
November 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 November 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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DEVICE AGNOSTIC: Why You Need to Transform Now

Device agnostic is no longer the future of online research. It's happening now. This new Ipsos Views white paper provides the lowdown.

SPOTLIGHT ON CHINA: The Boom of China's Automotive Aftermarket

China overtook the United States as the world's No 1 automotive market in 2009. As the market starts to mature, new possibilities are opening up, for example in e-commerce.

REPUTATION COUNCIL REPORT 2016: A guide to the latest thinking in corporate comms

Our panel of Reputation professionals discuss their current challenges, which include cyber security, risk management and adapting the "transparency agenda" to the particular circumstances of their business.

LOST IN A DATA JUNGLE? Making use of "smart data"

Fiona Moss explores how "research ecosystem" thinking can help us find our way successfully through the data jungle.

MENA DIGITIZED: The Tech Trends Shaping the Region

With connectivity levels skyrocketing, MENA's consumers are finding their voices online, engaging with the world around them and expecting to be heard.

EMOTION IN ADVERTISING: Making Connections with Your Brand

How can brand campaigns leverage the interplay of attention, memory and emotion to influence people's choices? Gailynn Nicks and Yannick Carriou investigate.

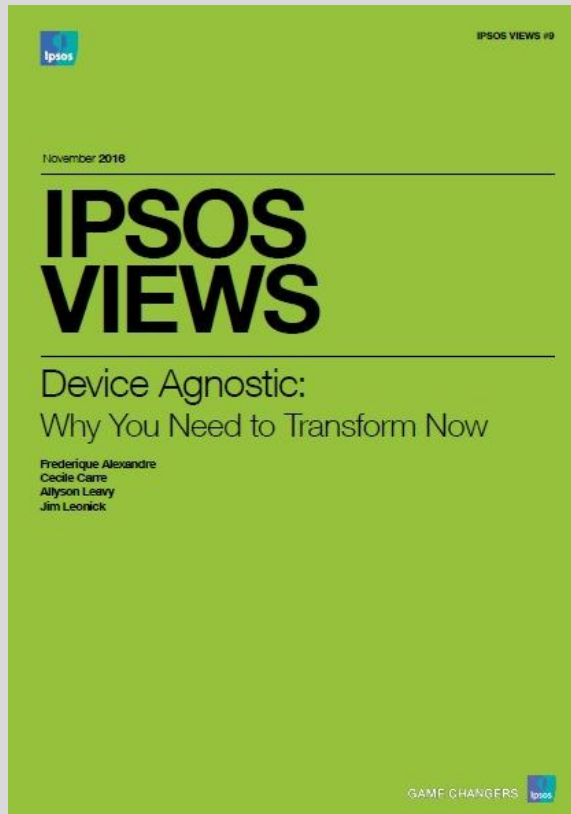
LATIN AMERICA: The most attractive countries for...

The region's opinion leaders have their say on the strengths of different countries: from gastronomy, culture, hospitality through to safety on the streets.

DIGITAL ADVERTISING: Measure the metrics that matter

Phil Shaw stresses the need to be clear at the outset on the desired brand impact of a campaign – including the role communications are expected to play in achieving these goals.



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DEVICE AGNOSTIC: Why You Need to Transform Now

Device agnostic is no longer the future of online research. It's happening now. This new Ipsos Views white paper provides the lowdown.

Marketers must adapt quickly or risk losing touch with their consumers. Over half of the global population is now using a smartphone – and it will be over 70% by 2021. At the same time, fixed broadband Internet subscriptions are flatlining. The result? “Traditional” online research has to change.

