IPSOS UPDATE

A selection of the latest research and thinking from Ipsos teams around the world

November 2019

Ipsos Knowledge Centre

GAME CHANGERS

Ipsos

WELCOME

Welcome to the November 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.

IN THIS EDITION

WORLD MENTAL HEALTH DAY
Attitudes towards mental wellbeing around the world

Mental health is widely considered an illness like any other, our global study for World Mental Health Day finds. A second study looks at mental health problems in the workplace in North America, Australia and the UK.

BLACK FRIDAY 2019
Still the superhero of the shopper's year?

Black Friday falls on 29 November this year. But will it kickstart the same shopper frenzy we have seen in the past? We set out what to expect and explore how to make the most of the changing shopper environment.

BRAND MENTAL NETWORKS
Make consumers think of you in the right way

Today, 'brand' is more important than ever as it provides people with a shortcut to easy, safe decision-making. To make this work for your target consumers, it is important to nurture your brand's 'mental network'.

FINANCIAL SERVICES AND WELLNESS
How to capitalize on health and wellness trends

With health and wellness becoming a greater priority for people today, our new paper suggests that financial services can incorporate this angle into their offer in a range of ways to appeal to their customer base.

CLIMATE CHANGE CONVERSATIONS
Unfiltered, uncensored and unsolicited

Social media monitoring offers additional angles and insights to make sense of the locations, volume and nature of the global buzz around climate change issues.

FOOD PACKAGING TRENDS IN CHINA
From visibility to interaction

Innovative packaging design in the food and beverage category can improve visibility, make the product more practical, and even resonate culturally to engage with customers on an emotional level.

THE END OF MANAGEMENT AS WE KNOW IT?
How to address a crisis in workplace management

Our study in China, France, Germany, UK and the US shows widespread dissatisfaction in the current model of management and suggests how agile methods can offer positive changes.

HEALTH AND THE ENVIRONMENT
Reveal six segment of conscious consumers

A global research study by Ipsos in partnership with Tetra Pak reveals a growing convergence between environment and health.

HEALTH AND THE ENVIRONMENT

Tetra Pak launches 2019 Index Based on Ipsos global study

A global research study by Ipsos in partnership with Tetra Pak reveals a growing convergence between environment and health. As a result, the food and beverage (F&B) industry is first sector to really grapple with this trend.

Two-thirds of consumers now believe that we are reaching an environmental tipping point and people overwhelmingly consider themselves to be directly responsible for the world around them, as well as for their own health. These issues are connected: nearly 60% of consumers believe that their health and well-being are strongly affected by environmental problems.

While the intersection of personal and planet health is generally on the rise globally, it can be unevenly developed, with varying priorities.

This report presents six different ‘types’ of consumer, grouped according to their attitudes towards health and the environment. This intends to support F&B brands to develop and tailor their products and messaging.

There are differences in the consumer landscapes in Brazil, the UK and China, for example, where issues vary in importance.

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BLACK FRIDAY 2019

Shoppers love it, retailers loathe it. As Black Friday continues to evolve, we ask: Is it still the superhero of the shopper's year?

The days of shoppers stampeding into stores to fight for bargains are probably over: Black Friday footfall now looks to have peaked in mature markets. But there are opportunities for growth online. Over the past 5 years, interest in Black Friday has blossomed most in South Africa, France, Italy and Japan while many consider China and South Korea to be promising markets for the future.

Our new white paper traces the evolution of Black Friday into a global, multi-day, omnichannel event, and recommends seven steps to meet the challenges of the changing retail environment – such as the trend towards perpetual discounting across the peak season, something that can detract from Black Friday excitement.

Retailers must think of novel ways to create buzz and anticipation on Black Friday. They can learn from other events, such as China's 'Singles Day' and Amazon Prime Day, which are rooted in a clear understanding of what the customer really wants.

