

THE YEAR IN REVIEW OPPORTUNITIES IN A POLYCRISIS

KEYS – A WEBINAR SERIES
BY IPSOS

14 December 2023



**THE YEAR
IN REVIEW
OPPORTUNITIES
IN A POLYCRISIS**

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BY IPSOS

14 December 2023

[Watch the recording](#)



AGENDA



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The Public Mood in 2023 – and 2024?

Simon Atkinson

Chief Knowledge Officer,
Ipsos

02

**Generative AI:
Where do I start?**

Michel Guidi

COO, Ipsos

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**Creative
Connections**

Aurelie Jacquemin

Chief Growth Officer,
Creative Excellence, Ipsos

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China's Next Phase
Patrick Xiang

Marketing Director, Ipsos in
China

THIS TIME LAST YEAR...



WE WERE STILL TALKING ABOUT COVID...



JANUARY

Ipsos > News & Events > News > 35% say that Coronavirus is one of the biggest issues facing their country this month

35% say that Coronavirus is one of the biggest issues facing their country this month

The recent rise in concern about Covid-19 following the spread of Omicron continues in 2022. Meanwhile, inflation hits record levels of concern.

25 January 2022 | What Worries the World / Covid-19 / Employment / Financial Security / Climate change

01 JAN 2022

Back in 1st place

← © Ipsos | KEYS Webinar The Year in Review



THIS TIME LAST YEAR...

What Worries the World – December 2022

PUBLIC
SECTOR

Have we reached peak inflation? Although still the top concern, worry about inflation falls for the first time in two and a half years according to the latest What Worries The World? global survey from Ipsos.

5 January 2023 What Worries the World / Inflation / Climate change / Coronavirus



Have we reached peak inflation?

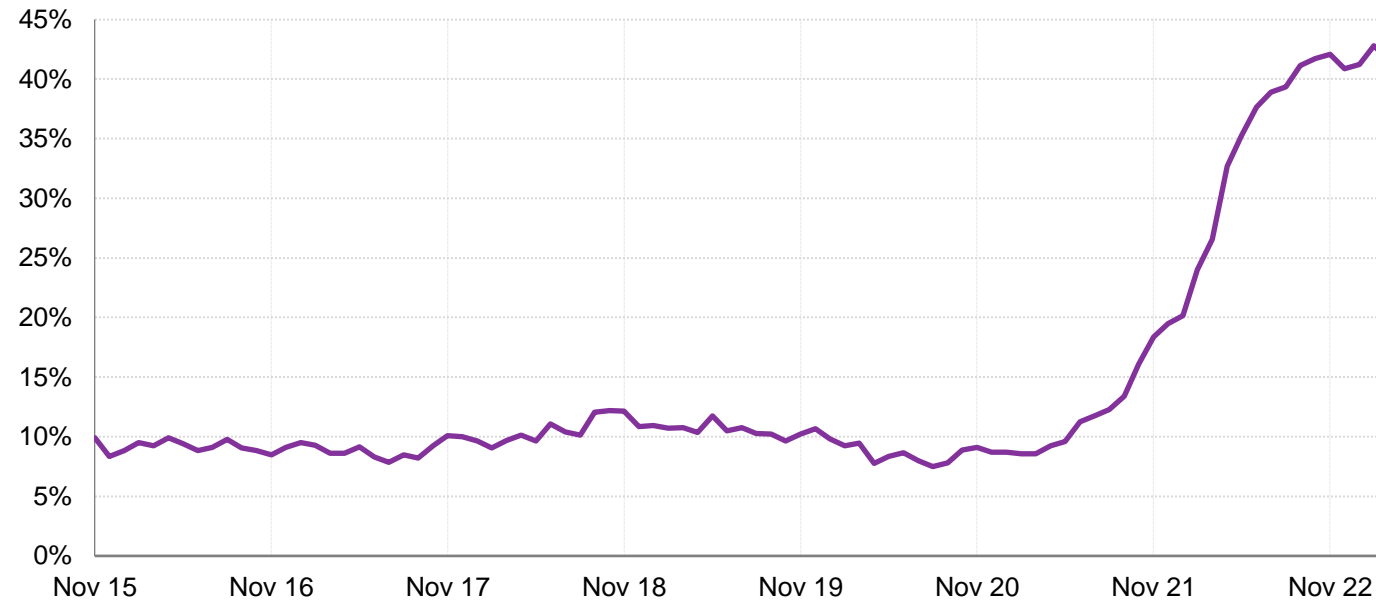
The #1 issue for 8 consecutive months

Q

Which three of the following topics do you find the most worrying in your country?

