
April 2016

IPSOS UPDATE

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

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GAME CHANGERS



WELCOME

Welcome to the April 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 email IKC@ipsos.com with any comments or ideas, or if you would like to subscribe to further issues.

To download previous editions of *Ipsos Update*, please visit www.ipsos.com/ipsosupdate

Thank you.

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IPSOS VIEWS: Perils of Perception

Following on from the success of our 33-country Perils of Perception survey, Bobby Duffy sets out a series of themes to consider in this new paper.

SPOTLIGHT ON CHINA: Food and Beverage Trends

This report reveals eating and drinking trends in China, including consumer opinion on topics including organic produce and product innovation.

GLOBAL @DVISOR: Economic Pulse of the World

With the first quarter of 2016 now behind us, this round-up provides a guide to economic optimism and public opinion across 24 countries.

ITALY FLAIR: Managing the Disorder

The latest report in our Ipsos Flair series, written collectively by local experts and designed to present a vision of a country.

QUEEN ELIZABETH AT 90: Attitudes towards the Monarchy

Surveys in Britain and Canada to mark Queen Elizabeth's 90th birthday illustrate the popularity of the long-serving monarch.

AUSTRALIA TODAY: Culture and Lifestyle Trends

With notions of social class forever disrupted, this report reveals where Australians believe they now sit on the socioeconomic strata.

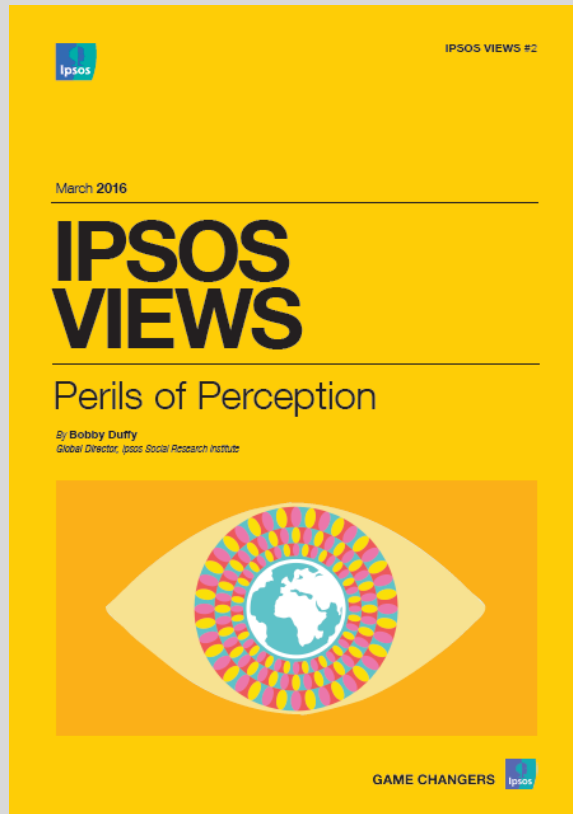
THE FUTURE OF TV: A Master of Reinvention

TV has consistently changed over time to embrace new technology and meet the evolving needs of audiences and consumers.

GLOBAL FRAUD SURVEY: Corporate Misconduct - Individual Consequences

While many businesses have made good progress in tackling fraud and corruption, this survey finds a persistent level of unethical conduct remains.





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IPSONS VIEWS: Perils of Perception

Following on from the success of the 33-country Perils of Perception survey, Bobby Duffy, Global Director of Ipsos Social Research Institute, has written a new *Ipsos Views* white paper on the subject.

The paper sets out a series of themes we need to consider:

- **What do we get wrong?** Americans think 33% of their population are immigrants, when in fact it's just 14%. Brazilians think the average age in their country is 56, when it's actually 31.
- **Why are we often so wrong?** The paper takes us through "The Ignorance Equation".
- **Does it matter that we're wrong?** Our view is that this does matter – misconceptions have always been with us, but it doesn't mean we can't learn from understanding these perception gaps. There are big messages for how government, media and businesses should respond.

For the full results of this latest study, please visit the [dedicated Perils of Perception microsite](#).

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FOOD AND BEVERAGE TRENDS IN CHINA

This Ipsos report reveals the latest developments in eating and drinking in China, from attitudes on organic produce, to innovation, personalising the packaging and even the product itself.