The average Black Friday discount last year was over 50% and even higher in the longest-participating countries (US, UK and Canada). But shoppers often expect deeper discounts – as well as fast and free delivery and returns. The bar is high for retailers looking to make a profit. If it is to survive, Black Friday must become healthier for retailers, not just bigger and better for consumers.

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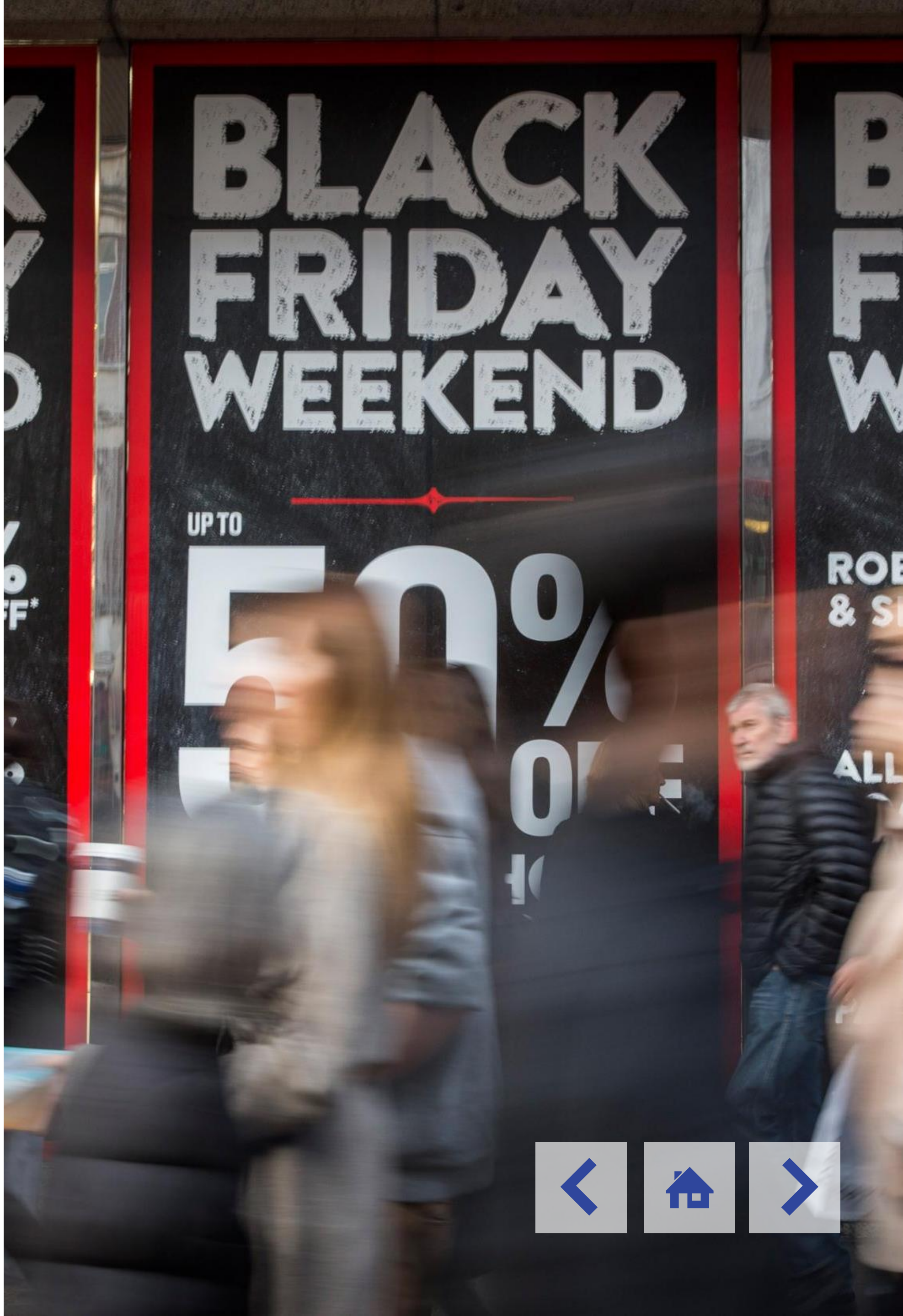

BRAND MENTAL NETWORKS

To reap rewards, there is no substitute for investment in brand-building and consistently strong creative.

