
June 2019

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 June 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.

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GAME CHANGERS



WE SEE WITH OUR MIND, NOT JUST WITH OUR EYES

We are biologically wired to rely heavily on vision to guide our decisions in the world, including our purchase decisions. Our white paper looks at how the specific visual features of a product affect how a consumer judges it.

ENTREPRENEURIAL GENERATIONS The financial wellbeing of young adults

Our study in seven countries looks at the financial realities and ambitions of 18-25 year olds, from spending and saving patterns to starting businesses, including how they compare themselves with previous generations.

FOR THE LOVE OF MONEY? How to manage Online Research Communities

Our new Ipsos point of view outlines the benefits of using online communities for research insights, setting out strategies for finding and keeping motivated and engaged participants.

BETTER MYSTERY SHOPPING Seven steps to success

Mystery shopping can be a powerful tool when designed and implemented well. Our overview of how to run a successful mystery shopping programme guides businesses to success, step-by-step.

EUROPEAN ELECTIONS 2019: Is the EU considered a success or failure?

Ahead of the 2019 European elections, our latest Global Advisor survey asked people in 28 countries, including 10 in Europe, about what they think of the European Project.

SUPER-AGEING JAPAN Understanding those 'squeezed in the middle'

As the world's premier ageing society, Japan is facing numerous challenges. This briefing looks at the facts and figures, as well as setting out Japan's perceptions on ageing compared to other countries around the world.

ETHICS IN SOCIAL MEDIA RESEARCH The greatest good for the greatest number?

Social media has ushered in a whole new category of business ethics. Our research experts outline principles that should be considered when navigating this new environment.

MIND THE GAP Why it matters what a brand promises and delivers

With clear evidence that businesses struggle with a promise-experience gap, our research seeks to understand the consumer view and advises on how to align brand expectations and customer experience.





WE SEE WITH OUR MIND, NOT JUST WITH OUR EYES

Despite what you may have been told, looks matter! The visual features of a product carry particular associations for consumers.

We often seek to understand how consumers respond to a product's appearance, but fail to link these responses back to the exact visual features that trigger them.

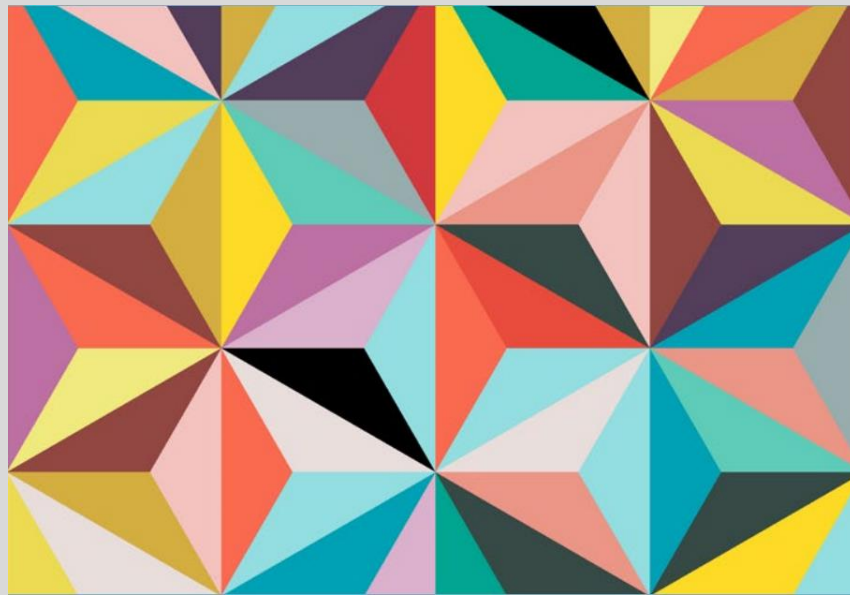
This is a fatal omission. Our new white paper explains how an understanding of the psychological responses connected to what we see can give designers and manufacturers a competitive edge in putting products to market.

