September 2017

IPSOS UPDATE

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

Ipsos Knowledge Centre

GAME CHANGERS

Ipsos

WELCOME

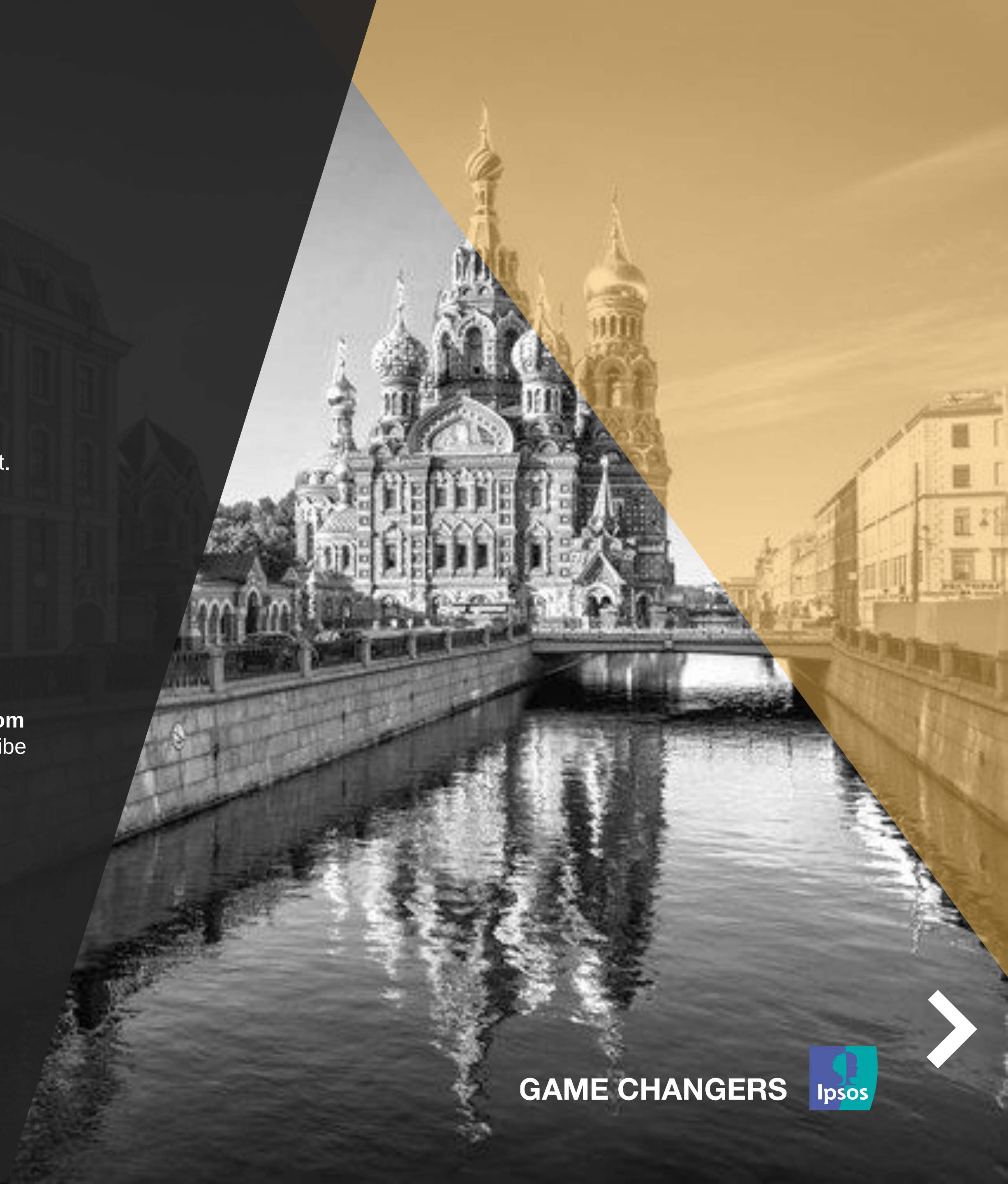
Welcome to the September edition of *Ipsos Update* – our round-up of the latest research and thinking from Ipsos teams around the world.