Using data from consumers of 1st and 2nd tier cities in China, the report investigates how people feel about a whole range of topics on food and beverages in 2016.

As is the case in other countries, consumers are concerned about the safety of their food, whether it's organic or not and how healthy it is.

Also under the spotlight are subjects such as how much of what people are consuming is imported, the emergence of e-commerce channels, and the increasing innovation and customisation of products.

On the same subject, you can also download our report on [current and future food trends in Italy](#). Presented at the Tutto Food conference, the largest Food Trade Fair in Italy, the report suggests fresh food will remain very popular and predicts that online usage, for both food shopping and reviews/articles, will increase.



Trends in Food, Beverage & Consumer Insights in China 2016

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GLOBAL @DVISOR: Economic Pulse of the World

The latest 24-country Global @dvisor study provides a guide to economic optimism.

The first quarter of 2016 is now behind us, and so far the economic news has been distinctly underwhelming, writes Simon Atkinson, Chief Knowledge Officer at Ipsos. Both The World Bank and the International Monetary Fund have downgraded their growth forecasts for the year.

As detailed in his latest blog post for Huffington Post, the headlines for this quarter include:

- In Europe, Sweden and Germany remain the star performers, although people there tend not to be as positive as they were in 2014 and 2015.
- In Spain, Italy and France barely one in seven people are willing to give their economy a "good" rating.
- At the other end of the scale, over eight in ten online consumers in Saudi Arabia and India are giving the green light to their country's current economic performance.



Ipsos Flair Collection



Italy 2016, Managing the Disorder

A SUMMARY OF THE FLAIR ITALY REPORT

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ITALY FLAIR: Managing the Disorder

Ipsos Flair is a series of reports designed to present a vision of a country, through the observation and interpretation of behaviours, attitudes and opinions of its consumer citizens.

Managing the Disorder is the latest report in our *Ipsos Flair* series, written collectively by Ipsos experts in the country.

There is a prevailing optimism concerning the country's economy despite the current dark times, while the public's rating of both the Prime Minister and the government has fallen considerably over the last two years.

Meanwhile, in the Italian media, 2015 was marked by a decline in revenues, and no substantial signs of a reversal in this trend can be discerned for the immediate future.

Other topics under the microscope include attitudes and behaviours of the Italian consumer regarding communication and how the individual is playing an increasingly active role in creating their own reality.

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QUEEN ELIZABETH AT 90: Attitudes towards the Monarchy

Surveys in the UK and Canada to mark Queen Elizabeth's 90th birthday show that the Monarchy remains popular with the public.

British support for keeping the Monarchy remains high, with 76% favouring their country keeping the current arrangement – compared to 17% preferring a republic.

Three-quarters of the public (75%) believe the Monarchy has an important role to play in the future of Britain and most do not think the Queen should retire, despite turning 90. More than two-thirds (70%) believe she should remain Queen.

On the other hand, our [survey in Canada](#) finds that a slim majority (54%) of Canadians agree that, given the Queen's age, she should abdicate to the next-in-line to the throne.

However, support for the monarchy remains fairly strong with 55% of Canadians backing continued ties between their country and the Monarchy after the Queen's reign ends.

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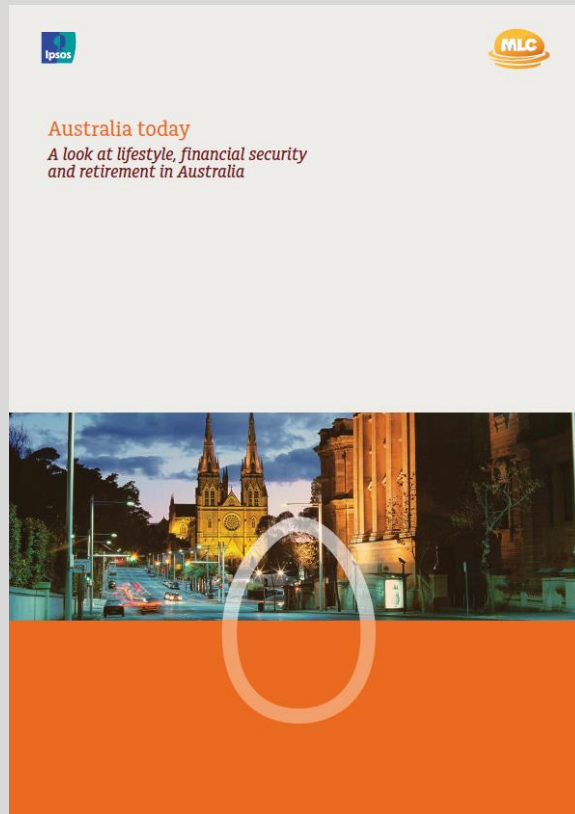
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AUSTRALIA TODAY: Culture and Lifestyle Trends

A look at lifestyle, financial security and retirement in Australia.

