
July 2016

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* – a 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. Everything here is in the public domain, so it can be shared widely with colleagues and clients.

We hope you find it useful. Please [get in touch with the Ipsos Knowledge Centre](#) with any comments or ideas, or if you would like to subscribe to further issues.

Thank you.

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IN THIS EDITION

AFRICAN YOUTH: Part 2 of our study

Covering 7 countries, this report reveals information about 15-24-year-olds who are currently studying, seeking employment or in full time employment.

ETHNOGRAPHY: An Unfiltered View of Reality

Originally used as a method to understand tribes or cultures in distant lands, today ethnography is applied to any culture including our own.

RUSSIA TRENDVISION: State statistics and consumer trends

The report covers key political and economic events changes in population strata and consumers' behaviour for 2000-2014 to forecast future trends.

CRACKING SOCIAL: Harnessing the contagious creativity of influencers

Traditional profiling and segmentations don't deliver the insights that lead to powerful brand engagement - it comes from something more nuanced.

DOING THE RIGHT THING: A checklist for successful corporate sustainability

This new Ipsos Views white paper explores the benefits that corporate sustainability or social responsibility programs have.

CHRISTMAS IN CANNES: Lessons of an effective communications campaign

An analysis of the success of the John Lewis "Monty the Penguin" campaign which has been awarded the Cannes Lions Grand Prix for Creativeness.

AUDIENCE MEASUREMENT IN THE DATA AGE: A new Ipsos Connect white paper

Media audience measurement is in robust health. Worth \$7 billion in 2014, according to ESOMAR, it represented 16% of market research spending.

THE YEAR OF DISRUPTIVE ELECTIONS: What will happen next in the US and France?

Ipsos recently presented at a seminar in Paris looking ahead to the forthcoming elections in the United States and France.

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AFRICAN YOUTH: Part 2 of our study

Africa has the world's youngest population, with under 25s accounting for 60% of the continent's population.

There are 220 million young people aged 15-24 in Africa. And according to a UNESCO forecast, this figure will rise to 350 million by 2030.

Covering 7 countries – DR Congo, Ivory Coast, Kenya, Morocco, Nigeria, Senegal and South Africa – this report paints a picture of Africa's 15-24-year-olds, whether they are currently studying, seeking employment or in full-time employment. The results of the study show:

- their preferred leisure activity is listening to music
- over 60% of those with internet access use it to go on social media
- their favourite brands are American
- 81% are optimistic about their future

You can also [read part 1 of the report](#), an infographic of all the headlines.



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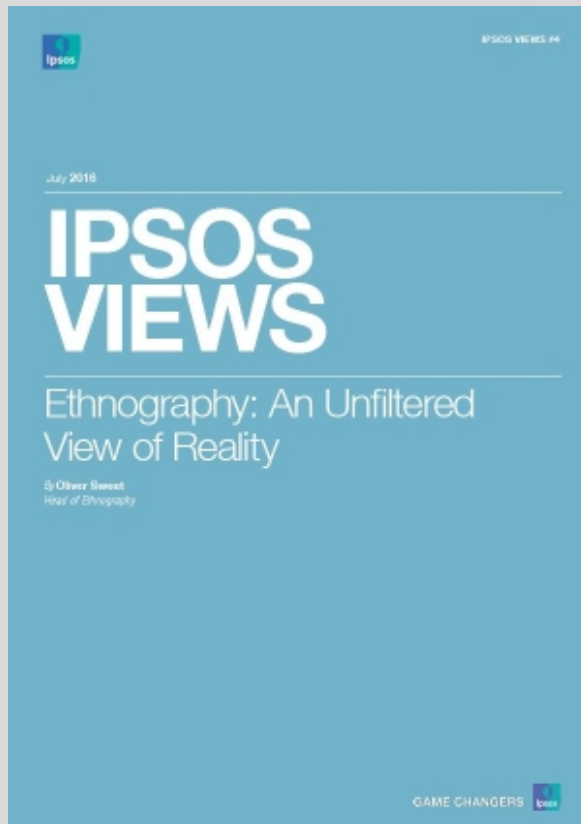
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ETHNOGRAPHY: An Unfiltered View of Reality

Originally used as a method to understand tribes or cultures in distant lands, today ethnography is applied to any culture including our own.