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** with any comments or ideas, or if you would like to subscribe to future editions.

Thank you.



IN THIS EDITION

PASSIVE SIMPLICITY:
TV and Radio audience measurement

This new *Ipsos Views* white paper explores the opportunities for working towards better measurements for the future, to ensure that we achieve the greatest understanding of the audience, with the least intrusive approach.

MOBILE PAYMENT USAGE IN CHINA:
The rise of the ‘cashless lifestyle’

This report looks at user behaviour around online payments in a country where, between 2013 and 2016, the number of transactions made through non-banking mobile apps increased from 3.7 billion to more than 97 billion.

WHAT WORRIES THE WORLD:
Unemployment is still the key concern

The majority of citizens across 26 countries believe that their country is headed in the wrong direction, with unemployment seen as the main concern, according to the latest *What Worries the World* study.

AFFLUENT AMERICANS:
Five surprising facts

Based on data from the *Ipsos Affluent Survey*, this infographic allows us an insight into the lifestyle of an ‘Affluent American’ – defined as the 75.5 million adults with a household income of more than $100,000 a year in the US.

MEDIA CONSUMPTION IN RUSSIA:
How the digital era is impacting on media habits

This special report, drawing on data from the quarterly *RusIndex Survey*, examines how people in Russia are consuming TV, radio and news, with a focus on digital vs. traditional devices.

THE RISE OF POPULISM:
A global approach

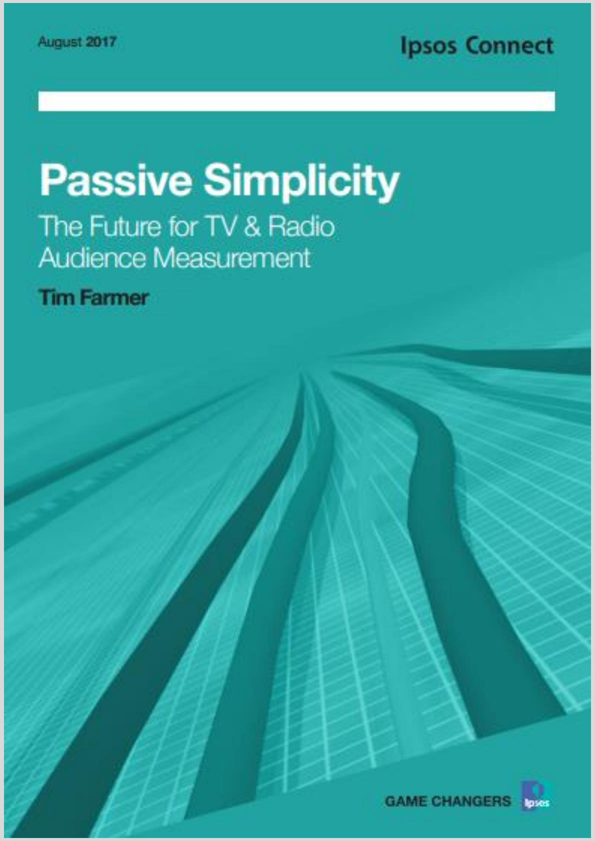
This new white paper explores what defines, conditions and drives populism around the world, reviewing current perceptions and how populism and nativism have “re-emerged”.

DO WE STILL NEED TO ASK QUESTIONS?:
The role of surveys in an ever-changing world

In a time where data and technology are changing the way brands interact, engage with, and communicate with people, this white paper explores whether asking questions in market research is becoming old-fashioned.

CORPORATE REPUTATION RESEARCH:
FAQs for our Global Reputation Centre

This paper provides in-depth answers to some of your frequently asked questions about corporate reputation and corporate social responsibility (CSR), including how we help our clients deal with crises.



