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January 2018

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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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Happy New Year! Welcome to the first 2018 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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## PERILS OF PERCEPTION: Things are not as bad as they seem

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Our latest Perils of Perception survey examines the gap between people's perception and the reality in 38 countries around the world, discovering that things are NOT as bad as they seem.

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## SENSORY SPATIAL SEGMENTATION: A new approach to segmentation studies

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Consumer-based preference segmentation studies can be complex and costly. This white paper presents a new approach – Sensory Spatial Segmentation – to deliver a segmentation solution on a smaller incomplete test design.

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## SPOTLIGHT ON EUROPE: Reflecting on 2017

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A selection of our research across Europe over the past year, showcasing the continent's diversity and providing some insights into how attitudes and behaviours vary in different geographic, economic and cultural contexts.

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## AUDIENCE MEASUREMENT 5.0: Pushing the boundaries

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As we enter the fifth age of audience measurement, this white paper explores a time when the quest for total understanding of audiences is higher than it has ever been.

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## DIGITAL GOV' BAROMETER: Digital transformation of the national government

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The 2017 survey of citizens across Germany, France, Norway and the UK finds that the majority believe that the development of digital state and government services is progressing.

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## IPSOS MORI ALMANAC: A round-up of what the UK is thinking (and feeling)

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Reflecting on a memorable year for Britain which has seen the nation regularly portrayed as divided, the 2017 almanac explores different views about the challenges we face – all through the lens of researchers.

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## PUBLIC PERSPECTIVES CANADA: What really mattered to Canadians in 2017?

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From Canada on the world stage, to money, immigration, health, the environment and social cohesion, the latest Public Perspectives report examines public opinion in 2017 to present the country's "critical numbers".

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## THE REPUTATION COUNCIL: The changing role of the corporate communicator

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The twelfth sitting of the Reputation Council explores how communications leaders across 22 countries are responding to an increasingly fractured communications landscape.





## PERILS OF PERCEPTION

Our latest Perils of Perception survey examines the gap between people's perception and the reality in 38 countries around the world.

The survey discovers that on many subjects – including murder rates, terrorist deaths, teenage pregnancy and diabetes – things are NOT as bad as they seem.

### Among the findings:

- Only 7% of people think the **murder rate** is lower in their country than it was in 2000 – but it is significantly down in most countries, and down 29% across the countries overall.
- People hugely overestimate the proportion of **prisoners in their countries who are immigrants**: the average guess is 28% when it's actually only 15%.
- **Teenage pregnancy** is overestimated across the world, often by a staggering amount. Overall, the average guess is that 20% of teenage girls give birth each year when the reality is 2%.

To find out more about the Perils of Perception, [visit the microsite](#) or [take our quiz](#) to test your knowledge of your country. You can also [visit the archive](#) to discover findings from previous years.

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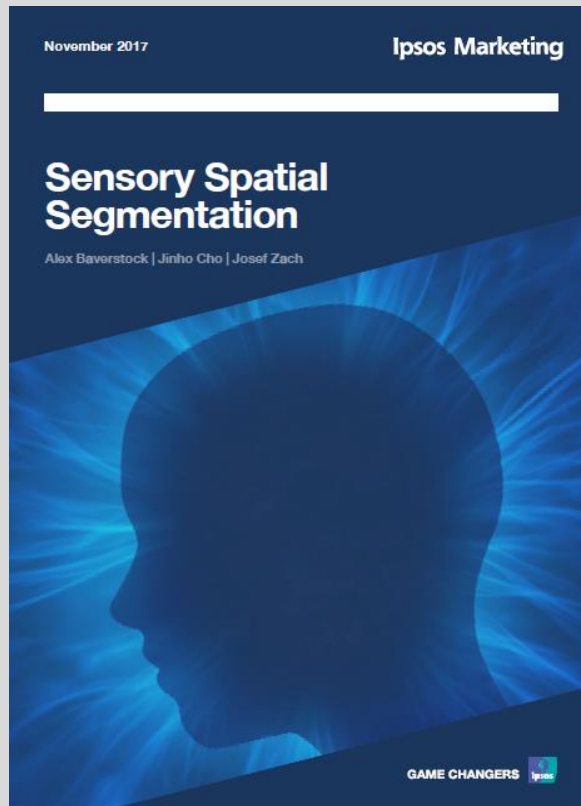
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## SENSORY SPATIAL SEGMENTATION