Product appearance is important today for two reasons:

1. **The growth of online sales:** what a product looks like takes on a more influential role as sales shift online.
2. **Increased accessibility to advanced manufacturing technology** makes it more difficult for consumers to differentiate products in terms of performance.

Cognitive and affective beliefs, which correspond to our head and our heart, work together as consumers decide whether to make a purchase or not.

This is demonstrated in three case studies that test consumer responses to the shapes, colours and styles of household goods and appliances.



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EUROPEAN ELECTIONS 2019

Our 28-country study explores attitudes towards the European Project, past and future.

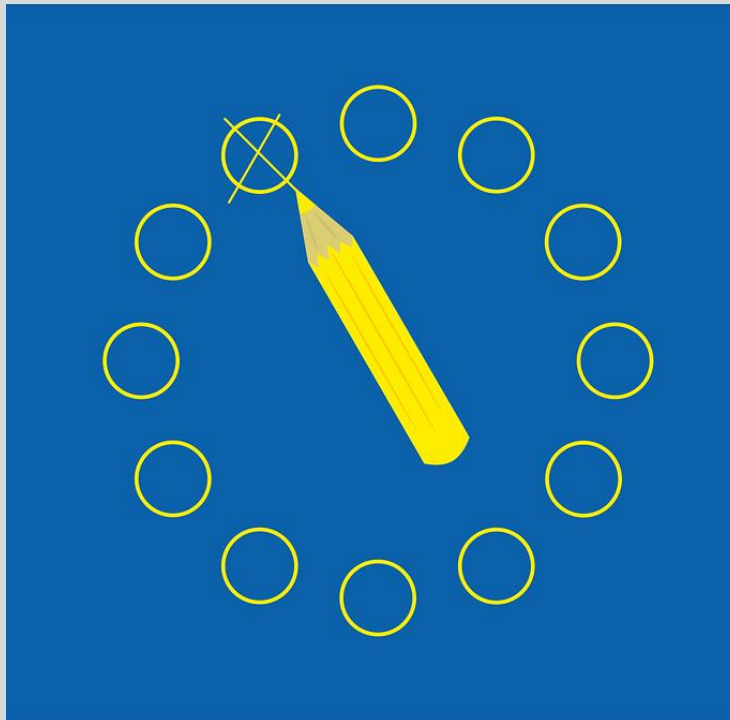
This Ipsos survey, run on the eve of the European elections, finds that nearly half of people in 10 European countries think that things across the European Union are on the wrong track.

Italy, France and Britain are most pessimistic about where the EU is heading, but in all countries – with the exception of Germany – people are less negative than they were two years ago.

One in two respondents worldwide think that the EU has made Europe stronger than it would have been otherwise, although non-EU countries are slightly more positive on this point than the European countries themselves.

Reflecting on the successes and failures of the European Project since 1957, twice as many people across all 28 countries think that its successes outnumber its failures, than those who think the opposite (30% vs 15%).

Respondents consider the biggest positive contribution of the EU to be the ease of travel between European nations (73%), followed by trade (66%) and the range of products and goods available (60%).



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ENTREPRENEURIALISM OF YOUNG ADULTS

How do the financial realities and ambitions of young people today compare to previous generations?

Over half of young adults think their generation is “more entrepreneurial” than previous generations, according to a survey of 18-25 year olds in Romania, Poland, Hungary, Lithuania, Czech Republic, Spain and Mexico.

But the same proportion also believe that there are more barriers to fulfilling these entrepreneurial ambitions today than in the past.

Some 45% of respondents agree that their financial situation is stronger than that of their parents, but this varies between countries.

We find that young people in Mexico and Romania are the most confident of all countries surveyed in managing their personal finances. They are also the most likely to consider starting up their own business in the future.

When it comes to choosing a job, earning a high salary is a decisive factor for two-thirds of Polish respondents. But this is only the case for one third for young Spanish adults, who are more likely to pursue a career that gives them personal fulfilment.



