
February 2019

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 February 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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WHAT WILL HAPPEN IN YOUR COUNTRY THIS YEAR?

Our new Global Advisor poll asks people across 31 countries what they think will happen in the global economy, world affairs, technology, culture and society in 2019.

THE THIRD MOMENT OF TRUTH Sustainable packaging as a corporate necessity

As environmental attitudes and shopping habits change, this paper argues that effective packaging offers real rewards for brands who demonstrate leadership on sustainability.

IGNORANCE AND DISTRUST ABOUT WHAT HAPPENS TO PERSONAL DATA

Ipsos and the World Economic Forum are launching a research program to track and decode public understanding and acceptance of new technologies across the globe.

CHILDHOOD OBESITY IN THE GCC: An ethnographic lens into a regional epidemic

We discover that childhood obesity rates have reached epidemic proportions in the region. A contributing factor is the sustained socio-economic growth, which has transformed the traditional Arab lifestyle.

COUNTRY BRIEFINGS: China's affluent consumers

With Chinese consumers expected to account for 44% of the world's total spending on luxury by 2025, we explore who are the country's affluent consumers and how to engage with them.

INTRODUCING THE NEW ERA OF LEAD USER INNOVATION

New research shows that it is not the producers but the consumers themselves who are the real pioneers. Our paper looks at the 'lead users', those with a motivation to develop solutions and create new products.

SHOULD BRANDS TRY TO CHANGE THE WORLD?

As more and more brands are taking on social issues, acceptance of short-term backlash, particularly on social media, should be expected. We present new analysis of the public's response to Gillette's latest advert.

MEASURING MEDIA IMPACT AND MAXIMISING VALUE

We have released two papers analysing media effectiveness. It's about time: measuring media impact and Media optimisation: does your media plan maximise, or just cut costs?





WHAT WILL HAPPEN IN 2019 IN YOUR COUNTRY

Our new Global Advisor Predictions survey looks at what the public think will happen this in world affairs, society and technology this year.

People around the world are less optimistic about the global economy than in 2018, our 31-country survey suggests.

Two in five (37%) expect major stock markets around the world to crash in 2019, a figure which has risen from around a quarter who expected a crash in 2018 (28%).

Expectations of a crash have almost doubled in Great Britain (47% compared with 25% last year) and Russia (47% compared with 26%).

Around the world, people are most confident in predicting that average global temperatures will increase this year, with nearly four in five (78%) thinking so (up from 71% last year).

Over half (56%) expect large scale public unrest (such as protests or riots) in their country.

Meanwhile, 13% anticipate that 2019 will be the year when aliens visit the Earth.

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WHO ARE CHINA'S AFFLUENT CONSUMERS?

Two new briefing papers put the spotlight on China's affluent consumers - and how to engage with them.

The first paper, *Who are China's Affluent Consumers?*, picks out four key macro-forces in the segment. These are: Status-seekers and Appreciators, Chinese women as independent consumers of luxury and lifestyle brands, Millennials and Technology.

The second paper, *Engaging China's Affluent Consumers*, looks at spending beyond national borders, striking the balance between accessibility and exclusivity while also looking at the future of brick-and-mortar boutiques.

The papers also explain what luxury, and non-luxury, brands are doing successfully in China.

Meanwhile, as part of its ongoing research on the United States affluent market, Ipsos has launched [Affluencers and the Power of Authentic Influence](#). This report analyses how "affluencers" develop their influence. They tend not to be celebrities, vloggers or social media stars. Their influence isn't based on social status or vanity metrics, but on authenticity, and is built from the ground up.

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THE THIRD MOMENT OF TRUTH: WHY SUSTAINABLE PACKAGING IS A CORPORATE NEED

As environmental views and shopping habits change, this paper shows how effective packaging offers real rewards for brands

Sustainable packaging is no longer a choice for brands but a corporate necessity, our analysis finds.

“We’re at a metaphorical tipping point where fundamental attributes of packaging design are increasingly questioned.”

“In a world of flat CPG growth, it is packaging which offers manufacturers real opportunity to develop meaningful differentiation, driving distinctiveness, salience and ultimately influencing choice.”

Sustainable packaging is becoming a greater concern to consumers, with eight in 10 people globally feeling we are heading for an environmental disaster unless we change our habits quickly.

Consumers’ expectations are changing. In the US, 82% of adults agree with the statement “I think manufacturers should actively support recycling initiatives for the products they sell.”

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INTRODUCING THE NEW ERA OF LEAD USER INNOVATION

Marketers and market researchers should no longer assume it is their task to develop innovative product concepts for consumers.

