
September 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 September 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.

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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FLAIR BRAZIL 2017: Debris or Seeds?

Our new report paints a picture of a country facing a very difficult situation – not for the first time.

FEEDING THE MACHINES: A Prognosis for Programmatic

Andrew Green takes us on a tour of “the programmatic” media buying landscape, providing tips on how to be seen above the clutter.

BRANDS DON'T BUY BRANDS – PEOPLE DO: The challenges for brand managers

How to attract more people, more easily, more often? Ben Joosen and Douwe Rademaker review the evidence, drawing on new Ipsos R & D.

ADVERTISING, REALITY, THE WORLD... ... according to Pokémon Go

Connecting great creative, with strong brand purpose *and* human aspirations. Arnaud Debia draws out ideas and inspirations from the Pokémon Go experience.

YOUTH OF THE NATION | INDIA: A focus on the under 35s

Indian consumers are willing to shop online – provided that discounts will be available. New research covering technology, lifestyle and more.

6 SECRETS OF DIGITAL STORYTELLING: Storytelling is more than an industry buzzword

Peter Minnium discusses the art of good storytelling and sets out the best ways marketers can tell those stories via digital media.

GETTING STARTED IN TEXT ANALYTICS: How to pick the right tool for you

The market has now matured: picking the right tool is more about ensuring the outputs will fit your needs. Fiona Moss on the questions you need to ask.

MILLENNIALS IN THE WORKPLACE: Millennials are “more enthusiastic and motivated”

But this was also the case among younger employees when we carried out similar research 10 years ago. Our 15 country study takes an in-depth look at millennial aspirations when it comes to their working lives.





Ipsos Flair Collection



Brazil 2017: Debris or Seeds?

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FLAIR BRAZIL 2017: Debris or Seeds?

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

Currently, Brazil's situation is hectic. And this is not the first time the country has faced a difficult situation like this. Some might say the country is condemned to live as if it were on a rollercoaster. But, this time, it may be different. And this is our bet: the current political, economic and moral crisis can awake a new conscience and trigger a real transition.

Some of the headlines summarising Brazil today:

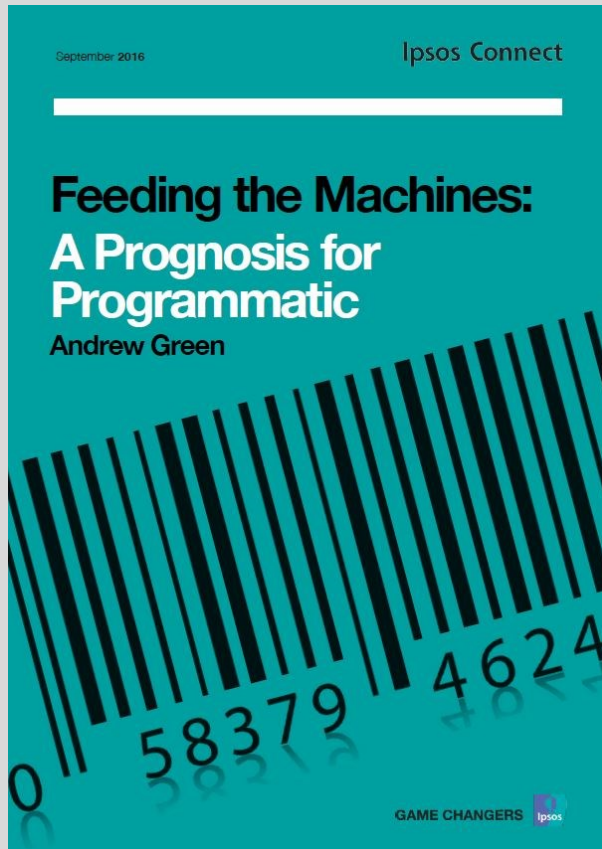
1. Brazil is on the wrong track, say 87% of its people.
2. Brazil's sharing economy is growing.
3. Brazil hasn't lost its sense of humour.
4. Brazil is experiencing a new wave of feminism
5. Brazil is ageing; brands need to adapt accordingly

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FEEDING THE MACHINES: A Prognosis for Programmatic

A tour of “programmatic” media buying - the use of software programmes to buy advertising space.