Ethnography is a research method made for investigating cultural practices, rituals, consumer behaviour, routines and social norms. It helps our clients identify previously unseen opportunities through looking at people's worlds in a new way, putting behaviour at the heart of our investigation.

Ethnography is used in numerous sectors – from healthcare, financial services and FMCG to automotive – and is so adaptable because of its dedication to interpreting human behaviour.

In this new **Ipsos Views white paper**, we go back to basics with **Oli Sweet** presenting a practical guide to the subject area. He covers:

1. What makes ethnography, ethnography
2. The case of identity theft: What *isn't* ethnography
3. Decision-making based on ethnographic insight

The emphasis is on putting investigative fieldwork at the heart of our approach to ethnography, along with rigorous analyses derived from anthropological research.

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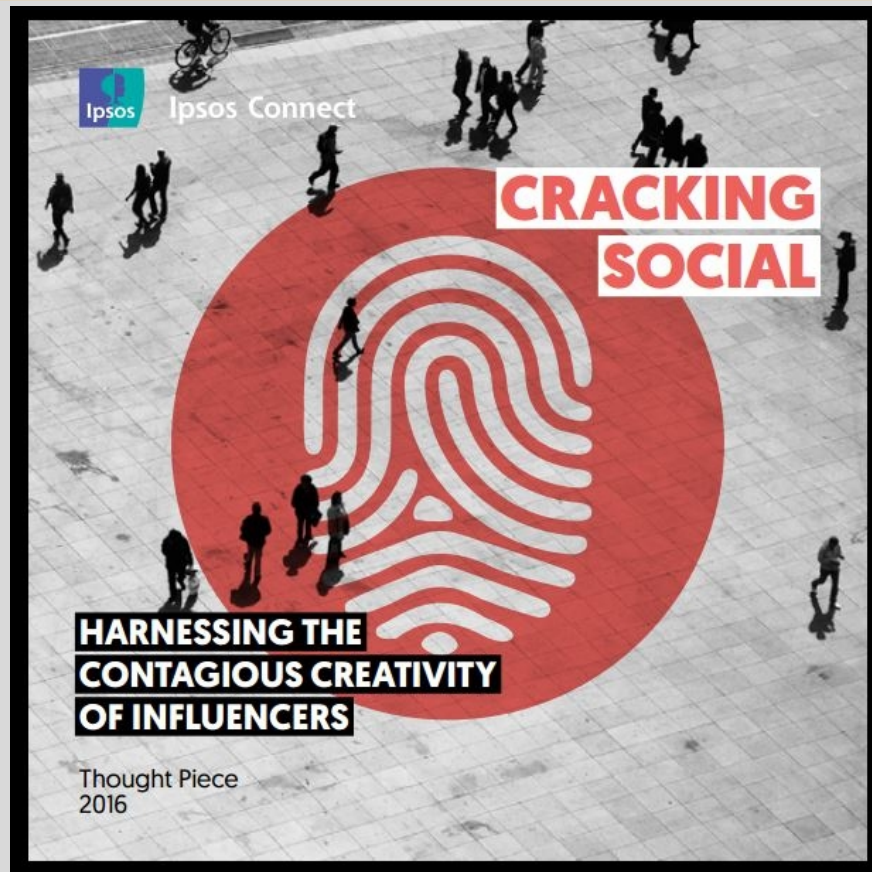
RUSSIA TRENDVISION: State statistics and consumer trends

Ipsos Comcon has just released its annual overview of Russia's current social and economic situation.

The report looks at the period 2000-2015, covering politics, the economy, population change and consumer behaviour - seeking to highlight future trends.

