



October 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 October 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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BEYOND POPULISM? REVISITED

Is the 'system is broken' belief still strong?

The survey analyses the subject of populism and 'the system is broken' sentiment across 25 countries and how this compares to 2016. One key finding of the report is fewer people think their country is in decline.

LAST IMPRESSIONS ALSO COUNT:

How to evoke an emotional response

We're forever told of the importance of making a good first impression, but, what about *last* impressions? This report argues that our memories can be governed more by how an experience ends than how it begins.

FOREIGN COUNTRIES AND DEVELOPMENT:

What Kenya thinks

This report provides an overview of what Kenyans think about foreign affairs. This includes which country Kenyans consider is most important to have close links with and what they think of President Trump.

HOW DIVIDED IS AMERICA?

A breakdown of the US ahead of the Midterms

Ahead of the Midterms, Ipsos has launched Political Atlas, which provides daily updates on the big issues along with poll and social media insight. GenPop shows how Americans are more similar than some may think.

UNDERSTANDING THE PERSPECTIVES OF

YOUNG PEOPLE AROUND THE WORLD

This report paints a global picture of optimism amongst young people, particularly in lower and middle-income nations. They expect a brighter future for themselves, their country, and the world, than adults do, the report finds.

MENA'S MILLENNIALS DECODED:

Where do the wealthiest spend their holidays?

In order to better understand the generation, Ipsos in MENA launched #Millennials; a comprehensive study of this segment covering eight key markets to highlight the trends which best define millennials.

FOUR WAYS AGILE RESEARCH WILL EVOLVE TO DRIVE INNOVATION

In today's fast-moving, shape-shifting world, it seems virtually every business, every marketer, and every researcher wants to be agile. But, what exactly does agility mean? And what changes will it bring about?

THE SECRET TO UNLEASHING A DISRUPTIVE BRAND? Stop being a victim

Being able to ride the waves of disruption is a skill all brands must master. This report sees us speaking to Ipsos clients to find out how to survive in a transforming market and handle the changes disruption brings.





BEYOND POPULISM? REVISITED

Our latest Global Advisor analyses the persistence of populism and 'the system is broken' sentiment across 25 countries.

The survey paints a picture where fewer people think their country is in decline than in 2016. However, many still believe the system is rigged against them, leaving them at risk of becoming alienated from mainstream politics: a majority are looking for a strong leader willing to break the rules.

This report is also available in [French](#) and [Spanish](#).

Findings include:

- Just under half (44%) of people believe their country is in decline, down from 57% in 2016. Perceptions of decline are strongest in Brazil (67%) and South Africa (64%). Less negative are Chile (24%) and Germany (25%).
- Two in three on average (63%) believe their country's economy is rigged to advantage the rich and powerful, which is down from 69% in 2016.
- A majority of people (59%) across 23 countries feel their traditional parties and politicians do not care about them.

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UNDERSTANDING YOUNG PEOPLE AROUND THE WORLD

This report paints a global picture of optimism amongst young people, particularly in lower and middle-income countries.

This new research for the Bill and Melinda Gates Foundation found young people to be consistently more optimistic about the future than older generations. In each of the 15 countries covered, young people expect a brighter future for themselves, their country, and the world, than adults do.

Other findings from the report include:

- Levels of optimism are highest in low and middle-income countries, and young people in these countries are the most optimistic group across all measures.
- Younger people in low and middle-income countries are more likely to agree that “my generation will have a more positive impact on the world than my parents” (63%), than their counterparts in higher-income countries (39%).
- There is more convergence when it comes to politics; just 23% of adults and 30% of 12-24 year olds globally think their politicians care about “people like me”.

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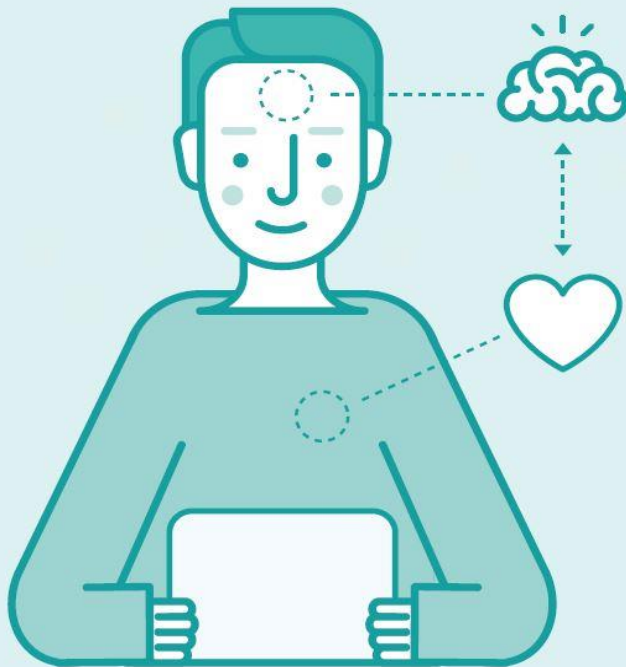
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LAST IMPRESSIONS ALSO COUNT

While we're forever told of the importance of making a good first impression, this paper asks: what about *last* impressions?

Studies in social psychology have found that, on average, we judge someone within seven seconds upon meeting them for the first time.

With such a short window for a video ad to tell its intended brand story, it's understandable that marketers focus on tactics to grab initial attention, such as striking visual images and including brand images and assets early.

But, what about *last* impressions?

This new paper argues that our memories can be governed more by how an experience ends than how it begins.

With this, our authors ask: If brand choice can be influenced by how easily retrievable memories are, should last impressions should matter more in advertising?

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MENA'S MILLENNIALS DECODED

A glimpse into MENA's most disruptive generation.