On a good day, programmatic technology enables media buyers to save time, increase efficiency and improve effectiveness.

On a bad day, programmatically targeted advertising will be seen by almost nobody, as a result of ad blocking, fraud and viewability issues.

And on an average day, digital display advertising struggles to be seen, due to heavy clutter and poor positioning. Viewability tends to be lower for ads placed programmatically, as opposed to those placed by a human

In this new paper, Andrew Green reviews the emerging landscape. He sets out the drivers of and barriers to growth, and looks at the challenges involved in measuring whether campaigns are meeting their objectives.

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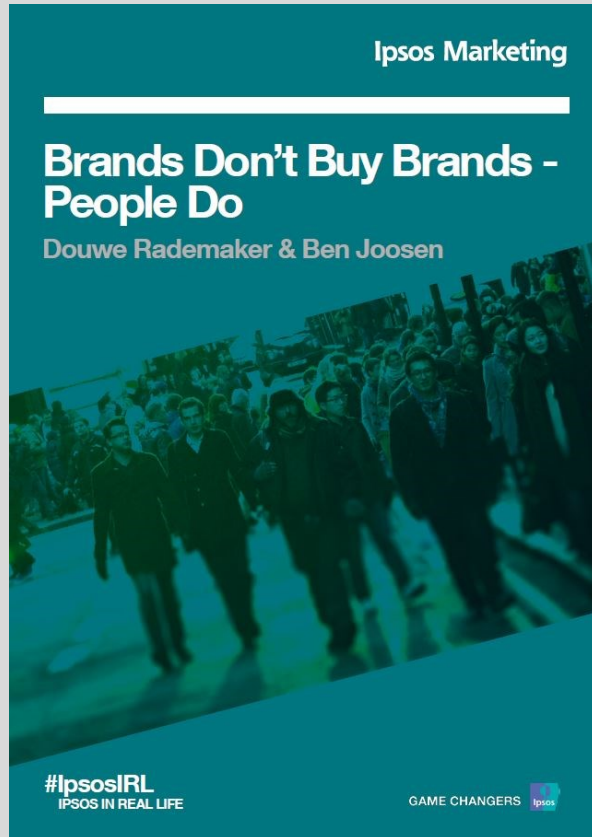
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BRANDS DON'T BUY BRANDS – PEOPLE DO

How can businesses grow their brands? A simple question with complex answers – answers that start with people in real life.

In order for brands to grow they need to attract more people, more easily and more often.

In this new White Paper, Douwe Rademaker and Ben Joosen set out the key issues, drawing on their latest Research & Development.

Three recommendations for brand managers:

- Strive to identify what people expect from the category and their brand: this is essential in order to ensure brand experiences reinforce these prominent memory structures and their brand is implicitly retrieved in the moment of choice.
- After deciding what is important to be included in your messaging, reinforce these in a consistent manner.
- Finally, build in cues or brand assets that make it easy for people to recognise you – so whenever consumers see your brand cues or assets, the brand comes to mind.



September 2016
Ipsos Connect

Advertising, Reality, the World – according to Pokémon Go

Arnaud Debia

Pokémon Go has been this summer's most striking global success story, grossing more than \$440 million in two months. Business analysts and mobile game specialists frame Pokémon Go's reasons for success in terms of technology - augmented reality made widely available. The human side to its success was many people's nostalgia for childhood Pokémon fun.

But is it more than that? Does Pokémon Go sit at the confluence of new trends shaping advertising and the world in 2016? Can Pokémon Go illustrate how brands could best answer people's current aspirations?

We've been on a hunt which uncovers trends that all have a bit of a Pikachu taste - ideas that brands can leverage to their advantage, as did Pokémon Go and other recent ground breakers (selected among this year's Cannes Advertising Festival winners).