Brands exist as a haphazard and chaotic network of thoughts, feelings, associations, colours, sounds, symbols and memories in the minds of individuals. This is the brand's 'mental network', and it is a helpful concept for thinking about brand-building activities.

A strong brand mental network, full of relevant, distinctive, positive and connected associations is key to successful brand-building. With both **memory** and **attention** salience, helping the brand to be both **thought of** and **noticed**, we can expect that it will instinctively come to mind in a consumer's key decision-making moments.

While there is no simple equation for brand-building, our research finds that the key elements of a strong brand mental network are: density, distinctiveness and choice primers.

In these impatient times, brand-building often falls victim to short-termism. Relentless sales activation can damage organisations' potential to realise the more valuable long-term benefits delivered by strong brands, such as more penetration, better retention, more share, better price sensitivity, and more profit.

We argue that brand is more important than ever as it provides people with a 'shortcut' to easy, safe decision-making.

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FINANCIAL SERVICES AND WELLNESS

Consumers are looking beyond the traditional markets to address their health and wellness needs.

Many sectors have embraced the increasing importance of health and wellness to consumers, and the financial services industry also has an opportunity to capitalize on this trend. Given that financial stress is often linked to health concerns from anxiety to sleep issues and heart disease, it would seem appropriate for financial services to look to deliver 'financial wellness' to their customers.

Financial wellness in this sense means the reduction of stress to improve holistic wellbeing, as opposed to the traditional sense of increasing financial prosperity. Large financial services companies are already making this a focus by offering, for example:

- Guidance on budgeting, credit and identity theft.
- Extended payment plans for large purchases.
- Online toolkits for managing finances.
- Cafés as comfortable spaces to receive personalised help, or attend workshops or coaching.

This paper suggests how financial services companies can look to re-imagine their offer, brand positioning and marketing strategies and appeal to the growing importance of health and wellness.

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WORLD MENTAL HEALTH DAY

Our studies show that many around the world take mental health seriously, but there are real barriers to addressing these issues in the workplace.

A majority of people in 29 countries say that mental and physical health are equally important. But, in many countries, people think physical health is treated with more importance than mental health. However, more than 50% in each country surveyed disagree that increased spending on mental health services is a waste of money – rising to 80% in Great Britain and Argentina, and 84% in Chile.

We find that respondents in Colombia, Mexico and Brazil are most attuned to their mental health, as three-quarters in these countries report thinking about their own mental wellbeing ‘very’ or ‘fairly’ often, compared to only 25% of Russians, 37% of South Koreans and 42% of Saudi Arabians. Younger people are also driving the trend: globally, 25% aged 16-34 think about their mental health ‘very often’ – more than any age group.

In another study on mental health with Teladoc Health, we focus on workplace wellbeing in the US, Canada, Australia and the UK. More than 8 in 10 with a diagnosed mental health condition say they have not confided in management about it, with 1 in 10 fearing they could lose their job as a result. Impacts for both employers and employees are clear as 4 in 10 admit giving false reasons for taking time off work as a result of mental health problems.

