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June 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 June 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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## MILLENNIALS: Myths and Realities

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Millennials are a fascinating cohort, and a vital group for business and governments to understand – the challenge being to build a balanced picture rather than relying on the myths and clichés that are often attached to them.

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## AFRICAN WOMEN Key drivers of the African economy

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Conducted in seven African countries, this new study paints a picture of motivated, independent and optimistic women who are a driving force across this rapidly developing continent.

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## REPUTATION, RESILIENCY AND RESULTS: Why does reputation matter?

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In this new white paper, we show what makes the world's "most trusted" companies different – including how CSR fits into the picture.

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## 2017 FRENCH ELECTION: A look back at Emmanuel Macron's victory

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Ipsos reviews the rise of the country's youngest ever president, accurately predicted by our pre-election polling.

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## MAKE YOUR BRAND ROCK: 5 tips to rock your communications

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To succeed, brand communications must reinvent themselves to even get a chance to earn people's attention. They need to rock. Here are five lessons Ipsos has learned from investigating brand communications.

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## EUROPEAN MOBILITY SURVEY: The present and future of transport infrastructure

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Ipsos and the Boston Consulting Group have carried out an extensive study on the views of Europeans regarding transport infrastructure, including what they think of new innovations like driverless cars.

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## HOLIDAY PLANS: Views of Europeans, Americans and Brazilians

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With the holiday season starting in many parts of the world, Ipsos has released its latest Europ Assistance holiday barometer. People are taking shorter holidays, but going on them more often.

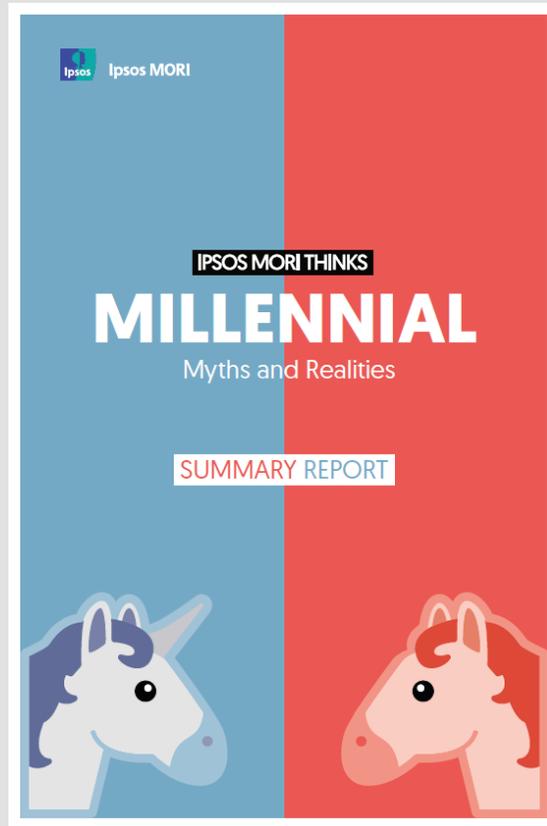
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## GLOBAL ECONOMIC PULSE – MAY 2017: More optimistic – in some places

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Some 45% of our global sample now says the economy in their country is in "good shape" – the highest level yet recorded.





## MILLENNIAL: MYTHS AND REALITIES

### The truth about the “most derided generation”

‘Millennials’ is an abused term, misused to the point where it’s often mistaken for just another meaningless buzzword. It provides a working title for the c.15-year birth cohort born around 1980-1995, which has unique, defining traits. Unfortunately, many of the claims made about millennial characteristics are simplified, misinterpreted or just plain wrong. Equally important are the similarities between other generations – the attitudes and behaviours that are *staying the same* are sometimes just as important and surprising.

Here are a few of the myths and realities we’ve uncovered:

- Millennials are *not* lazier at work – there is very little difference between them and Generation X
- Millennials are *not* more socially liberal – again, there is very little difference compared to Generation X
- Millennials *do* exercise more than previous generations – but they are also eating more unhealthily
- Millennials are the least religious generation yet – at least in western countries

Millennials are a fascinating cohort, and vital for business and governments to understand. This report helps us to build a more balanced and nuanced picture.