READ MORE DOWNLOAD CONTACT

PASSIVE SIMPLICITY

The future for TV and radio audience measurement.

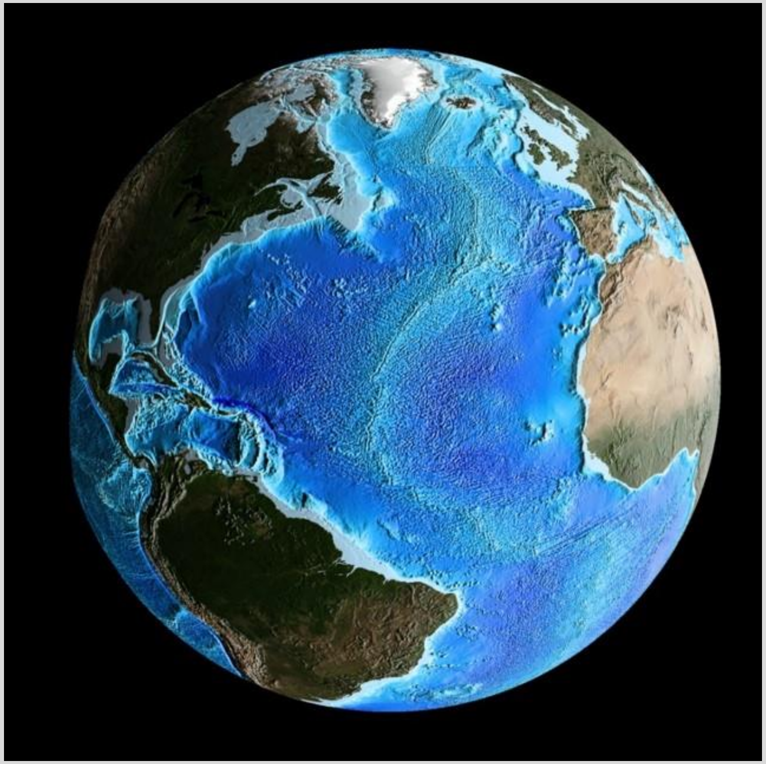
In the field of audience measurement, the greatest understanding comes from observations which have the least impact on behaviour.

At Ipsos we call this Passive Simplicity, by which we mean that the simplest and most natural research yields the most accurate findings.

The objective of TV and radio audience measurement is relatively simple; it's about counting how many viewers or listeners there are, to which channels or programmes, and knowing who these people are.

Today, as in the past, most measurement solutions rely almost entirely on sample surveys or measurement panels. These provide representative measures of the universe and employ methodologies which treat all channels and programmes fairly and equally.

This new white paper explores the opportunities for evolving these systems towards better measurements for the future, to ensure that we achieve the greatest understanding of the audience, with the least intrusive approach, while maintaining the focus on high quality, representative and equitable datasets.



READ MORE | DOWNLOAD | CONTACT

WHAT WORRIES THE WORLD

60% of citizens across 26 countries believe that their country is on the wrong track, according to the latest *What Worries the World* study.

Unemployment is seen as the main concern around the world, followed by financial/political corruption and poverty/social inequality.

The main stories this month include:

- China, India and Saudi Arabia remain the most positive about the direction their nations are taking. 87% of people in China think that their country is going in the right direction, 74% in India and 71% in Saudi Arabia.
- Mexico has replaced South Africa as the nation most anxious about the direction their country is heading. Only 8% in Mexico think their country is going in the right direction, 9% in South Africa and 12% in Brazil.
- Peru has seen the biggest deterioration, with a fall in 15 percentage points in those who think the country is headed in the right direction.
- In Britain, 72% think the country is on the wrong track – a rise of 7 percentage points since just before June's General Election.

MEDIA CONSUMPTION IN RUSSIA

A special report examining the impact of the digital era on the media habits of people in Russia.