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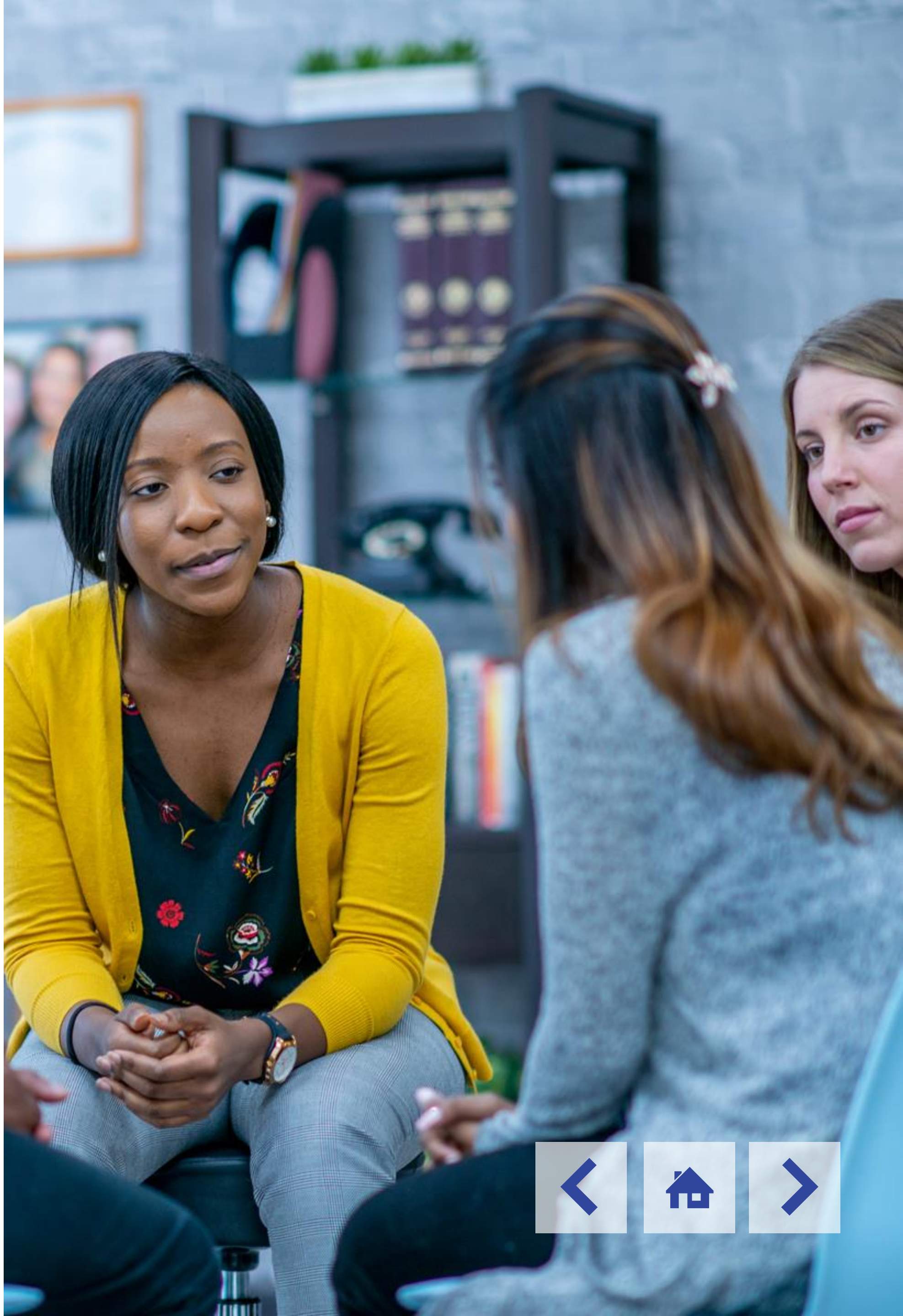

CLIMATE CHANGE CONVERSATIONS

Monitoring the fast-paced landscape of social media conversations on climate change.

A report by Synthesio, an Ipsos company, shares insights from its social listening technology to identify the unfiltered, uncensored and unsolicited online discussions related to climate change taking place around the world.

It finds that young people between the ages of 18 and 35 are leading the online conversations. This is partially due to the wide-scale usage of these age groups of social media, but also because this generation feels a great deal of environmental responsibility.

