
May 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 May 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 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

Thank you.

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MOBILE WALLET PAYMENTS: The Next Big Wave in India

The smartphone is changing the payments landscape in India's cities.

BREXIT LATEST: What Do Other Countries Think?

Ipsos hears from Europeans, Americans and Australians, among others.

PNEUMONIA: A View From Europe

A look at perceptions of pneumonia among the 50+ population.

AD BLOCKING AND PROGRAMMATIC BUYING: From Purgatory to Nirvana

The rise of ad blockers is leading to changes in how companies advertise.

CONNECTED CAR: Transforming the Automotive Experience

Motorists are looking for functions in their car like those on their smartphones.

MODERN MOTHERHOOD: 5 Key Considerations for Advertisers

Exploring how marketers and advertisers can connect better with mothers.

THE DEATH OF POLLING?: Understanding Society

Our experts assess the state of the polling industry around the world.

AFRICAN YOUTH: Values, aspirations and consumer behaviours

Introducing new Ipsos analysis from 7 countries across the continent.

WELL-BEING AT WORK: Environment + Appreciation + Emotion

The perspectives of employees in 15 countries from around the world.

IPSOS VIEWS: 2016 so far

Browse our collection of publications and points of view.





MOBILE WALLET PAYMENTS IN INDIA

What is the common thread among business people, students, IT professionals, rural farmers and store owners in India? *The smart phone...*

With more than 1 billion telecom connections, the use of mobile for electronic payments is set to create a dent in the volume of cash transactions. The latest statistics include:

- 15% of consumers have used mobile wallet services in the past six months; PayTM is the preferred service provider with 40% of consumers using the app, followed by free charge and Airtel Money.
- 49% of smartphone users in Metro and Tier 1 cities intend to use mobile wallet services in the next 1-2 years. In Mumbai and Delhi it is expected to rise to around 7 in 10.

For more information from this study, [read the full article](#).

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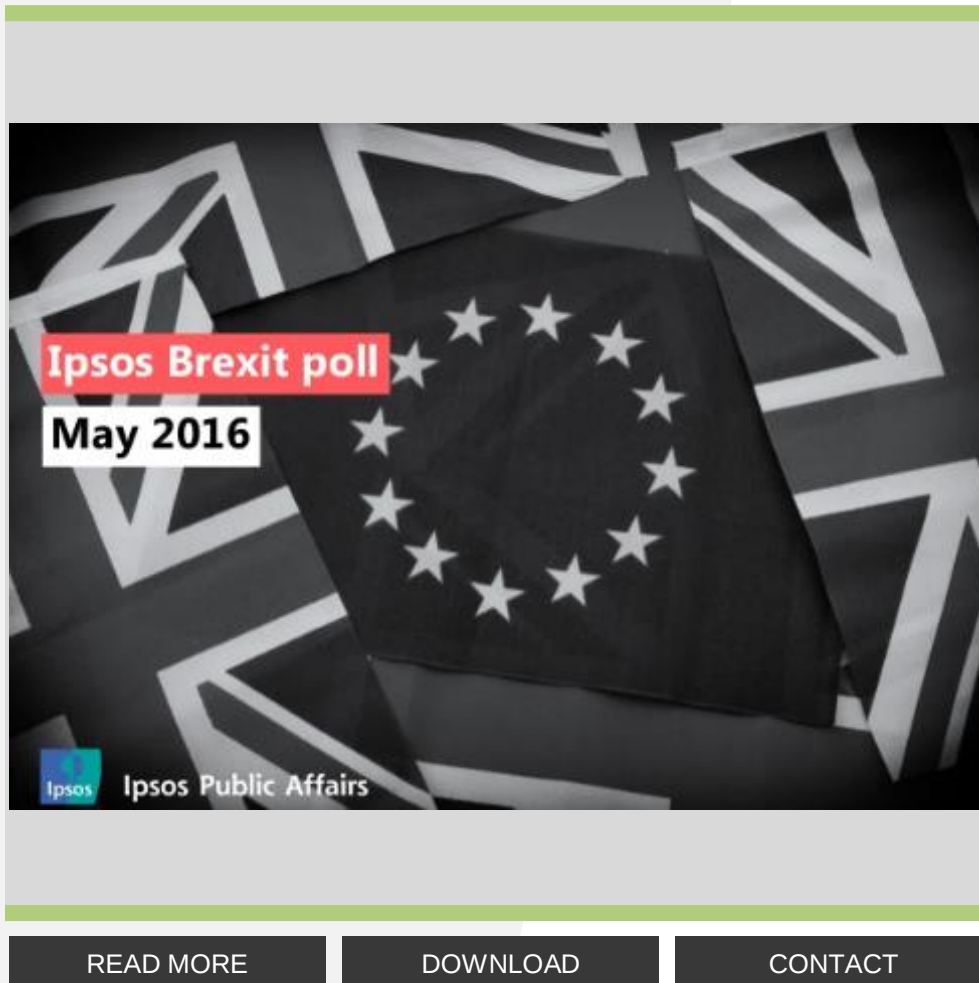
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Ipsos Brexit poll
May 2016

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BREXIT POLL LATEST

With the British referendum on European Union (EU) membership on 23 June rapidly approaching, our latest research reveals that half (49%) of Europeans in eight other EU countries believe that Britain will vote to leave.