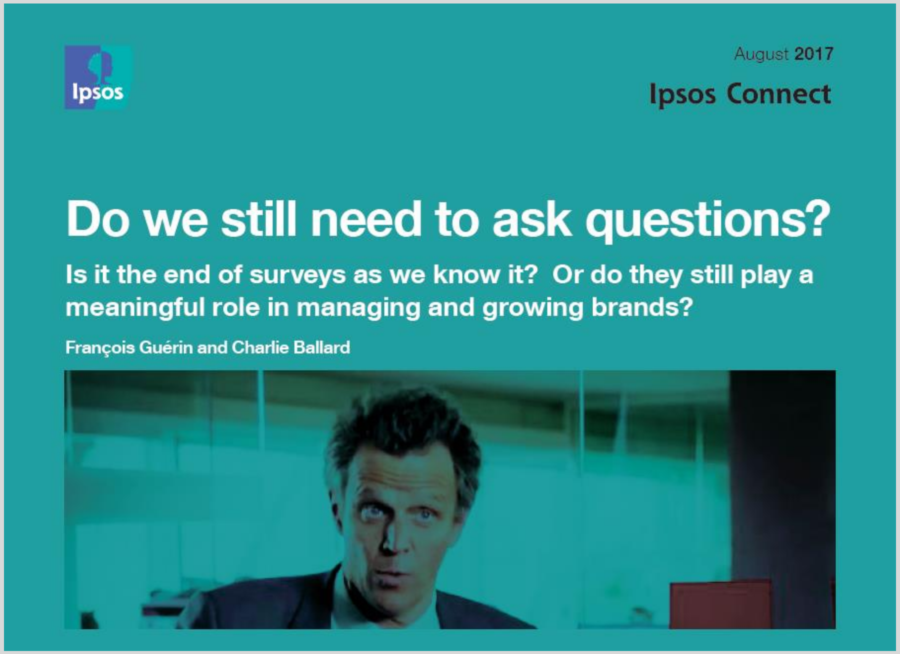
Despite the high usage of computers/laptops (71%), smartphones (62%) and tablets (16%) among the Russian population, the vast majority still use a TV set, rather than a digital device, to view television content.

When consuming news content, digital media proves slightly more popular in Russia. 12% of urban citizens aged 10-75 read the news on newspaper and magazine websites, rising to 19% among smartphone/tablet owners. Generation Z read the news via mobile devices most often, with 23% of young people aged 10-20 consuming news this way.

Among the weekly radio audience, 92% listen to the radio in FM range. Slightly less than a quarter of the respondents listen to the radio online.

This data on media consumption has been published as part of the quarterly *RusIndex Survey* - studying the lifestyle, consumption and media preferences of Russian citizens.

READ MORE | DOWNLOAD | CONTACT


August 2017

Ipsos Connect

Do we still need to ask questions?

Is it the end of surveys as we know it? Or do they still play a meaningful role in managing and growing brands?

François Guérin and Charlie Ballard

READ MORE DOWNLOAD CONTACT

THE FUTURE OF SURVEYS

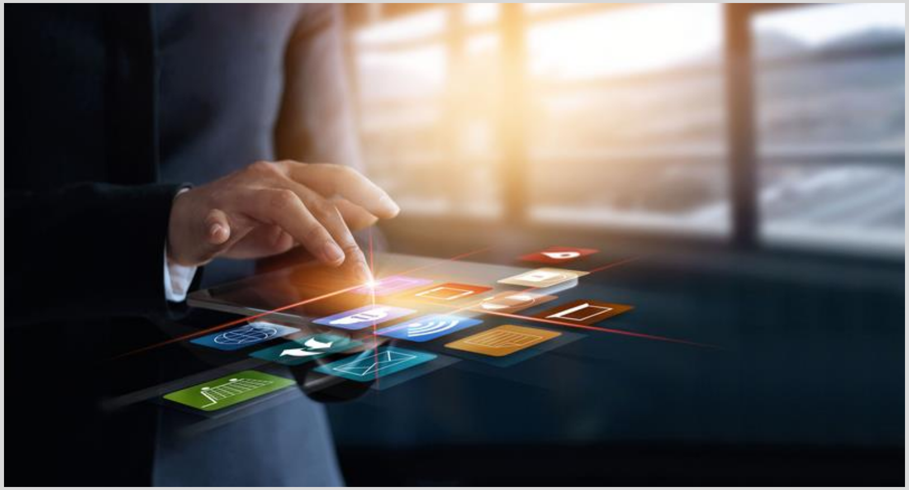
While creativity remains a powerful tool, there is no doubt that data and technology are changing the way brands interact, engage, and communicate with people.