Our Ipsos Mind & Mood team recently conducted research and a series of white papers for MLC – National Australia Bank's wealth management division entitled *Australia Today*.

Social mobility in Australia has meant that notions of social class have been disrupted. The term 'middle class' is used to describe almost everyone in Australia but few can define what it means or what a middle-class lifestyle really looks like today.

Meanwhile, the terms 'lifestyle' and 'standard of living' are often used interchangeably, and in a property market where the median house price in Sydney is more than a million dollars, no one really knows what qualifies you as 'rich' or 'wealthy' anymore.

Based on a survey of 2,000 Australians, this white paper reveals where Australians believe they sit on the socioeconomic strata and their expectations for how they should live.

[Part 2](#) of this report is also available.

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THE FUTURE OF TV

A master of reinvention, TV has consistently changed over time to embrace new technology and meet the evolving needs of audiences and consumers.

Now, with content that follows you, more seamless interplay between screens, personalisation and deeper levels of immersion, the future of TV looks more exciting than ever.

Collaboration with other media will be key, to ensure audiences can continue to be reached with the right content on the right device, in the moments that matter.

Top three trends in TV:

- Content that follows you
- Content that increasingly aligns with context
- More immersive experiences across devices

Top three challenges for content providers and advertisers:

- Understanding need states across different platforms at specific times
- Reaching the right audience
- Optimising content throughout live campaigns



Corporate misconduct – individual consequences

Global enforcement focuses the spotlight on executive integrity

14th Global Fraud Survey



GLOBAL FRAUD SURVEY

Our research for EY's 14th Global Fraud Survey, *Corporate misconduct – individual consequences*, finds that, while many businesses have made good progress in tackling fraud and corruption, a persistent level of unethical conduct remains.

The survey of almost **3,000 senior business leaders** from **62 countries** finds unprecedented support for measures to combat bribery and corruption.

Key findings include:

- 83% of respondents view prosecution of individual management members as an effective deterrent against fraud, bribery and corruption.
- 42% could justify unethical behaviour to ensure they met financial targets.
- 32% of our business leaders report that they have had personal concerns about bribery and corruption in their workplace.

The report also explores how businesses can take steps to minimise the risk of corruption in their own operations.

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SHORT CUTS

Food Trends in Italy

Presented at the *Tutto Food* conference, the largest Food Trade Fair in Italy, this report into current and future Italian food trends suggests fresh food will remain popular and predicts that online spending will increase.

Key findings include:

- The internet is a key source of information about food
- Savoury dominates over sweet (64% vs 36%)
- There is a desire for sustainability to be communicated in all aspects (including packaging)
- Eating out, including takeaway meals, will be a growing trend

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China Pulse

The latest *China Pulse* is now available, showcasing recent research and analysis from our team in China.

The current edition of the quarterly publication includes briefings on:

- International travel: the destinations (and aspirations) of Chinese tourists
- A survey on Spring Festival Consumption
- Macro economy data from Q1 in China
- The Effectiveness of Food and Beverage Advertising

For more information about China Pulse, please [contact Lu Peng](#).

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Pity the Millennials

One of the most compelling findings in Ipsos' work over the last few years has been our discovery of deep seated generational differences.

The gap between those alive in the 1940s and the current generation of 20-30 somethings is now very marked. The young are markedly less homophobic, and laugh at traditional gender roles. But they are also more pessimistic – particularly about their own future – in a way that is unprecedented.

[In this topical blog post](#), Ben Page, CEO of Ipsos in the UK, looks at generational differences and finds that “the young aren’t revolting any more.”

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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 email IKC@ipsos.com with any comments, including ideas for future content.

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