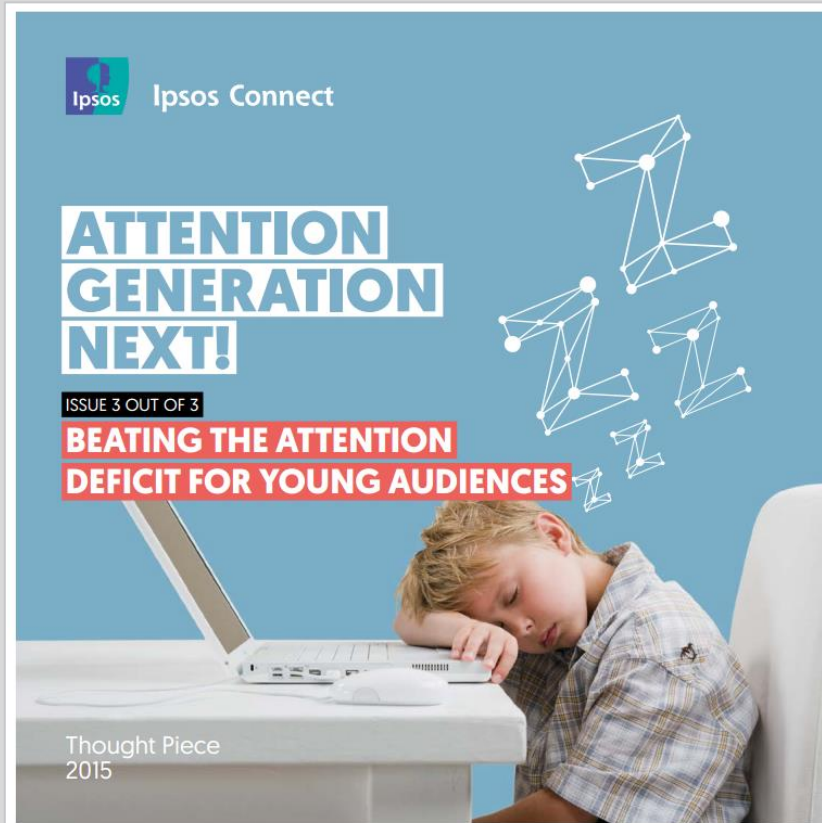
The media landscape in Africa is constantly evolving and one of the most significant changes is the ongoing transition from analogue to digital TV.

Presented at the [PAMRO](#) conference in Tanzania, this presentation discusses the opportunities offered by Kenya's digital migration and the challenges it presents to stakeholders.

Current strategies for overcoming the digital divide do not necessarily address the underlying gaps, which range from affordability to usage to relevance of content.

Highlights of the presentation include:

- The steps towards digital migration in Kenya so far.
- Public awareness of digital migration and set-top box ownership.
- The role of the government, including brief case studies of how other governments globally have supported digital migration.
- Benefits, opportunities and limitations.



[READ MORE](#)

[DOWNLOAD](#)

[CONTACT](#)

GENERATION NEXT: Beating the attention deficit

In a constantly evolving digital landscape, where 1 in 3 children aged 5-15 in the UK now owns their own tablet (up from 1 in 5 in 2013), how do brands even try to compete for the attention of young audiences?

Dealing with the unique **Generation Next**, who are 'growing up digital', is a cultural challenge for most marketers, many of whom are not digital natives themselves.

Brands are competing for attention against a wide variety of sources, from Taylor Swift videos to personal social media streams, where the drama, excitement and relatability of Generation Next's social circles are played out.

This paper investigates:

- Their ecosystem of influence
- How to create authenticity
- Which sources and platforms to target



Affluent Asia

Nearly 2 decades of surveying the region's top income earners as well as the influential

Ipsos Connect

GAME CHANGERS Ipsos

AFFLUENCE IN ASIA PACIFIC

Representing a population of over 10 million, the latest *Asia Pacific Ipsos Affluent Survey* provides a comprehensive overview of media consumption and product usage for the region's affluent adults.

Key 2015 insights for Affluent Asia include:

- 17.3 million trips taken over the last 12 months (up 26% from last year).
- Travel is the top topic that interests consumers (63%), followed by music (53%), cooking (46%), sport (42%) and business/economics (41%).
- Just over half (53%) feel financially secure, while 64% say gaining knowledge and being better informed is a priority.
- LinkedIn emerges as the fastest-growing media, with 19% using it during the last 30 days (up 6 points on last year).

Countries covered: Australia, Hong Kong, India, Indonesia, Korea, Malaysia, Singapore, Taiwan, Thailand and the Philippines.

