

June 2018

# The Directory

**The full collection of white papers and reports from the Ipsos Knowledge Centre**

Ipsos Knowledge Centre

GAME CHANGERS





# IPSOS KNOWLEDGE CENTRE: THE DIRECTORY

The *Ipsos Views* programme presents Ipsos' latest thinking and analysis through a series of general and specialist white papers. We also produce reports, country profiles, and the Ipsos Encyclopedia. This interactive document provides direct access to the full range of material available.

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2. [Customer & Employee Experience](#)
3. [Media & Advertising](#)
4. [New Methods & Techniques](#)
5. [Society & Politics](#)

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[Ipsos Encyclopedia](#): a unique glossary developed for everyone involved in the practice of market research.



[Ipsos Update](#): our monthly round-up of the latest research and thinking from Ipsos teams around the world.



# CONSUMER & SHOPPER

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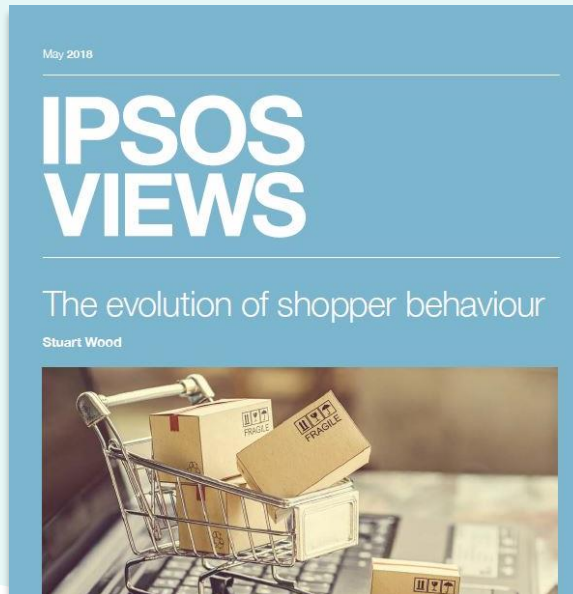
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Ipsos Knowledge Centre

GAME CHANGERS



# CONSUMER & SHOPPER

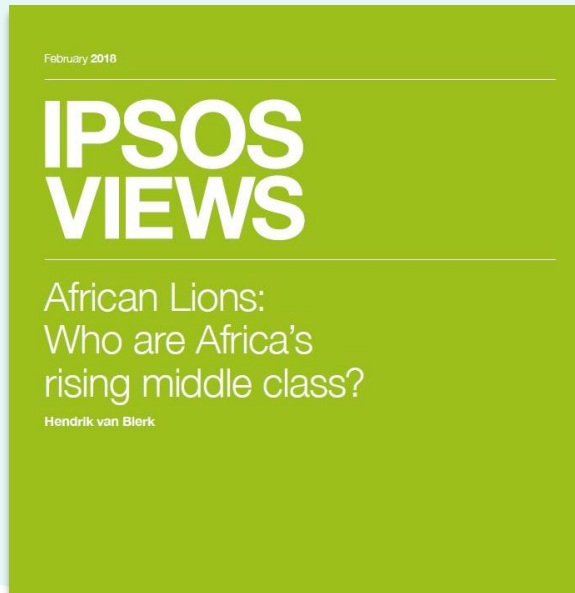


This white paper looks at five changes we're experiencing in shopper behaviour, why it's happening and reflects on how Ipsos is adapting to the situation.



Understanding and explaining how brands grow is top of mind in the industry. This new thought piece presents our research findings into the importance of 'more people' versus 'more often'

# CONSUMER & SHOPPER



Painting a picture of Africa's consumer landscape, this Ipsos Views paper examines topics including household finances, shopping, nutrition, brand relationships and media usage.



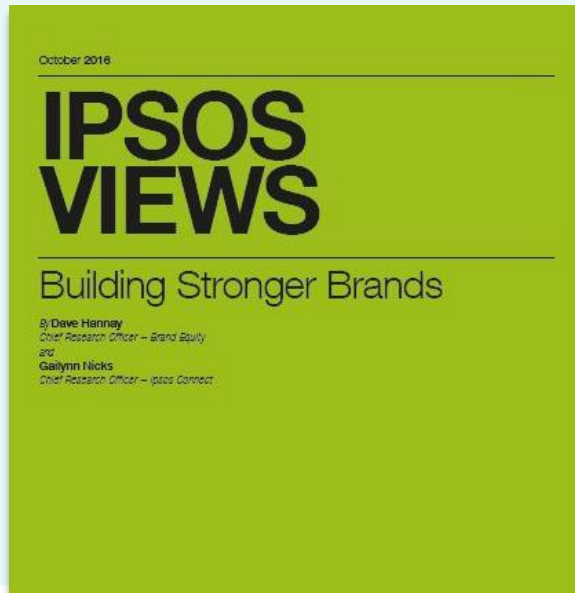
In his book, *How Brands Grow: What Marketers Don't Know*, Byron Sharp asserts that it is penetration growth and not loyalty that is critical to brand success. This white paper finds that Sharp's work cannot blindly be applied to innovations.



This paper explains how to judge what incidents are critical, which customers are expendable and what the most suitable, cost-effective response or intervention will give you a competitive advantage.



# CONSUMER & SHOPPER



This white paper sets out the definitive Ipsos View on how brands can grow, or halt decline, building on our latest research and thinking. It aims to help clients in their quest to answer the ultimate question: 'What makes a brand successful?'



Businesses want to know how they can grow their brands. This is a simple question with complex answers. And it all starts with understanding people in real life – how they choose brands. We look at how you can influence them to choose your brand more.



A history of this prominent date in the retail calendar. We identify some successes (and failures) experienced along the way, and some thoughts on what the next few years might bring.

# CONSUMER & SHOPPER



## Incremental versus Monumental Decision-Making

How to Keep Up with the Pace of Business in the New Reality

Douwe Rademaker | Marco Vriens



In this white paper, we describe an alternative “incremental” approach to decision-making that’s in tune with the pace of business in today’s rapidly changing world.

## An Efficient Alternative to Concept Optimization

Lee Markowitz | Lucy Haide Balbuena Robles | Luis Fernando Freixedas Abimerhy



You’ve narrowed down the best insights, benefits, and reasons to believe to include in your concept. What you need to know is: *which combination* of these elements will yield the greatest consumer appeal? This paper will help you on your way.

## Don’t Let Promising Breakthrough Innovations Die

Lee Markowitz



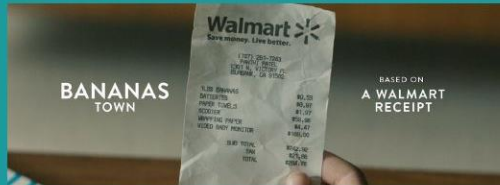
Breakthrough innovations are critical to future success because they can yield more than double the returns of non-breakthrough innovations. We look at how to avoid making the wrong choices and missing out on their potential.



# CONSUMER & SHOPPER

## #NotaJoke. Branded Entertainment Oscar Style

Eleanor Thornton-Firkin & Leah McTiernan



February is a prime month for American brands looking to capitalise on two of the largest television audiences of the year – the Super Bowl and the Academy Awards. Unfortunately for the teams behind Best Picture winner *Moonlight*, and the incorrectly announced Best Picture winner *La La Land*, Price Waterhouse Coopers' mishandling of the Best Picture Award winner envelope has overshadowed most all of the stories to emerge from the evening's events.

The controversy means you might have missed *The Receipt*, Wal-Mart's Oscar-style dose of 'branded entertainment'. 2016 marked the first year of Wal-Mart's multiple-year sponsorship of the Academy Awards, and to kick the partnership off in Hollywood style, the retailer sought out four well-known Hollywood directors, Marc Forster (*Monsters Ball*), The Vow Runners (*Training Day*), Evan Goldberg and Seth Rogen (*Superbad*, *Neighbors*) to create three one-minute branded entertainment films. The challenge to the filmmakers was simple: take a Wal-Mart receipt and integrate the six items into a compelling narrative. The platform guiding the film's development was "Behind every receipt, there's a great story."

Despite several impressive examples of branded entertainment, like Red Bull's events, GC Johnson's 'Glad Museum of Feelings', and even the latest instalment in the Lego movie series (*Lego Batman*), it appears that many are still trying to determine what it offers that traditional media channels do not, and how it should be used to build a brand, especially as most non-marketing people will describe it as advertising. Recognising it is not, let's start with a definition. Our working definition (through Ipsos' collaboration with Ogilvy & Mather, Wunderman, and The Branding Group) Marketing Association is:

Branded entertainment made an appearance at the Oscars in 2016. An introduction to the world of branded entertainment and how you can win at it.

## Make your brand rock 5 tips to rock your communications using multi-touchpoint campaigns

Arnau Debia



It has never been tougher for brands to touch and move people. We all experience it. Globalisation has resulted in multiplying brands. With digitisation, more content is developed for more channels. New channels open every day – outdoors, in our pockets, even on our fridges – through smartphones, connected screens and the Internet of Things. People are bombarded with thousands of branded messages every day, and pay less and less attention. They skip, fast forward, and multitask more and more.