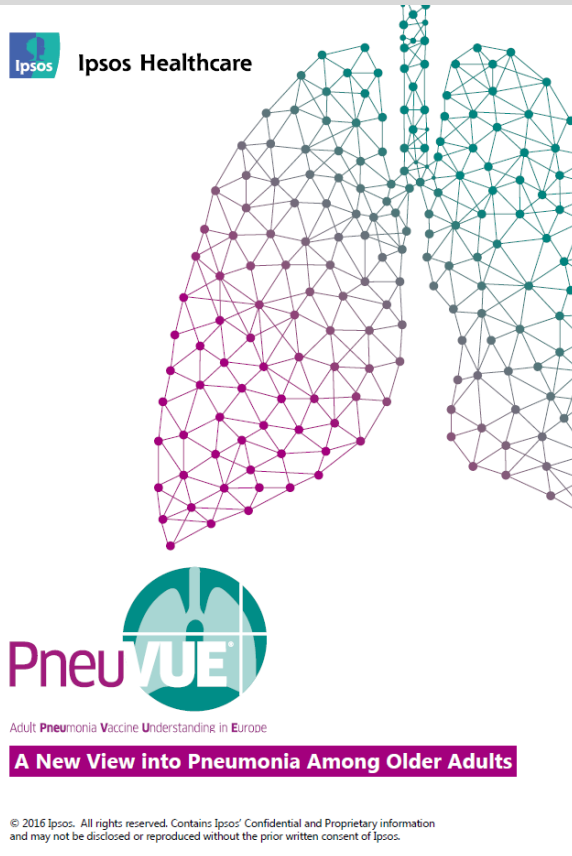
Between them, the EU countries surveyed represent around three-quarters of the EU population and approximately 80% of its GDP.

Headlines

- Half think Brexit could lead to a 'domino effect', leading to more countries withdrawing from the EU
- Europeans are more likely to think Brexit will harm the EU than the UK
- Four in ten Europeans foresee a reduced EU by 2020

In the UK itself those believing that the Brexit vote will prevail are in a minority – 35% of Britons think that the country will vote to leave the EU. The views of people from North America, India, Australia and South Africa were more closely aligned to those from Britain.

[Read the latest on the referendum from our UK team](#)

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PNEUMONIA: A View From Europe

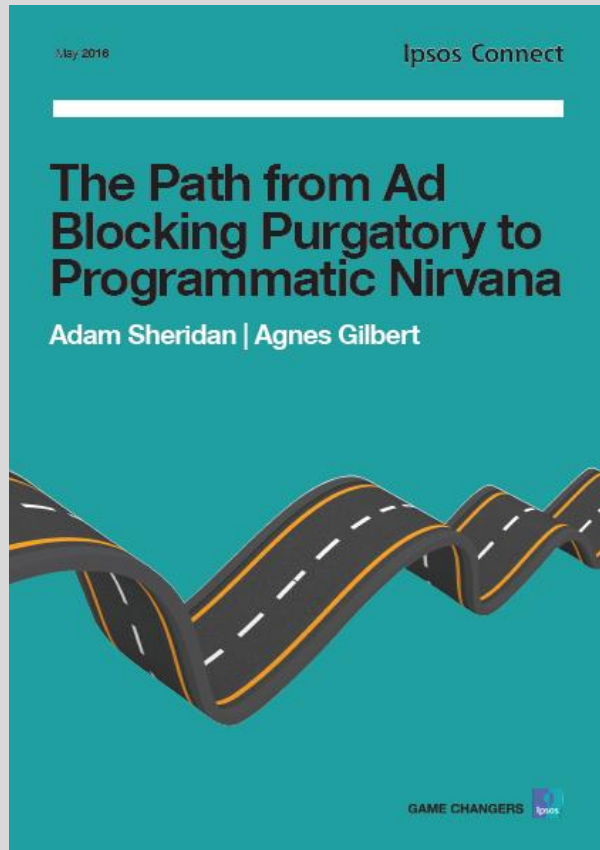
This study from Ipsos Healthcare looks at awareness and perceptions of pneumonia among the 50+ population in nine European markets.