This new white paper showcases our thinking on today's world of device agnostic surveys, including:

- How consumer behaviour is changing – and what this means for market research
- How device agnostic provides a route to deeper, more insightful connections with consumers
- An actionable set of best practices for device agnostic surveys – grounded in Ipsos' latest methodological research

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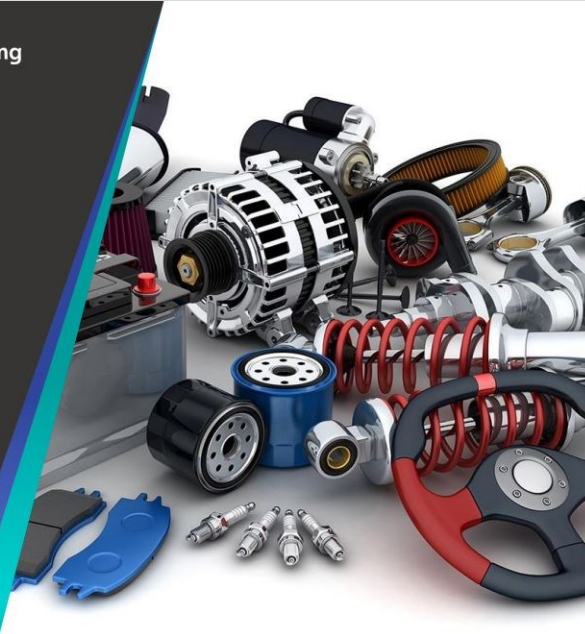




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THE BOOM OF
CHINA'S AUTOMOTIVE
AFTERMARKET
IS IMMINENT



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SPOTLIGHT ON CHINA: The Automotive Aftermarket

China overtook the United States as the world's largest automotive market in 2009 – and the industry is evolving quickly

The value of the country's automotive aftermarket industry reached \$118 billion in 2015 and it is expected to grow at 12.7% compound annual growth rate to reach \$214 billion by 2020.

This new industry guide takes a look at the realities and trends of the automotive aftersales market in China. It sets out some of the opportunities (and challenges) that companies, part makers and aftersales service providers will encounter when looking to secure high performance.

The expected boom in the automotive aftermarket will allow independent dealers and newer franchises to gain strength. Many will compete for this big market, and they will be applying a variety of methods – ecommerce, for example.

For more on the latest research and analysis from our team in China, the most recent [China Pulse](#) is now available, including briefings on beauty and skincare, buying habits of Millennials and a cashless mobile life.

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THE THREATS TO REPUTATION: From cybercrime to transparency

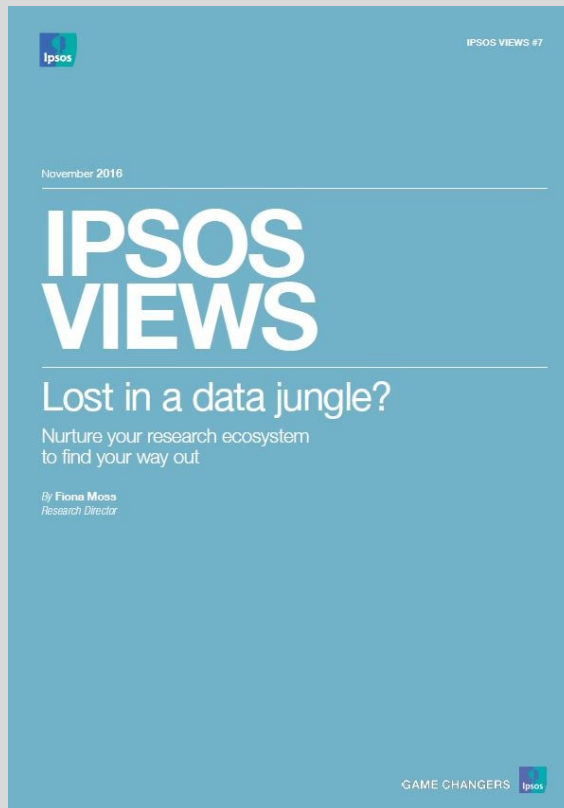
The Reputation Council Report 2016

Established in 2009, the Ipsos Reputation Council brings together senior communicators from large corporations to explore common ground and current trends.

Its mission: to increase understanding of the challenges facing communicators in the corporate environment, as well as capturing expert views on key trends, issues and events in the wider world.

