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March 2018

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# IPSOS UPDATE

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

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# WELCOME

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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](mailto:IKC@ipsos.com) with any comments or ideas, or if you would like to subscribe to future editions.

Thank you.

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**GAME CHANGERS**



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## AFRICAN LIONS: Who are Africa's rising middle class?

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The African middle class is thriving. But who exactly are they? And how can we understand more about them? This paper paints a picture of the continent's consumer landscape, including key considerations for marketers.

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## WOMEN'S ECONOMIC EMPOWERMENT: Why women are essential to global development

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Since 2012, we have been implementing impact studies for corporate Women's Economic Empowerment (WEE) initiatives. Drawing on a number of case studies, this paper shares some of the methodological findings from our work.

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## WHAT WORRIES THE WORLD: Unemployment continues to be the main concern

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Many global citizens believe their country is on the wrong track, with Brazil, Mexico, Italy and Hungary the most anxious, according to the latest *What Worries the World* survey across 27 countries.

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## LAUNCHING SUCCESSFUL INNOVATIONS: Applying Byron Sharp's principles

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While Byron Sharp's theory about brand marketing offers advice on how to grow existing brands, this paper explores whether marketers can apply Sharp's principles to new product development as well.

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## 2018 WINTER OLYMPICS: The impact of global affairs on public attitudes

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Concerns about global affairs impacted public opinion ahead of the recent Winter Olympics, with many suggesting that the games have become too nationalist and too corporate, according to a *Global @dvisor* study.

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## ADHERING TO ADHERENCE: The no-blame approach

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Adherence is one of the biggest challenges facing healthcare today. This paper provides a framework for thinking about adherence through patient behaviour – exploring motivation, ability, and physical and social context.

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## TRANSGENDER PEOPLE: New survey highlights global attitudes

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A majority of people want their country to do more to protect and support transgender people, according to a study examining the attitudes of citizens across the world.

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## A NEURO TAKE ON THE SUPER BOWL ADS: How Tide cleaned up

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This paper presents the results of our live audience Super Bowl party/study where a theatre full of football fans were equipped with biometric technology to capture their emotional reactions to the game's adverts in real time.







## AFRICAN LIONS: WHO ARE AFRICA'S MIDDLE CLASS?

The African middle class is thriving, and with that brings new opportunities. But who exactly are they? And how can we understand more about them?

Last year's African Lions study spanned 10 major African cities and provided a demographic profile for the African middle class. The study found there are over **100 million middle class people** in Sub-Saharan Africa representing a total spending power of **+\$400 million per day**.

Building on the findings from the study, our new *Ipsos Views* paper paints a picture of the continent's consumer landscape, examining topics including household finances, shopping, nutrition, brand relationships and media usage.

### Contents include:

- Defining the African middle class
- Challenging assumptions
- Understanding the African shopper and the power of brands
- Considerations for marketers
- Future prospects

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## MEASURING WOMEN'S ECONOMIC EMPOWERMENT

Women are essential to global development. There is irrefutable evidence that communities progress when women have influence over financial decision-making in their households, and GDP increases as more women formally participate in the economy.

Institutions in both the public and the private sector have reason to support the empowerment of women across the globe. However, the private sector is uniquely positioned to impact women's participation in the economy, with the capacity to reach all corners of the world via global employee networks, supply chains, and customer bases.