The growth of behavioural science, the development of new passive techniques, and the growing amounts of data available in private companies or social spaces are great new sources for marketers to gather insights about their brands and communications.

With all this rich information, does market research still need to ask questions of people? Or, is asking questions becoming old-fashioned?

This new white paper raises discussions around:

- What your brand is trying to achieve (this should drive any sound research design).
- What each tool, approach or method delivers in terms of information, data and insight (this is good practice to drive the necessary change needed in research programmes).
- How to integrate new information, data, and new insights (in an increasingly complex world, integration is the sweet spot).



READ MORE

DOWNLOAD

CONTACT

MOBILE PAYMENT USAGE IN CHINA

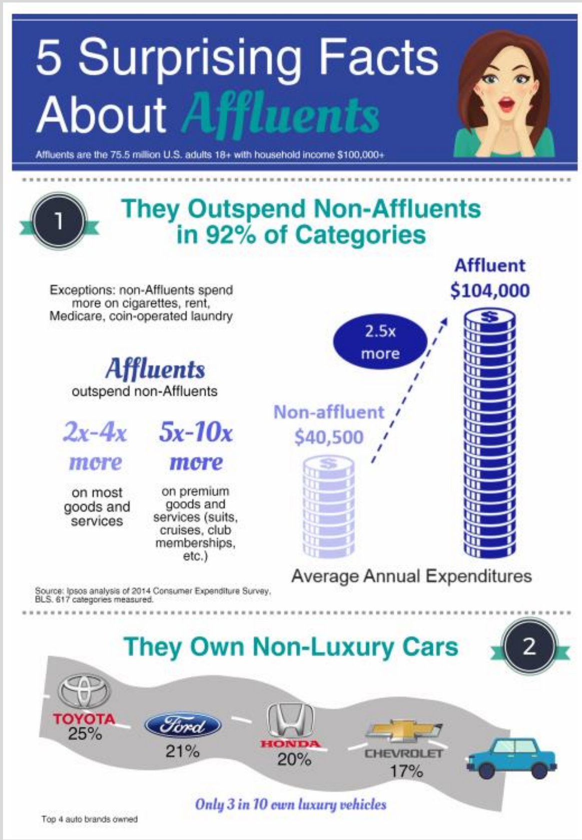
WeChat Pay has become the main cashless payment method for daily small transactions in China.

Statistics from the *Payment and Clearing Association of China* show that from 2013 to 2016, the number of transactions made through non-banking mobile apps increased from 3.7 billion to more than 97 billion.

Based on WeChat Pay data and an online survey, this report explores different behaviours around online payments and the rise of the 'cashless lifestyle'.

Highlights include:

- 40% of people regularly carry less than 100 RMB (£11.60) in cash.
- 74% of people said they can live with only 100 RMB in cash for more than a month.
- 84% of people feel 'calm' if they don't carry cash.
- Mobile payments have a higher adoption rate in Eastern and Northern China than other parts of the country.
- Fast food chains, convenience stores, cinemas and taxis are the most popular channels for mobile payment.



READ MORE

DOWNLOAD

CONTACT

AFFLUENT AMERICANS

Five surprising facts.