The top hashtags related to climate change detected over the past year are: #ClimateCrisis, #Drought, #ClimateAction, #ClimateEmergency, and #RenewableEnergy.

Social media monitoring can detect those who do not believe climate change is real and finds that the majority of people posting the keywords “hoax,” “conspiracy,” and “myth” are middle-aged, between 45 and 55 years old and male.

The report also includes analysis of specific events that cause spikes in social media activity related to climate change, such as the Amazon rainforest fires in August 2019. Automated sentiment analysis also shows whether response are positive or negative.

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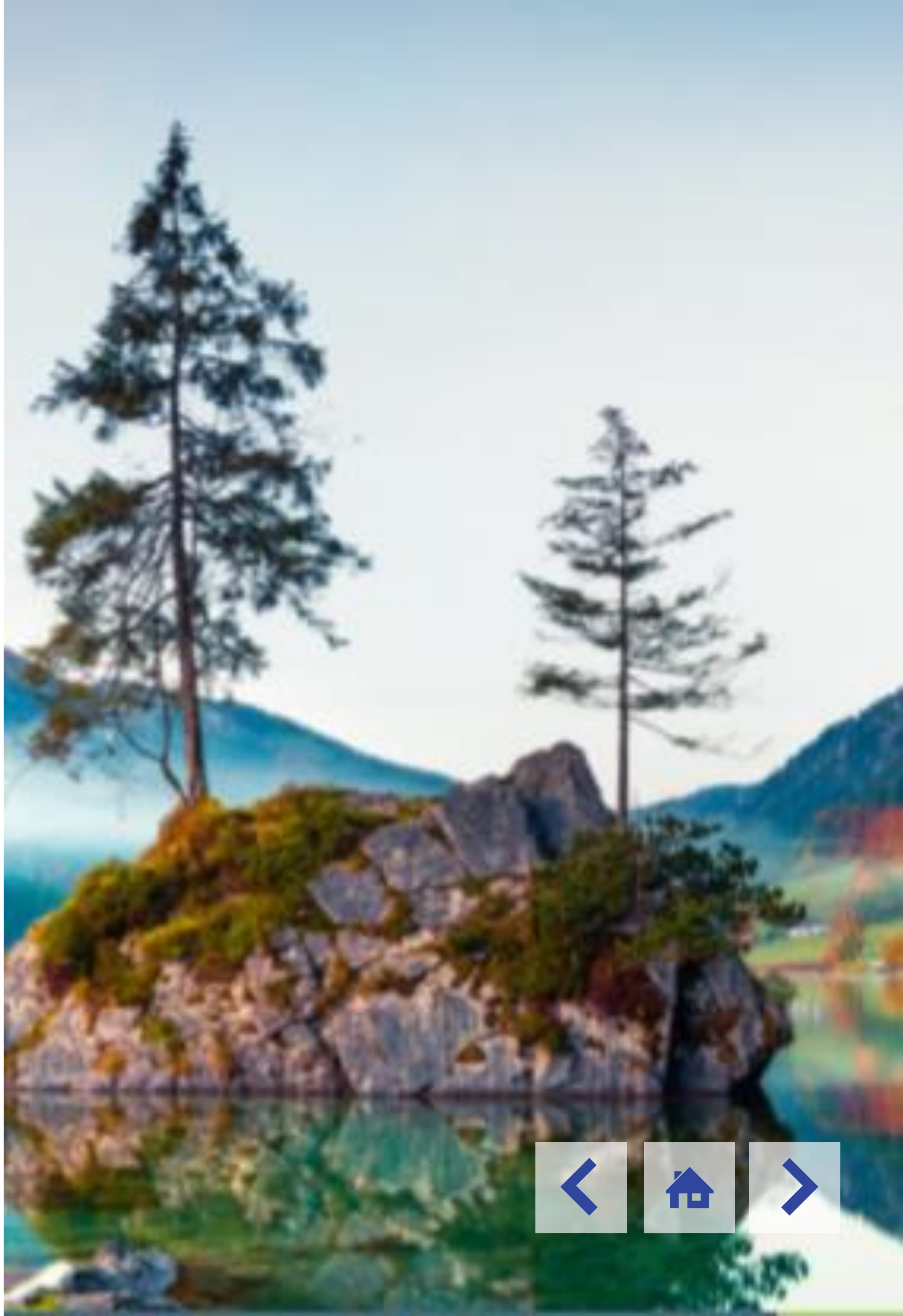