Global country average

% mentioning inflation



15
DEC
2022



Have we reached peak inflation?

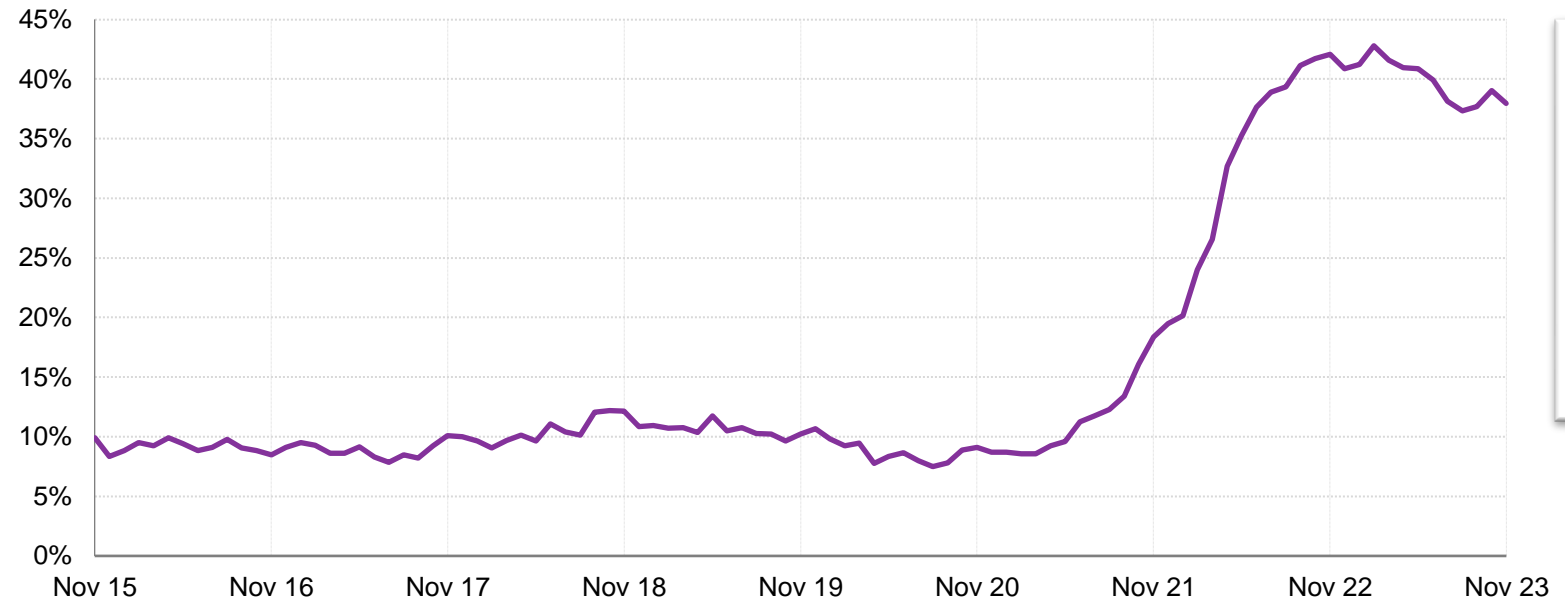
The #1 issue for
20 consecutive months

Q

Which three of the following topics do you find the most worrying in your country?

Global country average

% mentioning inflation



14
DEC
2023



Have we reached peak inflation?

IPSOS GLOBAL INFLATION MONITOR

A 33-country Ipsos Global Advisor survey

November 2023

GAME CHANGERS Ipsos

- 16pp

since April 2022

The proportion who think **inflation** is going to rise

+12pp

since April 2022

The proportion saying their **disposable income** will rise

OUR VOCABULARY IS EVOLVING...

Shrinkflation in the news

What is shrinkflation and is it costing me money in my weekly shopping?

France's Carrefour puts up 'shrinkflation' warning signs

Less is more: Why shrinkflation is sparking anger among French shoppers

The curse of shrinkflation: how food is being sneakily downsized - but prices aren't

Feel like you're paying more for less? These are the latest items to be hit by 'shrinkflation'

Smaller boxes in the cereal aisle? Say hello to shrinkflation.

