
July 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 July 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



ETHNOGRAPHY: An unfiltered view of reality

This *Ipsos Views* paper presents a practical guide to ethnography; a research method investigating cultural practices, rituals, consumer behaviour, routines and social norms.

THE INCLUSIVENESS OF NATIONALITIES: Who is and is not a “real” national?

This 27-country *Global Advisor* study finds Canada and the US have the most inclusive definition of nationality, followed by South Africa, France, and Australia.

WHAT WORRIES THE WORLD: Over half feel their country is on the “wrong track”

Our latest *What Worries the World* survey finds people in Italy (86%), Mexico (85%), Brazil (83%) and Spain (80%) have the greatest levels of concern that their country is on the “wrong track”.

ARTIFICIAL INTELLIGENCE: The revolution of AI in the workplace

This study finds overall optimism towards artificial intelligence (AI) in the workplace, but also significant worries about privacy, job security and economic equality.

THE NUMBERS GAME: Measuring audiences in the data age

The emergence of digital media has changed the way planners and buyers look at audience measurement. This paper examines the current landscape, including the challenges faced by the industry and what the future might hold.

THE POWER OF CULTURE: How culture affects our social norms

In this report, we look at the effect of culture on our social norms and the underlying tensions it can create, showcasing examples and practical solutions to building cultural understanding.

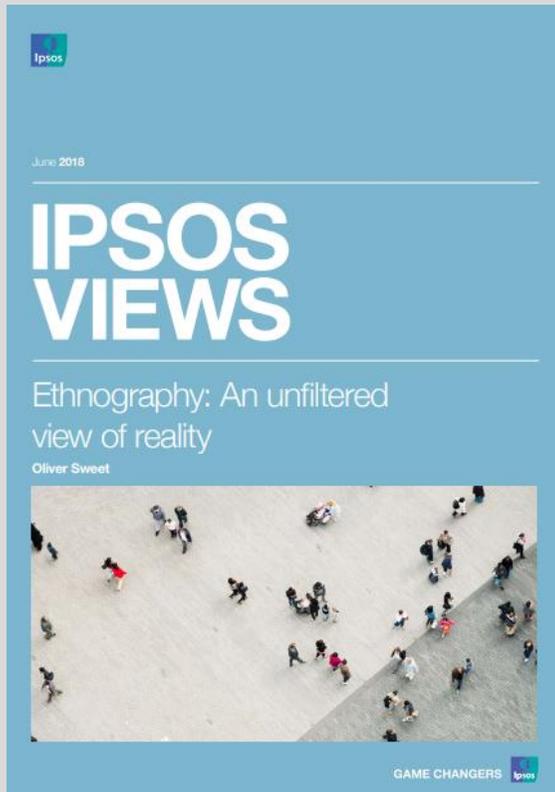
“MOODVERTISING” DURING THE WORLD CUP: Why is the mood of the crowd so important?

This paper showcases our learnings from ad testing during huge sporting events and shares evidence that the mood of the crowd can play a critical role in how consumers respond to a brand.

A WASTED OPPORTUNITY: The challenges of food waste

With global waste estimated to rise to 2.2 billion tonnes by 2025, this paper explores the complex obstacles and hurdles faced in the war on food waste, including where the concern and responsibility lies.





ETHNOGRAPHY: AN UNFILTERED VIEW OF REALITY

Ethnography is a research method that investigates cultural practices, rituals, consumer behaviour, routines and social norms – helping us identify previously unseen opportunities.

Today ethnography can be applied to any culture, and many contexts, including our own. It is used in numerous sectors – including healthcare, financial services, fast-moving consumer goods and automotive – and is highly adaptable due to its dedication to interpreting human behaviour.

Despite being one of the oldest fieldwork techniques, it is often characterised as being a new, sometimes innovative, research method in market research.

In this *Ipsos Views* paper, we go back to basics to present a practical guide to ethnography, covering:

- What makes ethnography, ethnography?
- The case of identity theft: what isn't ethnography?
- Making decisions based on ethnographic insight.

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THE INCLUSIVENESS OF NATIONALITIES

Who is and is not a “real American”, a “real Chinese”, or a “real Brazilian”?

Results from our latest 27-country *Global Advisor* study find Canada and the US have the most inclusive definition of nationality, followed by South Africa, France, and Australia. The study reflects social acceptance of diversity as it applies to religion, immigration, sexual orientation and gender identity, political views, and criminal background.

Other key findings include:

- A majority of respondents in 13 countries – including three-quarters in the US and two-thirds in Canada and Australia – consider that an immigrant who has become a citizen of a country is a “real” national. On the other hand, most people in Malaysia, Hungary, Serbia, and Turkey disagree with this statement.
- Three countries have at least two-thirds of respondents that consider atheists as “real” nationals – France, Canada and Sweden. Nearly half in Malaysia and seven in ten in Saudi Arabia think an atheist is not a “real” national of their country.
- At least 65% of adults in all but three countries think that someone who has served in the armed forces is a “real” national.