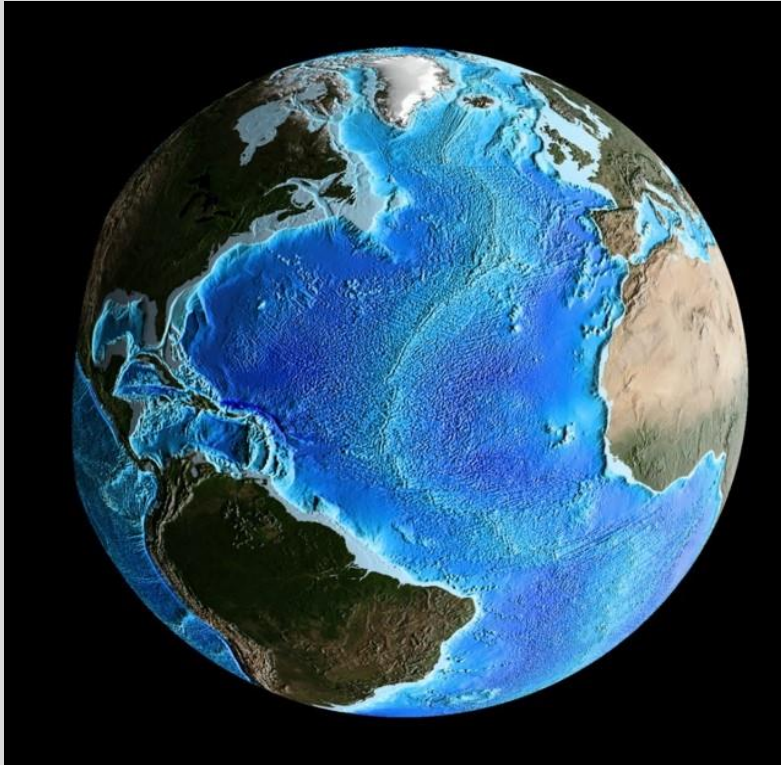
Since 2012, Ipsos has been implementing impact studies for corporate Women's Economic Empowerment (WEE) initiatives.

Drawing on a number of case studies, this paper shares some of the methodological findings from our work, with the goal of generating discussion and supporting expert measurement of WEE interventions.

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## WHAT WORRIES THE WORLD

Many global citizens (57% overall) believe their country is on the wrong track, according to the latest *What Worries the World* study.

### Findings include:

- Brazil (83%), Mexico (82%), Italy (82%) and Hungary (76%) are the most anxious that their country is on the wrong track. Meanwhile, China and India remain the countries most positive; 92% of Chinese people surveyed believe their country is going in the right direction, as do 72% in India.
- This month's biggest fall in optimism comes from Russia (42% of Russians believe their country is going in the right direction – down 12 points), followed by Saudi Arabia (65% – down 8 points). On the other hand, we see the biggest increase in optimism in South Africa (27% – up 17 points) and Canada (57% – up 7 points).

In addition, unemployment continues to be the main concern among citizens around the world (35%), followed by financial/political corruption (34%) and poverty/social inequality (34%).

Full details of the results for all 27 countries can be found in the report.

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## LAUNCHING SUCCESSFUL INNOVATIONS

### Can marketers apply Byron Sharp's principles about brand growth to new product development?

In his book, *How Brands Grow: What Marketers Don't Know*, Byron Sharp outlines a theory about brand marketing and offers marketers several rules to follow to achieve brand growth.

While Sharp's advice focuses on how to grow existing brands, this paper explores whether marketers can use these principles to help them launch successful innovations.

#### Key points include:

- Trial is important but you must also consider the potential for innovation to grow your brand through increased volume (*more often*) and increased penetration (*more people*).
- Genuine differentiation is proven to be a key driver of innovation success that innovators should not ignore when evaluating new products – but maintaining differentiation over time is tough.
- Innovations should be evaluated among the broadest possible audience to measure mass appeal.

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## 2018 WINTER OLYMPICS

**Concerns about global affairs impacted public opinion ahead of the recent Winter Olympics, with many suggesting that the games have become too nationalist and too corporate, according to a *Global @dvisor* study.**

The study, carried out across 27 countries before the start of the recent games, found key world influencers had differing views on whether nationalism would negatively affect the event. 61% of citizens in Brazil and 57% in China believe there is too much nationalism on display at the games, compared to Great Britain (34%) and the US (38%). Noticeably, developed economies were less concerned (43%) about nationalistic tendencies in the games than those in emerging economy nations (51%).

Three-in-five (60%) believe that the Olympics have become too corporatised due to sponsorship. 72% of South Koreans, who seemingly benefit the most from their country hosting the Olympics, believe that the games have become too corporatised, with neighbouring countries such as China and India echoing that sentiment.

Many people were also concerned about safety at the games. About half said they were worried about a terrorist attack taking place during the games, with strongest concern coming from Peru (68%), Spain (66%) and Argentina (63%).

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## ADHERING TO ADHERENCE

**Adherence is one of the biggest challenges facing healthcare today. Sub-optimal adherence results in sub-optimal health outcomes, which can burden a system already buckling under many other pressures.**

Non-adherence has historically been blamed on the patients themselves. However, a broad industry shift towards patient centricity and a great appreciation of the behavioural barriers means that the focus of responsibility is shifting to healthcare practitioners, the government and pharmaceutical companies.