BuzzFeed

"Shrinkflation" Has Gone Too Far — Here Are 19 Items That Are No Longer A Bang For Your Buck

IPSOS GLOBAL INFLATION MONITOR

A 33-country Ipsos Global Advisor survey

November 2023

GAME CHANGERS Ipsos



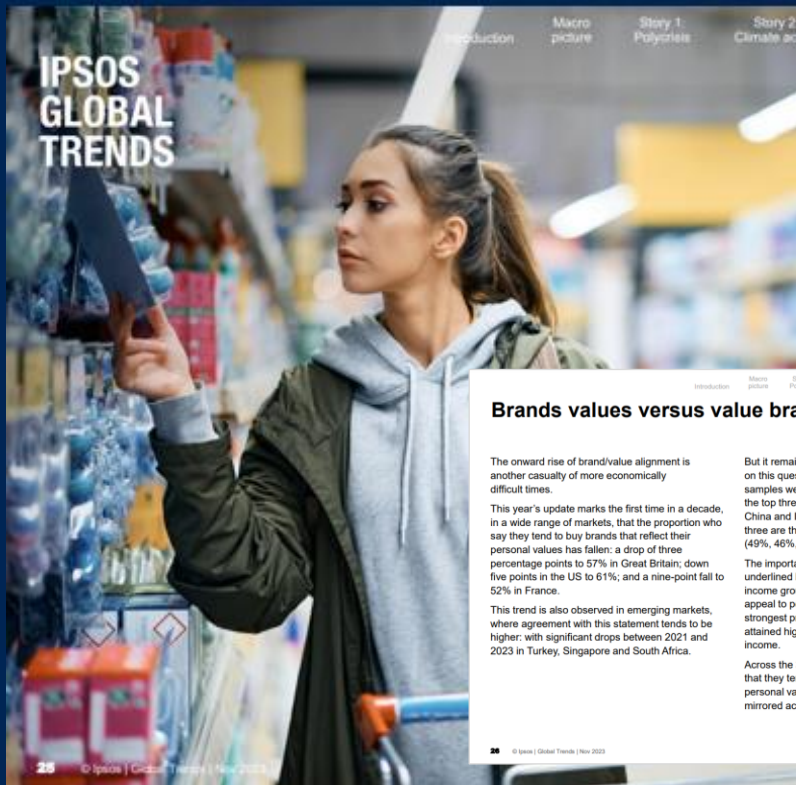
46% have noticed
"Shrinkflation" in their country

Product sizes becoming smaller, but the price remains the same

Global Inflation Monitor results [here](#)

AND THE CONTEXT IS CHANGING...

Are brand values losing out to value brands?



IPSOS GLOBAL TRENDS

Introduction Macro picture Story 1: Polycrisis Story 2: Climate action

Introduction Macro picture Story 1: Polycrisis Story 2: Climate action **Story 3: Brand values** Story 4: Science Story 5: Globalisation Final thoughts Appendix

Brands values versus value brands

The onward rise of brand/value alignment is another casualty of more economically difficult times.

This year's update marks the first time in a decade, in a wide range of markets, that the proportion who say they tend to buy brands that reflect their personal values has fallen: a drop of three percentage points to 57% in Great Britain; down five points in the US to 61%; and a nine-point fall to 52% in France.

This trend is also observed in emerging markets, where agreement with this statement tends to be higher, with significant drops between 2021 and 2023 in Turkey, Singapore and South Africa.

But it remains the case that emerging markets lead on this question, likely reflecting the more affluent samples we deal with in many of these markets: the top three countries in agreement are Indonesia, China and India (89%, 84%, 79%) while the bottom three are the Netherlands, Hungary and Japan (49%, 46%, 41%).

The importance of affluence to brand values is underlined by analysis of the views of different income groups. While brands with value have appeal to people across different groups, the strongest preference is among those who have attained high education levels or have more income.

Across the 31 countries of the study, 61% agree that they tend to buy brands that reflect their personal values, while 30% disagree – a trend mirrored across most demographic groups.

