

---

May 2017

---

# 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 May 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.

Ipsos Knowledge Centre

GAME CHANGERS



---

## IPSOS GLOBAL TRENDS: Fragmentation, Cohesion & Uncertainty

---

Our Global Trends survey is the largest study of its kind, providing a unique snapshot of the world today. It explores the attitudes and behaviours of over 18,000 consumers and citizens in 23 key countries around the world.

---

## POPULISM OR A BANANA? The rise of a new political agenda

---

Are we seeing something significantly different when it comes to politics, both domestically and globally? Just what is going on? Many have called it “populism”. Is that the case or is it something else?

---

## FLAIR ITALY 2017: The Bespoke Reality

---

The latest in the Ipsos Flair series – our focus on a country, its values, its people. In Italy, we find a country pessimistic about growth and uncertain about where Europe is heading.

---

## THE ECONOMIC SITUATION IN LATAM: The latest views from Latin America

---

Our regular survey of opinion leaders in the region finds more optimism about the economic prospects for countries on the Pacific rather than the Atlantic coast.

---

## TURKEY REFERENDUM: Voting patterns in the constitutional referendum

---

April's constitutional referendum divided the nation. For example, “Yes” votes were concentrated particularly among 25-44-year-old males, while the majority of young first time voters said “No”.

---

## DIGITAL ADVERTISING: Marketers need to know the metrics that matter

---

How to get noticed amid the clutter? It's imperative for success in digital advertising to start off from the right place — with a clear focus on the metrics that matter.

---

## BRAZIL PULSE: Politics, the economy, consumer behaviour and the social agenda

---

Ratings of the country's direction of travel and Presidential approval scores both remain in negative territory, as does consumer confidence.

---

## FRAUD SURVEY 2017: Is corruption and bribery rife in the workplace?

---

A look at business perspectives on fraud across Europe, the Middle East, India and Africa. One in two say it remains a widespread problem in their country.





## IPSOS GLOBAL TRENDS

### Fragmentation, Cohesion & Uncertainty

This report features both 'Megatrends' – the known technology, demographic and environmental changes happening now and in the future – alongside eight global master trends.

With over 400 questions, it covers everything from tradition to trust, from brands to business, from society to social media and much, much more.

For example:

- 76% of people globally feel that economies are rigged to the advantage of the rich and powerful
- 78% think we are heading towards an environmental disaster unless we change our habits quickly
- 67% say it's become more important that the brands they choose make a positive contribution to society
- 54% say they couldn't live without their smartphone
- 77% would like more control over decisions affecting their health

Click on the links for access to the full data, which shows trends from our 2014 study along with downloads for additional material.

[READ MORE](#)

[DOWNLOAD](#)

[CONTACT](#)

Ipsos Knowledge Centre

© Ipsos Version 1

GAME CHANGERS





# POPULISM OR A BANANA?

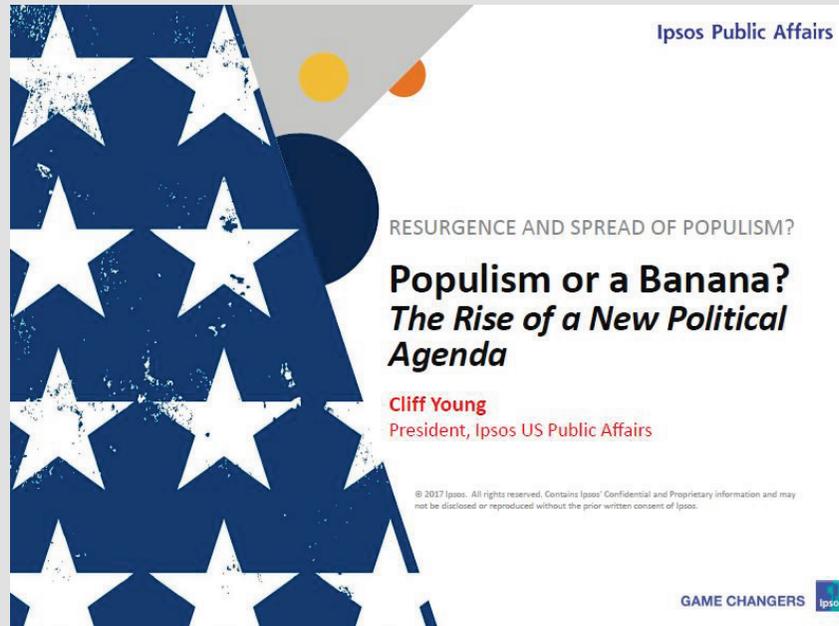
## The Rise of a New Political Agenda

Are we seeing something significantly different when it comes to politics, both domestically and globally? And what is going on? Many have called it populism. Is that the case or is it something else?