To succeed, brand communications must reinvent itself to even get a chance to earn people's attention. They need to rock. Literally.

How can you make your brand rock? Here are five lessons Ipsos has learned from investigating successful – and not so successful – brand communications.

### 1. Give your brand a rock band

From Genesis to Twenty One Pilots or Muse, the best and most legendary rock bands result from great musicians playing together, amplifying their individual talents. Likewise, in order to increase the chances of engaging people with the campaign, winning brand communications rely on inspiring content, played across several loud points.

In short, when we compare the results of pre-testing a single touchpoint with testing an entire multi-touchpoint campaign, on average we see an uplift of 11% for Attention, 31% for Consideration, and 38% in Brand Desire. These results are echoed in the 2016 APEC Think conference, which reported

To succeed, brand communications must reinvent itself to even get a chance to earn people's attention. They need to rock. Literally.

## Is Love All That Matters?

It's Complicated

Gillian Drewett



The relationship status between people and their brands should, like human relationships on Facebook, sometimes be labelled "It's complicated".

Why? Because we live in a systemic world where things exist and function in relation to one another, rather than as independent entities, not unlike the world of human relationships as viewed through the lens of social media.

There is one brand where the relationship status is very simple – you are either of the #lovemarmite view or of the #hatemarmite view. However, recently a grocery store brand made the relationship status much more complicated. More on that later.

As consumers, each of us has in our minds complex mental networks of associations with respect to different brands. The brand mental network is a rich picture of our unique mix of experiences, associations, impressions, shape, colour and so on. How then, in the complex world of brand desire, does a brand stand out and get chosen?

Being chosen requires working with a variety of contributing parts: being in mind, having a relationship, having high perceived value, being easy to choose in market. The elements work as a system to build up or break down brand relationships. Emotional connection is enveloped in, and contributes to, creating a mental network of brand association. But, being known and having feelings for a brand doesn't guarantee that your brand will be bought.

There is a lot going on in the mind of someone choosing a brand, all this activity is taking place



The relationship status between people and their brands should, like human relationships on Facebook, sometimes be labelled "It's complicated". We look at the lessons to be learned from the *Marmite* brand communications heritage.





# CONSUMER & SHOPPER

## Reality check Drive growth, by understanding the reality of how people choose brands

Keith Glasspoole



The pace of technological and social change is bewilderingly fast. In the world of brand and communications, we feel this particularly keenly, with the digital revolution transforming the way that brands seek to connect with people.

At the age of 45, I am not particularly old – and yet when I embarked on my career in the mid-1990s, “search engine optimisation” meant trying to work out why my car wouldn’t start, and “social networker” meant the people I met in the pub.

So, when age-related depression threatens to set in, and I am tempted to write myself off as a dinosaur, it is comforting to remember that people and their behaviour don’t change as fast as technology does.

Critically, in many categories, the role that brands play in people’s lives doesn’t change. For example, back in the mid-1990s, I would not have had e-commerce apps installed on my smartphone, allowing me to order my groceries at the touch of a button. Indeed, I wouldn’t have known what you meant by “app” or “smartphone”. However, when my groceries reached the kitchen, I was still cooking them and eating them the same way then as I do now. (A slightly better quality chef these days, perhaps).

So, whilst grocery brands have a lot of new ways in which to gain my attention, and influence my choice – the underlying factors driving my choice have not changed. I know that particular brand of brown sauce still tastes great on a bacon sandwich, and that experience will stay lodged in my mental network for that brand, regardless of the fact that I can order it online these days. As long as

## Are you leveraging your path to purchase as a path to growth?

Hans Reemdonck



To help gain an understanding of today’s retail opportunities, we need to define a clear framework of the path to purchase and identify what needs to be influenced to help marketers and retailers develop a successful path to purchase strategy.

## Future-Proof Your Brand

Douwe Rademaker



In this white paper we discuss a four-step Ipsos Brand Future-Proofing approach to formulate and execute a brand growth strategy in a disrupted category.



# CUSTOMER & EMPLOYEE EXPERIENCE

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GAME CHANGERS





# CUSTOMER & EMPLOYEE EXPERIENCE



## Getting Sticky Emotional attachment and profitable customer relationships

Roger Sant



Brand managers want emotionally attached customers. They know intuitively that an emotional connection is a 'higher level' of relationship; it equates to more valuable customers – customers who stay longer, spend more and recommend the brand to others.

## Here, There and Everywhere

Nicholas Mercurio



Failing to leverage an omni-channel approach to mystery shopping represents a dangerous "blind spot" that could have costly ramifications – particularly as it relates to reducing customer churn and increasing conversion, satisfaction, sales and lifetime customer value.

## Designing a 'Smarter' Mystery Shopping Program Seven Steps to Success

Nicholas Mercurio and John Fleeta



Research studies show that brands which put the customer first and deliver a superior experience relative to their competition achieve greater customer loyalty, higher profits and better returns for shareholders. We set out the essential building blocks for a mystery shopping program.

# CUSTOMER & EMPLOYEE EXPERIENCE



## Decisions, Decisions

Loretta Chan | Mary DeBleschop

Which text analytics tool is right for you?

So, you have your unstructured data in hand. Now what? How do you get started? There are so many tools out there - which do you use?

## Making the Most of Text Analytics

Piona Moss

Why the automated brain of text analytics still needs a human heart

This white paper reminds us that most text analytics projects involve a combination of fully automated *and* analyst-driven techniques. The balance between these techniques will depend on the nature of your question.

## Getting Started in Text Analytics

Piona Moss

The questions to ask

The number of text analytics tools has proliferated. The market is no longer concerned about accuracy and is more about ensuring the outputs will fit your needs.



# CUSTOMER & EMPLOYEE EXPERIENCE



## Five Top Tips for Successful Text Analytics

Fiona Moss

Avoiding the pitfalls and delivering better insights



Successfully unearthing text analytics insights does not need to be complicated. In this paper, we set out some of the potential risks involved in starting a text analytics project, including the best ways to avoid these to ensure the results deliver action-orientated insight.

## Don't Kill the Analyst Just Yet

Jean-François Damais interviewed by Seth Grimes

How Ipsos Loyalty applies text analytics

Text analytics plays a key role in Enterprise Feedback Management (EFM), which is about collecting and reporting customer feedback within organisations in real-time to drive action and growing at a very rapid pace.

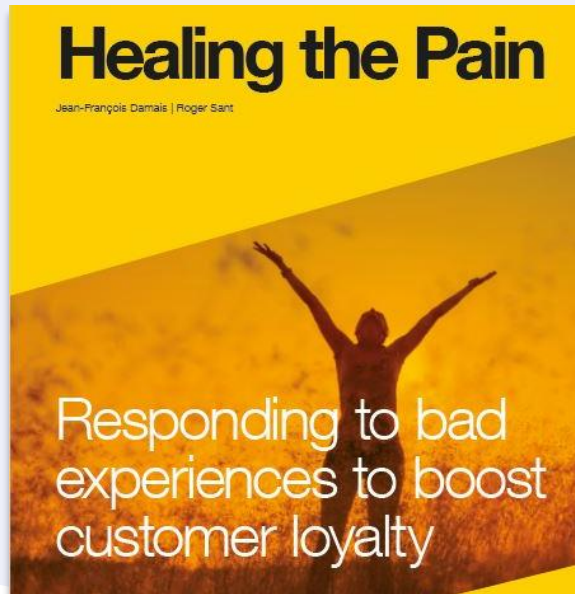
## Drive your results with target-setting analytics

Bharath Vijayendra  
Sherril Loweke

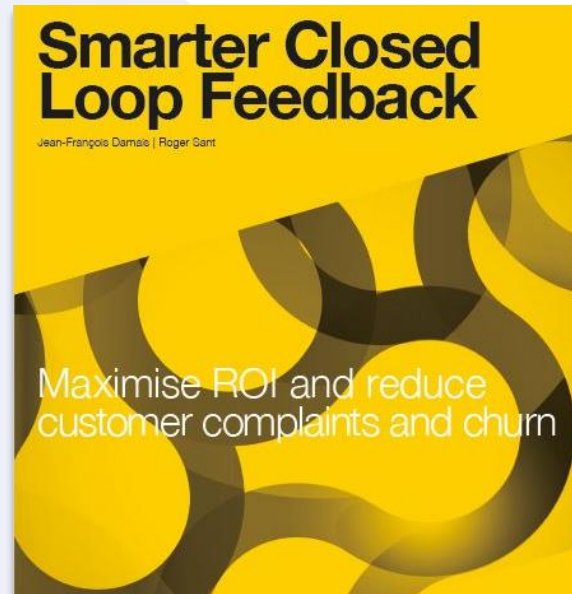


The key tenets of the roadmap for target-setting success, addressing the importance the right overall VOC (voice of customer) measures and laying the right foundations.

