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June 2016

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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

Welcome to the June 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. Everything here is in the public domain, so it can be shared widely with colleagues and clients.

We hope you find it useful. Please email [IKC@ipsos.com](mailto:IKC@ipsos.com) with any comments or ideas, or if you would like to subscribe to further issues.

To download previous editions of *Ipsos Update*, please visit [www.ipsos.com/ipsosupdate](http://www.ipsos.com/ipsosupdate)

Thank you.

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## BREXIT: What happened and what's next?

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A historic week in British politics as the public vote to leave the EU.

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## POLITICAL INSTABILITY: What do we think of our current governments?

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Respondents from around the world evaluate their governments and leaders.

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## PULSO BRASIL: The latest news from Brazil

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Politics, the economy, consumer behaviour and the social agenda in Brazil.

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## NEW IPSOS VIEWS WHITE PAPER: Is the Behavioural Lens out of Focus?

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Making behaviour work in CPG, financial services, technology and retail.

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## IT'S A MAD, MAD, MADTECH WORLD: A Media, Advertising and Technology mash up

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Technology is reshaping the advertising and media landscapes.

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## THE FUTURE OF MONEY: Are cash and card dying out?

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The financial services industry is experiencing a digital revolution.

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## HIGH DEFINITION CUSTOMERS: Unlocking value with data science

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Just like the best films, data can tell a story too.

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## HOLIDAY BAROMETER: Where are people going and why?

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The latest trends of holidaymakers from mainland Europe, the US and Brazil.





## BREXIT: THE AFTERMATH

**A historic week in British politics as the public vote to leave the European Union.**

On June 24, the UK voted to leave the European Union by a margin of 51.9% to 48.1%. As the fallout from the public referendum continues to unfold, Ipsos has published its initial analysis.

**Claire Emes, Chief Innovation Officer in the UK**, spoke at Estates Gazette's London Question Time about what happened and how the country was divided. Her presentation can be found here: [Ipsos MORI on Brexit and getting back to business](#)

Meanwhile, **Head of Politics at Ipsos MORI, Gideon Skinner**, wrote an article for the *Daily Telegraph* entitled '[How Project Fear failed to keep Britain in the EU – and the signs that anyone could have read](#)'. The headlines:

1. Immigration became the focus, not the economy
2. The Leave campaign messages were getting more cut-through with the public
3. 'Brexiters' were pretty confident leaving would actually be good for the economy

Read more on [the concerns about immigration](#) prior to the referendum.

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## POLITICAL INSTABILITY

### What do we think of our current governments and political leaders?

In new **Global @dvisor** research, respondents from 24 countries around the world evaluate their current governments and national leaders.

- Six in 10 (62%) agree that their current national leader and government “should be replaced by someone else”.
- 59% agree their leaders have a “hidden agenda”.
- 54% agree their leaders are “in power for themselves” and not for any other reason.

Ahead of the US Presidential Election later this year, Ipsos has been researching exactly why there is support for the divisive figure of Donald Trump. Cliff Young’s analysis focuses on the importance of nativism, with Trump supporters much more likely to hold strong anti-immigrant beliefs

Meanwhile, a real political earthquake has shaken Italy in the administrative elections, highlighting a real cleavage between people and the elites. [Read more](#).