Produced annually since 2005, the report combines both Russian Federation formal state statistics and Ipsos Comcon's quarterly syndicated study *RosIndex*. It covers a range of topics. For example:

- Russia has more than 200 ethnic groups
- Consumer income has doubled since 2008 but saw a slump in 2015
- Since 2006, internet penetration has risen from 15% to 70%
- 50% of Russians now own a smartphone

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CRACKING SOCIAL

Harnessing the contagious creativity of the new breed of “influencers”

When it comes to connecting meaningfully with audiences on social media, a number of factors must be considered. The most important is the need for a new kind of audience understanding. Traditional profiling and segmentations don't deliver the kinds of insights that lead to powerful brand engagement. Powerful engagement comes from something more nuanced and less tangible.

Brands that want to engage their audiences in the social media space need to behave like all the best content creators. To be successful, brands need to focus on three key areas:

- Think social first
- Cultural capital
- Collaborating

To ensure brands are part of people's cultural lives and conversations, advertisers need to embrace and invest, more than ever before, in meaningful and risk-taking content.



DOING THE RIGHT THING

A checklist for successful corporate sustainability programmes

This new **Ipsos Views white paper** from our Global Reputation Centre explores the benefits corporate sustainability programmes can have on both the business and the wider community - provided they are well thought through.

In addition to delivering a reputational boost, carefully designed actions can strengthen the long-term viability of the *corporate value chain*, increase employee engagement, and improve relationships with special interest groups.

Ipsos has 20 years' experience helping companies to shape their social responsibility and sustainability programs. Our research has demonstrated that effective engagement requires addressing the authenticity, credibility, and effectiveness of these programs - from both an internal and external perspective.

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Christmas in Cannes

Lions praise Penguins

by Eleanor Thornton-Firkin & Leah McTiernan



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CHRISTMAS IN CANNES

Seasonal advertising: Lessons from an effective communications campaign

Not to be outdone by the Super Bowl held every winter in the USA, the UK has its own annual advertising event. Shortly before the holidays the buzz begins as advertisers, primarily large retailers, seed their annual holiday creative online. That buzz quickly turns to water-cooler and social conversations about which retailer will “win” Christmas.

In this new comment piece, Ipsos’ **Eleanor Thornton-Firkin** and **Leah McTiernan** analyse the success of the John Lewis “Monty the Penguin” campaign, which has now been awarded the Cannes Lions Grand Prix for Creativeness. The five factors that drove success:

1. Plan beyond the one TV commercial
2. Use consistent creative assets
3. Integrate Social Media into the mix
4. Seed early to create anticipation
5. Continue to learn from your success

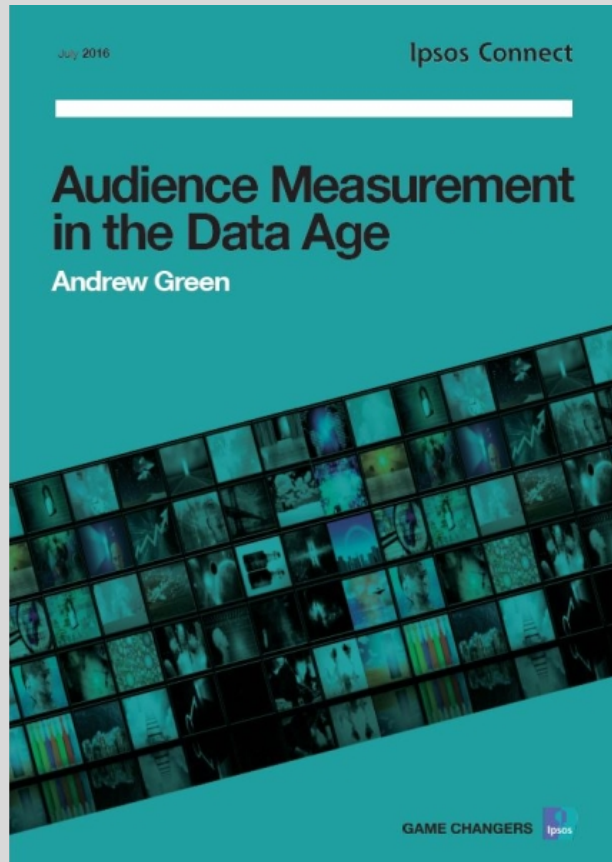
The paper also includes Ipsos’ own analysis of the ad, including how facial coding can help understand the dynamics of how people respond to different types of image and stimuli.