READ MORE

DOWNLOAD

CONTACT

Ipsos Knowledge Centre

© Ipsos Version 1





HOW ONLINE CROSS-BORDER COMMERCE IS EVOLVING

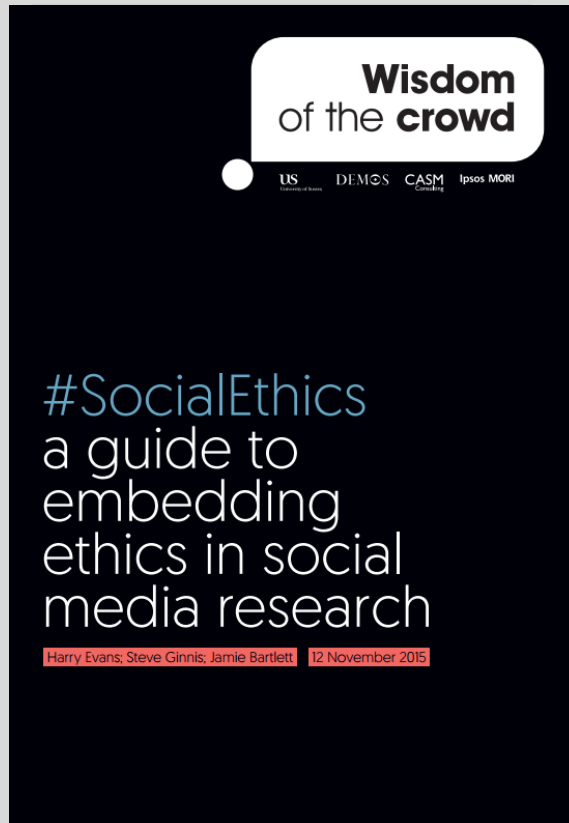
A study across 29 countries carried out for PayPal presents a global view of how consumers shop online, focusing on where, what, and how much they shop from websites in other countries.

Providing an insight into what prevents consumers from shopping online in other countries, the research also looks at what measures online retailers can take to encourage more consumers to shop on their website from abroad.

Highlights include:

- China and the US are the biggest markets in terms of online spend, but India is growing fast.
- Buying online from abroad is most prevalent among people living in Ireland, Austria and Israel.
- In most countries, the most popular category for cross-border purchases is clothing and apparel.
- Shipping costs are the top barrier for cross-border shopping.

[READ MORE](#)[DOWNLOAD](#)[CONTACT](#)

[READ MORE](#)[DOWNLOAD](#)[CONTACT](#)

WISDOM OF THE CROWD: #SocialEthics

Ipsos and Demos call for better ethical standards in social media research in this report. Our analysis finds that just 38% of the UK public are aware their social media posts are potentially being analysed for research projects.

The report proposes a series of positive and practical recommendations on how research organisations and social media platforms can better safeguard social media users, including:

- Minimising the collection and analysis of unnecessary 'meta-data', such as location data or the username or @ handle, where this information is not necessary for the project.
- Publishing some details of ongoing social media projects online to allow social media users to see how their data is being used.
- Developing tools to limit the collection of data from those who may be under 16.

#SocialEthics: a guide to embedding ethics in social media research is part of the year-long [Wisdom of the Crowd](#) project.



EUROPE AT WORK

The first findings of the sixth *European Working Conditions Survey* have been released and present a diverse picture across country, occupation, gender and age group.

On behalf of [Eurofound](#), Ipsos conducted more than 35,000 interviews in 28 European countries to track the state of working conditions.

The results highlight the complex reality facing Europe's policymakers as they seek to build a fair and competitive Europe in an increasingly digitalised global economy.

Key 2015 findings include:

- 58% are satisfied with their working time.
- 2/3 feel "motivated" by their organisation.
- 45% have worked in their free time to meet work demands.
- The proportion of employees with a female supervisor stands at 33%, up from 24% in 2000.

Findings from seven more countries – Norway, Switzerland, Albania, the Former Yugoslav Republic of Macedonia, Montenegro, Serbia and Turkey – will be released in 2016.

[READ MORE](#)[DOWNLOAD](#)[CONTACT](#)



SHORT CUTS

A Question of Trust

A recent debate in the UK House of Commons focused on the **security of personal data**.

Ben Page, Ipsos MORI CEO, put forward the motion that personal data is safer in the hands of market research than government.

He argued that because the livelihoods of those working in the research industry depend on people “freely and willingly giving us their data”, this means that researchers can be better trusted to take the responsibility more seriously.

[Read more about the issues raised in the debate.](#)

READ MORE

The Magic of Mobile

Thanks to the smart mobile devices being carried and used by customers for everything from product research to price checking, it is now possible to capture active and passive customer information right at the time and place customers are making decisions and purchases.

This Ipsos Loyalty webinar, about the **future of mobile and GPS tracking**, presents a series of case studies illustrating advances and opportunities using mobile research for customer insights.

[Watch the webinar.](#)

READ MORE

The Future is Hybrid

In the world of **audience measurement**, we now want to know not just *when* people are watching TV or reading a newspaper, but *which* platforms and devices they use, whether they look at ads and respond to them *and* whether different environments are more conducive to them being receptive to advertising.

Global Head of Audience Measurement, Andrew Green, explores the future of audience measurement and research in a multi-screen streaming TV landscape.

[Read the full article.](#)

For more information, please [contact Andrew Green](#).

READ MORE



CONTACT

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 get in touch with the Ipsos Knowledge Centre with any comments, including ideas for future content.

www.ipsos.com
[@_Ipsos](#)