# CUSTOMER & EMPLOYEE EXPERIENCE



This paper introduces the concept of 'Smarter Closed Loop Feedback', helping companies maximise the ROI of customer feedback programmes. It explores the importance of responding well to bad experiences and looks at how this can actually boost customer loyalty.



In Smarter Closed Loop Feedback, we explore how to optimise the design of Enterprise Feedback Management (EFM) and Voice of the Customer (VOC) programmes to maximise the ROI and reduce customer complaints and churn.



Ipsos' research has found that over half of customers believe they are working harder than companies to fix problems following a complaint or incident. This white paper outlines what companies need to do to optimise the Customer: Company Effort Ratio to maximise Loyalty.





# MEDIA & ADVERTISING

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# MEDIA & ADVERTISING

## “Moodvertising” during the World Cup – first half

Why is the mood of the crowd so important? How can it influence the ROI of your advertising?

Alan Liberman and Diego Pagura



Barcelona FC did something unique by putting together an Argentinian (Messi) and a Brazilian (Neymar Jr.) to play together. It was epic. It is also unexpected to combine one Brazilian and one Argentinian advertising researcher to write (and agree) on how to maximise communication efforts during the World Cup. It won't be epic but hopefully this will be useful.

Our focus in this article, (which like any good football match is a game of two halves), is to first explore the risks and benefits for the advertisers when making such a bet, because as Vance Law, former professional baseball player, said, “It is amazing how quickly emotions can change.”

In this first half, we want to show you what we have learned by testing many ads during these huge events; determine which objectives and challenges seem to apply and share some evidence that makes us believe that the mood of the crowd can play a critical role in how your consumer will respond towards your brands. Right after the World Cup, we expect to show you further evidence of how the mood factor can indeed influence consumer nonconscious responses.

\*The authors will be using throughout this article the term “football”, because this is how this sport is known everywhere in the world, except in the US

### The football World Cup triggers emotions

Sporting events such as the World Cup involve passion, highly emotional content and can provide incredible moments. Many marketers take the opportunity to invest in communications that build and/or reinforce traits such as pride, patriotic values or just a sense of belonging that a national team can help convey, hoping to fully leverage

## A dull category doesn't have to mean dull ads:

Transforming adversity into a creative opportunity

Hazel Freeman and Samira Brophy



With spring in the air, many of us are revisiting those resolutions made in the dark days of January to get fitter, eat more healthily or learn something new. But somehow excuses creep in as to why you can't do what you intend to... not enough time, the facilities aren't available... the list of excuses is easy to write! And this is true of the creative development process as well.

Our observation is that perceived blocks can be in place

campaign, it'll take time to bed in", "we are a small brand, we won't cut through against brands with more money" or, at times, "this category is really dull it's really hard to do interesting advertising in it". We thought it would be good to unpick this challenge of how to develop interesting advertising in dull categories, but the more we think about it, the more we have come to the conclusion that there is perhaps no such thing as a completely dull category and that anything can be made interesting with imagination

## Viewability Matters

What advertisers need to know about advertising viewability

Phil Shaw



We tend to overestimate the impact of a technology in the short-term and underestimate its impact in the long-term. This maxim, conceived by Roy Amara, an American scientist and futurist, really describes the “Type cycle” of new technology and especially that of online advertising.

The promise of online advertising was to deliver more

People would only be exposed to ads appropriate to their desires and at the moments when they were most receptive, while advertisers would cut waste and deliver hyper-efficient campaigns through laser-guided audience targeting and personalised messages.

It hasn't turned out like that. Yet.

Why is the mood of the crowd so important? How can it influence the ROI of your advertising? In this paper we explore the risks and benefits for the advertisers investing in communications for their brands.

In this thought piece, we unpick the challenge of how to develop creative ads in dull categories, sharing examples of successful ads that have beaten the dull category challenge and setting out a framework for success in transforming adversity into a creative opportunity.

The promise of online advertising was to deliver more relevant, timely and targeted communications for the mutual benefit of consumers and advertisers. It hasn't turned out like that. Yet.



# MEDIA & ADVERTISING



## Audience Measurement 5.0 Pushing the Boundaries

Andrew Green



In this white paper by Andrew Green, he looks into the five ages of audience measurement, with a focus on the most recent, and the five core principles underlying this evolution.

## Brand Purpose: What's the point of you?

Samira Brophy



Brand purpose has been one of the most hotly debated marketing topics of the last ten years, celebrated as a business model for growth and debunked as cod strategy in equal measure. The arguments for brand purpose are often fuelled by and intertwined with assumptions that one, millennials are immune to advertising and dislike large institutions, and two, that the rate at which the world is moving online is directly proportional to the size of opportunities for brands, and this connectivity has improved business accountability to a point that demands a re-write of the brand marketing playbook.

substance. It is therefore a good time to also examine the concept of brand purpose with a level head and from the perspective of what really drives brand growth – people. Behaviourally, people are more inclined to punish than praise. This year has seen its fair share of global brands undermined online by content faux pas. And because what goes on the internet, stays on the internet, these pieces of wayward content are likely to be dredged up repeatedly and shared in ad fail compilations. Sorry has had a politically incorrect billboard ad from 10+ years ago re-emerge in such a compilation, alongside more recent

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## Getting Brand Assets Right Leveraging your distinctive brand identity to grow your brand

Steven Naert



In this white paper, Steven Naert shows how Ipsos has developed a new approach that helps clients prioritise a set of unique brand assets that strengthen the brand and which can then be reinforced through communication, packaging, etc.



# MEDIA & ADVERTISING

## The Rise of Fakism From fake news to hacking advertising... and that Dove advertising hack

Arnaud Debia



It should not be any wonder anymore for any marketer that advertising and creativity thrive on echoing real life trends to get people's attention and engage. Thus it's not a surprise to see so many of this year's Cannes creativity winners embracing the concept of fake news in their own special way.

Indeed, Fake News, a concept introduced by Donald Trump during the 2016 US Presidential campaign, has become a common currency these days. Fake news takes many forms, far beyond political propaganda, despite it being put to use this year by Mr Trump, Mrs Clinton, Kim Jong Un, Vladimir Putin, Emmanuel Macron, Marine Le Pen, the press (feel free to delete any of the above that you feel don't apply according to whom you follow on the

This thought piece investigates the rise of 'fakism' in advertising and how brands are using – and in some cases misusing – the concept for their own ends.

## There is a better way:

Moving beyond the claims of fast, good  
and cheap digital measurement to  
help build stronger brands

Andrew Bradford



In this latest white paper by Andrew Bradford, digital measurement is under the microscope, and specifically the challenges facing clients today.

## Breaking the Stereotype:

Empowering women in advertising in developing markets

Pinaki Banerjee



Given the role that they play in deciding on the everyday brands used in households, women are central characters in many advertisements. Traditionally in many developing markets, stereotypes were often used to portray the role women played. Most advertisements were centered around activities performed by women at home to make the family happy, portraying their dependency and not making any important decisions. While growing up, when TV was the most dominant media, every commercial break out would show advertisements with women either doing laundry or

For example, Nirma, a laundry powder brand in India, showcased the importance of clean clothes for family to stand out in a crowd.

Fortunately, a couple of decades have passed, and some of the old stereotypes are giving way to new approaches to advertising in developing markets. Arel launched their 'Is laundry only women's job?' campaign which challenges the typical stereotype that was predominant for years. This was followed by their Cannes Lions winning 'Share the Load' campaign which not only achieved results for the brand,

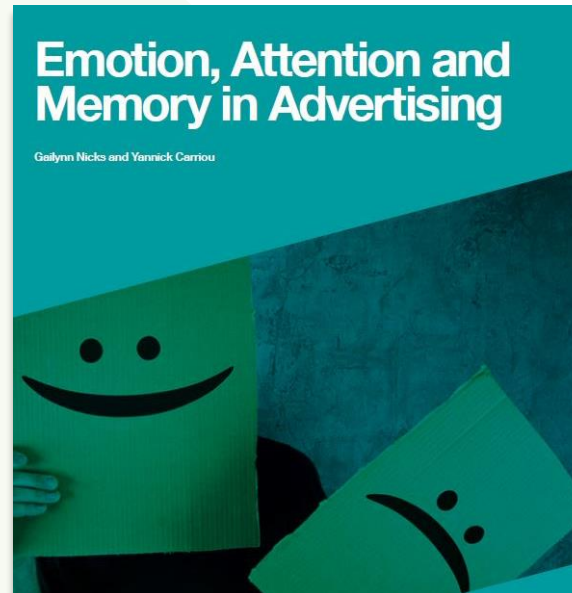
This thought piece points out that while stereotypes are a reality in society, nearly half of women surveyed agree that TV commercials show too many outdated gender stereotypes. Advertisers need to seize this opportunity and portray the true roles they are playing today.