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AUDIENCE MEASUREMENT IN THE DATA AGE

Media audience measurement is in robust health. Worth \$7 billion in 2014, according to ESOMAR, it represented 16% of market research spending.

The ways in which people access content are changing fast and the methods we use to identify and track the audiences are changing in order to keep pace.

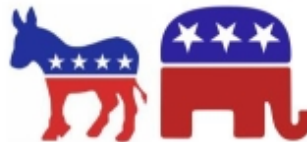
In this **new Ipsos Views white paper, Andrew Green** outlines 10 predictions for the future of audience measurement. These predictions are informed by our ongoing conversations with audience measurement stakeholders and users around the world; they include how:

- panels will remain paramount
- out of home measurement will be enriched by mobile phone 'Big Data'
- new cross-platform metrics will emerge



2016-2017: The Year of Disruptive Elections

Embassy of the United States of America
Paris, June 8, 2016



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THE YEAR OF DISRUPTIVE ELECTIONS

What will happen next in the US and France?

Ipsos recently presented new analysis at a seminar in Paris looking ahead to the forthcoming elections in the United States and France. The event, hosted by the US Embassy, saw **Brice Teinturier** (Deputy CEO, Ipsos France) and **Clifford Young** (President, Public Affairs, Ipsos US) describe the prevailing mood in their respective countries and what this means for the political scene.

The assessment of the current French situation is stark:

- 86% feel that France is in decline – although 62% think this is not irreversible
- Just 13% say the economy is in “good” shape – the lowest in Europe
- 65% believe that “there are too many foreigners in France”

Meanwhile, in the US, where 63 per cent now feel their children's generation will be worse off than their parents, terms like “The Rich are to Blame” and “Taking America Back” are at the heart of the debate.



SHORT CUTS

Spotlight on Canada

The **2015 Canadian Federal Election** was expected to produce record turnout levels. Surprisingly however, while it was the highest in decades, **three-in-ten Canadians still did not vote**.

Find out how the emergence of behavioural economics provides a new and useful lens through which to examine why this happened via the **'Read More'** link below.

Meanwhile, in celebration of **Canada Day**, Ipsos created a quiz to find out how well Canadians know their own country. The results showed that while they knew how healthcare budgets are spent, they were less well versed in how many people smoked marijuana, travelled abroad or volunteered.

[Take the Canada Day quiz](#)

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LATAM focus

Pulso Brasil provides a snapshot of the current mood of the country's 210 million people as it prepares for the Olympic Games. It finds:

- 89% of people think the country is heading in the "wrong direction"
- 43% consider interim President Temer's administration "bad or very bad"

For an in-depth perspective, the **Ipsos Flair** reports aim to deliver original and sharp views, set against the cultural and sociological background of the country.

Recent additions to the collection include Mexico, Brazil and Colombia. Argentina will be launched shortly.

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Reaction to Brexit

While the future direction of the UK remains uncertain following the EU referendum, the shockwaves continue to reverberate around Europe. Here is some reaction to Brexit from other countries.

In Italy, 42% of people said they would welcome the idea of an Italian referendum; and 46% said they would Remain if there were a vote, while 28% opted for the Leave camp. Half felt that Brexit would impact the Italian economy negatively.

Meanwhile **in Ireland**, 81% of people said the decision made by the UK to leave was the "wrong" one. They themselves are very clear about where Ireland's future lies, with 86% wanting to see the country remain in the EU.

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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 internet sites and social media outlets.

Please get in touch with the Ipsos Knowledge Centre with any comments, including ideas for future content.

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