In many arenas, it is 'lead user' consumers who are the real pioneers and should be at the centre of the modern innovation process..

A new method developed by Ipsos and specialists at the Massachusetts Institute of Technology (MIT) allows producers to efficiently identify commercially-promising novel concepts to market.

The four-step process uses machine learning algorithms and expert validation to 'scrape', filter and validate online content to find these Lead User Innovations.

A pilot study looking at kitesurfing identifies improvement innovations to existing equipment as well as ideas that could incubate a new sporting direction.

Trend and popularity analysis make it possible to track the adoption of trends and evolution of innovations, taking the guess-work out of which concepts will prove successful.

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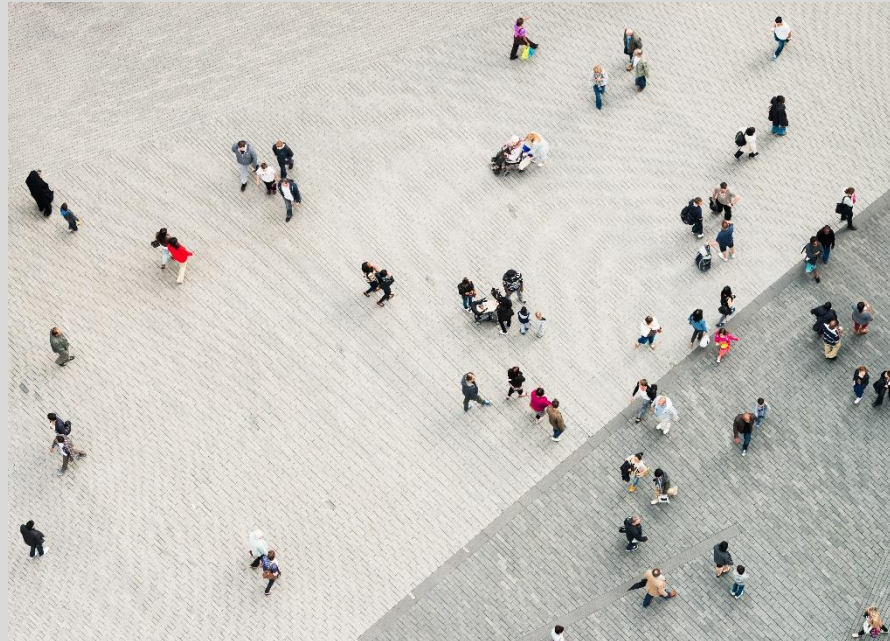
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COMPANIES, GOVERNMENTS AND PERSONAL DATA

The report, developed in partnership with the World Economic Forum, looks at public understanding and acceptance of new technologies around the world.

A third of people globally know “nothing” or “very little” about how their personal information is used by companies and government, the report finds.

There is a lack of trust in companies and governments to handle personal data in the correct way. Trust is lowest for foreign governments (20%), but we also find that only a minority of citizens trust their own national government (39%).

Two-thirds of consumers say they would be more comfortable sharing personal information with a company if it was clear about how it uses the data.

See our [global predictions poll](#) for more on this topic. One in two people (50%) think that their personal data will be leaked on the internet this year.

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SHOULD BRANDS TRY TO CHANGE THE WORLD?

As more and more brands are taking on social issues, acceptance of short-term backlashes, particularly on social media, should be expected.

It is the job of advertising to elicit a reaction from consumers. It is the job of advertisers to plot the course on *how* to do this.

Recently Gillette has chosen to use its significant reach to address an issue that has been increasingly prominent in the last few years.

This paper provides an analysis of the social media response to Gillette's new advert.

We find:

- 36% reacted negatively, while 16% were positive to the campaign in the days following its release.
- Its detractors voice concern about stereotyping male behaviour and trying to “shame” men.
- Meanwhile, supporters of the campaign applaud Gillette for “making people think” and urge critics to reflect on *why* they feel the way they do.

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CHILDHOOD OBESITY IN THE GCC

We go below the surface to explore the issues at hand.

Childhood obesity rates in the Gulf Cooperation Council states have reached epidemic proportions, our new report from the Ipsos Ethnography Center for Excellence in MENA finds.

This is due, at least in part, to sustained socio-economic growth across the GCC which has transformed the traditional Arab lifestyle.

Key findings of the report include:

- Many believe that 'exercise trumps diet': children are granted leeway to have unhealthy diets, if they take part in any form of exercise.
- Parents consider food as 'the currency of love', with mothers in particular giving in to junk food requests, to maintain their connections with their children.
- The harsh climate in the region is limiting outdoor activities for children.

