
July 2017

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* – 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.



AFRICAN LIONS: The African middle class

An in-depth look at factors such as living conditions, aspirations, buying patterns and media consumption of Africa's urban middle class – a market making up more than 100 million people in sub-Saharan Africa.

WHAT WORRIES THE WORLD: 2016 – a year of great disruption and change

This new *Ipsos Views* white paper presents a view of how the world's everyday worries are shifting, based on new analysis of one of our flagship global Ipsos surveys.

OPINION POLLS: Why they remain the reference

The last year has seen opinion and election polling subjected to both criticism and praise. Here we review the evidence, looking particularly at recent experiences in the US, UK, France and the Netherlands.

BEHAVIOURAL SCIENCE: Surveys still have a big part to play

This new *Ipsos Views* white paper examines how behavioural science techniques are being applied to market research practice and highlights five reasons why we need to continue to ask questions.

THE AGE OF THE ALGORITHM: How data science techniques are being used

In this white paper, we look at how data science techniques are being used in media measurement to provide clients with better quality information, while keeping the burden on respondents to a minimum.

DANGEROUS WORLD 2017: Who influences global affairs in today's world?

A new *Global @dvisor* poll finds an overwhelming majority of citizens across 25 countries feel the world has become more dangerous since 2016, with Canada and Australia seen as having the most positive impact on the world.

REALITY CHECK: Understanding how people choose brands

We explore why basing your brand evaluation around people – and the reality of how they choose brands – can help you identify and pursue the best strategy for profitable growth.

UNDERSTANDING SOCIETY: Beyond Populism

This special international edition of *Understanding Society* brings together a wide range of influential voices to explore the major political and social shifts around the world.





AFRICAN LIONS

Spotlight on the African middle class

The University of Cape Town Unilever Institute of Strategic Marketing has partnered with Ipsos to uncover a mass of information about a market that makes up more than 100 million people in sub-Saharan Africa: the Urban Middle Class.

The *African Lions* report charts the profile and dynamics of the middle class and provides marketers with an in-depth understanding of factors such as living conditions, aspirations, media consumption, buying patterns and brand relationships.

In this part of the world, 'middle class' is defined as someone who:

- earns more than \$4 a day
- has disposable income
- is employed, runs a business or is studying
- made it to secondary school
- is not earning more than \$70 a day

Across 10 cities in sub-Saharan Africa, it was found that over 60% of people are defined as middle class, although this varies significantly by city. In Lagos, 68% of people (14m) are defined as middle class, while in Nairobi it's 49% (1.6m).

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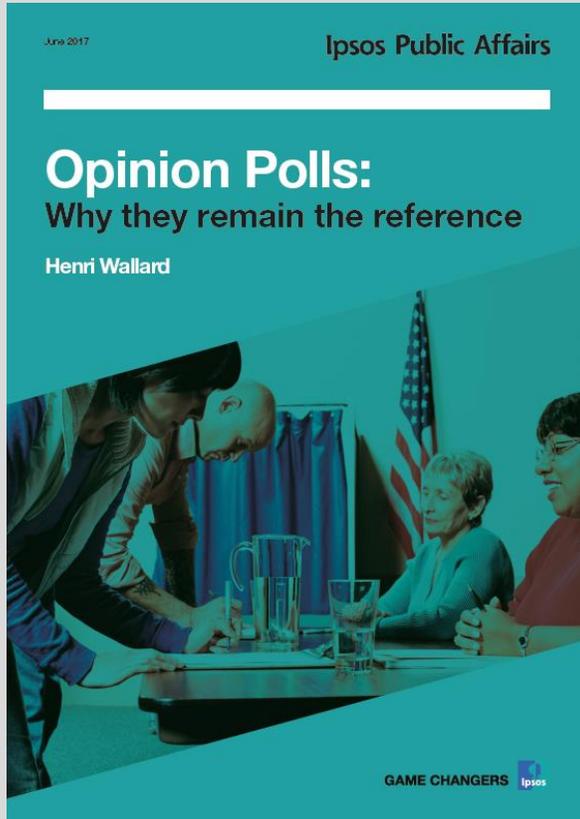
The everyday concerns of the global population

In this new *Ipsos Views* white paper, Michael Clemence and Harriet Fowler present new aggregate analysis of a flagship Ipsos survey, *What Worries the World*.