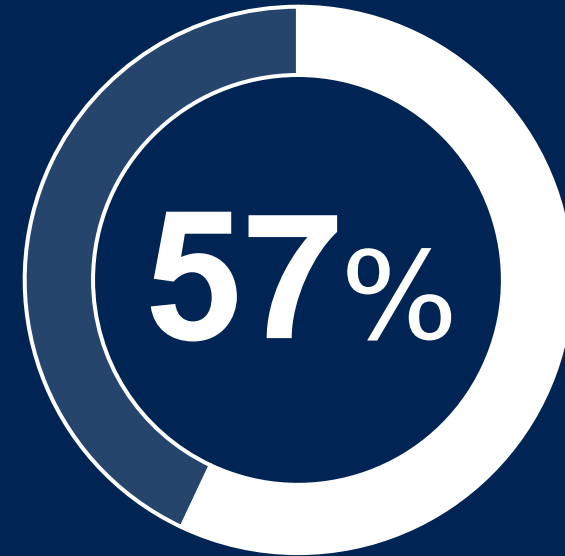
61%
Across the 31 countries of the study, six in ten agree that they tend to buy brands that reflect their personal values, while 30% disagree.

28 © Ipsos | Global Trends | Nov 2023

“In Latin America, people are prioritising the wellbeing of themselves and their loved ones. This is reflected in the growth of private label brands, and greater presence of hard discounters and convenience stores.”

Ipsos Global Trends Report [here](#)

GOING INTO 2023



said it
would be the
hottest year
on record

THEY WERE RIGHT...

Climate crisis

2023 on track to be the hottest year on record, say scientists

Last month was hottest October since records began, with average global temperature thought to be 1.7C above late-1800s levels