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WHAT WORRIES THE WORLD

The latest *What Worries the World* survey finds that over half (58%) of citizens across 28 countries feel their country is on the “wrong track”.

Key findings include:

- People in Italy (86%), Mexico (85%), Brazil (83%) and Spain (80%) show the greatest levels of concern that they are on the “wrong track”.
- Once again, China is the nation which inspires the most confidence about the direction it is taking: 92% say things are going in the right direction. Saudi Arabia, on 76%, remains in second place, followed by South Korea (74%) and India (60%).
- Optimism in Poland about the country’s direction has risen 11 points since last month to 44%. Their rise in positivity was followed by South Korea (74% - representing a 9 point upturn).
- The five major worries across the world are; financial/political corruption (35%), unemployment (34%), poverty/social inequality (33%), crime and violence (32%) and healthcare (24%).

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THE REVOLUTION OF AI IN THE WORKPLACE

This study – conducted in Canada, China, France, Germany, Spain, the UK, and the US – finds overall optimism towards artificial intelligence (AI) in the workplace, as well as significant worries about privacy, job security and economic equality.

Highlights include:

- AI adoption varies widely among countries; 31% of respondents in China say they work in organisations that already use AI, followed by North America (26% in Canada, 24% in the US) and Europe (20% in the UK; 18% in Spain, 16% in France, and 15% in Germany).
- In workplaces that use AI-powered tools, more than two-thirds of employees say it has already had a positive impact on their efficiency (75% cite improvements in their effectiveness, 75% in their results, and 74% in how their work is structured).
- More than two-thirds of workers fear that AI will eventually lead to job losses due to a reduced workload, while 65% are afraid that AI will dehumanize work, resulting in reduced social cohesion.

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THE NUMBERS GAME

Audience measurement is a discipline swimming in numbers and, with the emergence of Big Data to supplement or even replace more traditional survey approaches in many cases, now throws out even more numbers.

The emergence of digital media, and the data that comes with it, have made the job of sifting through these numbers more challenging than ever – changing the way planners and buyers look at audience measurement.

The basic difference between traditional and digital audience measurement is that traditional measurement captures exposure to a *medium*, while digital measurement focuses on the *audience* itself. For example, traditional television audience measurement is based around tracking TV sets within a household and who is present when they are switched on. What digital audience measurement seeks to do is to identify and track individuals as they surf the internet enabling them to be targeted wherever they go online (sometimes known as ‘re-targeting’).

In this paper, we explore the current digital advertising and audience measurement landscape, including the challenges faced by the industry and what the future might hold.

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THE POWER OF CULTURE

This report explores the way in which culture affects our social norms and the underlying tensions it can create – whether that be in brands, business, politics or society.

Cultural insight increasingly offers clues and explains behaviour in a way other forms of analysis can overlook. If we don't focus in on culture, how can we expect our communications to be effective, our brands to have salience, or our policies to be attuned to people's true beliefs and behaviours?

In this report, we showcase some practical solutions to building cultural understanding, sharing examples which have led to more culturally relevant, impactful outcomes:

- *Mars Petcare's* award-winning story explains how we used cultural insights to create relevance in emerging markets.
- *Public Health England* set out how they used cultural analysis to ensure strategies around health and wellbeing are developed to work with the consumer to drive positive behaviour change.
- *The Economist* used their understanding of gender norms to become more inclusive.

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“MOODVERTISING” DURING THE WORLD CUP

Why is the mood of the crowd so important?
And how can it influence the ROI of your advertising?

Sporting events such as the World Cup involve passion, highly emotional content and provide incredible moments. Many marketers take the opportunity to invest in communications that build and/or reinforce traits such as pride, patriotic values or the sense of belonging that a national team can help convey.

This paper examines the risks and benefits for the advertisers in this situation. We showcase what we have learned through ad testing during these huge events, and share evidence that the mood of the crowd can play a critical role in how consumers will respond towards a brand.