Each month we ask an online sample of over 18,000 citizens in more than 25 countries about the key issues they believe are facing their country, asking them to pick up to three from a diverse array of topics, ranging from unemployment to access to credit.

This analysis reviews the data for January to December 2016 – a year of great disruption and change – to try to understand how the world's worries are changing. We make use of Ipsos' long-term trends to see how concerns have shifted over time, what people are worried about right now, and what we might worry about in the future.

Unemployment is the issue people around the world worry most about, with healthcare a particular concern for Americans and crime among the major worries in many parts of Latin America. Looking to the future, concerns in large emerging economies about the environment and cost of living seem set to rise.



OPINION POLLS

Why they remain the reference

The last year has seen opinion and election polling subjected to both criticism and praise. Here, we review the evidence, looking particularly at recent experience in the US, UK, France and the Netherlands.

At Ipsos, social media, big data and machine learning techniques have become mainstream in some parts of our activities. The art is to combine these approaches with surveys in ways which are effective, rather than trying to force a certain solution if we believe it is not adequate and ready. This is particularly apparent when we look at the practice of polling.

While electoral polls are not perfect predictors, they remain an excellent method, based on sound theory. Claiming that one could replace them, for example by simplistic methods derived from social media, is just a fallacy.

At the same time, the polling industry should not be complacent; it needs to continue to invest in scientific progress and rigorous practice. The focus needs to be on implementing the *right methods*, combined with a responsible attitude towards citizens and media.

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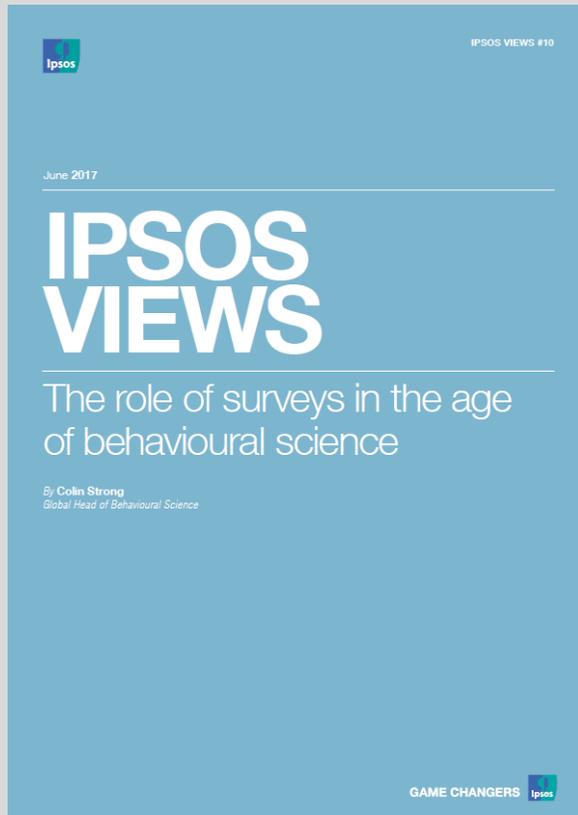
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BEHAVIOURAL SCIENCE

The role of surveys in the age of behavioural science

In this new *Ipsos Views* white paper, Colin Strong takes us on a tour of how behavioural science techniques are being applied to market research practice.

He identifies five reasons why we still need to ask questions:

1. Most academic research indicates that we are reasonably reliable witnesses of much of our lives.
2. Sometimes we do need to know how consumers feel and what they believe. There is no sensible alternative in these instances to asking questions.
3. All approaches have their limitations. Alternatives to asking questions are no exception.
4. Asking people questions reflects a belief that how we think and feel shapes how we decide to act.
5. Any instances of poor questionnaire design do not automatically mean that asking questions is wrong.

The paper suggests that integrative approaches are the future; we need to continue to ask questions but also use techniques such as ethnography, data analytics and experimental design to ensure a total consumer understanding.