THE END OF MANAGEMENT AS WE KNOW IT?

Our survey in China, France, Germany, UK and US suggests workplace management needs to change.

A study with the Boston Consulting Group (BCG) reveals that many are dissatisfied with the current model of management. The report argues that aspects of it must adapt and become more agile.

Across the Western countries surveyed, more than eight in ten managers say their job is harder than in previous years. Seven in ten report feeling more overworked and more stressed, and as a result, nearly half say they feel less motivated.

It appears that management is becoming less of an aspiration. Less than one in ten managed employees say that they aspire to become a manager in the next 5-10 years, with one third stating that they do not find the position appealing. Instead, many prefer to become experts, work for themselves or transfer to a new country or role.

Managers are anticipating change: one third think their job will have disappeared within 5-10 years, but they do see positive opportunities with the nature of digital change and Generation Z.

The report proposes positive adaptations to management in the form of an agile mode of working, where teams are multidisciplinary and more autonomous.

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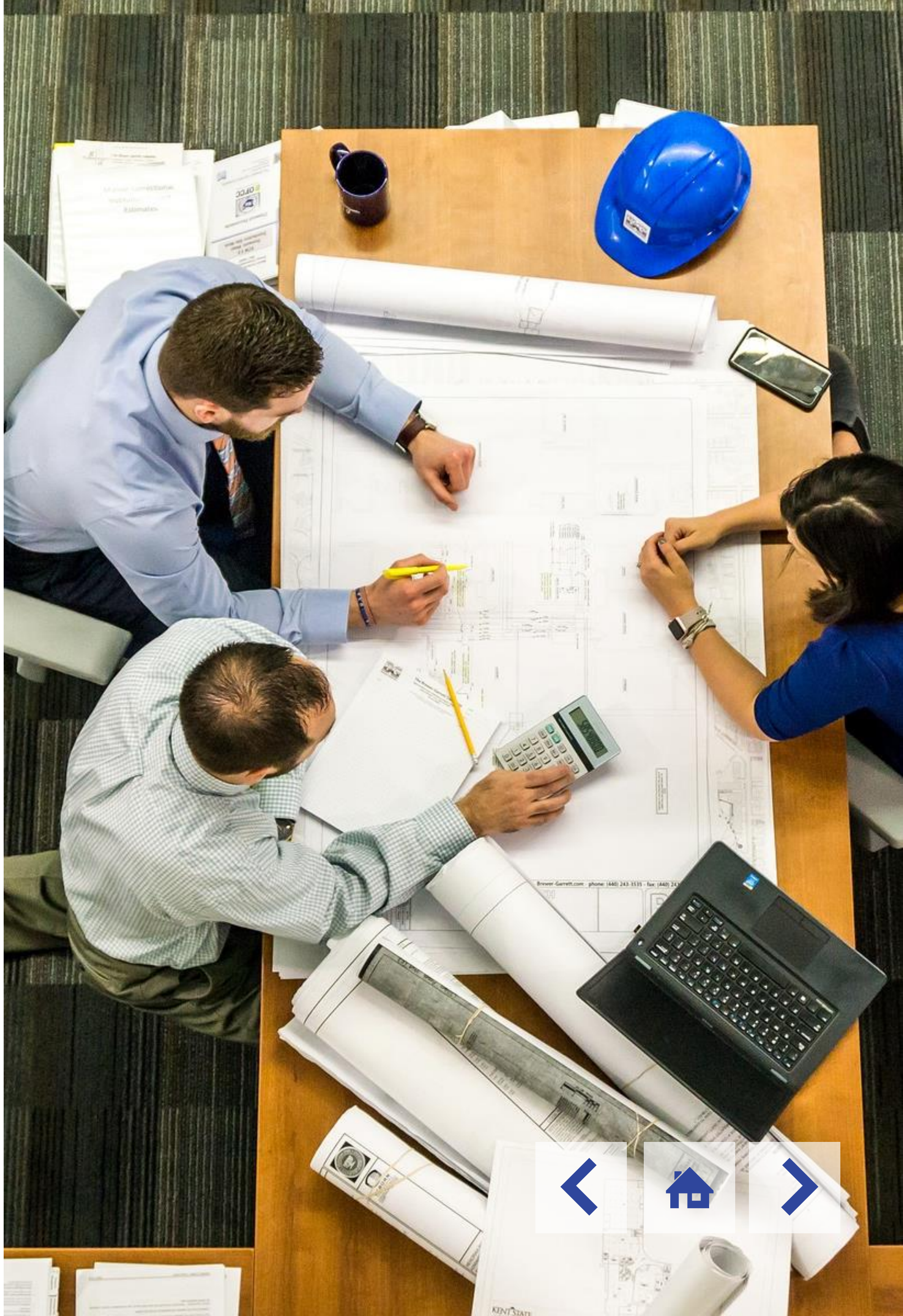