From Pokémon Me time to celebrating ME. As with other mobile games, Pokémon Go is all about having a break - just you and your merry band of pocket monsters. Smartphone apps enable individuals to satisfy their inner ME and reveal it to the world - sharing their personal views, taking selfies and tweeting. Many celebrities in the news exemplify ME: focused self-advertisement, from Cristiano Ronaldo to Kim Kardashian. A recent jobber is US presidential candidate and Twitter addict, Donald Trump, whose political agenda largely revolves the cult of Donald: "part of the beauty of me is that I'm really rich".

Another recent example is Under Armour, which has successfully harnessed the cult of ME, both mentally and physically, to be salient and strengthen their relationship with people. From Gisele Bündchen, to Michael Phelps, the brand demonstrates how we can all rule ourselves.

While ME is still in, WE is gaining more and more importance.

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ADVERTISING, REALITY, THE WORLD - according to Pokémon Go

What does Pokémon Go tell us about what really motivates consumers today?

Pokémon Go has been this summer's most striking global success story, grossing more than \$440 million in two months. Business analysts frame Pokémon Go's reasons for success in terms of technology – augmented reality made widely available. Meanwhile, the human side to its success was many people's nostalgia for childhood Pokémon fun.

Arnaud Debia draws out ideas and inspiration from the Pokémon Go experience. His checklist includes:

- Satisfying the inner ME, while illustrating the rise of WE
- Bringing video game play into hard reality
- Finding virtual reality and escapism
- Augmenting reality to transform it

It's a powerful example of what can be achieved when great creative and strong brand purpose connect with real human aspirations.



YOUTH OF THE NATION POLL

Report on



Poll Duration:
25th July - 7th August 2016



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YOUTH OF THE NATION POLL | INDIA

Indian consumers express scepticism about shopping online – unless discounts are on offer.

In the second edition of the **Youth of the Nation Poll**, a study by Ipsos and the news app *Inshorts*, 54% of respondents say they won't shop online unless a discount is offered.

This major survey focuses mainly on the views on Indians aged under 35, across the country's top 10 cities. Among the findings:

- 74% said they have used a dating app but only 6% have met someone through it
- More are using Instagram than Twitter or Snapchat
- Only 11% have conducted a transaction using a chatbot or a personal assistant app
- 80% of respondents say YouTube is the place where they find themselves watching more videos these days
- Out and about, 59% say their experience as a railway passenger has improved over the last two years

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6 SECRETS OF DIGITAL STORYTELLING

Peter Minnium discusses the art of good storytelling and the best ways marketers can tell those stories in digital media.

Humans are programmed to find a story in everything we see. Every picture, word or sentence, no matter how simplistic, is imbued with deeper meaning. This hardwiring helps our brain understand, contextualise and retain details about the world around us.

For that reason alone, it is only logical that good stories can also function as potent strategic business tools — ways and means to communicate marketing ideas, change perceptions, forge emotional connections, and alter behaviours.

Six secrets to digital storytelling

1. From Sequential to Simultaneous Communications
2. From Owned to Shared Supply Chain
3. From Linear Storytelling to Systemic Story-Building
4. From Kinescope to Kaleidoscope Content
5. From Incite to Insight
6. From Craftsman to Craft Guild

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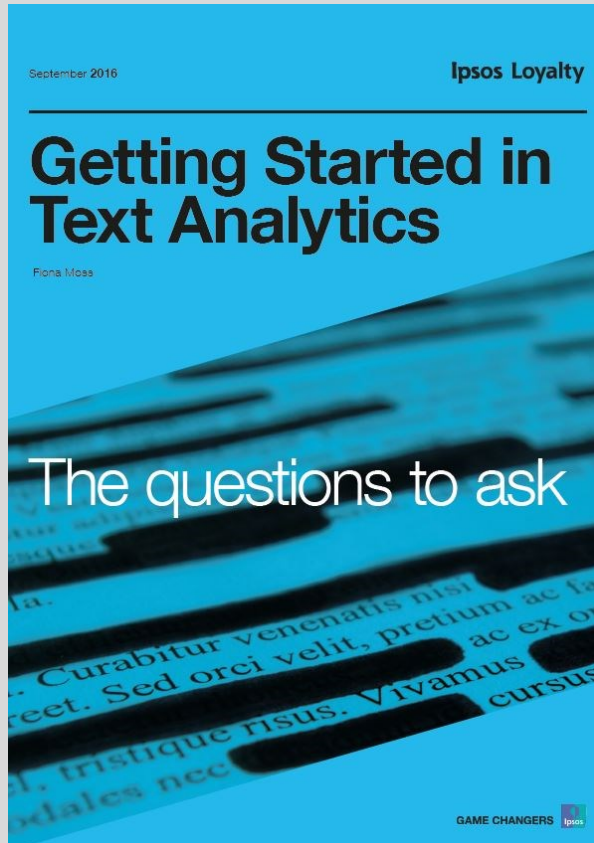
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GETTING STARTED IN TEXT ANALYTICS