Ajit Niranjana

Wed 8 Nov 2023 06.01
GMT



01
OCT
2023

GLOBAL VIEWS ON CLIMATE CHANGE

Impact | Information | Action

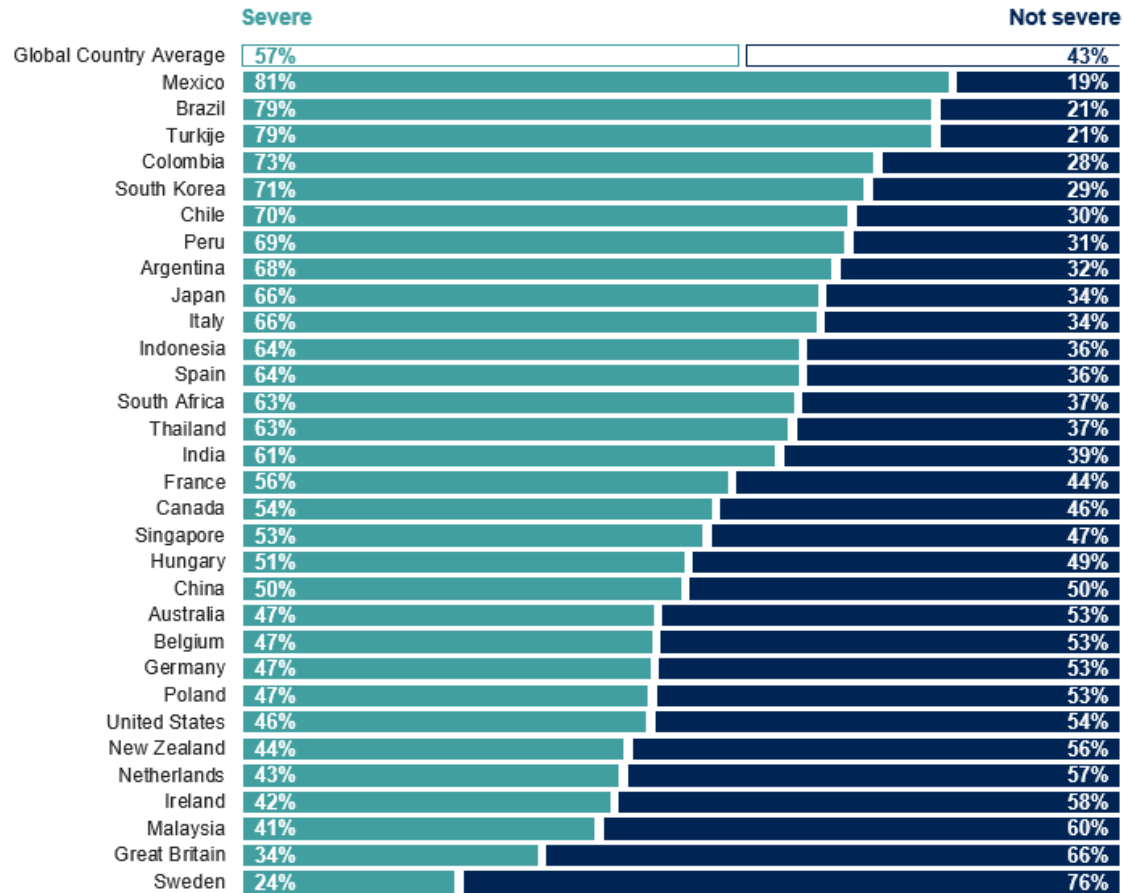
A Global Advisor survey



57%

say climate change is **already**
having a severe effect on the
area where they live

[COP 28 survey results here](#)



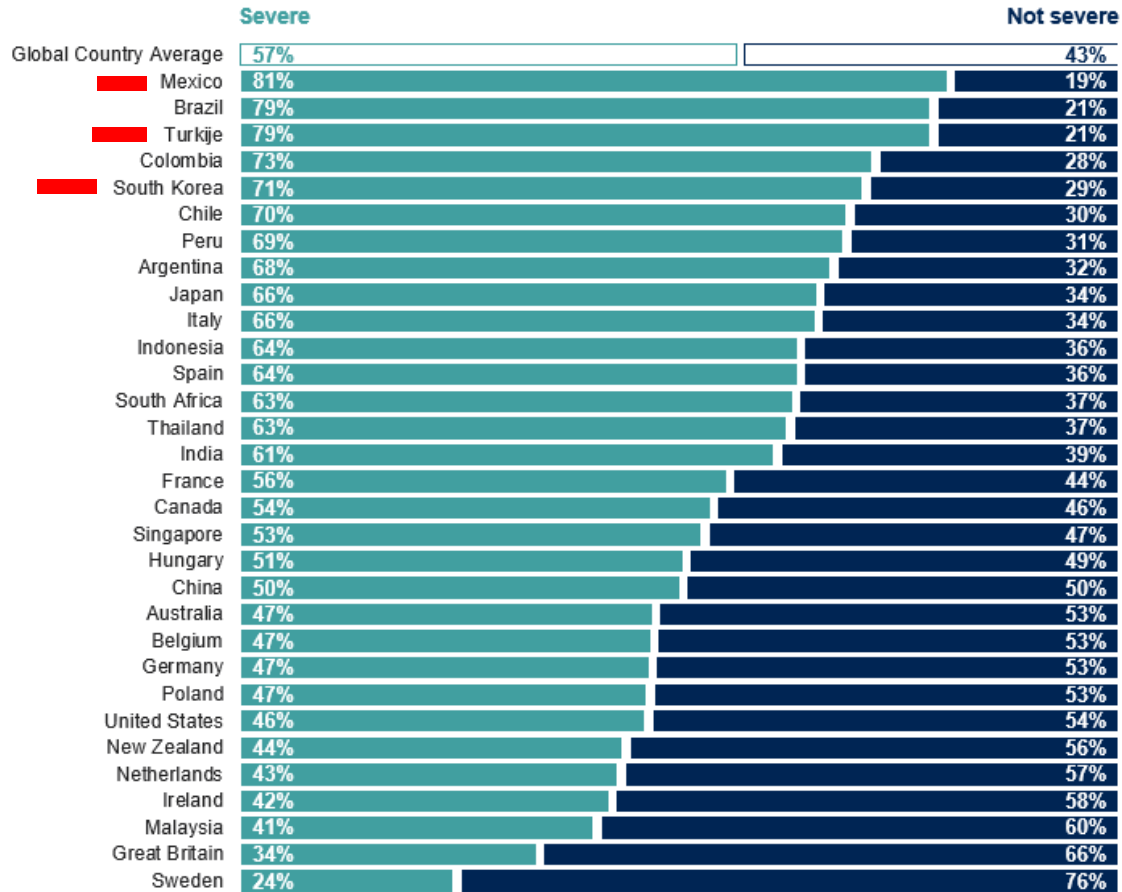
Base: 24,220 online adults across 31 countries, 22nd September - 6th October 2023. NB surveyed adults aged 18 and older in India, 18-74 in Canada, Republic of Ireland, Israel, Malaysia, New Zealand, South Africa, Türkiye and the United States, 20-74 in Thailand, 21-74 in Indonesia and Singapore, and 16-74 in 24 other countries.