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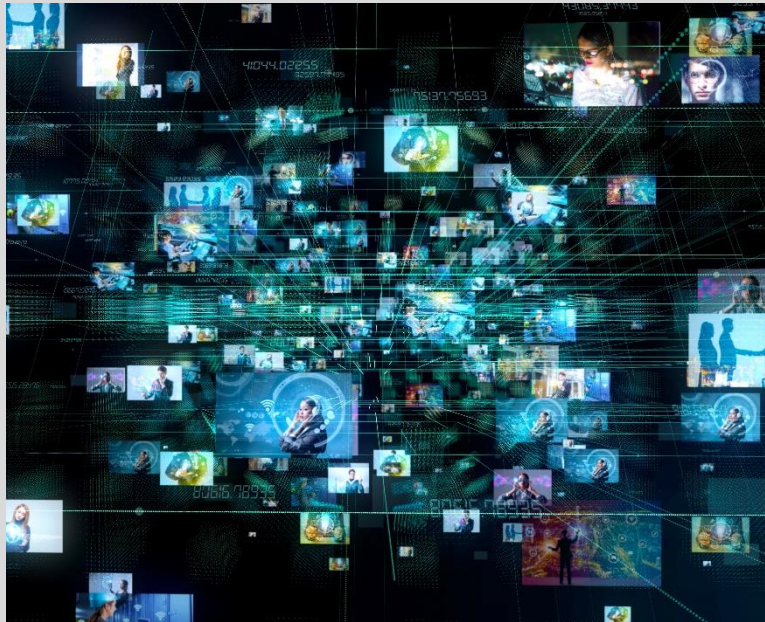
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MEASURING MEDIA IMPACT AND MAXIMISING VALUE

Two papers on the media industry look at measuring media impact and how to make the most from your media plan.

It's about time explores how time can be incorporated into audience measurement practices for advertising. As a metric, it is quantifiable, applies to any medium and fairly simple to implement – it is already used to some extent in publishing and radio. But it is no panacea.

Because all minutes spent using media are not equal. Some minutes are spent highly engaged with content and others much less engaged. The challenge is to translate time measures into impact.

The second paper, *Media Optimisation: Does your media plan maximise value, or just cut costs?*, argues that excessive focus on cutting costs can obscure consideration of good value.

The importance of creative has not diminished with the evolution of media, and it is likely more important than ever to gain attention in a cluttered media world. However, the choice of *which* media channels to use is now more pivotal to the success of an ad campaign.

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SHORTCUTS

Mobile and rapid digital growth in India

Amit Adarkar, head of Ipsos in India, looked at the unprecedented pace and scale of digital adoption in one of the world's fastest growing economies in this WEF blog.

Mobile technology and rapid digital adoption have hugely influenced consumers' system behaviour and decision-making.

While some areas of business, such as social media networks, e-commerce platforms and shared mobility apps, have taken advantage of this change, many have not.

With India expected to have more than one billion internet users by 2030, nearly all going online primarily through mobile phones, this paper argues that FMCG and major automotive players have to adapt to this changing market at a time when the information divide between rural and urban consumers is narrowing.

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Martin Luther King's enduring legacy

To mark Martin Luther King's 90th birthday, Ipsos looked at attitudes towards the civil rights leader alongside other prominent African American leaders.

Dr King registers a favourability rating of 90% among Americans, followed by Rosa Parks (88%) and Muhammed Ali (77%). Among contemporary figures, Colin Kaepernick had a favourability rating of 41%.

Other findings include:

- 70% say the Civil Rights Movement of the 1960s made the United States better.
- The Black Lives Matter movement is more polarising, with 39% saying it's made things better compared to 31% saying it has made things worse.
- Other movements recorded greater support such as the LGBTQ equal rights (46% better vs 23% worse) and #MeToo (45% vs 22%).

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Tourism and its effect on the city

In the first ever global survey from Ipsos and the World Tourism Organisation (UNWTO), 47% think "they live in cities with a high number of tourists."

However, results vary across the 15 countries surveyed, with Australia reporting 68% and France 33%.

Key findings include:

- 52% think tourism has a big or moderate impact on generating wealth and income, with this sentiment particularly marked in countries like Argentina, Australia and South Korea.
- 49% say "there should be measures to manage tourism."
- The most popular measures include "improve infrastructure and facilities" (72%), "create experiences and attractions that benefit both residents and visitors" (71%) and "ensure local communities benefit from tourism" (65%).

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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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