
March 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 March 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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EMPTY PLANET: The shock of the global population decline

While many fear the consequences of future human overpopulation, it may be that we are heading for quite the opposite. A new book explores why global population decline is a possibility, and looks at its geopolitical impacts.

GLOBAL ATTITUDES TOWARDS AUTOMATION A positive assessment?

The second in our series of reports with the World Economic Forum on public acceptance of new technologies looks at automation. It finds very different levels of favourability and preparedness across 26 countries.

JAPAN BRIEFINGS The worries and work habits of the Japanese

Two new country briefings from local Ipsos team on Japanese society: Why is poverty and social inequality the country's top concern? Are the Japanese really workaholics?

IS YOUR INNOVATION RESEARCH ON ITS BEST BEHAVIOUR?

Refuting criticism that surveys cannot provide behavioural insights, our new paper presents Ipsos' survey-based behavioural measures and shows how they can still predict innovation success.

PERENNIALS: The future of ageing

New Ipsos research in 30 countries explores how our ageing societies are simultaneously a feat of medical and scientific achievement, a social challenge, and an exciting opportunity.

HOW THE ASIAN MOTHER IS CHANGING And how to win her over

Presenting the findings of 'Mothering Excellence', Ipsos' qualitative research study in 11 Asian countries, our new white paper uncovers current trends and strategies in mothering behaviour.

BE BOLD, BE CREATIVE, DO RESEARCH! Developing brand-building ideas

Brands can capture the creative spark needed to set themselves apart by engaging in early communication research. Three examples of brave breakthrough campaigns illustrate this process.

KEEPING IT FRESH: Being on trend in food and drink

Informed by Ipsos' Mega Trends, we uncover how food and beverage brands can adapt their offerings in 5 key ways. Our team look at how evolving social preferences and expectations influence consumer choice.

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EMPTY PLANET: GLOBAL POPULATION DECLINE

The global population is unlikely to reach the UN's prediction of 11.2 billion people by 2100. Instead, it could peak at nine billion, and then start to go down.

Contrary to warnings of a burgeoning planetary population overwhelming the earth's resources, a new book by Ipsos' Darrell Bricker and co-author John Ibbiston argues that the global population will soon begin to decline.

Depopulation is historically the result of a catastrophe such as ice ages, plagues and civilizational collapse. But this time, it will be down to deliberate decisions to have fewer children.

In much of the developed and developing world, this population decline is already under way through trends such as urbanisation, women's empowerment and declining religiosity.

A smaller global population will bring a number of benefits:

- fewer workers will command higher wages;
- good jobs will prompt innovation;
- the environment will improve;
- the risk of famine will wane; and
- women will enjoy greater affluence and autonomy.

But enormous disruption lies ahead, too, as population decline could dramatically reshape the social, political, and economic landscape.

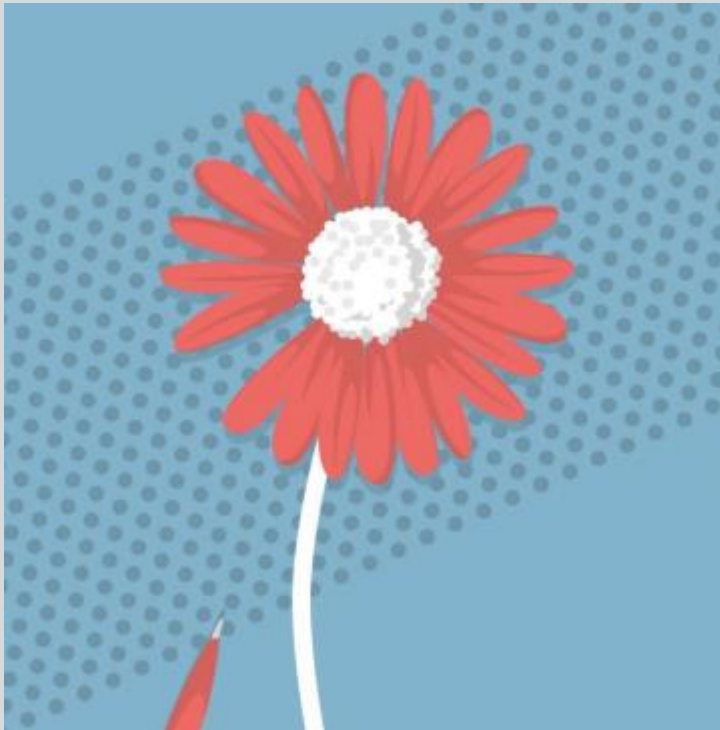
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PERENNIALS: THE FUTURE OF AGEING

Younger generations are often considered the 'disruptors', but our new research suggests that ageing is having an even greater impact on our society.