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“SUPER-AGEING” JAPAN

Our briefing on the dramatic demographic change facing Japan highlights both the challenges for society and individual worries.

With a life expectancy of 84 years old, an older generation renowned for good health and fitness, and a culture of respect for the aged, Japan may appear a perfect place to grow old. But only 10% of the population are looking forward to old age.

For those Japanese who have not yet reached old age, doomsday forecasts about the country's super-ageing population tell them that they cannot expect the same levels of care and security in later life as their parents.

It follows that we find Japan's middle-age citizens to be the most pessimistic about ageing. They are 'squeezed in the middle', between caring for their children as well as ageing relatives, in an increasingly insecure work environment.

Further findings from the briefing include:

- Only 5% of Japanese cite 'being financially secure' as something to look forward to in older age, compared to the 20% global average.
- Concern about maintaining social programmes is strong in Japan, given that the elderly dependency ratio (already 44% in 2015) is expected to grow to 73% by 2050.

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FOR THE LOVE OF MONEY?

How best to engage with consumers? Incentives are important, but monetary rewards are secondary to “intrinsic”.

Our new white paper explores the rise of Online Research Communities: password-protected online environments that enable brands to gain insights by interacting and collaborating with consumers in real-time.

Findings from communities managed by Ipsos show that the reasons that participants get involved in research greatly affect the quality and quantity of their contributions. *And money is not the main motivator.*

This requires us to think beyond pay-for-participation methods to consider broader motivation and engagement strategies.

Our guide for growing and managing effective online communities shows that:

- Extrinsically-motivated respondents are the least valuable members of a community in the long-run.
- Those with multiple intrinsic motivations are the most engaged members and perform best across all measures.
- Rewards can be a bonus, but it is better to align them with intrinsic motivations. This will keep members coming back for more reasons than just money.

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PRACTICAL ETHICS IN SOCIAL MEDIA RESEARCH

How do we “do the right thing” when it comes to social media research?

Social media is a rich and colourful data source that allows us to understand how people interact with the world, And the amount of data readily available is staggering.

Recent events – from personal data scandals to new data protection laws – have raised questions about its use. We found that 60% of people do not think that individuals’ data should be used for research purposes.

But, despite the public scrutiny, people do see the value of social media research – when data is handled responsibly and appropriately.

This report offers guiding principles for making social media research as conscientious as it is revealing, including:

- Ground research in what is *publicly acceptable* instead of what is *technically possible*.
- As a litmus test for research, ask yourself: “Would I be happy for my/my parents’/children’s data to be used in this way?”
- For sensitive topics, consider additional steps to anonymise or protect data.
- Examine aggregated mentions instead of individual posts for a more holistic picture.

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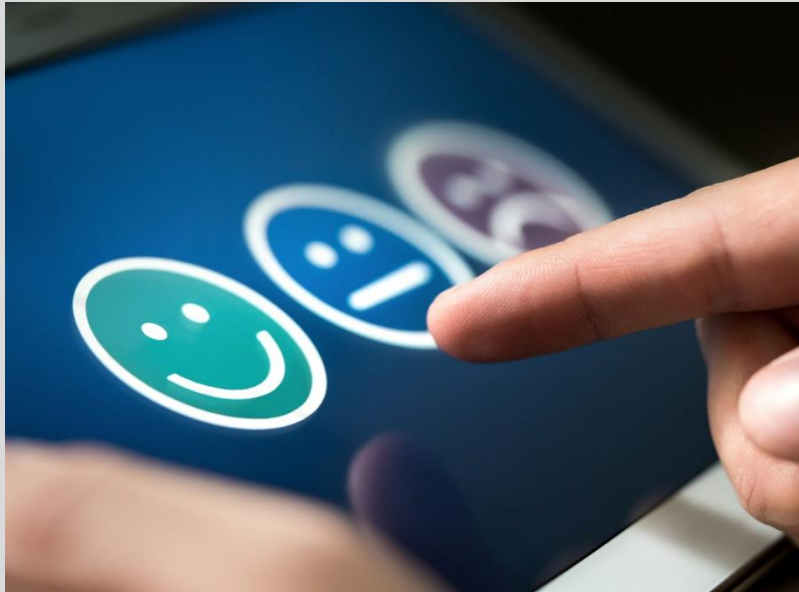
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DESIGNING A BETTER MYSTERY SHOPPING PROGRAMME

Seven steps to retail success through effective mystery shopping programmes.