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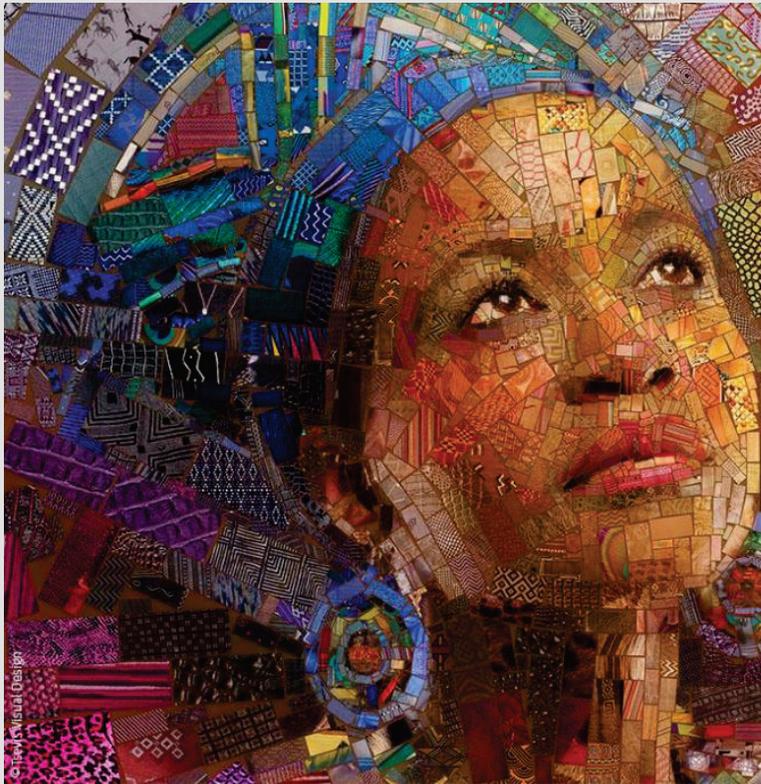
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## AFRICAN WOMEN

### Women as key drivers of the African economy

Conducted in seven African countries, this new study paints a picture of motivated, independent and optimistic women who are a driving force across this rapidly developing continent.

Actively engaged in wealth creation and cornerstones of the economy, family well-being and education, the women of Sub-Saharan Africa play a vital role in these key markets.

Key figures from this seven-country survey:

- 89% of African women are the decision-makers or co-decision-makers for household purchases.
- 42% have a regular job and 49% earn an independent living.
- 74% of the women interviewed say the status of women has improved in their country over the last five years.

'The road to equality and female empowerment in Africa is long, but this is one of the major transformations taking place on the continent', explains Florence de Bigault, Director of Ipsos in Francophone Africa.

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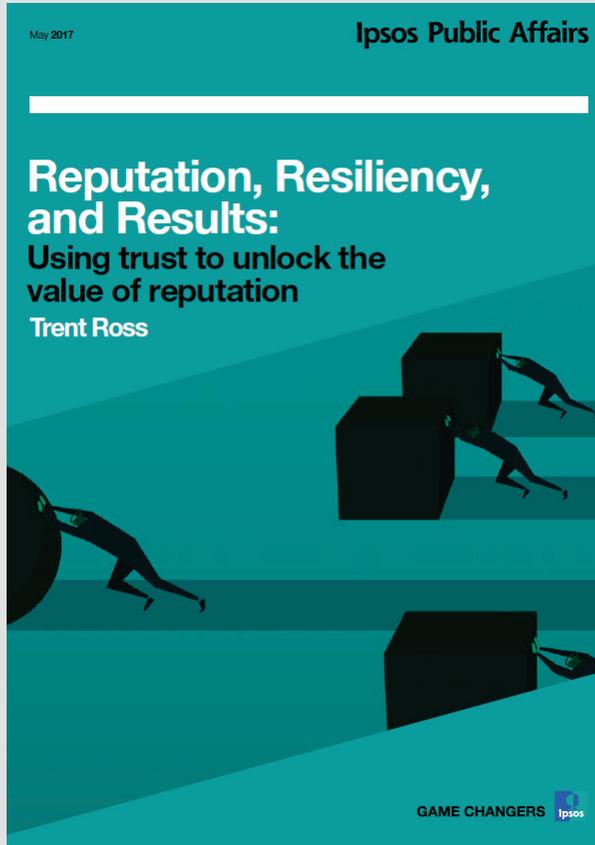
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## REPUTATION, RESILIENCY AND RESULTS

### Why does reputation matter?

The Ipsos Global Reputation Centre recently undertook a massive online study of the reputation of more than 100 of the world's largest companies to examine the factors that contribute to reputational success and resiliency in the face of crisis.

In this new White Paper, we unpick the characteristics of the world's most trusted companies. Being able to combine strong business performance with a social conscience is a key component of companies in the "top tier" when it comes to trust.

Trent Ross points out that we also need to be alive to differences by country: respondents in western Europe and Australia tend to be more sceptical of companies, whereas people in emerging markets, as well as the United States, are generally more trusting.

But the research shows that, by doing the right things to manage their reputation, companies can transcend poor trust scores even in these more "sceptical" markets.

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## 2017 FRENCH ELECTION

### A look back at Emmanuel Macron's victory

The recent French elections saw the Ipsos and Sopra Steria teams announcing their very precise estimations “live” via their media partners.