The world has entered a new political “supercycle”, where citizens are supporting political leaders who promise to upend broken institutions. The 2016 United States presidential election is a prime example of this development. Across party lines, a majority of Americans believe the “system is broken.”

This belief stretches beyond the United States. Coupled with nativism, this largely explains why confidence in institutions such as the media and political parties is low throughout the world.

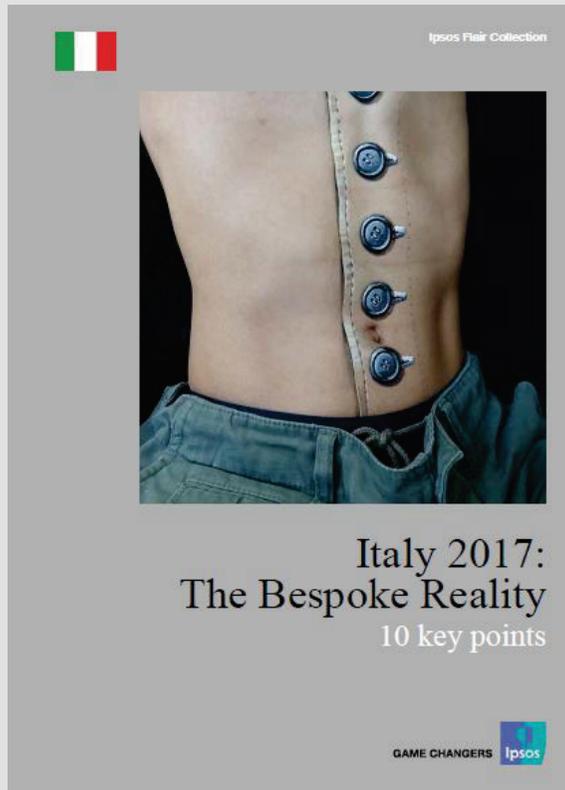
In this presentation, Cliff Young defines populism as a political strategy with three necessary conditions: 1) the presence of a political entrepreneur *willing to break the rules*, 2) a sense of *insecurity* among the people, and 3) the belief that the *system is broken*. When these variables align, we often see populist change, such as the 2016 U.S. presidential election and the Brexit referendum.



[READ MORE](#)

[DOWNLOAD](#)

[CONTACT](#)



## FLAIR ITALY 2017: THE BESPOKE REALITY

The latest report in our Ipsos Flair series is on Italy, a country in a precarious situation

### Italy no longer trusts in Europe

It seems that the foundation of the pact has been called into question. Many associate the EU with ongoing austerity. Meanwhile there is deep disapproval of Europe's response to the migrant crisis.

### Italy's families are in an increasingly precarious situation

As many as 97% of families find themselves in an income situation equal to or lower than in 2005. Few anticipate growth in consumption and especially not in employment.

### Italy has seen a boom in organic food

Growing by 11% between 2010 and 2014, the organic food market has snowballed in recent times. The estimated turnover is around €3 billion and involves an increasingly high number of operators (over 55,000 companies).

### Italy threatens to miss the digital economy's opportunities

Italians spend 78% of their online time via mobile, and 89% of this time is spent using mobile apps. However, mobile consumption is concentrated on a limited number of apps and multi-platform (desktop and mobile) usage is lower than in US, UK and Spain.

READ MORE

DOWNLOAD

CONTACT

Ipsos Knowledge Centre

© Ipsos Version 1

GAME CHANGERS Ipsos



## THE ECONOMIC SITUATION IN LATAM

### What do key opinion leaders think about Latin America?

Ipsos' latest survey of opinion leaders in Latin America, paints a contrasting picture of the state of the region's economies.

The results of the survey find Uruguay, Peru and Chile are currently best placed economically.

Meanwhile, Argentina, Colombia and Peru again rank highest in terms of economic prospects over the coming year.

On the other hand, Mexico's economy is expected to worsen over the next year. Some 42% expect a decline, while 30% think the economic situation will get worse in Cuba.

Meanwhile Venezuela's economy is viewed with the greatest concern. Just 2% say the economy is in good shape. And 84% say things will get worse over the next year, with just 4% saying things will improve.

[READ MORE](#)

[DOWNLOAD](#)

[CONTACT](#)

Ipsos Knowledge Centre

© Ipsos Version 1

GAME CHANGERS





## TURKEY REFERENDUM

### Ipsos in Turkey's analysis of voting patterns in the recent constitutional referendum

On the day of the referendum on the proposed constitutional amendment package, Ipsos in Turkey's Social Research Institute conducted an exit poll for CNN TURK TV Channel.