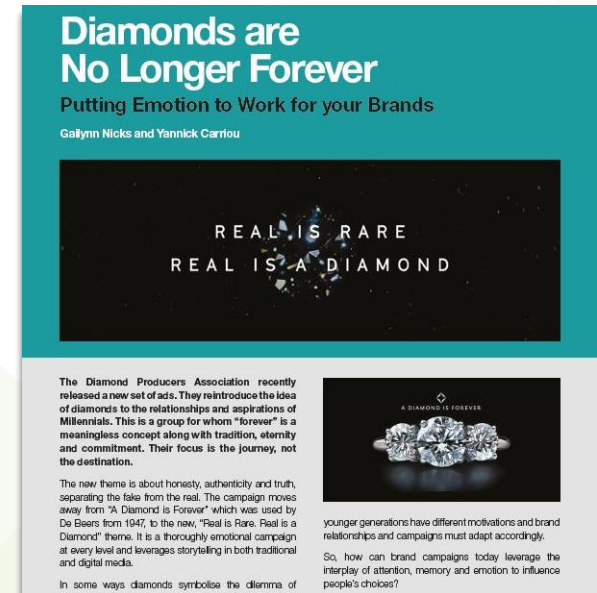
# MEDIA & ADVERTISING



Advertisers need metrics across platforms and media. *Reach* and *frequency* have long been at the heart of media trading and evaluation. Yet the link between these metrics, potential exposure and cut-through varies between media. So, what other metrics should be considered?

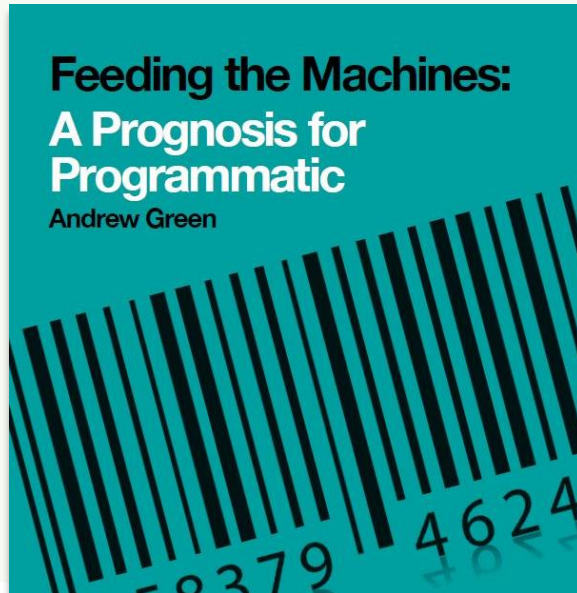


How can brand campaigns leverage the interplay of attention, memory and emotion to influence people's choices? A comprehensive overview of the issues at hand.

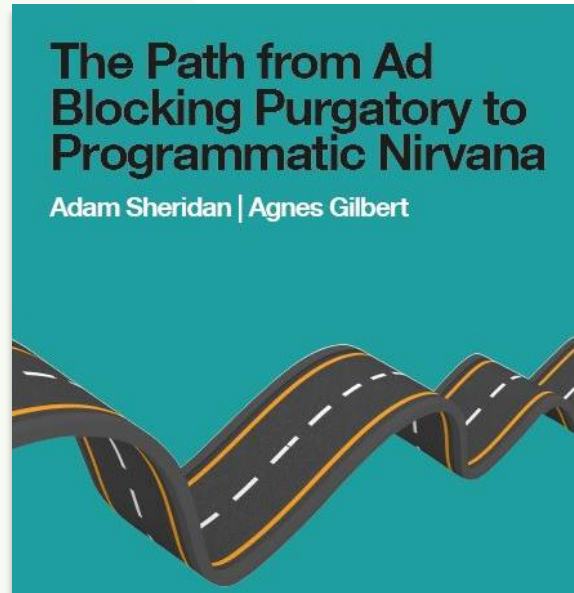


The Diamond Producers' Association recently released a new set of ads. They reintroduce the idea of diamonds to the relationships and aspirations of Millennials. They reintroduce the idea of diamonds to the relationships and aspirations of Millennials.

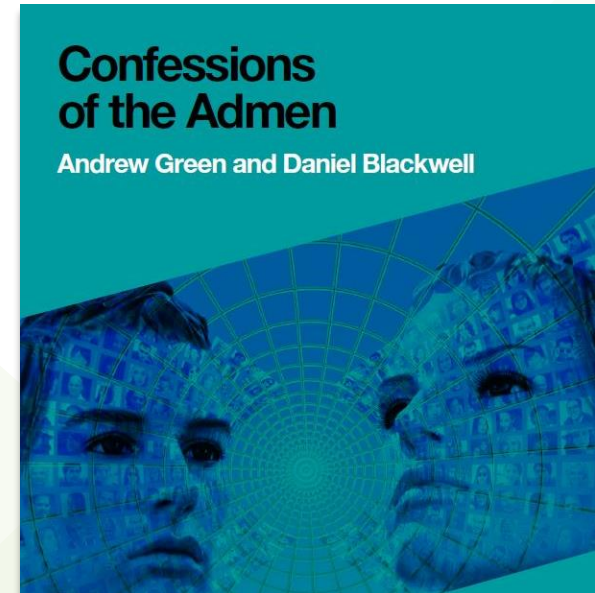
# MEDIA & ADVERTISING



“Programmatic” media buying can be defined as the use of software programmes to buy advertising space. The software replicates and automates what, in some media, can be a lengthy manual process. We review the landscape.



Programmatic buying has led to a revolution in advertising. These cloud-based platforms allowing the automated buying and selling of digital advertising have come with the promise of near nirvana; but at what cost?



This white paper separates myth from reality by highlighting the ‘perils of perception’ in the communications world. We look at whether or not the decision-makers in advertising are thinking and acting in line with the people they’re advertising to...





# MEDIA & ADVERTISING

## Micro-target or target everyone?

Balancing reach with precision in your media strategy

Keith Glasspool



What is the best way to get the right amount of reach but also the right precision? Some marketers are seduced by the promise of micro-targeted precision through digital media spend. Others go broad and target everyone. What is the right balance for your brand? Frustrating though it may be – the answer is “it depends”.

Marketers are under pressure. As the area of responsibility for CMOs changes and evolves, their average tenure is on the decline.<sup>1</sup>

So, it's no surprise that, just like the social media-fueled consumers they are targeting, marketers are subject to

Fear that your competitors are making better use of “new big things” than you are. Fear, above all, of being seen as behind the curve.

This fear has led some marketers into decisions which, with hindsight, they might consider rash – hence the recent comments by what is the perhaps the most reliable bellwether of advertiser thinking.

Marc Pritchard, chief brand officer of Procter & Gamble, was quoted in a recent interview as follows:

## Audience Measurement in the Data Age

Andrew Green

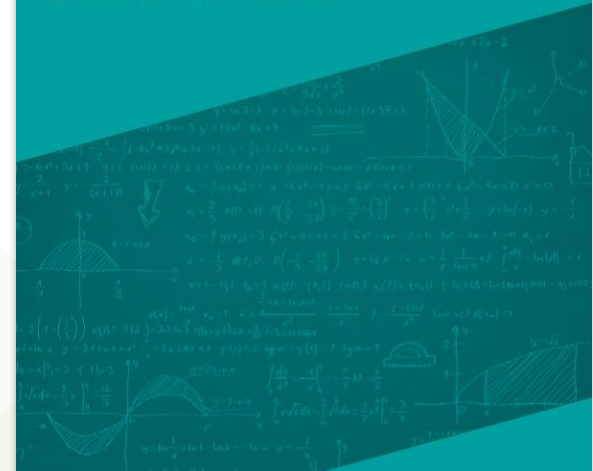


Some predictions for the future of audience measurement, including how:

- panels will remain paramount
- out-of-home measurement will be enriched by mobile ‘Big Data’
- new cross-platform metrics will emerge

## The Age of the Algorithm

Andrew Green and Mario Paic



In this white paper we investigate how data science techniques are being used in the media measurement world to provide clients with better quality information while keeping the burden on respondents to a minimum.

# MEDIA & ADVERTISING



## 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 joiner is US presidential candidate and Twitter addict, Donald Trump, whose political agenda largely revolves the out 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 sell and strengthen their relationship with people. From Gisèle Bündchen, to Michael Phelps, the brand demonstrates how we can all rule ourselves.

## Who else is Going for Gold?

Sponsors join athletes aiming for the podium

John Hallward



Who else is Going for Gold?  
John Hallward

The bar was set on August 12, 2012 - and it was set high.

The numbers were: 3.6 billion, 100,000, 500 and 220.

To set the context, according to the IOC Marketing Report for the London 2012 Games, the global reach was 3.6 billion, with over 100,000 hours of content on more than 500 channels across 220 countries. Those figures do not include the 1.9 billion digital video streams on 170 websites or the 2,700 hours of live or on-demand YouTube content (generating 59.5 million views from 64 territories). The historical context is even more dramatic: the 1948 London Games reached ~800,000 people, most within a 50-mile radius of the city with ~80 hours of content.

It takes someone strong  
To make someone strong

## The Reality of Rio

Was this really #Apocolympics Now?

Gailynn Nicks and Leah McTiernan



Or were the Games the catalyst for a fresh look and a new tone to the link between sponsors, organisers, audience and athletes that reflects the participative nature of brands and citizenship in the connected world?