**Consumer-based preference segmentation studies can be complex and costly undertakings.**

Prompted by this, Ipsos has developed a new approach – Sensory Spatial Segmentation (SSS) – to deliver a segmentation solution on a smaller incomplete test design. Not only does SSS meet this requirement, it also challenges the widely-held assumption that multi-day complete designs are necessary for the strongest results.

By applying this approach, we can see that incomplete designs deliver better consumer preference data, with the added benefits of significantly reduced study time and investment.

### **This white paper explores:**

- Delivering robust segmentations
- The case for adopting incomplete designs more widely in consumer preference testing
- A case study exploring the use of SSS, including understanding sensory drivers and identifying new product opportunities

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## EUROPE 2017

A selection of our research on public attitudes across Europe over the past year.

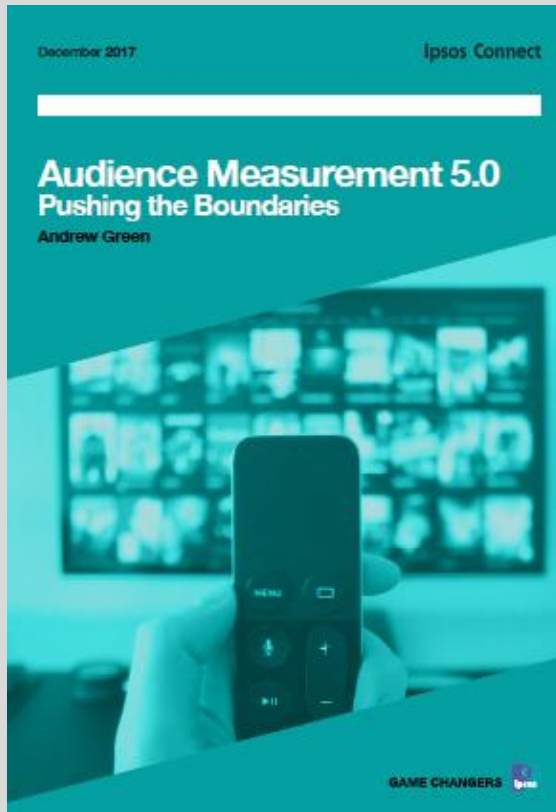
Showcasing the continent's diversity, this research round-up provides some insights into how attitudes and behaviours vary in different geographic, economic and cultural contexts.

### Contents include:

- **Economic Recovery:** Growth is back! Perception of the national economic performance improved everywhere (except in Great Britain).
- **What Worries Europe:** The top three most worrying issues by country are far from homogeneous across Europe. But those countries that have experienced terror attacks in the past two years remain wary.
- **European Mobility:** A majority of Europeans think their governments are not investing enough in transportation infrastructure.
- **Affluent Audiences:** Across Europe, 88% of affluents who consume international media brands consider them to be trustworthy, compared to only 58% for the main domestic media brands.
- **European Holidays:** A growing number of European holidaymakers are interested in Airbnb-like person-to-person lodging arrangements – and New York is the city they most often dream about visiting.

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## AUDIENCE MEASUREMENT 5.0

### Exploring the five ages of audience measurement.

We are entering the Fifth Age of Audience Measurement – a time where methodologies are being re-calibrated in response to a fast-changing media environment, and where the quest for total understanding of audiences is higher than it has ever been. It is also an era where politics and economics are far greater barriers to progress than technical concerns.