A patient's automatic decision-making process exerts a strong influence on behaviour and therefore understanding the personal and situational barriers in the use of medication is crucial to combat the adherence problem effectively.

This paper provides a framework for thinking about adherence through patient behaviour – looking at four categories: motivation, ability, physical context and social context.

With this framework, we can begin to create bespoke interventions which speak to individuals, allowing a patient-centric and more informed approach to tackling the adherence challenge.

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## GLOBAL ATTITUDES TOWARD TRANSGENDER PEOPLE

As part of Ipsos' ongoing commitment to bringing a voice to people through data, our *Global @dvisor* survey examines the attitudes of citizens around the world toward transgender people.

### Key findings include:

- The majority (60%) want their country to do more to protect and support transgender people, with those in Spain (70%) and Argentina (67%) most supportive. Poland (39%), Hungary and Japan (both 41%) are least likely to agree.
- Countries around the world believe they are becoming more tolerant of transgender people, with 59% of people agreeing. This perception is strongest in Argentina (78%), Canada (78%), and Great Britain (75%).
- Most people (52%) believe transgender people are “a natural occurrence”. This belief is most commonly held in Spain (64%) and Germany (60%). People in Hungary (44%), Italy (45%), and Japan (48%) are least likely to feel this way.

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## A NEURO PERSPECTIVE ON THE SUPER BOWL ADS

There is extensive commentary on the Super Bowl ads, but few take an internal view of the consumer psyche when it comes to responding non-consciously.

Ipsos conducted a live audience Super Bowl party/study where a theatre full of football fans were equipped with biometric technology to capture their emotional reactions in real time. As a result, we saw a different pattern than many of the surveys that report on the conscious response to survey questions. This is because biometric technology measures in real time and is quicker than self-perceptions.

Tide's "*It's Yet Another Tide Ad*" was the top performing advert from a neuro perspective. This was the third of four Tide ads throughout the game and, by this time, it seemed that the audience was fully invested in the joke. From the perspective of behavioural science, advertising strategy and neuro research, the Tide campaign succeeded at imprinting the audience with the brand and nudged them to think about Tide in ads that had nothing to do with Tide through the power of association.

In addition to the paper, you can also watch this [video](#) to hear Ipsos' Elissa Moses discuss the benefits of biometric research.

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# SHORT CUTS

## The business of belonging

Referencing research conducted by Ipsos, this [AdAge article](#) on *The Dual Imperatives of Brand Belonging* discusses the substantial business and marketing performance gains to be had when brands play a role in addressing the consumer belonging deficit.

Many consumers are inundated with news, notifications and posts, and we spend less time sharing pastimes and feeling involved in our communities. It's up to brand experience designers and marketers to uncover the attitudinal commonalities and imperatives that matter to consumers.

Discussing the research conducted for IBM iX in more detail, you can also listen to Ipsos' Christie Moorman in this episode of [The Belonging Brief podcast](#).

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## Rapid response advanced analytics

Ipsos can help answer your business questions with advanced analytics solutions using a high quality, affordable and fast-turnaround market research platform.

Questions might include:

- What's important to my customers?
- What message is going to resonate with my stakeholders?
- Can I charge a premium for this feature?
- How do I build a better product?

[In this webinar](#), we hear how to use advanced analytics tools in market research surveys and highlight some of the most commonly used solutions, such as MaxDiff, TURF and Discrete Choice modules. The webinar includes a case study on "planning a vacation" that will showcase how advanced analytics were used to dig deeper into the data.

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## Index design and consumer happiness

The age-old question of 'Are my customers happy with my product?' is a difficult one to answer. Satisfaction is subjective and means something different to everyone depending on how much they interact with your service, their experience of the product, and the quality of their interactions with your customer service team. However, in the age of big data and with data science we can provide an accurate and robust measure of overall happiness.

In this thought piece, *Index Design: The Pursuit of (Consumer) Happiness*, we investigate how index design can provide a better understanding of the KPIs that matter to your business. By applying data science techniques, we can generate robust customer insights that enable you to drive loyalty and make tangible improvements for those who are dissatisfied. Ultimately, this reduces costs, increases ROI, and delivers that elusive consumer happiness.

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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](mailto:IKC@ipsos.com) with any comments, including ideas for future content.

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