In order to better understand the generation, Ipsos in MENA launched *#Millennials*, the first and most comprehensive study of this segment.

#Millennials covers eight key markets in MENA and our report highlights the key trends that best define this generation, with insights relating to their lifestyles, behaviours, and attitudes.

The markets featured are Saudi Arabia, UAE, Kuwait, Jordan, Morocco, Iran, Tunisia, and Egypt.

Key findings:

- 57% are fascinated with other cultures and enjoy learning about them.
- 55% make sure they are always updated on global affairs.
- 47% consider themselves a global citizen rather than a person belonging to a certain group.
- 94% are present on at least one social media platform.
- 48% say they only buy from brands that are socially responsible.

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FOREIGN COUNTRIES AND KENYA'S DEVELOPMENT

This report provides an overview of what Kenyans think about key foreign affairs issues

The report provides a wide-ranging demographic profile of the country as well as a breakdown of Kenyans' views on the world around them.

Findings include:

- 45% of working-age Kenyans are self-employed.
- 35% of Kenyans see the US as the development partner of greatest benefit, ahead of China (25%), despite the latter having established a much more visible 'footprint' in the country.
- China is considered by 26% to be the biggest threat to Kenya's economic and political development, with 12% saying US poses the greatest threat.
- Among the 62% of Kenyans who could name Donald Trump as the US President, some 68% have a negative view of him, whilst only 5% reported a positive opinion of the current occupant of the White House.

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FOUR WAYS AGILE RESEARCH WILL EVOLVE TO DRIVE INNOVATION

In today's fast-moving, shape-shifting world, it seems virtually every business, every marketer, and every researcher wants to be agile. But, what exactly does agile mean?

A recent Ipsos global survey found that only 24% of consumers felt that brands deliver regular innovations and products. Indeed, back at headquarters we find 94% of global executives are dissatisfied with their organisation's innovation performance.

This report argues that new agile research approaches are needed to help marketers better innovate.

It states that agile research will evolve in four ways:

1. Research quality will be delivered quicker, with new systems to assess respondent engagement and fraud.
2. Social intelligence will be leveraged in product development.
3. Artificial intelligence will help facilitate iteration through its ability to automate.
4. Modular innovation will become more prevalent.



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HOW DIVIDED IS THE US?

Our look ahead to the Midterm elections in November: do Americans have more in common than many would think?

With the US Midterms on the horizon, Ipsos, with the University of Virginia Centre for Politics, has launched [Political Atlas](#).

This provides daily updates of the main issues affecting citizens in all 50 states, along with poll and social media indicators for every congressional, senate, and gubernatorial race in the country. To read more [click here](#).

[A new survey of the US public](#) asks “Has Trump made America great again?” It finds only 18% think the US government handled Hurricane Maria well, while 44% believe the US economy has yet to recover from 2008’s economic crash.

Looking through the prism of politics, America appears a greatly fractured nation, but our latest analysis [GenPop](#) points out that [there is much which unites Americans](#).

It highlights 118 things Americans have in common, such as bottled water, Tom Hanks, and Medicare for all.

To read more ways Americans are united [click here](#).

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THE SECRET TO UNLEASHING A DISRUPTIVE BRAND? STOP BEING A VICTIM

This report gathers the views of global marketing research clients to find out how brands can survive in a transforming market.

As brands struggle to survive in a transforming world, brand managers often ask: What are the driving forces behind these changes? Which changes should we pay attention to? How should we react?

In this piece, we argue that these are not the only questions that need to be asked. It's imperative for marketers to also consider:

- Which changes in my category are truly disruptive?
- Is my brand initiating any of these disruptions? If so, in what sense?
- If not, how am I harnessing my brand or portfolio against these disruptions?

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SHORTCUTS

How digital is driving African media growth

This is the 5th Affluent Survey Africa, which measures media use and consumption behaviour of the top 15% of earners in Cameroon, Ghana, Kenya, Morocco, Nigeria, South Africa, and Uganda.

Key findings of the survey include:

- Despite internet penetration in the continent lagging behind other regions of the world, Africa's affluent population have embraced digital technology more rapidly than their European counterparts: many more of them are watching TV on tablets, computers and smartphones, and more of them read newspapers digitally.
- International TV channels now enjoy a higher reach amongst the affluent population than national channels.
- Social media is now considered the first port of call for news amongst a substantial proportion of the affluent population.

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“Mindful hedonism”: the new luxury

The days of compulsive and frenetic consumerism are gone. The new narrative in luxury is “mindful hedonism”, according the World Luxury Tracking survey.

The categories most associated with luxury, such as handbags and watches, have been replaced by the “new classics” of jewellery and travel.

Our annual study looks at five countries from “The Great East”: China, Hong Kong, Japan, South-Korea, and Russia.

The report found three trends to characterise the expectations of “The Great East” Affluents:

- **Me, myself and us:** Luxury as a personal development tool, but always in relation to the community.
- **Casual materialism:** A cooler, more conscious and more mindful materialism.
- **Intense fluidity:** A realiance between fluidity and intensity to enhance consumer satisfaction.

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An exploration of diets globally

The report looks at the current diet of consumers across 28 countries, including the length of time they have been making those dietary choices.

The report includes:

- An omnivorous diet is the most common diet globally, with non-meat diets (which can include fish) followed by over a 10th of the global population.
- 43% of vegetarians globally have been following the diet for six months or less.
- Campaigns to reduce meat consumption are working – 39% of meat limiters say that meat reduction campaigns have made them aware of the benefit of eating less meat.
- 16% say that advice from ‘healthy-eating bloggers’ has lead them to reduce the amount of meat they eat.

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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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