By 2050, there will be over 2 billion people aged over 60. But only a third of people around the world are looking forward to old age.

Findings from a new Ipsos report show what this demographic shift looks and feels like, and how it differs depending on where in the world you are.

- Old age starts latest in Spain, at 74 (according to Spanish people). In Saudi Arabia you become 'old' at 55. The global average of when old age starts is 66 years old.
- The perception of ageing populations as a 'major' problem is most pronounced in Japan (87%), South Korea (79%) and China (67%).
- Latin American countries are among those most likely to agree that there is a 'lack of respect' for the elderly.
- Only 29% globally believe that the elderly have *too much* political influence.

[See the survey data from 30 countries.](#)

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GLOBAL ATTITUDES TOWARDS AUTOMATION

Automation has transformed the way we work and the verdict (so far) from people around the world is broadly positive.

The latest report on public acceptance of new technologies by Ipsos and the World Economic Forum finds that attitudes towards automation vary widely across countries.

While, on average, twice as many respondents say automated technologies have a positive impact on society than a negative one (43% vs 19%), there is a wide gap in attitudes between high- and low-income countries.

For example, 64% in China and 62% in India rate the impact of automation technologies positively compared to just 22% in Germany and France, and 23% in Belgium.

Among the findings:

- Nearly half of workers globally report that automation has totally transformed their job.
- On average, three in ten workers say automation is putting their current employment at risk.
- This concern is highest among agricultural workers (38%) and those in administrative services (37%) and lowest in healthcare and social services (23%).

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HOW THE ASIAN MOTHER IS CHANGING

Our 'Mothering Excellence' study explores mothering and parenthood trends in 11 countries in Asia-Pacific (APAC).

Female participation in the labour force is now at 50% in the majority of APAC economies, and 60-80% in 11 countries. Women's empowerment is evidently a force driving change in motherhood.

Our new study goes further, exploring how the Asian mother expresses her human motivations and how these relate to mothering strategies. Key takeaways include:

- For the Asian mother, life doesn't stop at kids, and she is comfortable in asserting and prioritising her needs.
- The Asian mother experiments with new ways of parenting and is willing to part with some traditions.
- Despite taking on more responsibilities with less time to spare, the Asian mother remains in control.

Parenting itself is also transforming in Asia with the rise of non-traditional family models and neutral gender-roles.

Marketers can win over Asian mothers by connecting to her purpose, being her voice for change, supporting her in online communities and helping her meet productivity goals.

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SPOTLIGHT ON JAPAN

Two new briefings on Japan look at the cultural context around what the country worries about and how it spends its holidays.

Ipsos' 'What Worries the World' survey finds that the following three topics cause the Japanese most concern:

- Poverty and social inequality (36%)
- Maintaining social programs (33%)
- Taxes (32%)

The top 3 worries arise in part because of the increasing demand from an ageing population on public services, which are now being supported by a shrinking workforce. And in Japan today, 1 in 6 now live below the poverty line.

The [new briefing](#) looks at these issues and more.

Another short piece, this time on [vacations in Japan](#), explains why Japanese workers are the least likely of all countries surveyed to take all of their vacation days.

For example, the social desire to avoid causing “meiwaku” (迷惑), or inconvenience to others, can explain a hesitance to take vacation.

At the same time, Japan has 22 national holiday days; significantly more than other countries. Furthermore, additional “obon” (お盆) days in summer offer collective, uninterrupted time off.

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BE BOLD, BE CREATIVE, DO RESEARCH!

Advertising now requires something extra: bolder creative choices to develop strong, brand-building ideas.

Our new paper shows how brands can master the art of creative, bold and research-based advertising. In order to create breakthrough campaigns, early communication research is key.

Three case studies from *Carling*, *Carrefour* and *Libresse*, show how they developed their courage and creative spark.