Some of the insights from the survey:

- "Yes" votes mainly came from 25–44 age, male, middle school or lower graduate voters while "No" votes were more concentrated in the 18-24 and 45-64 age groups, as well as among females and the better educated.
- The majority of young first time voters voted "No".
- 90% of the ruling Justice and Development Party's (AKP) supporters said "Yes" in this referendum. Meanwhile, the majority of the main opposition Republican People's Party (CHP) and the Peoples' Democratic Party (HDP) supporters said "No" (95% and 91% respectively).
- "No" voters are deeply disappointed: one in four say they are now planning to move to another country. These people are particularly likely to be well-educated younger people.



[READ MORE](#)

[DOWNLOAD](#)

[CONTACT](#)

Ipsos Knowledge Centre

© Ipsos Version 1

GAME CHANGERS







# PULSO BRASIL

Ipsos

READ MORE

DOWNLOAD

CONTACT

## BRAZIL PULSE

***Pulso Brasil* covers politics, the economy, consumer behaviour and the social agenda**

Every month, Ipsos produces a snapshot on what's been happening in Brazil. Here are this month's lead stories.

### **The direction of travel**

People remain very gloomy: 90% think Brazil is heading in the wrong direction. There are ongoing questions regarding the current Government – reform is on the agenda, but many find the plans difficult to understand. The public is feeling insecure.

### **Presidential ratings**

Assessments of Michel Temer's administration continue to be negative, with 62% of people taking a critical view. The political instability and the institutional crisis the country is experiencing is part of the explanation for this – coupled with questions about the future of the current administration.

### **Consumer confidence index**

Confidence is stagnating. Despite the Federal Government having announced 35,000 new formal jobs in March, the unemployment data continues to be alarming – there are now 13.5 million out of work. The consumer confidence indicator is now at 71 (out of 200) compared to 137 in January 2015.



## FRAUD SURVEY

### The EMEIA Fraud Survey 2017 explores current business conduct, including technology's role in detecting fraud and corruption

One in two respondents in the biennial EY Europe, the Middle East, India and Africa (EMEIA) Fraud Survey still perceive corruption to be widespread in their country.

This new study finds 27% saying that it is “common practice” in their business sector to use bribery to win contracts.

The report, *Human instinct or machine logic – which do you trust most in the fight against fraud and corruption?*, surveyed 4,100 employees from large businesses in 41 countries.

- 77% of board members or senior managers say they could justify unethical behaviour to help a business survive.
- 75% of respondents say their companies should monitor sources such as emails, calls or messaging services. Despite this, 89% feel monitoring data would constitute an invasion of privacy.
- Only 21% of respondents are aware their company has a whistleblowing hotline.

[READ MORE](#)

[DOWNLOAD](#)

[CONTACT](#)

Ipsos Knowledge Centre

© Ipsos Version 1

GAME CHANGERS





# SHORT CUTS

## New year, new opportunities

While the **Lunar New Year** in Asia has been and gone, Ipsos is following through the time-honoured tradition of examining how different brands engaged with the festivities.

We're passionate about unpacking cultural phenomena and across Southeast Asia we conducted an auto-ethnographic study of the festival. By documenting and reflecting on the celebrations, we've concluded there are several untapped opportunities:

- With food such a big part of celebrations, there could be a opportunity to highlight homophones to develop awareness e.g. the Mandarin for 'cheese' sounds similar to the word for 'knowledge'
- The trend for nostalgia in the region is a chance for 'lost' traditions to be revived
- Brands could address boredom among children by gamification of these cultural events

[READ MORE](#)

## Best-in-class customer experience

There's no doubt that CX is a big business and it's getting bigger. Some estimates put the measurement and implementation of CX programmes at \$11 billion globally by 2020.

Most would also agree that building and maintaining a good CX system that delivers real results is hard work. In fact, many C-Suite executives will admit that they have not seen significant return on their investment.

So why is this the reality? This white paper by Trish Dorsey, Jon Atkin, Nancy Costopoulos and Kate Barker, investigates how we can ensure that the programmes we build are not among the failures.

These are the four key areas:

**Engagement:** without it, there's no traction!

**Insight:** without it, there's confusion!

**Action:** without it, there's frustration!

**Embedment:** without it, there's protraction!

[READ MORE](#)

## French election

This month sees the second round of the French presidential election taking place on Sunday 7<sup>th</sup> May.

Ipsos' polling for the first round of the election produced estimates very close to the final outcome, with Emmanuel Macron and Marine Le Pen emerging as the candidates to face the vote in the second round.

Some 82% of the French electorate say they are interested in what happens in the election, including 57% who say they are "very interested". On the other hand, rather fewer – 36% – say they have found the campaign itself "interesting".

Next month's *Ipsos Update* will include full analysis of the election outcome. In the meantime, the latest results can be found on the global and Ipsos France websites.

[READ MORE](#)

GAME CHANGERS





---

# 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 website and social media outlets.

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

[www.ipsos.com](http://www.ipsos.com)  
[@ Ipsos](#)