The market has matured. Picking the right tool is now more about ensuring the outputs will fit your needs.

This is no small challenge, not least because jargon and terminology abound in this market. From semantic engines that identify word patterns then use rules-based approaches to build categories, to probabilistic/statistics-based approaches that use frequencies and co-occurrence of words to derive results, it can be difficult to know exactly what you are getting.

Fiona Moss outlines the key questions which may help:

1. Is your focus on exploring the data or categorising and quantifying it?
2. How much data do you have?
3. How much consistency will you need in the analysis over time or between projects?
4. How much transparency and control over the categorisation do you need?
5. Is there a lot of “noise” in your data (for example, do your social media comments contain a lot of irrelevant posts)?
6. How much granularity will you require?



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MOTIVATION
AT WORK
increasing for 26%
of young employees

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MILLENNIALS IN THE WORKPLACE

Millennials are more enthusiastic and motivated, work in a more trusting and supportive environment and feel better managed and trained.

But this was also the case among younger employees ten years ago.

So is this a generational effect or just the classic attitudes of new joiners on the job market?

The latest *Edenred-Ipsos Barometer* finds that, in a series of areas, the perspectives of millennials in the workplace do not differ very much from those of their older colleagues.

For example, when it comes to what people are looking for from their line manager, employees across the age spectrum are all looking for honesty, fairness and someone who shows them respect.

Download the full report for full details of the research, based on analysis of younger workers across 15 countries.

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SHORT CUTS

Brexit Britain

Ipsos MORI recently hosted an event entitled 'Britain after the referendum: What next?' Speakers included Nick Clegg, MP, and Paul Drechsler, President of the Confederation of British Industry. [See the slides here](#).

When asked about the impact on the UK economy, around half of Scots (52%) think it will be negative compared to one in five (21%) who think it will have a positive effect. [Read more about this story](#).

Meanwhile in Northern Ireland, an Ipsos MORI poll finds 63% wanting to remain part of the UK; 22% would like to join the Republic of Ireland. These figures are little changed on 3 years ago. [Find out the details here](#).

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Virtual reality grows

With **virtual reality (VR)** set to have its first billion-dollar year by the end of 2016, savvy marketers are seeking to tap **into the platform's storytelling power**. The range of possibilities in VR makes it an exciting time for those who are involved in content creation. It's great for branded content partnerships as it enables brands to tell stories in an immersive way, shifting from talking about brand values, to inviting people to feel them. [Read more](#)

Is VR the sleeping giant for **the auto industry**? The simple answer is, yes, according to John Kiser and Narith Panh. VR is no longer just for gaming. Ipsos is now exploring consumer VR usage impact within the auto industry. [Here are the results](#).

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Who won the US presidential debate?

While Hillary Clinton is something of a consensus winner of the first debate, it hasn't really impacted the race. She led going into the debates, did well, and leads coming out.

More likely voters say that Hillary Clinton won the September debate, with 48% saying Clinton did a better job to 23% saying Donald Trump did better.

However, the debate has not radically altered perceptions of either candidate. 53% of likely voters say it did not change their perceptions of Clinton and 56% said it did not change their perception of Trump.

Nationally, Clinton still holds a small lead over Trump, now at +4 among likely voters. [More at our US Election homepage](#).

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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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