SHORTCUTS

HOUSING AFFORDABILITY

According to our Global Advisor report in 29 countries, nearly three in five say that they can't afford to buy a home in their local property market. For one in two, this is a permanent – not only a temporary problem.

Analysis of the survey states that a combination of low interest rates, a growing population, restricted housing supply and foreign buyers have pushed house prices beyond the reach of many – especially first-time homebuyers – as incomes have not increased at such a rapid pace.

The countries where most said they were priced out of the market include Hungary (84%), Japan (83%), Poland (75%), Argentina (68%) and Russia (67%). Seven of the top 10 countries are in Europe.

Perceived housing affordability tends to be highest in emerging markets. The countries where greatest numbers of respondents think it is 'somewhat' or 'very' likely that they could purchase a house are China (74%), India (73%), Saudi Arabia (61%), and the US and Peru (both 55%).

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WORLD LUXURY TRACKING 2019

The latest wave of Ipsos' World Luxury Tracking survey reveals the trends in the global luxury market today, across China, the U.S. and Europe (France, Italy, Germany Great Britain and Spain).

This year the quest for exclusivity is getting stronger, and encompasses a desire for long-lasting quality, digital fluidity and creative boldness, all while prioritising more ethical means of production.

Key points include:

- More than 8 in 10 consumers of luxury worldwide are looking for bold, new and unseen products.
- The second-hand market is developing in all regions, especially the US and Europe.
- Consumers of luxury are showing greater willingness to purchase online.
- Through their purchases, these shoppers wish to connect with what they consider to be 'essential', such as time, meaning, other people and nature.

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PACKAGING TRENDS IN CHINA

Looking at food products in particular, this report presents the top ten packaging trends in China. It finds that the key points of packaging innovation are: **visibility**, **function** and **emotional connection**. These can work together to encourage trial of new products, repurchase and to increase brand-consumer interactions.

The study reveals that Chinese consumers, especially younger and higher-income groups, are interested in purchasing products with novel and unique packaging. Product names, packaging shape and colour are the features that most catch their eye. Three-quarters of consumers say that they focus on nutrition and health-related information, and over 8 in 10 like to see the product through its packaging.

Packaging has also become an important carrier of brand emotional communication, which can enhance connections with consumers to maintain long-term loyalty. More people now prefer to buy products with "attitude" and a "sense of identity".

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CONTACT

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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