#Apocolympics has certainly been one of the trending hashtags over the Games, with its allusion to all the problems of the Olympics. In Apocalypse Now a mad man (Kurtz) creates his own renegade army, a movie based loosely on Joseph Conrad's 'Heart of Darkness' and using many of the themes from T.S. Eliot's 'The Hollow Men'.

A lot has happened since London 2012. Economic concerns about Brazil and the cost of the Games have kept the sponsor's approach muted while the Zika virus meant

remained unsold just prior to the opening ceremonies, with many venues remaining empty throughout. Doping scandals have meant audiences have booed medal ceremonies - taking on the role they felt the IOC should have played; sponsors have felt obliged to speak out when they would typically stay quiet. Furthermore, there was a Twitter storm over commentators' pejorative reporting on female athletes despite this being the most successful Games ever in terms of female participation. One way or another people have spoken and the power of their voices has been felt.

Global and local sponsors and advertisers have been having to face up to these new realities. After selling more than US \$12 Billion in advertising, NBC Universal faced lower than expected ratings throughout the games with several

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

Before the 2016 Summer Olympics, we took a look at the other battle for supremacy. The one away from the athletics track and the swimming pool - the one involving the big brands and their sponsorship and advertising.

Were the 2016 Olympic Games really #Apocolympics Now? Or were they the catalyst for a fresh look and a new tone to the link between sponsors, organisers, audience and athletes that reflects the participative nature of brands and citizenship in the connected world?



# MEDIA & ADVERTISING



## Christmas in Cannes

Lions praise Penguins

by Eleanor Thornton-Firkin & Leah McTierman



Christmas in Cannes  
Eleanor Thornton-Firkin & Leah McTierman

Not to be outdone by the Super Bowl held every winter in the USA, the UK has its own annual advertising event - or is it an advertising season? The Daily Telegraph has called it an "arms race". Shortly before the holidays the buzz begins as advertisers, primarily large retailers, seed their annual holiday creative online. That buzz quickly turns to water-cooler and social conversations about which retailer will "win" Christmas. From sentimental to cheeky to downright provocative, many of the season's ads are not only discussed around the kitchen table but throughout the advertising industry. Recently they have become the darlings of awards shows.

As the pioneer of holiday advertising, the annual John Lewis (a chain of upmarket department stores) campaign is eagerly anticipated for its heartwarming insight into the emotions surrounding Christmas. While each successive year the retailer tackles different perspectives, spots are always tied back to the wonder of the holiday, and (of course) how John Lewis can play an instrumental role in

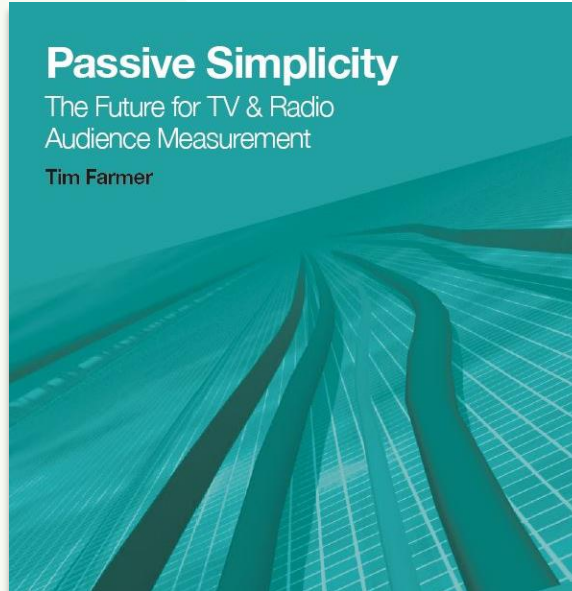


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## Passive Simplicity

The Future for TV & Radio  
Audience Measurement

Tim Farmer



In the field of audience measurement, the greatest understanding comes from observations which have the least impact on behaviour. This paper explores the opportunities for evolving these systems towards better measurements for the future.

## Using Social Intelligence for a Sharper Vision of Your Brand and Category

by Inga Havemann



Category dynamics are in constant motion. New entrants come in, established brands rise and fall and rise again, while the borders around categories are constantly expanding and blurring. For example, large hotel chains are being threatened by Airbnb, traditional beers are competing with tequila-flavored beers, and "athleisure" wear - casual clothing that is suitable for both exercise and everyday wear - is the new fashion.

Marketers need to understand their category's dynamics to optimally position themselves and compete effectively. To do this, they must get the consumer's perspective - because consumers, not industries, are defining today's markets. As researchers, we use market structure analysis and brand associations as strategic tools to help marketers understand their markets and tackle brand and product positioning challenges. These are powerful tools and are becoming even

In this thought piece, we look at how we can build market structure maps using social media data. Negative events can erupt that impact how consumers view the brand, competitive brands, and how the category is defined.





# NEW METHODS & TECHNIQUES

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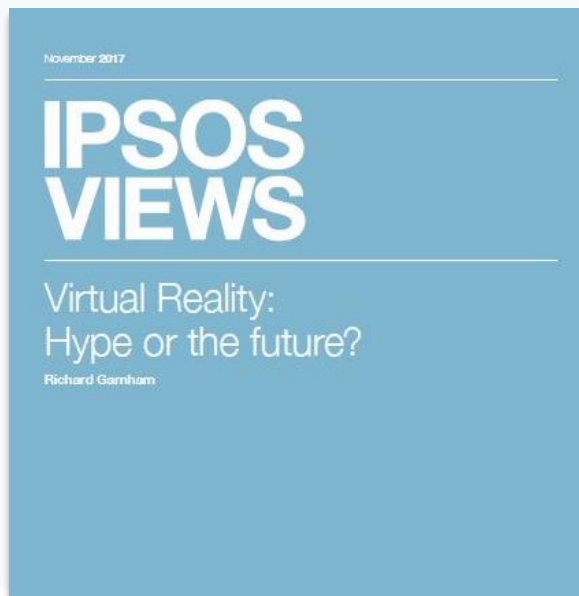
Ipsos Knowledge Centre

GAME CHANGERS

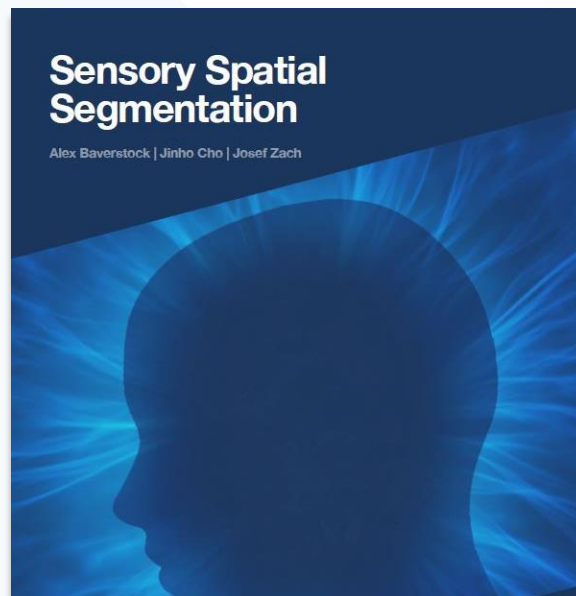




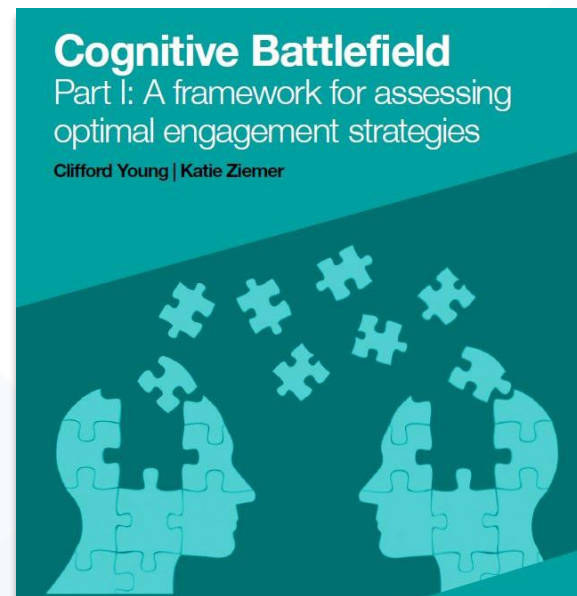
# NEW METHODS & TECHNIQUES



Virtual Reality (VR) has been around for at least a decade but has not yet hit mass adoption. This new white paper explores why, and what the future holds.