Looking back into history, we can see that there have been at least four key phases of development in audience measurement methods and that the one we are entering now – the Fifth Age – is different. This white paper sets out the five core principles underlying this evolution:

1. Platform-neutral
2. Respondent-friendly
3. Big data
4. Hybrid
5. Data science





## DIGITAL GOV' BAROMETER

Examining the digital transformation of the national government as seen by citizens in Germany, France, Norway and the UK.

Findings from the 2017 survey include:

- **Satisfied, but impatient citizens**  
The majority of citizens think that the development of digital state and government services is progressing. Norway ranks highest, with 75% of citizens believing that digital transformation is improving in their country, followed by France (66%), and the UK (64%). Least positive are the Germans (42%).
- **The digital transformation is everyone's priority, as long as it simplifies our lives**  
More than 7 out of every 10 European citizens believes that developing digital public services is a priority, especially in the health sector (cited as the top priority in all but Germany).
- **Citizens have great expectations of digital**  
Across all four countries, citizens are expecting a significant digital transformation. Almost 90% of people in France, Norway, Germany and the UK would like to be using online services now and doing more of their administration on the internet.



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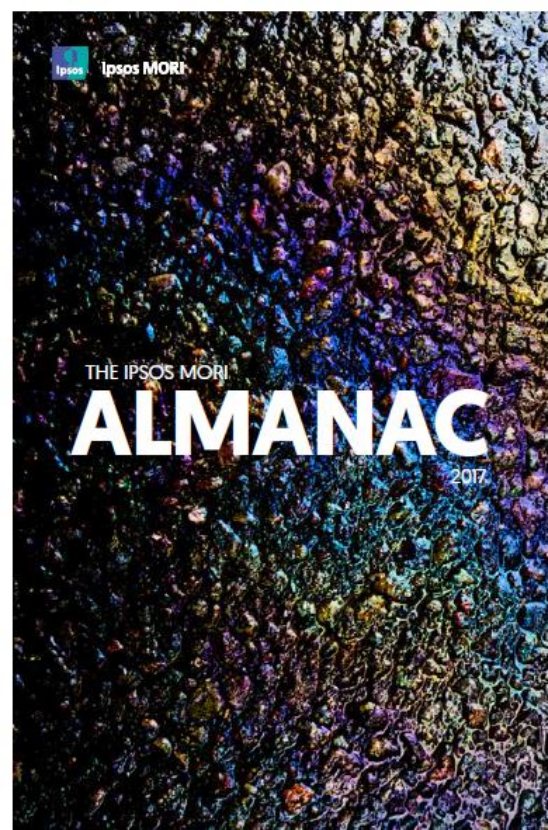
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## IPSOS MORI ALMANAC

Our UK team's annual round-up of insights and analysis reflects on a memorable year which has seen Britain often portrayed as divided.

Whether the split is between the 'haves' and the 'have nots', Millennials and Baby Boomers or Brexiteers and Remainers, recent upheavals in Britain have crystallised divides that have existed for some time. These include a deep generational split, divisions over our social and economic priorities, competing views about Britain's role in the world, and threats to people's sense of identity, among others.

Brits are not alone in experiencing uncertainty about the future. Our [2017 Global Trends Survey](#) found one of the starkest themes is the underlying sense of fragmentation across many spheres of life and an increasing disillusionment with how the world is.

As 2017 ends, despite the different views about the challenges faced, there are still things that most can agree on. Above all, people want to be allowed to feel good about their country and themselves – brands and institutions that understand that will succeed in 2018.

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## PUBLIC PERSPECTIVES: CANADA

From Canada on the world stage, to money, immigration, health, the environment and social cohesion, the latest Public Perspectives report examines public opinion in 2017 to present Canada's "critical numbers".

### Findings include:

- Positive sentiment towards the national economy has grown from 52% to **68%** since the start of 2017.
- Owning your own home is too much to expect for many, with only **26%** of Canadians saying that it will be easier for them to own a home compared to their parents.
- Healthcare is the top public issue, with **35%** of Canadians saying it is their most pressing concern.
- Whether it be climate change, or plastics in the ocean, **73%** of Canadians feel we are heading towards an environmental disaster.
- **53%** believe artificial intelligence and robots are going to fundamentally reshape the economy and the country.