The disease is responsible for over 120,000 deaths in Europe per year, with older people and those with certain medical conditions particularly vulnerable.

The research shows that across Europe there is generally a poor understanding about the risks and prevention of pneumonia.

Key findings include:

- 8 out of 10 adults at risk report they are not vaccinated against pneumonia
- Nearly 8 out of 10 older adults (78%) do not feel personally concerned about the risk of catching it
- Only 3 out of 10 older adults are aware that pneumonia vaccines exist
- Almost three times as many people report being regularly vaccinated against flu as have received a vaccine against pneumonia, which is the more deadly disease



AD BLOCKING AND PROGRAMMATIC BUYING

Programmatic buying has led to a revolution in advertising. However, online users are now being presented with more ad-cluttered sites and, as a result, are turning to ad blocking software.

This new white paper from Ipsos Connect sets out the issues. Considerations for advertisers about how to reduce the problem of ad blockers include:

- **Redefining variables of programmatic currencies** – Buying and selling behaviour is currently defined by what the market place values.
- **Greater availability of user opt-in ad formats** – Skippable and autoplay ad formats such as YouTube and Facebook Video offer the best of both worlds.
- **Optimising advertising to the online experience** – Advertisers need to consider ways to creatively add to the online experience, rather than intrude on it.

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CONNECTED CAR

Motorists are looking for functions in their car similar to those already available on their smartphone devices.

And the latest technology now makes this possible. Step forward the “Connected Car”, subject of a new report by **Ipsos Business Consulting**. Our analysis points to around 69 million connected cars being on the road by 2020, equivalent to 75% of all cars shipped globally.

This presents a clear challenge for vehicle manufacturers. They are now engaged in a process of digital transformation, something that has previously been alien to heavy engineering companies. Connected Car will see the world’s motoring giants developing new partnerships with Original Equipment Manufacturers (OEMs) in order to deliver these new mobile services to drivers.

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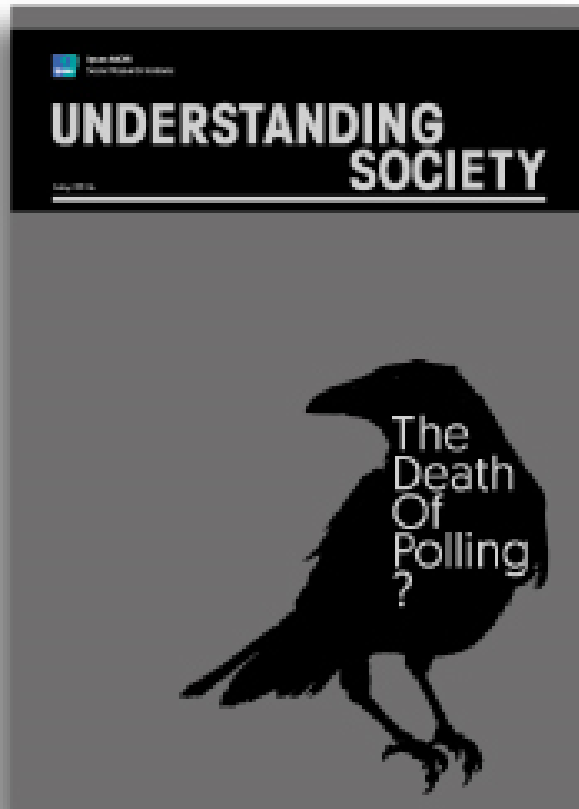
MODERN MOTHERHOOD

This Ipsos Connect paper explores how marketers and advertisers can better understand mothers and tap into their diverse range of needs by embracing the complex nature of parenting today.

The face of modern motherhood is changing. Our research shows mothers struggle with the idea of defining themselves narrowly and instead have a huge raft of identities that explain their outlook and behaviour.

Five key considerations for advertisers:

1. More diverse teams in advertising agencies will better reflect the needs of real mothers
2. Complexity should be embraced – don't advertise to a 'universal' mum
3. Remember that mothers now are the most educated in history
4. Don't be afraid to challenge out-of-touch messaging
5. Get as close as you can to your broader target of mothers



THE DEATH OF POLLING?

In this international edition of the Ipsos Social Research Institute's *Understanding Society* publication, we examine the state of polling across the world.

'The Death of Polling?' may be a deliberately dramatic title to mark one year on from the UK General Election, but it's fair to say it has not only changed the British political landscape, but has also shaken the polling industry.

Highlights of this edition include:

- An interview with Professor Samuel Wang, founder of the Princeton Election Consortium website, who discusses why we need political forecasters and pollsters, the popularity of data journalism and why polling isn't dead.
- Expert contributions from journalist Ann Treneman, who takes us on the campaign trail, and Dr Rob Ford, one of the most prominent thinkers in this election, who dissects the rise of the insurgent parties.
- The significance of social media: how UK politicians John Major and Ed Miliband got more mentions on Twitter than Kim Kardashian and One Direction.