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# PULSO BRASIL

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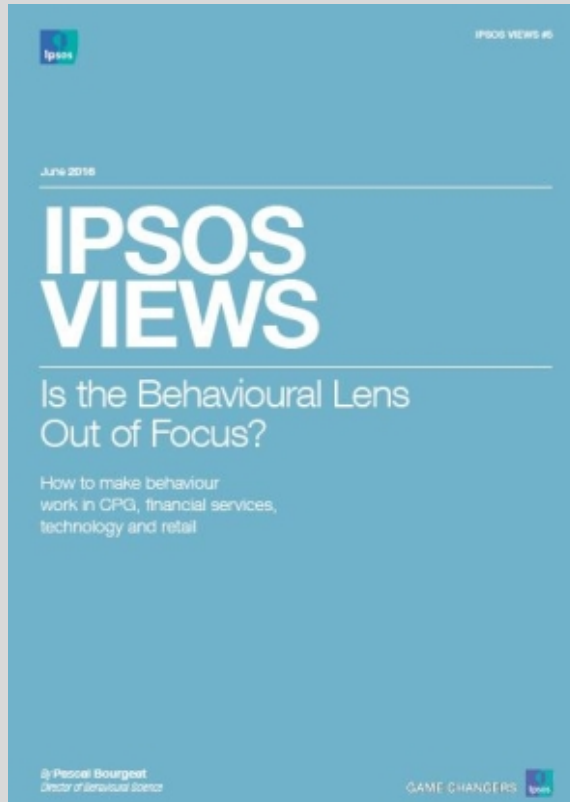
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## PULSO BRASIL

Every month, Ipsos produces a snapshot on what has been happening in Brazil. *Pulso Brasil* covers politics, the economy, consumer behaviour and the social agenda.

This month, there are some big issues under consideration:

- With the temporary suspension of President Dilma Rousseff, there is a positive trend regarding the country's direction and the government seems to be moving on. Is this an opportunity for acting President Michel Temer?
- The Consumer Confidence Index has grown by 2 points and there is a gradual rising trend – inflation and unemployment will be the key pillars to confirm this upward movement.
- With 70% of the public in favour of new elections, Michel Temer's disapproval index rose again after two consecutive drops.
- With the impeachment process under way, the country is anxiously awaiting its outcome. What can be expected in the coming months?



## IS THE BEHAVIOURAL LENS OUT OF FOCUS?

How to make behaviour work in CPG, financial services, technology and retail

Before psychologists and neuroscientists came onto the stage, Shakespeare's Hamlet, Prince of Denmark was the best reference to understand our deep dislike of uncertainty and how it shapes our behaviour. Experimental psychology and more recently neuroscience have not replaced Hamlet but they have enriched our view of behaviour, especially *behaviour within the context of uncertainty*. They have also changed how we look at ourselves as consumers, shoppers, customers or citizens.

In this **Ipsos Views** paper, **Pascal Bourgeat** takes the helicopter view of behaviour to show:

- that the lens we use is often out of focus (and why)
- a simpler and clearer view of how (economic) behaviour works from the overlap of various areas of behavioural science
- examples from different industry sectors
- It is when we fit most closely around the way consumers, shoppers and customers 'construct decisions' that the creativity in our interventions, actions and campaigns is most effective.

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MAdTech

# It's a Mad, Mad, MAdTech World

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## IT'S A MAD, MAD, MADTECH WORLD

**As the lines between media, advertising and technology blur, marketers, content creators and consumers are changing.**

We now live in a world in which media, advertising, and technology – “MAdtech” – intersect to alter fundamentally how consumers “consume” content. The key themes of this analysis by Peter Minnium, President of Ipsos Connect in the US, are:

- **MAdtech changes everything**  
The implications for advertising and media are widespread.
- **MAdtech changes nothing**  
It's still all about people.
- **Making sense of MAdtech**  
It starts with data and insights.
- **The MAdtech mash-up**  
The walls between advertising, media, and technology have crumbled.

[Read the white paper](#)

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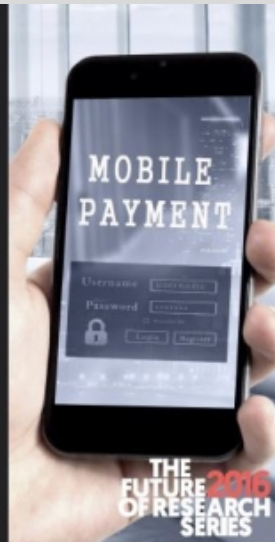


## THE FUTURE OF MONEY

### FINANCIAL SERVICES IN A DIGITAL WORLD

PAUL STAMPER, HEAD OF FINANCIAL SERVICES,

IPSOS MORI



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## THE FUTURE OF MONEY

The financial services industry is experiencing a digital revolution - customers have a wealth of data at their fingertips, and are interacting and paying through new platforms and devices.

