

May 2018

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

Thank you.

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GAME CHANGERS



CROSSING DIVIDES: More tension in the world?

Three in four people feel society in their country is divided, with six in ten saying their country is more divided now than 10 years ago, according to this 27-country study investigating public attitudes towards division.

'NATURAL' FOOD: What does it mean to consumers?

Consumers are more conscious than ever about the safety and trustworthiness of food and drink. In this global study, we explore the increase in the use of the term 'natural' on packaging and how consumers interpret it.

VIEWABILITY MATTERS: What advertisers need to know about viewability

The promise of online advertising was to deliver more relevant, timely and targeted communications for the mutual benefit of consumers and advertisers. This paper sets out the current reality, including the successes and challenges.

FLAIR INDONESIA: Dealing with the opposites

As part of our *Ipsos Flair* series, this report investigates society, consumer behaviour and market trends in Indonesia, revealing the deep dynamism of a country that is booming after decades of sustained economic growth.

DRIVERLESS CARS: Is the world ready?

As technology companies continue to develop self-driving cars, this special *Global Advisor* study discovers that most consumers across the world are intrigued but unsure about the idea of autonomous vehicles.

UNDERSTANDING SOCIETY: Putting people in the picture

As sustainable development becomes increasingly embedded in government and corporate practice, we bring together some of the leading voices in the sector, along with Ipsos experts across the world, to explore the issue.

MILLENNIALS IN PAKISTAN: New trends in attitudes and behaviours

Presenting a selection of findings from a comprehensive study on millennials, this summary report sheds new light on Pakistan's Generation Y – one of the country's most important and disruptive consumer segments.

THE POWER OF MODERN PARTISANSHIP: The aligning of social and political identity

While political partisanship is not a new phenomenon, the contemporary landscape has become ever more corrosive and detrimental to the functioning of society. This paper explores the current trends and effects.





CROSSING DIVIDES

This 27-country study for the BBC investigates public attitudes towards division and societal tensions around the world.

Key findings include:

- Three in four people think society in their country is divided, with citizens in Serbia (93%), Argentina (92%), Peru and Chile (both 90%) most concerned about division. On the other hand, those in Saudi Arabia are least likely to say their country is divided (34%), followed by China (48%) and Japan (52%).
- When asked how divisions have changed since ten years ago, six in ten (59%) feel their country is now *more* divided (compared with 16% who say it is less divided).
- Across the 27 countries, the greatest causes of tension are felt to be between people with different political views (44%), differences between rich and poor (36%), differences between immigrants and people born in the country (30%) and differences between religions (27%).
- There is, however, some optimism in the study: the majority of citizens (65%) believe that people across the world have more things in common than things that make them different, with agreement highest in Russia and Serbia (both 81%).

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'Natural'

What does it mean to consumers?

'NATURAL' FOOD: WHAT DOES IT MEAN?

Consumers are more conscious than ever about the safety and trustworthiness of food and drink, which has led to an increase in the use of terms such as 'natural' on packaging.

To help consumers feel more confident about the safety and purity of their food and drink, manufacturers are having to become more open about their ingredients, production and supply chains.

Although terms such as 'gluten-free' are easy for consumers to understand, 'natural' is slightly more ambiguous, leaving consumers and marketers to define it for themselves.

In this global study, we set out to discover exactly how consumers interpret the term. 'Without artificial ingredients', '100% from nature' and 'healthy' were the three most common associations.

Despite a strong consensus in opinion across the 28 countries, key regional differences were found and are highlighted in the report. For example, LATAM is significantly more likely to associate 'natural' with 'healthy', while North America is significantly more likely to associate the term with 'without artificial ingredients'.

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VIEWABILITY MATTERS

In this new paper, we examine what advertisers need to know about advertising viewability.

We tend to overestimate the impact of a technology in the short term and underestimate its impact in the long term. This maxim, conceived by Roy Amara, an American scientist and futurist, neatly describes the “hype cycle” of new technology and especially that of online advertising.

The promise of online advertising was to deliver more relevant, timely and targeted communications for the mutual benefit of consumers and advertisers. People would only be exposed to ads appropriate to their desires and at the moments when they were most receptive, while advertisers would cut waste and deliver hyper-efficient campaigns through laser-guided audience targeting and personalised messages. It hasn't turned out like that, yet.