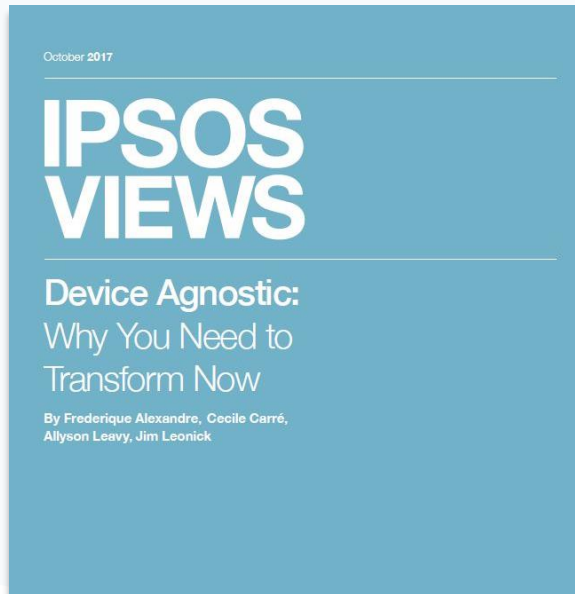
Consumer-based preference segmentation studies can be complex and costly undertakings. Prompted by this, Ipsos has developed a new approach – Sensory Spatial Segmentation (SSS) – to deliver a segmentation solution on a smaller incomplete test design.



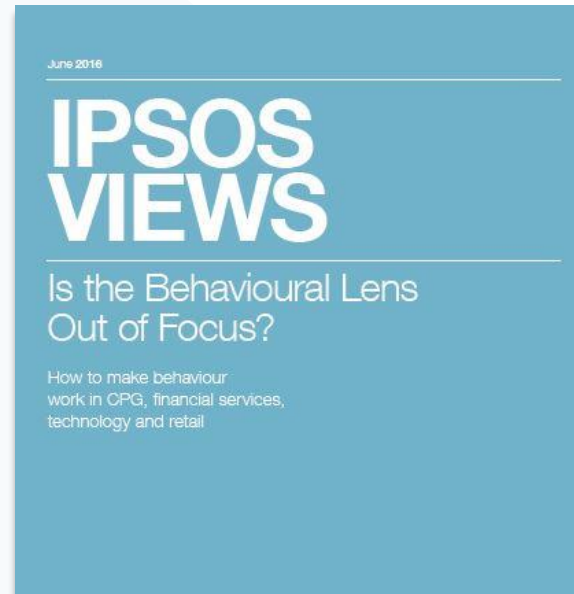
This paper presents a framework for understanding and assessing the decision-making process, based on the multi-attribute model.



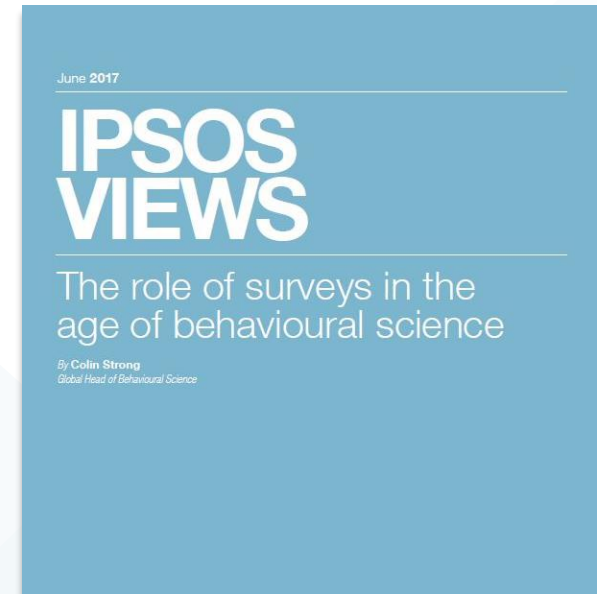
# NEW METHODS & TECHNIQUES



Migrating to device agnostic is not just about using a new technical platform; it requires a new way of thinking about research. This paper looks at how we can adapt traditional surveys to stay connected to consumers.



In this white paper, we look at behavioural science and show that the lens we use is often out of focus. A simpler and clearer view of how behaviour works is needed, informed by various areas of behavioural science.

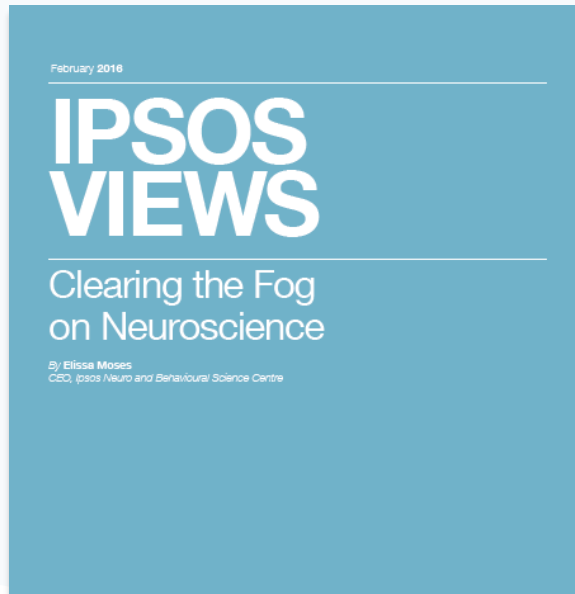


We go on a tour of how behavioural science techniques are being applied to market research practice, looking particularly at how they can be used to improve and refine survey-based programmes.

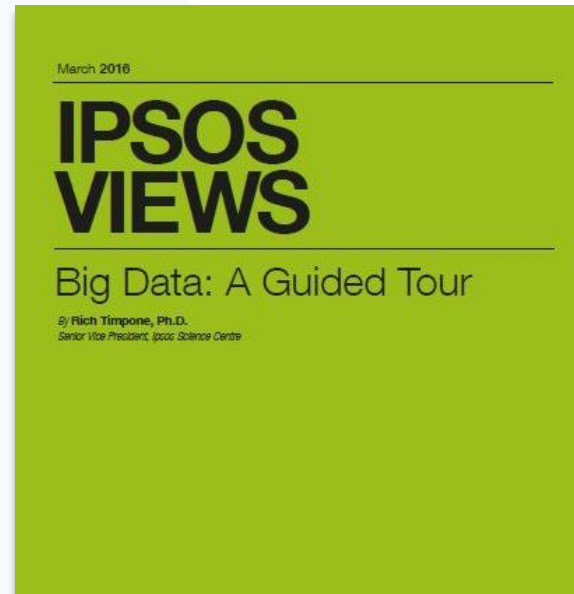




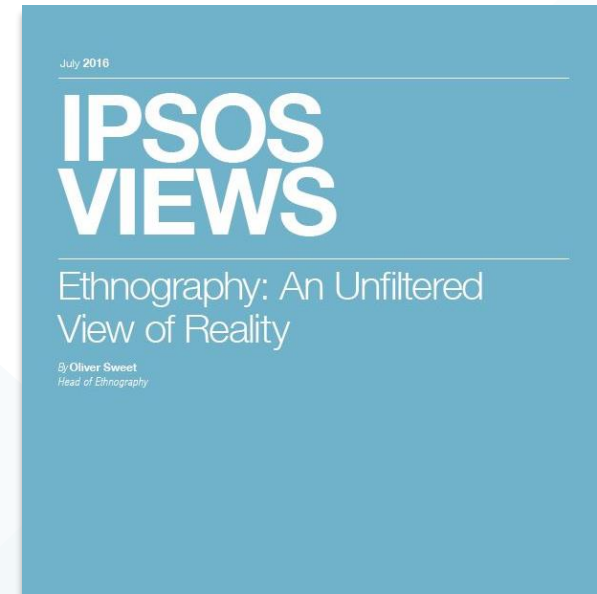
# NEW METHODS & TECHNIQUES



This paper provides an essential briefing on the subject, addressing some of the misunderstandings around what neuroscience is and what it can and can't do.



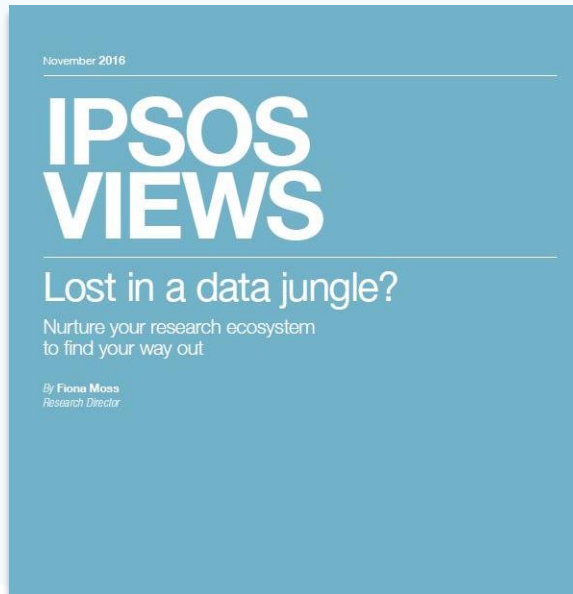
Big Data has become a feature of many workplace discussions about strategies and business plans. This white paper provides a guided tour, including a definition, characteristics and types of Big Data, and how it should (and should not) be used.



Ethnography is a research method made for investigating cultural practices, rituals, consumer behaviour, routines and social norms. This paper provides an introduction on its applications to market research today.