The central challenge for the first round (23 April) centred on four candidates each having a plausible chance of moving into round two.

The results released by Ipsos were extremely close to the official figures. The election saw Emmanuel Macron out in front on 24% of the national vote, with Marine Le Pen's Front National recording 21.3%, a record for her party.

The second round, on 7 May, saw Macron elected as France's youngest president (Ipsos' final estimations were 65.8% to 34.2% compared with the result: 66.1% vs 33.9%).

The abstention rate was higher in the second round (25.4% vs 22.2% in the first). Additionally, a record number of 4.1 million blank and null votes was recorded (8.6%).

Ipsos' great performance and reliability are due to an extensive research programme deployed via the Cevipof panel: 24,000 voters in 20 waves, featuring a series of thematic surveys.

Our dedicated site (in French) includes detailed analysis of the campaign, including breakdown of the results by social group and the reasons given by electors for their vote choice.



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It has never been tougher for brands to touch and move people. We all experience it. Globalisation has resulted in multiplying brands. With digitisation, more content is developed for more channels. New channels open every day – outdoors, in our pockets, even on our fridges – through smartphones, connected screens and the Internet of Things.

People are bombarded with thousands of branded messages every day, and pay less and less attention. They skip, fast forward, and multitask more and more.

To succeed, brand communications must reinvent itself to even get a chance to earn people's attention. They need to rock. Literally.

How can you make your brand rock? Here are five lessons Ipsos has learned from investigating successful – and not so successful – brand communications.

**1. Give your brand a rock band**

From Genesis to Twenty One Pilots or Muse, the best and most legendary rock bands result from great musicians playing together, amplifying their individual talents. Likewise, in order to increase the chances of engaging people with the campaign, winning brand communications rely on inspiring content, played across several touchpoints.

Indeed, when we compare the results of pre-testing a single touchpoint with testing an entire multi-touchpoint campaign, on average we see an uplift of 14% for Attention, 31% for Consideration, and 38% in Brand Desire. These results are echoed in the 2016 AFP Rethink conference, which reported

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# MAKE YOUR BRAND ROCK

## 5 tips to rock your communications using multi-touchpoint campaigns

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To succeed, brand communications must reinvent themselves to even get a chance to earn people's attention. They need to rock. Literally.

Here are five lessons Ipsos has learned from investigating successful (and not so successful) brand communications.

1. Give your brand a rock band
2. Create a hit for your brand
3. Great rock bands jam
4. Idols are contagious
5. The brand is the voice

Remember: great campaigns are not only remembered for the idea or story they tell, but also by the brand they serve.

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## EUROPEAN MOBILITY SURVEY

### The latest views of people in the EU on their transport infrastructure in Europe

Ipsos and the Boston Consulting Group have carried out an extensive study in ten major European Union countries looking at transport infrastructure.

Some key figures from the survey:

- On average, Europeans spend almost two hours per day on the move, irrespective of the mode of transport
- The car is the most common mode of transport for regular daily journeys (65% drive to their place of work or study)
- 66% of Europeans would be prepared to use their car less if “necessary investments” were made
- 77% believe that mobility innovations in the future will have a positive impact on their day-to-day life

As for the future, nearly half (46%) of people surveyed agree that self-driving vehicles would be driving on “almost all roads” in 15 years’ time.

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## HOLIDAY PLANS

### Europeans, Americans and Brazilians are going for shorter holidays more often

With the holiday season now starting in many parts of the world, Ipsos has released its latest Europ Assistance holiday barometer.