Instead, 600 million devices now carry ad blockers and when ads do reach them, people skip and scroll. At the same time, over a third of programmatic ads are served to the wrong target audience, while ad fraud means that around 10-30% don't reach human eyes at all.

This paper explores the current reality of online advertising, what the challenges mean for advertisers and why success is grounded in robust research and survey data.



FLAIR INDONESIA 2018

As part of our *Ipsos Flair* series, this report reveals the deep dynamism of Indonesia, a country that is booming after decades of sustained economic growth.

Key points include:

- **Indonesia is dealing with the opposites:** GDP per capita ranks 107th in the world, with 100 million Indonesians (out of 260m) living below or on the poverty line. It's a buzzing topic on social networks globally: the four richest men in Indonesia are richer than the 100m poorest.
- **Indonesia is experiencing the rise of individualism:** For an increasing of number of Indonesians, life is a competition between individuals. Status and uniqueness are key to success, with Indonesians hungry for new things and relishing constant change.
- **Indonesia has a dualistic media landscape:** TV remains the main media for entertainment, offering dramas, soap, Indian movies, Bollywood, musicals, "The Voice", etc. While TV is the mass media amusing the public, the internet is the place where Indonesians seek and share information, news and views. The campaigns for the election of governors, especially in Jakarta, have exemplified this dichotomy.

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DRIVERLESS CARS

Most global consumers are intrigued but unsure by the idea of self-driving cars, according to this 28-country study.

Key findings include:

- 30% of global citizens are excited at the prospect of using self-driving cars and can't wait to do so, with people in India (49%), Malaysia (48%), and China (46%) most receptive.
- 13% say they would never use self-driving cars, with citizens in Germany (31%) and France (25%) most reluctant.
- When asked how often they would use self-driving car features for various activities, the top responses were parking (58%), commuting (53%), and driving on the highway (53%).
- The greatest perceived benefits to self-driving cars are making driving easier (69%), more comfortable (68%), and more relaxing (64%).
- As an unprecedented technology, much of the conversation surrounding self-driving cars has focussed on regulation. Respondents cite those who manufactured the cars (43%), followed by the government (28%) as the groups they are most likely to trust to write proper self-driving car regulation.

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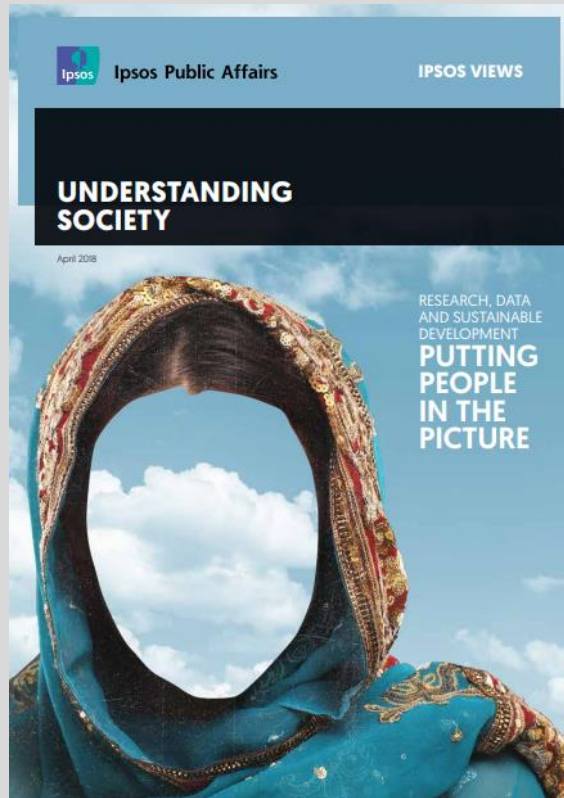
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UNDERSTANDING SOCIETY: PUTTING PEOPLE IN THE PICTURE

As sustainable development becomes more embedded in government and corporate practice, the world of research has increasingly shifted its thinking to economic, social and environmental impacts.