For more analysis from Ipsos' pollsters on the issues face, take a look at [the presentation from our Death of Polling](#) event earlier this year.

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AFRICAN YOUTH

Africa has the world's youngest population. Young people account for 60% of the continent's population. More specifically, there are 220 million young people aged 15-24 in Africa. According to a UNESCO forecast, there will be 350 million in 2030.

This new Ipsos research focuses on the values, aspirations and consumer behaviours of 15-24 year-olds in 7 African countries.

Key figures from the **African Youth** Ipsos survey:

- 81% of young Africans are optimistic about their personal future, and 63% about the future of the country
- Their main concerns are unemployment (69%), cost of living increases (63%) and corruption (59%)
- Their main expenditure items are food and beverages (43%), clothing (38%), and communication (internet and telecommunications) (33%)
- Young Africans in our survey spend an average of 2:20 hours a day on the internet and social networks
- 22% of 15-24 year-olds report being influenced by social networks in their purchase decisions



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WELL-BEING AT WORK

This 11th edition of the Edenred Well-being at Work Barometer was conducted with 14,400 employees in 15 countries: Belgium, France, Germany, Italy, Poland, Spain, Turkey, the United Kingdom, Brazil, Chile, China, India, Japan, Mexico and the United States.

Well-being at work is a growing challenge for companies struggling with an unpredictable economic environment. They can be more and more dependent on their employees' willingness to go the extra mile.

Encouraging well-being by developing active policies in this area positively impacts employee engagement and eventually companies sustainable performance. Central to this are the right environment, feeling appreciated and having an emotional connection with our work.

This new research shows that a little more than 7 out of 10 employees overall are positive about their well-being at work. This proportion varies across countries, national economic environments, job markets, employee expectations and cultural differences.

You can follow the discussion on the key challenges surrounding employee well-being on Twitter at #WBWBarometer.



IPSOS VIEWS: 2016 (so far)

Browse our collection of publications and points of view, powered by Ipsos experts.

The Ipsos Views series has been developed to bring new perspectives and points of view to our clients and stakeholders.

We invite you to take a look at the collection, download the reports, and let us know what you think.

Our programme includes:

- Essential guides to Big Data and Neuroscience, and a briefing on the Perils of Perception.
- New analysis on how to better understand your customers and their expectations.
- Commentary on breaking issues, such as ad blocking.
- Points of view on how to make the most of new technology in research, for example in the area of text analytics.
- Putting countries in the spotlight: The Ipsos Flair Collection gets under the skin of behaviours, attitudes and opinions in a series of countries, including Italy, Mexico, Colombia, Brazil and Thailand.
- Understanding Society: Our social research team's analysis of the latest trends, and what these mean for government and policy-makers.



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SHORT CUTS

Tech round-up

In the UK, Ipsos Connect Tech tracker is a quarterly survey which **measures the emerging trends and developments in technology**. [Find out more](#).

Meanwhile, Ipsos France has just released the latest edition of its *Junior Connect* study. It's a comprehensive study, covering 4,700 **French young people** aged under 20.

Among the topics covered is social media. Facebook remains the dominant force, used by 77% of 13-19 year olds. Meanwhile, Instagram is on the rise, with its usage (now at 28%) having doubled over the last year.

[Download the presentation \(in French\)](#).

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Food matters

The Ipsos Food CHATs (Consumption, Habits, Attitudes and Trends) report is Australia's most comprehensive study into food and provides a unique insight into the eating behaviour and attitudinal trends of everyday Australians when it comes to food. [Read the report](#).

Ipsos FIVE service provides daily tracking of what individuals eat and drink, with the consumption behaviour and attitudes of 20,000 Canadians annually trended over time. Recent findings from the study reveal that as the snacking landscape continues to change and evolve, kids remain the most prolific snackers. [Find out more](#).

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Content marketing

Content needs to deliver benefits for brands as well as audiences. [In his IPA Blog post](#), Liam Fox-Flynn, Research Manager for Ipsos Connect, identifies four key considerations to the success of branded content:

1. Will the content work like content?

Consumers do not have to like advertising to be influenced by it, but generally will consume content if it is engaging, informing or surprising.

2. Have you agreed the content's objectives? To be successful, content needs to deliver benefits for the brand and the audience.

3. Is the content platform appropriate? For the target audience, brand and the content itself?

4. Does the content feel right for the brand? Nailing content is tough, even with the guiding principles above.

Find out more about [content usage in Asia](#).

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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.

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