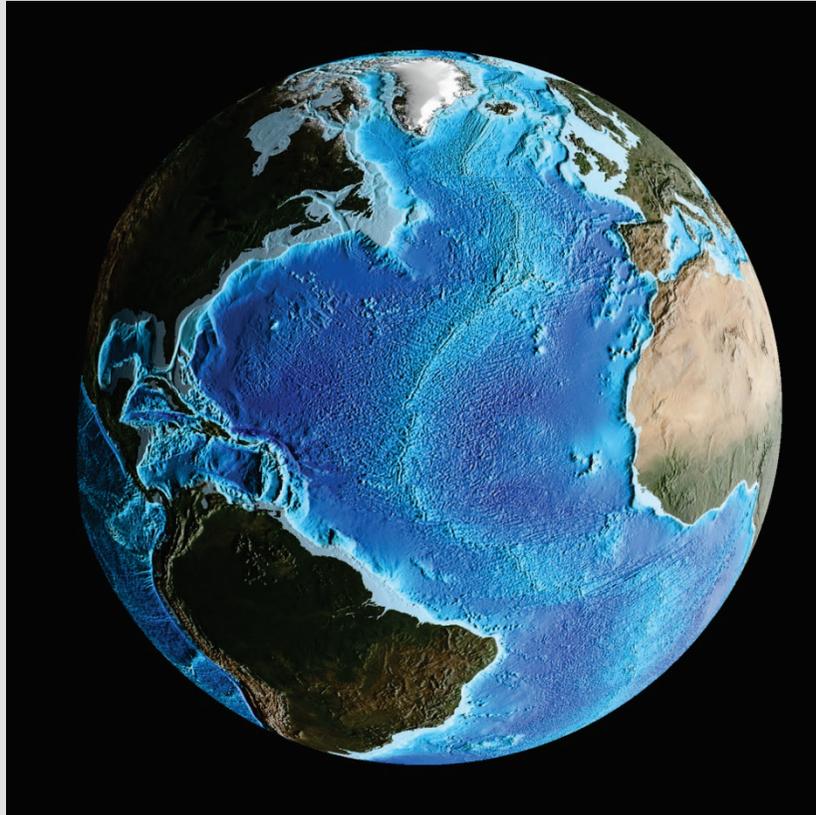
A reduced holiday budget for holidaymakers is in evidence on both sides of the Atlantic.

Domestic holidays are still preferred by many. More than 50% of holidaymakers from France, Italy and Spain will stay in their own country, while 41% of Americans and 34% of Brazilians stay 'local'.

Of the cities that Europeans would like to visit, New York comes out on top, while Americans and Brazilians favour Paris.

Although the majority of holidaymakers prefer a hotel, other options are now attracting large numbers, especially in the US. There, 48% of people have participated in 'primitive camping', compared to 23% of Europeans.

Checking online opinions is now a common practice among holidaymakers: it is now the third decision-making criterion in selecting holiday lodging (31% in Europe, 31% in the United States and 28% in Brazil), with value and location the top two.



## GLOBAL ECONOMIC PULSE

**The positive trend continues, with people increasingly upbeat about the state of the economy in their part of the world.**

This month sees 45% of global citizens assessing the current economic situation in their countries as “good”. This is the highest score ever recorded in the Global Economic Pulse.

The main driver of this is Latin America where Peru now has 77% describing their country’s economic situation as “good”. Mexico and Argentina are also showing improvements.

Globally, Saudi Arabia takes the top spot, with 87% saying the economy in their country is in “good” shape. The mood is also positive in India (83%), with China and Germany both at 81%.

At the other end of the spectrum is Brazil (where just 10% give their economy a positive rating), followed by South Korea and South Africa (both 13%).

But what of the next six months? In India, as many as 70% expect to see the economy in their local area become stronger over the next six months. In Italy, that figure stands at just 8%, followed by France (9%) and Japan (11%).

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# SHORT CUTS

## European driving habits

Based on more than 12,000 people in France, Germany, Great Britain, Italy, Spain, Sweden, Belgium, Greece, Poland, Netherlands and Slovakia, this Ipsos survey was conducted for the Vinci Autoroutes Foundation for Responsible Driving.

Perceived main causes of fatal road accidents in general, according to respondents:

- Inattention 57%
- Driving under the influence of alcohol or narcotics 56%
- Speeding 42%

Drivers in Sweden are considered to drive most responsibly, followed by those in Germany and The Netherlands. On the flip side, Italy tops the countries seen as the least responsible drivers, with Greece and Poland behind them.

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## Why digital context matters

In a digital and programmatic world, it's easy to lose sight of context. Peter Minnium explains why context matters.

In his latest *Marketing Land* article he notes marketers have long known that context matters and have acted on this knowledge to the extent that the available media allowed; for example, with beer and pizza ads appearing during sporting events.

In becoming "digital," these same marketers seem to have forgotten this proven precept. The rapid growth of programmatic advertising in recent years has driven an almost cult-like adherence to audience-centric buying, with little if any regard for the importance of the context in which the ads are delivered.

The atomisation of content via digitisation opens the possibility for media sellers and buyers to lead marketers to the promised land of the right ad message *in the right place* every time.

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## Is America great again?

President Donald Trump campaigned on a plan to "Make America Great Again." It's a pledge he wore on his metaphorical sleeve and his literal head. It's a slogan and concept that resonated with voters and propelled him to the White House. But like all campaign promises, its progress should be evaluated.

Ipsos has begun asking Americans "How great do you think America is?" It's a simple— though loaded— question and one which we will be tracking throughout Trump's presidency.

On the surface, most believe America is "pretty darn great". They give themselves a 7.3 out of 10, giving Trump a solid baseline early in his presidency with room to improve.

Matt Carmichael goes on to explore the question of when (if ever) America was great. For the 55+ crew of Baby Boomers, the 1950s is a popular choice.

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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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