A year on from the launch of the *Ipsos Sustainable Development Research Centre*, we bring together some of the leading voices in the sector, along with Ipsos experts from all over the globe. This international review features contributions from Claire Melamed, Global Partnership for Sustainable Development Data, and Jamie Drummond, ONE campaign.

Topics covered include the challenges of translating perceptions to policy and action, how to build an inspiring global consensus on climate change, and how 'good' data is embedding progressive attitudes to women and girls among policy-makers around the world.

The ideas and actions presented reflect a changing world, but the message is an old one. When we put people's own experiences and views at the heart of policies and projects, we are much more likely to achieve something that is sustainable.

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MILLENNIALS IN PAKISTAN

This study sheds new light on Pakistan's millennials - one of the country's most important and disruptive consumer segments.

More brands are shifting their attention to millennials as they look to gain insights into how future consumers will shape tomorrow's trends.

In this comprehensive study on Pakistan's Generation Y, we discover new trends in attitudes and behaviours across key demographics.

This summary report presents a selection of findings from the study, including:

- Almost a quarter of millennials in Pakistan value their country's traditions passed down from older generations. However, almost half of millennials are not afraid to speak their minds, even if their opinions go against societal norms or expectations.
- While 58% of Pakistani millennials are optimistic about their future in the country, this varies drastically by gender (45% of women compared to 71% of men).
- Almost one third of Pakistani millennials are willing to give brands they have had a bad encounter with another chance – a figure that is significantly higher than in other countries in the region.



The Power of Modern Partisanship

The Aligning of Social and Political Identity and Its Effects
An **Our Age of Uncertainty** paper by Chris Jackson

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THE POWER OF MODERN PARTISANSHIP

This paper, part of the *Our Age of Uncertainty* series, explores the aligning of social and political identity and its effects.

In order to attract people to a broader sense of identity that unifies more than it divides, leaders today must understand where their people currently are and what political team they identify with.

Political partisanship is not a new phenomenon. However, contemporary partisanship has become more corrosive and detrimental to the functioning of society than at any time in recent history.

Partisans are increasingly isolating themselves from people on the other side, curtailing the moderating influence of having to socialise with people with different viewpoints. The strength of negative partisanship is also increasing, making it easier to believe the worst about your political opponent and making it harder to find common ground.

In addition, this paper details how most people who now identify as moderate or independent are opting out of regular political participation, paving the way for more extreme partisan voices to take the field.



SHORT CUTS

Alcoholic drinks: What's trending?

The alcoholic drinks industry, like many others, has experienced an interesting journey over the past few years. Regulatory changes and barriers, demographic shifts, changing consumer preferences, increased concern about health and technological evolutions have disrupted the market. In these two papers, we examine current trends and analyse the implications of industry changes.

- [Crafting a definition](#) looks at the craft beer revolution and how global brands have bought up independent breweries to create their own craft products.
- [What's my alternative?](#) looks at how the industry can respond effectively to the change in consumer behaviour around health.

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Flower Power! The impact of in-store gifts

Marketers are investing heavily across media channels to entice consumers, however, in-store shopping environments remain underleveraged.

In this article for the *Journal of Shopper Research*, we present research showing that when shoppers receive an in-store flower gift early in the shopping experience, it significantly increases their emotional arousal, reduces visual attention to price, boosts enjoyment, and improves touch-to-purchase conversion rates – compared to those who did not receive the gift.

The more retailers can engage consumers with positive associations and sensory experiences, the greater their chances of improving customer experience and driving purchases.

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Wearables fail to make mark in Hong Kong

The Hong Kong market is becoming increasingly saturated with tech hardware, but consumers do not seem in a rush to buy more, according to our latest *Media Atlas Survey*.

Ownership of sports cameras (such as Go Pro) lags at 6% of the Hong Kong population, while flying camera drones are owned by only 3% – although 4% are considering buying one. Meanwhile ownership of wearable devices stands at 9%, with 7% of consumers contemplating a purchase over the coming year. While newer forms of consumer tech are failing to excite the masses in great numbers, there are clear disparities in terms of gender and age. For example, those aged 35-44 show the most interest in flying drones.

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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.

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