Delivering an exceptional customer experience is increasingly difficult today, with heightened consumer expectations and a complex multichannel retailing environment.

Mystery shopping research exists to alleviate these concerns for organisations. When used effectively, it can be a powerful performance management tool that creates awareness around standards and initiatives, and drives organisational behaviour change.

And the scope of mystery shopping has grown: it is no longer limited to measuring compliance to brand standards in brick and mortar locations. It can be deployed across any customer channel and leverage new technologies.

But many organisations misuse mystery shopping methods and suffer from poor programme design.

In this paper, Ipsos experts provide a blueprint and top tips for retailers to design a better mystery shopping programme and enjoy more impactful results.

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MIND THE “BRAND-EXPERIENCE” GAP

Misalignment between brand promises and customer experience doesn't just weaken relationships with consumers, it breaks them.

Brands make promises to customers every day, but not only through direct and official channels. Previous experiences, word of mouth and social media feeds all converge to form an 'influenced promise'.

This sets a benchmark in consumers' minds for future interactions with a brand. It is important for businesses to understand this so that they can avoid the fall-out from a promise-experience gap.

Our research shows that many organisations struggle to deliver a customer experience that is consistent with their own brand promise, which can cause customers to often feel 'misled'.

Aligning brand promise and customer experience is a fundamental task that will allow businesses to:

1. Ensure expectations are met.
2. Guard against any feelings of ill-treatment that may translate into churn.
3. Facilitate greater emotional connection.
4. Foster greater KPI scores.

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SHORTCUTS

Numerate Nation? Maths skills in the UK

Too many Britons believe numbers don't count, according to our new report for National Numeracy day.

Despite government data that shows half of working age adults in the UK have the numeracy level of a primary school child, some 43% of respondents say that they do not want to improve their numeracy skills.

The report argues that there is a widespread lack of recognition of the use of everyday numeracy skills, such that:

- Three in ten think most people don't need to use numbers as part of their day jobs.
- Twice as many people say they would be proud of their child *if they were good at reading and writing* than if they were good at maths.

The report warns that millions of adults in the UK could be missing out on the benefits of improved numeracy skills due to a failure to appreciate their importance in everyday life.

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A life without digital media?

In his latest article for Marketing Land, Peter Minnium writes about how technology has disrupted the boundary between media and non-media interactions.

He asks: if we now rely so much on screens, can we function without them as a society? And would we want to?

While media has in the past acted almost exclusively as a vehicle for information and entertainment, it no longer plays such a singular and discrete role in our life. Today, it touches every aspect of our being, from how we live to how we work, play communicate and connect.

This article reflects on what was different, better or worse in a media-free world.

Although we might be inseparable from our screens in today's world, is that such a bad thing? After all, it frees up time that would hardly be better spent pouring over maps, on the phone to customer service reps or dashing from location to location.

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Nine trends impacting the baking industry

An Ipsos survey with Puratos uncovers nine trends impacting the baking industry, allowing companies to keep up with the ever-evolving industry. These trends are based on insights from 66 experts in 16 markets, 80 foodies in eight cities, and over 17,000 consumers in 40 countries.

Our report groups these trends into the three main categories of 'taste', 'health' and 'freshness', all of which which should not be compromised in baking products.

On taste, although 78% of consumers in North America prefer traditional tastes, the survey found that 56% want exotic flavours.

To determine the health of a product, 27% of consumers look for specific grains. Key ingredients for optimising the health-to-taste ratio include cocoa, seeds and nuts.

Freshness is determined by a consumer through five factors: when it's baked or prepared, its appearance, smell, expiration date and crunchiness.

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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.

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