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# THE REPUTATION COUNCIL

LATEST FINDINGS FROM THE TWELFTH SITTING

THE CHANGING ROLE OF THE CORPORATE COMMUNICATOR – AND THE BIGGEST ISSUES THEY FACE

SHOULD COMPANIES 'TAKE A STAND' ON CONTENTIOUS POLITICAL AND SOCIAL ISSUES?

HOW TO EFFECTIVELY COMMUNICATE WITH MILLENNIALS

THE ROLE CORPORATE REPUTATION PLAYS IN THE WAR FOR TALENT

HOW CONNECTING CORPORATE AND PRODUCT BRANDS LEVERAGES AN ORGANISATION'S REPUTATION

La Meridien de Paris

120.00	51.8806	60.0200	56.83	138.83	18.82	LT	18.82	LT	3.29	4.57	3.29%
80.00	51.0204	60.0200	94.11	94.11	14.11	LT	14.11	LT	0	3.10	3.29%
80.00	51.0529	60.0200	94.05	94.05	14.05	LT	14.05	LT	0	3.09	3.29%

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## THE REPUTATION COUNCIL

The twelfth sitting of the Reputation Council explores how communications leaders across 22 countries are responding to an increasingly fractured communications landscape.

With the pace of change quickening, many companies are feeling challenged just to keep up. Our recent Global Trends data highlighted the relationship between the speed of change in society and the sense of insecurity people have about their future. In many ways, the same issues are impacting reputation management and the corporate environment.

The year's Reputation Council report explores the challenges faced by corporate communicators in their day-to-day activities, exploring how they cope with the changing landscape.

### Contents include:

- The life of a modern communicator
- Communicating with millennials
- The ins and outs of equity flow
- The role corporate reputation plays in the war for talent



## SHORT CUTS

### The Automation Divide

Automation is taking over tasks that used to be performed by humans across nearly all sectors, and shows no signs of abating. There are those who are well-prepared and optimistic about a future with increased automation. On the other hand are those who fear automation and resist the changes it brings.

Not surprisingly, usage breeds familiarity and favourability. The more consumers use automated technology, the more familiar they are with it. And the more familiar they are with it, the more they like it.

This white paper explores the divide in public opinion on automation. It also finds that people view increased ease, comfort, speed, and time savings as the biggest benefits of automation, while the biggest drawbacks include increased laziness, loss of jobs and reduced human interaction.

[READ MORE](#)

### Brand Purpose: What's the point of you?

Brand purpose has been one of the most hotly debated marketing topics of the last ten years, celebrated as a business model for growth and debunked as bogus strategy in equal measure. But what exactly is brand purpose? The broad understanding is it guides a brand to act in a way that is beneficial to society in some way, by positive actions taken in their chain of operation.

Considering whether brand purpose is the solution for brand growth, this new paper exposes some of the myths and explores a few of the realities. It also sets out three important things that matter about brand purpose:

1. People will choose a good product over a good cause
2. Purpose can take many forms
3. Think about positioning and the "big idea"

[READ MORE](#)

### Infrastructure in Brazil

The concept of infrastructure development is not well understood in Brazil with almost a quarter (24%) of Brazilians unable to express what investment in infrastructure means to them, according to our new *Brazil Pulse* study examining public perceptions on the topic.

Deficiencies in Brazil's existing infrastructure have negative consequences for the economy and the daily lives of its citizens. Lack of investment is often blamed, and public discussion about existing economic setbacks is frequent. What isn't as well understood, however, is the impact of public perception towards infrastructure development, including who is responsible for driving it, how it's defined, the investment benefits, and the impact of corruption.

This new Point of View addresses these points and analyses the key data in more detail.

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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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