As part of the **2016 Future of Research Series**, Ipsos' UK team brought together a panel of experts from across the industry to discuss how they are adapting to the future of money.

Speakers included Mark Oakes, Head of Communications, Corporate Affairs Division, **Financial Services Compensation Scheme**, and Alison Sagar, Marketing Director, **PayPal UK & Ireland**.

Among the topics discussed in the financial services landscape:

- mobile banking by phone is becoming more prevalent
- the growth in mobile payments
- whether cash and cards are dying out

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## HIGH DEFINITION CUSTOMERS

Just like the best films, data can tell a story too – you just need to know where to look.

Ipsos uses a number of advanced statistical analysis techniques to uncover the hidden stories, and value, in the data that may not be visible at first glance.

In this white paper, we explore how three types of advanced statistical analysis – **Factor**, **Cluster** and **CHAID analysis** – can help us unlock additional value from market segmentation.

They help us see our customers in high definition, by better understanding the variables in the survey and defining the segments.

Leo Cremonesi's analysis uses the movie industry as his case study. Cinema goers can be very distinct in the way they look for information about new films. This guide showcases how the use of the right statistical tools can give us a better view.


[Download the report](#)

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**Summer Holidays of the Europeans and Americans**

16<sup>th</sup> Ipsos Barometer / Europ Assistance

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## HOLIDAY BAROMETER

**What motivates people to go on holiday? When to go, and where? Focusing on people from mainland Europe, the US and Brazil, a number of trends emerge in the 2016 Ipsos/Europ Assistance Barometer.**

In 2016, fewer Europeans are predicted to go on a summer holiday, whereas the number of American and Brazilian holidaymakers appear to be on the rise.

This summer, 57% of French plan to go away, a fall of 6 points from 2015. The trend is similar in other European countries, with the Germans (55%), Spaniards (49%), Italians (52%), Belgians (47%) all less likely to go away than last year. The only exception is Austria with a stable rate compared to 2015 (63%).

Across the Atlantic, the situation appears more positive: Americans and Brazilians have higher rates (61% and 64%), close to the levels seen last year in European countries.

For Germans, Italy is their favourite foreign destination; Belgians look to France for a trip abroad; and Americans favour Mexico.

[Read more about the summer travel intentions of America's affluent](#)



# SHORT CUTS

## Car buying in China

In 2015, more than 21 million passenger cars were sold in China, up 7% from the previous year. All of a sudden, the post-1990 generation is now growing up - and buying cars.

The headlines of this latest research from Ipsos China:

- The post-90s generation is spendthrift in their purchasing
- 'Classy' car models are the most popular with this age group
- There is a special love for European models, especially German cars
- Looking to the future, the preferred buying method of this generation will be online purchasing

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## Virtual Reality

According to an article in *Marketing Week*, "Virtual Reality (VR) is set to become a \$1bn (£710m) industry by the end of 2016."

Ipsos Research Manager Neil Stevenson says, "Virtual Reality is the perfect storytelling application and if you're creating a captivating experience, consumers don't mind if the content is brand-led."

"People are interested in VR, but it's seen as sitting in the gaming niche. They are waiting for the industry to show cool, new VR applications from movies and music to news."

[Read the full article](#) on the *Marketing Week* website.

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## The future of research

The new GreenBook Industry Trends (GRIT) Report declares that mobile surveys and online communities are now mainstream, while a range of techniques (e.g. text analytics and mobile ethnography) are increasingly prominent. Ipsos is pleased to be ranked among the leaders in the **Most Innovative Suppliers** category.

Continuing the theme, Ipsos Turkey's 2016 Annual Conference focused on **'Innovation in Research'**. Presentations from the event in Turkish and English can be found [here](#).

Meanwhile, Ipsos and the University of Cape Town are delighted to have been awarded the **IJMR Collaborative Research Award** for their paper *'Eliminating order effects in association tasks without using randomisation'*.

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