- *Libresse*, in the feminine care sector, wanted to connect more closely with women and break taboos surrounding periods. This resulted in the #Bloodnormal and Viva la Vulva campaigns, tackling shame and body-consciousness, building positivity and empowerment.
- To align itself with sustainability and health, *Carrefour* embarked on a bottom-up campaign of honest communication with the French consumer, someone who is typically sceptical of overly positive messages.
- Using research on masculinity in South Africa, *Carling Black Label* painted a modern portrait of the bold, brave, strong man who uses his strength to do the right thing.



IS YOUR INNOVATION RESEARCH ON ITS BEST BEHAVIOUR?

Making the case for smartly-designed surveys, we show how to use behavioural measures and predict success in innovation.

Surveys have come under fire because of the belief that people are not conscious of their own motivations or needs.

But a new white paper shows how behavioural measures can be incorporated into surveys, looking specifically at their applications for innovation research.

Ipsos' approach uses comparisons to evaluate innovations. This works by asking survey respondents' to choose a preference and then measuring the conviction of their choice by how long it takes for them to respond.

Additionally, to test new product innovations, surveys can ask consumers to compare a new product with the one they use most often – the consumer-defined reference point.

By capturing behaviour in these ways, we circumvent the need for respondents to report on their thinking.

Designed carefully, surveys remain a practical solution that allow us to evaluate innovation ideas in a scalable manner.

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KEEPING IT FRESH

Clever innovation in line with key social trends can give food and beverage brands the edge in a competitive market.

Presenting five macro trends from Ipsos' Global Trends report, this paper shows how they can provide inspiration for innovation in the food and beverage sector.

These trends include:

- **Digital detox**

Many brands are tapping into mindfulness and nostalgia to appeal to consumers: 63% of global citizens think that we are spending too much time online and 80% of people think that traditions are important.

- **'Healthification'**

Food and drink companies are evolving for the health-conscious consumer. Ipsos research shows 80% of the population believe that 'eating right' is most important for good health, And Google tells us 'best foods for...' searches have grown by a factor of 10 since 2005.

- **Discovery and connoisseurship**

Millennials, particularly, are spending more in the experience economy to enrich their lives in place of material gains. Successful brands leverage this thirst for discovery and connoisseurship both online and offline.

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SHORTCUTS

Research futures

In ten years' time, the research ecosystem will look very different.

A global study by Ipsos and Elsevier uncovers the biggest drivers of change shaping knowledge production and sharing. It introduces three possible scenarios for the future of research:

- **Brave open world:** Where open access is on the rise, enabled by advances in AI and technology.
- **Tech titans:** The growing influence and dominance of technology companies gives them the roles of creators and distributors of knowledge.
- **Eastern ascendance:** China's desire to transform into a knowledge-based economy means that the country will have a central part to play.

These scenarios underline a shared responsibility for creating a new environment in which science and research can flourish.

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Finding your voice

Alexa, Siri, Cortana and Google Assistant have made their way into millions of homes, making 2019 a big year for voice technology.

An Ipsos study with the Internet Advertising Bureau (IAB UK) seeks to understand the potential future impact of voice technology.

It finds and dispels three myths:

1. **The future will be without screens:** Although 75% of Britons agree that they are constantly looking at screens, voice technology is not a cure. Instead it offers an additional way to control our devices.
2. **Voice technology has already changed the game:** The average consumer has elevated expectations about what the AI powering their voice assistant can do, often making the reality disappointing.
3. **Voice tech won't take off due to privacy issues:** Consumers are happy to share some of their most private information with brands *if they believe they are getting something worthwhile in exchange.*

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European youth and the future of work

Less than half of young Europeans feel well prepared to enter the job market and a large majority (88%) would like better support in making their professional choices.

This is according to an Ipsos survey of those aged 18-25 in France, Germany, Spain, UK and Belgium for the World Innovation Summit for Education.

Further findings include:

- **Almost 4 in 5 young Europeans are optimistic about the future of work**, with Germans the most (81%) and the French the least (72%).
- Only 37% of the French youth think their **education system prepares them well to enter the job market**. This figure rises to 59% in Belgium.
- **Salary is the main criteria for young adults when choosing a job**, above work-life balance, equal career progression and a purpose-driven job.

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