This eleventh sitting of the Reputation Council involved 109 senior communicators based in 14 different countries. Topics covered include:

- Responding to a crisis
- The reputational threat of cybercrime
- The link between reputation and your home market
- Identifying emerging reputational risks
- Achieving the appropriate level of transparency
- Making social media work for your organisation



LOST IN A DATA JUNGLE? An Ipsos Views white paper

Using “research ecosystems” thinking to find your way out

Do your tracking studies feel more like juggernauts than nimble research vehicles? Are you drowning in data but still left with unanswered questions? Do you want efficient, joined-up insight from your different data sources, but don't really know where to start?

In this latest *Ipsos Views* white paper, Fiona Moss describes the benefits of applying a “research ecosystem” mindset to help find your way successfully through this data jungle.

What seems clear is that today's proliferation of data – surveys, customer feedback, web chatter – is not going away. It brings great possibilities – but with it come the challenges of managing and using that data. Already this has brought about a step change in the way insight is delivered: where once ‘more data, more detail’ was a constant mantra, now the emphasis is on *smart data* that delivers specific insights easily, coherently and upon request.

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MENA DIGITIZED

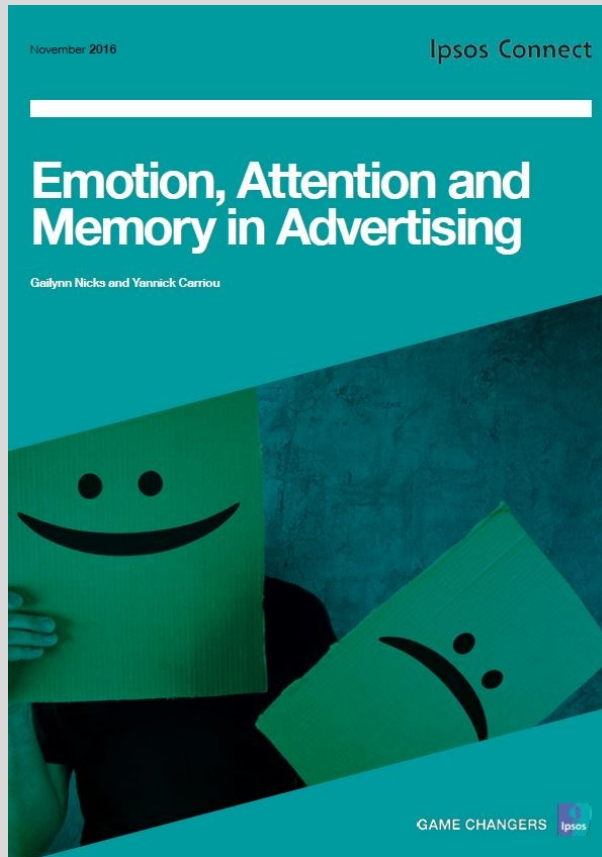
Explore the Tech Trends Shaping the Region

Combine an explosive growth in Internet usage, a wave of tech-hungry Millennials and the infiltration of smart devices across the MENA region, and witness a digital transformation taking consumer lifestyles by storm.

With connectivity levels skyrocketing, MENA's consumers are finding their voices online, engaging the world around them and expecting to be heard. And with unprecedented connectivity comes the pivoted reality of how media is being consumed, information searched for and opinions formed.

Key findings from our new report:

- Smartphone penetration has grown from 27% in 2007 to 84% in 2015
- Tablet ownership increased from 1% in 2012 to 19% in 2015
- 9 out of 10 millennials use social networks, and 80% use chatting platforms
- 90% of MENA Internet users are on social media, with 96% on Facebook

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EMOTION, ATTENTION AND MEMORY IN ADVERTISING

How can brand campaigns leverage the interplay of attention, memory and emotion to influence people's choices?

We have always known that stories with the ability to stir our emotions get remembered. They also have the capacity to influence our behaviour. So, emotion-based advertising can be highly effective. But to be truly effective it needs to be more than just a good story. Yannick Carriou and Gailynn Nicks explore the evidence.