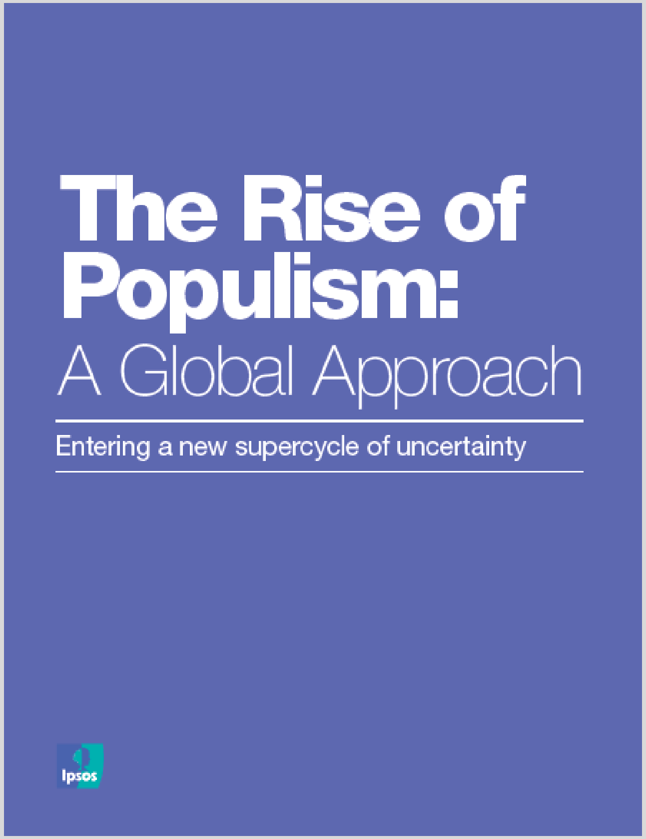
'Affluents' – defined in America as the 75.5 million adults with a household income of more than $100,000 a year – are becoming an increasingly important and influential demographic.

These new infographics are based on the *Ipsos Affluent Survey* which has been tracking the lives, lifestyles, purchase patterns and media habits of financially successful Americans for over 40 years.

Five facts about Affluent Americans:

1. They outspend non-affluents in 92% of categories measured (the average annual expenditure of an affluent in the US is $104,000 Vs $40,500 for a non-affluent).
2. They own non-luxury cars (the most popular brands being Toyota (25%) and Ford (21%).
3. They prefer to spend on experiences over 'things' (68% of affluents would rather spend money on a fantastic trip than an expensive car).
4. They shop at mainstream big box stores (58% say they shop at Target).
5. They read more publications in relation to their wealth.

GAME CHANGERS


The Rise of Populism:
A Global Approach
Entering a new supercycle of uncertainty
Ipsos

READ MORE | DOWNLOAD | CONTACT

THE RISE OF POPULISM: A GLOBAL APPROACH

Entering a new supercycle of uncertainty.

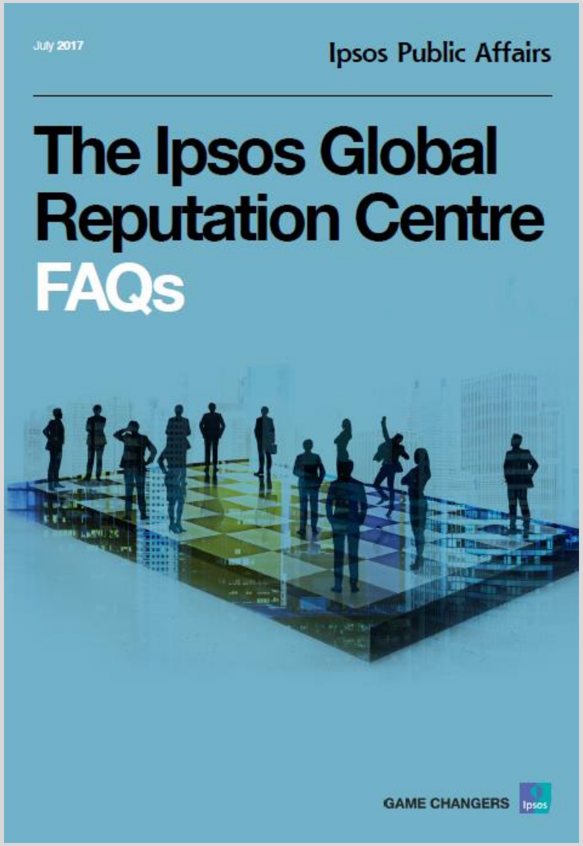
What defines, conditions and drives populism?