# NEW METHODS & TECHNIQUES



Do your tracking studies feel more like juggernauts than nimble research vehicles? Are you drowning in data but still left with unanswered questions? This white paper can help you to find the answers you need.



Is it the end of surveys as we know it? Or do they still play a meaningful role in managing and growing brands? There is no doubt that data and technology are changing the way brands interact, engage with, and communicate with people.



Drawing on recent Research on Research, this paper explores the trade-offs associated with length of surveys on mobile. Based on the findings, it suggests 20 minutes as a maximum limit and representing a good compromise across all measures.





# SOCIETY & POLITICS

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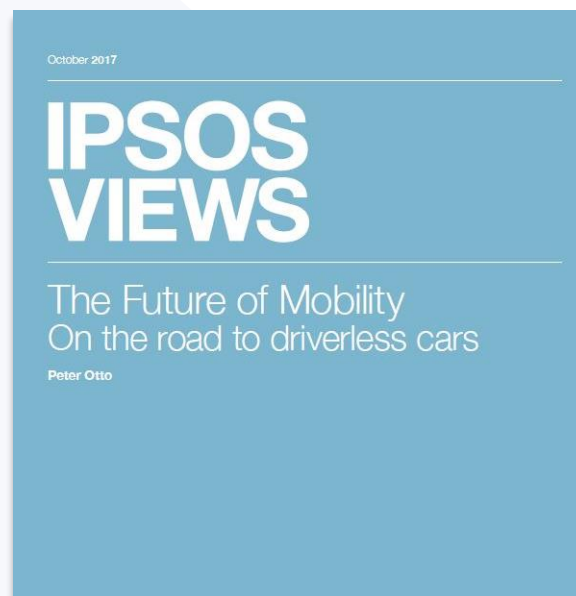
GAME CHANGERS



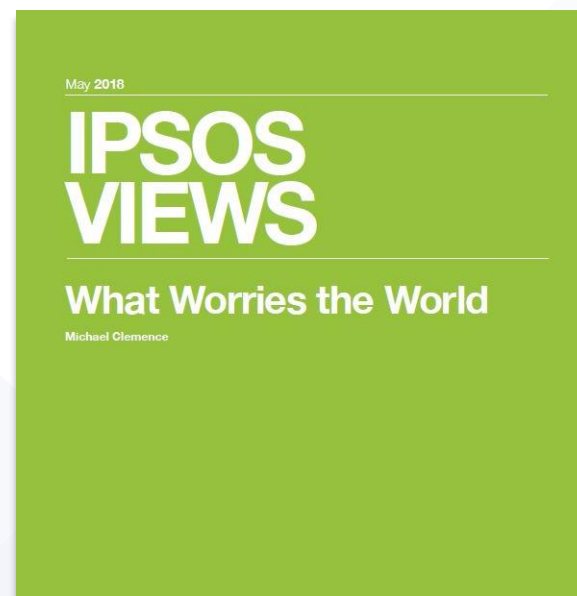
# SOCIETY & POLITICS



With a number of high profile attacks bringing cybercrime to the forefront of corporate minds, this white paper investigates the threat to company reputation.



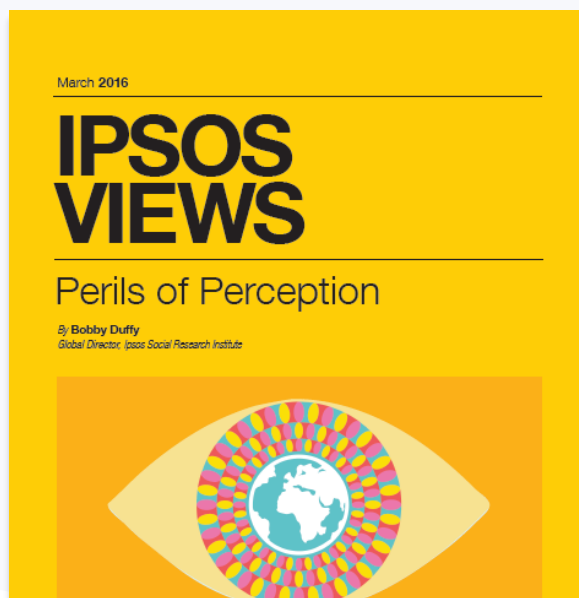
At a time when technology has the potential to change the way we travel, this new white paper reveals global consumer attitudes towards the prospect of fully automated cars.



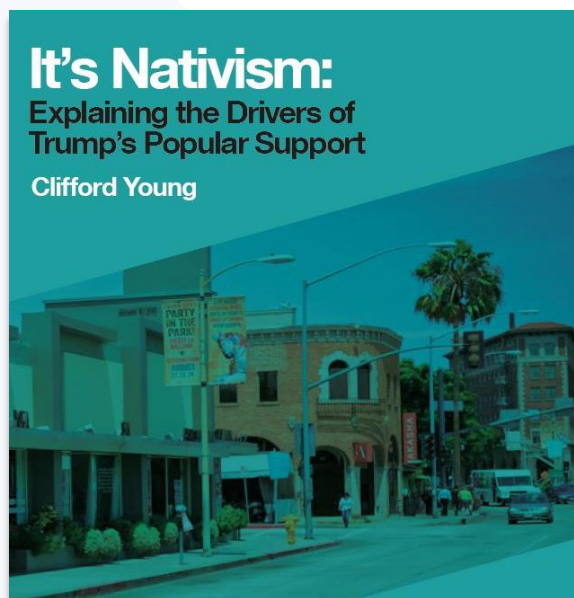
Every month our What Worries the World survey series asks people in 26 countries about the biggest worries for their nation, from a list of 17 concerns ranging from crime to childhood obesity. This white paper is a summary of responses from 2017.



# SOCIETY & POLITICS



How accurate are people in estimating a range of key social realities? This international survey shows just how wrong we often are.

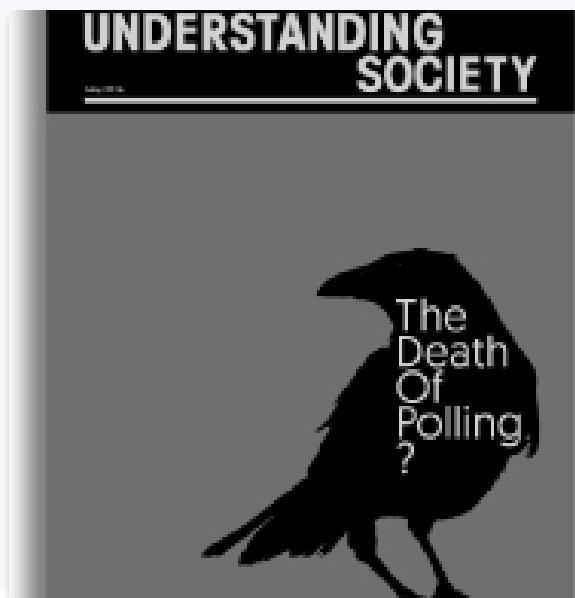


How did Donald Trump manage to confound so many pundits, observers and critics, who failed to anticipate his rise to the Presidency?

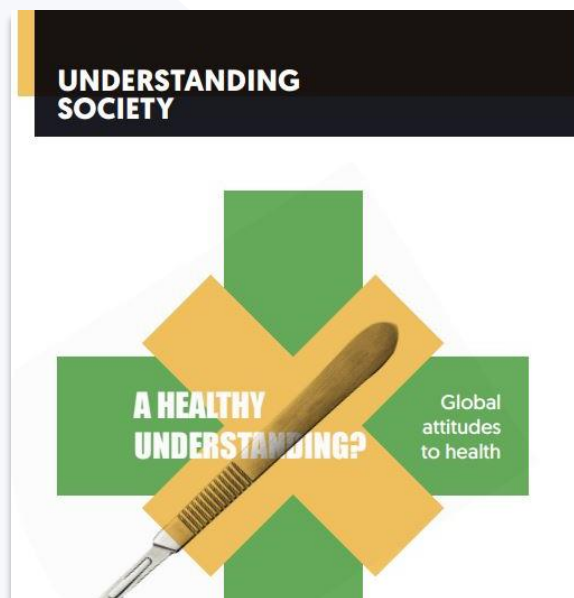


This white paper explores the benefits that corporate sustainability or social responsibility programmes have beyond being a responsible member of the global community.

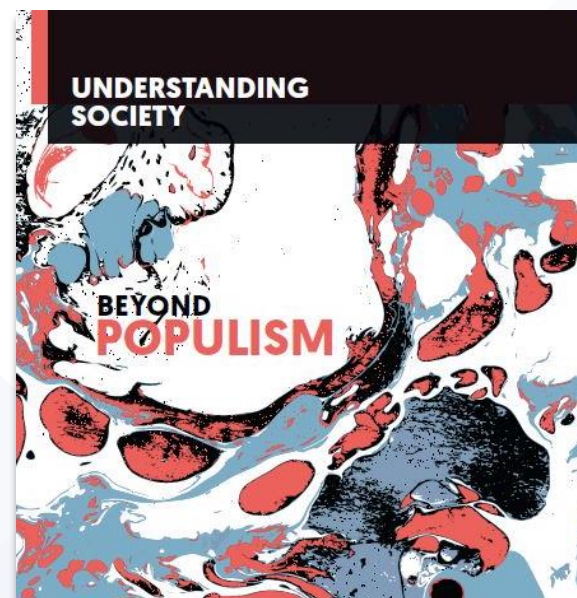
# SOCIETY & POLITICS



Bringing together leading Ipsos experts, this collection of papers looks at the state of opinion polling in the world today.