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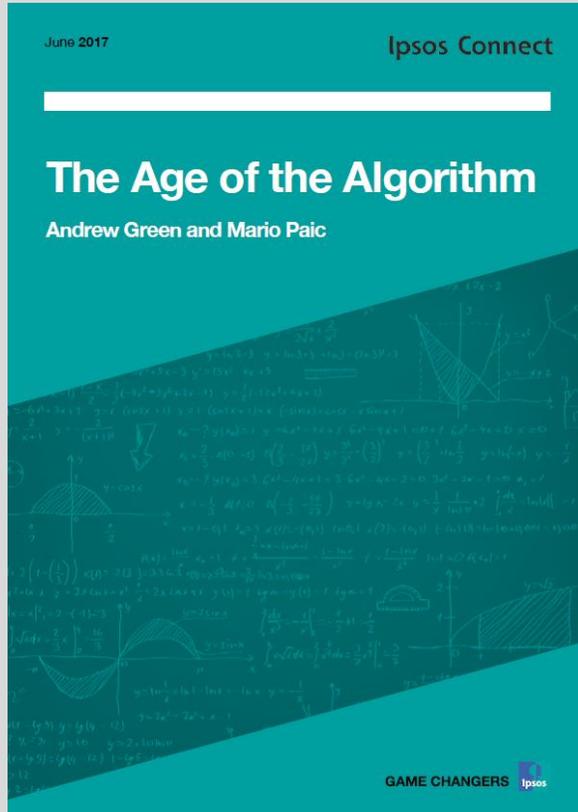
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THE AGE OF THE ALGORITHM

How data science techniques are being used in media measurement

It is hard to find a major audience measurement service that does not employ statistical wizardry of one sort or another. From simple weighting of survey results, to correct for sample imbalances, to modelling the audiences, to hard-to-measure media, the use of statistics and algorithms is increasing.

The digital revolution means advertisers and media companies need more information than ever before on media usage. Yet people are less willing than they have been in the past to participate in surveys and, even when they can be persuaded to do so, want to be engaged rather than bored.

This conundrum of needing more information while finding it harder to collect from surveys alone is likely to get harder rather than easier as time passes.

In this white paper, we look at how data science techniques are being used in media measurement to provide clients with better quality information, while keeping the burden on respondents to a minimum.

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DANGEROUS WORLD 2017

Shedding light on who influences global affairs in today's world

In a new *Ipsos Global @dvisor* poll, an overwhelming majority (86%) of respondents in 25 countries agree that over the last year the world became more dangerous.

Since October 2016, the number of those who say things are getting more dangerous has increased most markedly in Brazil, South Korea, and Germany.

In contrast, the proportion saying the world has become more dangerous has fallen in Russia, France and Hungary.

Canada and Australia top of the list of countries and organisations that people believe have a "positive influence" on world affairs today, scoring 81% and 79% respectively.

On this measure, the European Union scores 57% and China scores 49%, ahead of the US on 40% and Russia on 35%.



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Ipsos June 2017 Ipsos Connect

Reality check

Drive growth, by understanding the reality of how people choose brands

Keith Glasspoole

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REALITY CHECK

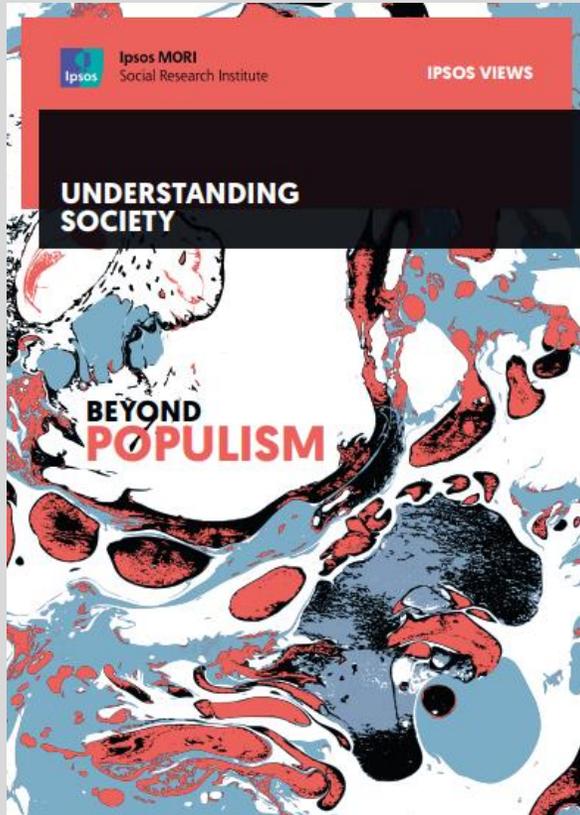
Understanding the reality of how people choose brands