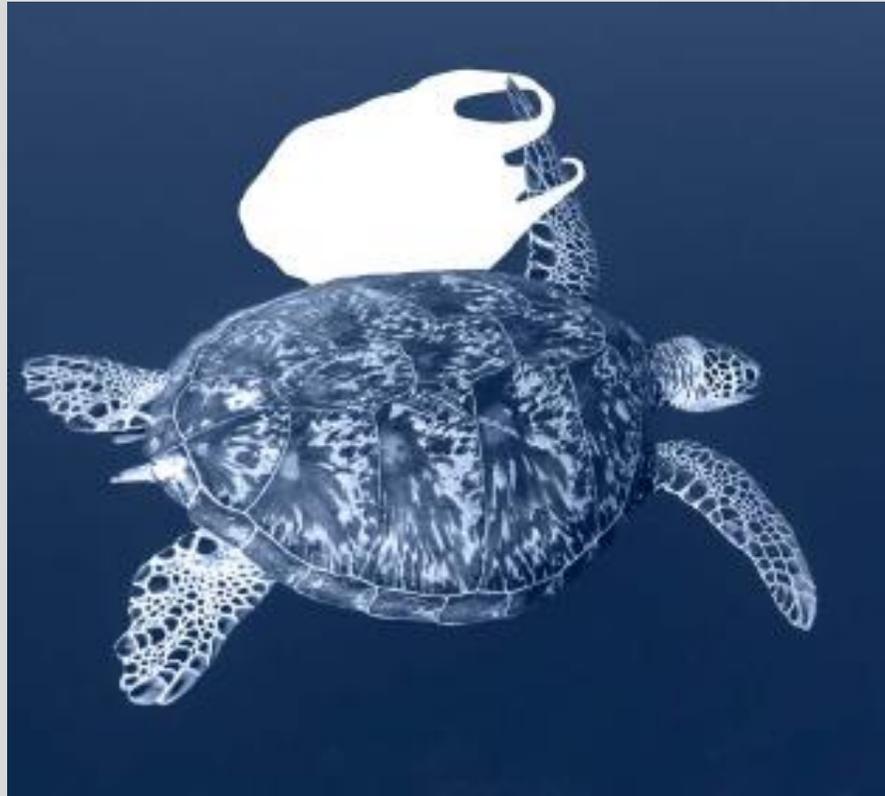
Global attitudes towards the FIFA World Cup 2018

The World Cup was also the topic of a recent [Global Advisor poll](#) carried out ahead of the competition. Findings include opinions on the favourites to lift the cup (almost a quarter of global citizens were proved wrong following Germany’s shock exit in the group stage), as well as trust in FIFA and attitudes towards the host country, Russia.

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A WASTED OPPORTUNITY

This paper explores the complex challenges faced by manufacturers, retailers, councils and consumers in the war on food waste.

The world generates approximately 1.3 billion tonnes of waste annually, with Asia alone accountable for 1 million tonnes per day. With current urbanisation and population growth rates, global waste is estimated to rise to 2.2 billion tonnes by 2025. Despite huge investment, countries are battling with the challenge of preventing environmental degradation.

In this paper, we present the challenges of food waste and recycling faced by manufacturers, retailers, councils and consumers in the UK, while also showcasing data from our *Global Trends Survey* across 22 countries. We look at where the concern and responsibility lies, and who the public believe should take the lead on tackling this issue.

Framed within the context of consumer behaviour and lifestyle choice, there are many considerations that must be addressed to achieve effective change. The paper suggests three potential routes forward, focusing on design, behavioural science and messaging, with the aim of working towards a more sustainable future.

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SHORT CUTS

Super Mario and behavioral science

For anyone who wants to learn more about customer experience and behavioral science, video game legend Super Mario is a great metaphor. In this *Quirk's Media* article, Namika Sagara from Ipsos' *Behavioral Science Center* explains why:

“Those who grew up playing the very first Super Mario may remember investing great time and effort in trying to beat a particularly hard level. More recent games are structured differently. In the mobile game *Super Mario Run*, players can immediately see that it caters more towards what behavioral scientists call System 1 processing. One sub-game called *Toad Rally* lasts just 60 seconds, catering to our limited attention and need for instant gratification.”

Read the full article to discover what else Super Mario can teach marketing researchers about behavioral science.

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Our age of uncertainty

Consumer concerns about technology were the focus of a recent presentation for *The World Economic Forum Industry Strategy Meeting*. In this report, Ipsos' Clifford Young explores a number of key topics and data, including:

- **Consumer concern around data privacy and security** (22% of global internet users are “much more concerned” than a year ago about online privacy).
- **Consumer sentiment around automation** (70% say they worry a lot about data security when using automated devices).
- **Perceptions of automation in the workplace** (47% say the loss of jobs is the main drawback of automation in the workplace).
- **Mental health risk among young people** (63% of millennials have “high risk mental health”, compared to 24% of baby boomers).

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Viewability with brand impact

The often-forgotten secret of digital advertising is that it's just advertising. Great digital creative can gain attention and impact the brand – even if it's just a simple banner ad.

In partnership with *Lumen*, we ran a research project to ascertain what it takes to get a viewer's attention and, more importantly, how this can be converted to brand impact. Consequently, this paper sets out five key rules for honing your creative to get the most out of your digital ad spend:

1. Look don't read
2. Big bold branding
3. Get to the point
4. Strong visual hierarchy
5. Remember; viewability doesn't equal attention and attention doesn't equal brand impact.

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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 with any comments, including ideas for future content.

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