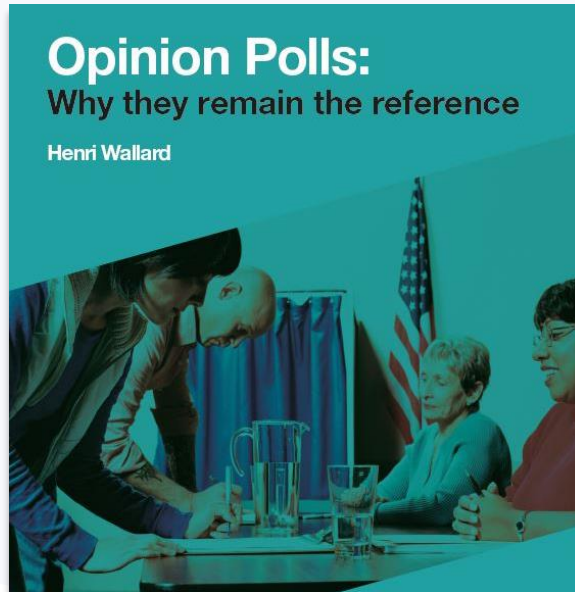


This edition examines the state of health at both a national and global level, drawing together some of the research carried out in 30 countries, across 5 continents.

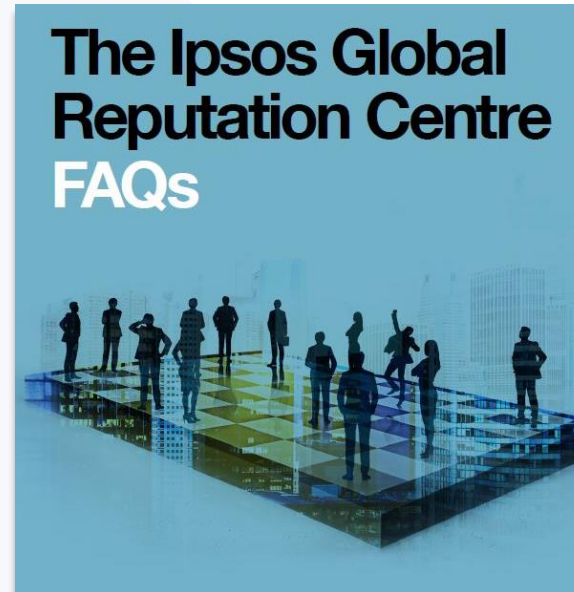


In this special edition of *Understanding Society*, the Ipsos Social Research Institute brings together a wide range of influential voices to explore the major political and social shifts around the world.

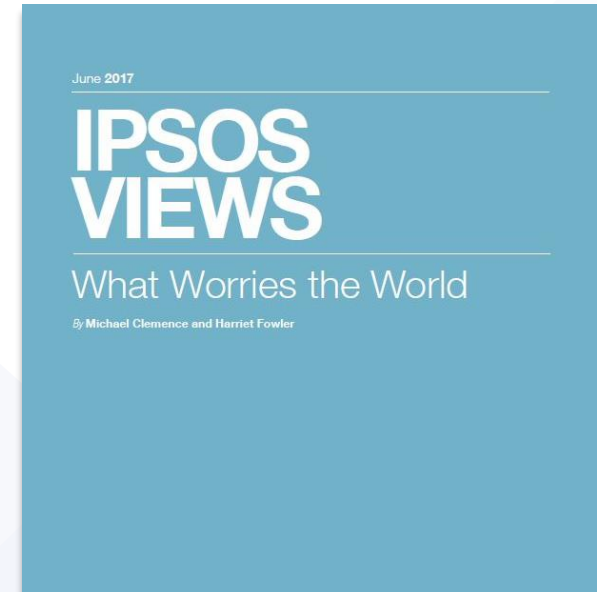
# SOCIETY & POLITICS



The last year has seen opinion and election polling subjected to both criticism and praise. Here we review the evidence, looking particularly at recent experiences in the US, UK, France and the Netherlands.



This in-depth publication from the Ipsos Public Affairs team provides answer to some frequently asked questions about corporate reputation, CSR, and how we help clients to avoid crises.



Aggregate analysis of the flagship Ipsos survey using a full year's data. Unemployment is the issue people around the world worry most about, but concerns in large emerging economies about the environment and cost of living, seems set to rise.





# IPSOS FLAIR

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The Ipsos Flair collection presents a vision of society founded on observation and interpretation of the behaviours, attitudes and opinions of people in a given country. These in-depth reports provide detailed analyses of the countries.

[Explore the full collection on our website.](#)

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Ipsos Knowledge Centre

GAME CHANGERS







**Italy 2018:**  
A country in search of identity  
10 key points

In this eighth edition of Ipsos Flair Italy, we focus on 10 key points to report on what's happening in the country, including the reactions of Italians and how they feel about their place in the world.



**Indonesia 2018,**  
Dealing with the opposites.

Ipsos Flair's purpose is to do justice to Indonesia by revealing the deep dynamism of society and the opportunities offered by its variations of local and international brands. It is also an opportunity to discover the innovation potential of its entrepreneurs.



**Indonesia 2018,**  
Dealing with the opposites  
10 key points

A bite-sized version of the full Flair Indonesia 2018 report.





**Brazil 2018:**  
The Mask Slipped!  
Time for Truth

For many Brazilians, it's the "Time for Truth". Years of political scandals, government corruption and the omnipresent "false news" have become too numerous - people now trust only themselves to discover reality.



**India 2018,**  
Aspiration to action.

In 2018, the Indian economy will be in fifth place worldwide, ahead of France and the UK. Flair India 2018 captures the latest trends and thinking in this in-depth report.



**France 2018:**  
Simmer? Shudder? Or quiver?  
10 key points

This year Ipsos Flair explores three possible developments: a France that will simmer out of anger at undelivered promises, shudder at how fast the world is changing or quiver with joy at the idea that future could again mean progress.



Italy 2017,  
The Bespoke Reality

A SUMMARY OF THE FLAIR ITALY REPORT



Brazil 2017:  
Debris or Seeds?



Colombia 2017,  
Reviving.

The last year has been marked by a fluctuating, complex situation, hard for citizens to decode. There is a perception that the country's economic situation is tending towards improvement, but not so much as to truly improve the deep sentiment of Italians.

Currently, Brazil's situation is hectic. And, this is not the first time that the country faces a difficult situation like this. Some could say this country is definitely condemned to live like in a rollercoaster. But, this time, it may be different.

"Reviving" is the word of the year in Colombia and in all Colombians' hopes and dreams. Despite 28% of the Colombian population living in poverty, the conditions are conducive to open a new way.



# IPSOS FLAIR



Mexico 2016,  
a year of (more)  
scrutiny and change

“Discontent”, “mistrust”, “pessimism”, “crime”, “poverty”, “corruption”... The list goes on. But when it comes to Mexico, whenever things seem to be reaching a breaking point, the country finds a way to stave off the bad and cultivate the good.



Peru 2017,  
From informality  
to modernity

"From informality to modernity" explores the individual facets of the Peruvian individual, whether as consumer, citizen, spectator or employee, with the aim of overturning stereotypes and thinking in a profound and innovative way.



Thailand 2017,  
Beyond the concerns.

“Beyond the concerns”, offers a unique perspective on the mood of Thailand. This is a crucial year for the Thai economy which has suffered from weak growth.



# IPSOS ENCYCLOPEDIA

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The Ipsos Encyclopedia is a unique glossary developed for everyone interested in the practice of market research.

◀ [Explore the full directory on our website.](#)

Ipsos Knowledge Centre

GAME CHANGERS





# IPSOS ENCYCLOPEDIA – EXAMPLES



## Facial Coding

An extract from the  
**Ipsos Encyclopedia**

## Concept Testing

An extract from the  
**Ipsos Encyclopedia**

## Sensory Evaluation

An extract from the  
**Ipsos Encyclopedia**

Facial Coding uses automated software and webcam capture and has become one of the most relied upon methods for quantifying emotional response to ads and digital videos used in market research.

A concept test is the stage in the product development process where a detailed description of a product (and its attributes and benefits) is presented to prospective customers or users, to assess their attitudes and intentions toward the product.

Sensory Evaluation is a scientific discipline used to evoke, measure, analyse and interpret reactions to those characteristics of foods and materials as they are perceived by the senses of sight, smell, taste, touch and hearing.



# IPSOS UPDATE

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Ipsos Update is our monthly round-up of the latest research and thinking from Ipsos teams around the world.

◀ [Explore the content on our website.](#)



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GAME CHANGERS







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