The pace of technological and social change is bewilderingly fast. In the world of brand and communications, we feel this particularly keenly, with the digital revolution transforming the way that brands seek to connect with people.

By basing your brand evaluation around people, and the reality of how they choose brands – which is still governed by “analogue” mental networks, even if those networks can be digitally disrupted these days – then you can find the best strategy for growth.

Three quick tips to drive success:

1. *Be salient to be considered.* Make sure your brand comes to mind at the moments that matter.
2. *Be chosen first at those moments that matter.* Make sure your brand has the highest perceived value. Do so by making sure your brand performs well. Then make sure your brand has created a stronger emotional connection than the next brand.
3. *Be easy to choose.* Which means be available and visible and in the format people want. This is so much more important, and more profitable, than focusing on price.



UNDERSTANDING SOCIETY

Beyond Populism

In this special international edition of *Understanding Society*, the Ipsos Social Research Institute brings together a wide range of influential voices to explore the major political and social shifts around the world.

Our *populist trends* global survey highlights the importance of nativism and a sense across a wide variety of countries that the 'system is broken'. However, this report concludes that populism as it's commonly discussed is more of a political strategy than a coherent ideology.

There are certainly common themes – but the key is to understand what lies beneath and beyond in people's beliefs, rather than try to fit all global situations to one common phenomenon.

Also on the topic of populism, Ipsos Public Affairs have published a new point of view paper – *Brand Risk in the New Age of Populism: Four Key Tactics for Surviving Hyper-Partisan Consumers* – aimed at helping brands manage the politicisation of their customer base with a view to avoiding or minimising politically-minded boycotts.

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SHORT CUTS

UK General Election

Age was **the** big dividing factor in the recent UK General Election, according to recent Ipsos MORI research into how different sub-groups voted, and how this compares with the 2015 election.

The swing towards Labour came from the under 45s, compared to a swing towards the Conservatives in the over 55s. Education was another clear divide; the Conservatives had a large 17-point lead among those with no qualifications, while Labour had a 15-point lead among graduates. These mark a shift in the voting patterns Britain has been used to in recent decades.

Meanwhile, our [qualitative case study into understanding emotional reactions to political speeches](#) suggests that perceptions of party leaders are having a greater influence on voting intentions than previously.

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Russia's Upper Middle Class

Despite the economic crisis, travel is found to be the top life goal of the Russian upper middle class, according to the latest Ipsos Comcon *Premier'2017* survey.

Over the past 12 months, 75% of respondents travelled outside Russia and the CIS. Most (69%) used travel agencies service to organise a trip, while 31% organised their trip independently.

The study analyses in detail brands, goods and services of the upper price range, available to the well-off segments of the population.

The top five goals of life for the coming year among this upper middle class audience are travel, a healthy lifestyle, renovation of a property, savings or investments, and buying a car.

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Ad Blocker Trends

We know consumers like to browse online, but the situation with online ads – especially the ones that slow wireless networks and clog technology with malware – has become so dire that more and more people are downloading ad blockers.

In this article, Adrienne Gibbs highlights recent Ipsos findings that 82% of people around the world find advertising a “nuisance” and that 83% think online ads “get in the way” of what they’re trying to do.

Ad blocking has risen in connection with specific ad formats that are proving to be extremely annoying to consumers, such as pop-up ads and auto play video ads with sound. When people encounter these ads, they move on to a different page, close the site or download an ad blocker. And when that happens, everyone loses.

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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.

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

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