This new white paper suggests that populism is not actually an ideology, but instead a strategy that 'political entrepreneurs' employ to achieve power. It capitalises on the social or economic conditions that make disruption possible, perceptions that the system is broken and that liberal institutions must be changed or eliminated; an "us vs. them" discourse.

Populism operates around three key conditions:

1. **Public appeal** – favourable public opinion for extra-institutional measures to fix a perceived broken system
2. **Opportunity structure** – conditions that create a sense of insecurity, such as nativist fears, economic downturn and war
3. **Political entrepreneur** – someone who gives voice and leadership, e.g., Trump, Sanders and Le Pen

The paper goes on to explore the topic in more detail, drawing on case studies from recent elections, looking at the current perceptions of populism globally, and examining how populism and nativism have "re-emerged".



READ MORE | DOWNLOAD | CONTACT

CORPORATE REPUTATION RESEARCH

Our Global Reputation Centre provides in-depth answers to some of your frequently asked questions about reputation and corporate social responsibility (CSR), including how we help clients to deal with crises.

Questions include:

- Why is corporate reputation important?
- What is the difference between brand and reputation?
- Why do we use ‘trust’ as a measure of overall reputation?
- Why is measuring stakeholders important and what kind of stakeholders should be measured?
- How can we help our clients implement the research findings?
- What research approaches can be deployed in response to a specific crisis?
- Where does CSR fit into the reputation model?

SHORT CUTS

Tech Tracker

Smartphone usage is seen to increase among parents when children are preoccupied, with social media as the stand out activity across all age groups, according to the latest quarterly update of the *Ipsos MORI Tech Tracker*.

Eating dinner is the situation where mobiles and tablets are used the least by both parents and children. Only 7% of UK children are permitted to use a smartphone or tablet at the dinner table, and 8% when out for a family meal.

Smartphone ownership in Britain is almost universal under the age of 44, though Android and iPhone ownership remains stable vs. previous waves. As well as increased ownership of smartphones, their capabilities continue to increase with 73% of smartphone owners using their device to read or send emails in the past three months.

READ MORE

Syrian refugees in Turkey

Most Syrian refugees in Turkey are content with their living conditions and look to the future with hope.

Results from a survey jointly conducted by Ipsos and the *Humanitarian Foundation for Development (İNGEV)* show that 74% of Syrians refugees want to acquire Turkish citizenship, increasing to 80% amongst those aged 15 to 17. When asked about their future expectations, 52% said they see themselves and their families' future in Turkey and 64% are optimistic about the future.

Regarding refugees' economic activities, the survey found that 50% of Syrian refugees are unemployed and searching for a job, while among the employed, 17% are working for Turkish employers, 5% are employed by Syrian employers and 5% are self-employed.

READ MORE

Apps and behaviours

Focusing on sports, news, entertainment and games apps, this new report finds that different apps encourage different behaviours. News app users snack on content up to three times a day, while entertainment app users immerse themselves in programmes for up to seven hours a day. Findings include:

Apps are universal: At least 9 in 10 people from each gender and from all age groups use apps – a major shift from when they were thought to be the preserve of the young and tech-savvy.

Apps are more than social: Two thirds (68%) of the smartphone audience use news, games, entertainment or sports apps – rather than just social media.

Apps are used all day long: 20% of news app users check the headlines before they get out of bed in the morning, a third check during breakfast, and another third while travelling.

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 website and social media outlets.

Please email IKC@ipsos.com with any comments, including ideas for future content.

www.ipsos.com
@_Ipsos