- Emotion-based advertising can be highly effective but must work within a strong and consistent brand framework.
- Brands need to have a range of distinctive iconography or assets that are consistent, engaging and understood.
- Advertisers should ensure that emotion-based advertising links to the brand through association with the cues – needs, functions, situations, sounds, sights or smells – that are *most relevant* in the *key moments*.
- Effective emotional priming means having stories that are relevant to people's motivations and goals – thereby ensuring that engagement with advertising is sustained and people associate the brand with the things that matter most to them.



Ipsos Public Affairs

Latin America's most attractive countries

What do Latin-American opinion leaders think?

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LATIN AMERICA'S MOST ATTRACTIVE COUNTRIES

Latin American opinion leaders have their say on where different countries' strengths lie

Latin American countries may have a lot in common. At the same time, they have their own unique identities. This new survey of the region's opinion leaders showcases the attractions and diversity of the continent.

The headlines:

- Mexico stands out for its historical attractions
- Argentina ranks highest in cultural activities
- Peru leads in gastronomy
- Colombia wins in hospitality
- Chile is first in safety
- Brazil leads in natural attractions and music



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DIGITAL ADVERTISING

MEASURE THE METRICS THAT MATTER

Thought Piece
2016



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DIGITAL ADVERTISING

Measure the metrics that matter

Marketers need to be clear on their desired brand impact *and* the role of communications to help achieve their goals.

This means determining:

- What attitudes or behaviours do you wish to influence?
- Over what timeframe?
- Which metrics demonstrate their success?

Once the goal has been set it then becomes important to choose the right tactics. The biggest challenge brands face is getting noticed. With a limitless amount of content to consume, how can you maximise the chances that your communications will gain attention?

Phil Shaw sets out three principles to help you make the right choices:

- Ensure viewability – if no one sees your ad it can't have an impact
- Prioritise brand impact – use metrics that evaluate against the brand objectives
- Optimise to context – different journeys require different tactics



SHORT CUTS

Customer expectations

Earlier this year, Ipsos published a paper entitled [*Are Your Customers Working Too Hard?*](#) in which we argued that measuring customer effort in isolation is not enough. While it does link to customer outcomes, it is the *Customer: Company Effort Ratio* that really matters.

Picking up on this theme, [*a new Ipsos Australia study*](#) evaluates customer experiences in eight sectors and highlights just how important a topic this is. Irrespective of industry sector, around 60% of customers perceive that they have had to put in more effort than a company to sort out an issue.

In the telecoms sector, this “putting in more effort” figure rises to 75%. Online shopping, at 51% is the lowest of the industries covered.

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World Luxury Tracking

Our latest study for the luxury market focused on six markets – China, Hong Kong, South Korea, Thailand, Brazil and Russia – and identified four major consumer expectations.

Uniqueness - 79% say the ability to customise products is important.

Adventurousness - 76% of respondents say that, when they buy a luxury brand, they are seeking “an unforgettable experience”.

Seamlessness - E-commerce strategies must provide a seamless buying experience. 41% of respondents buy luxury goods online but only 54% of them are satisfied with their experience, versus 80% in stores.

Thoughtfulness - consumers expect luxury brands to be more ethical and attentive to their needs, while 75% expect brands to be more innovative.

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US elections

Ipsos/Reuters post-election polling finds both the [*President-Elect*](#) and [*Barack Obama*](#) enjoying boosts to their popularity scores.

The outcome was defined by the decision by many urban and suburban middle- and working-class Democrats in “rust belt” states (that have seen industry closure and job stagnation) choosing to stay home rather than cast a vote for Hillary Clinton – something the opinion polls did not predict as they would have liked. Ipsos is reviewing its methods in the light of the 2016 experience and will be sharing our findings with you.

For more on the US political scene, Cliff Young's [*It's Nativism*](#) and [*Energizing the Base*](#) pieces set out the factors underpinning Donald Trump's rise to power, while our [*Election webpage*](#) provides full details of our polling and analysis this year.

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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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