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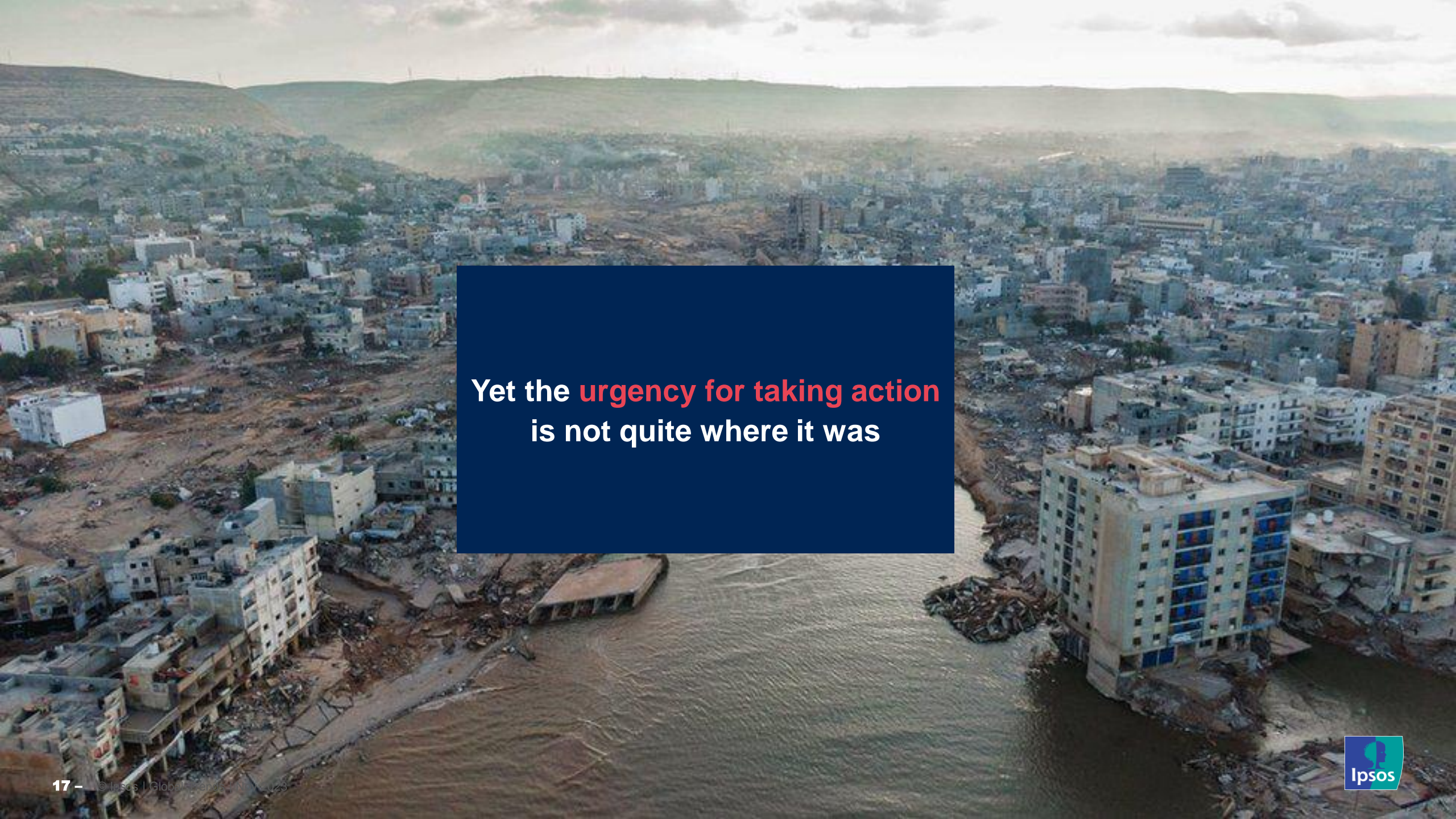
**POLARISATION,
PESSIMISM AND
POSITIVITY**

IPSOS
GLOBAL
TRENDS

75%

say we are **heading
for disaster** if we
don't change our
habits quickly





Yet the **urgency for taking action**
is not quite where it was

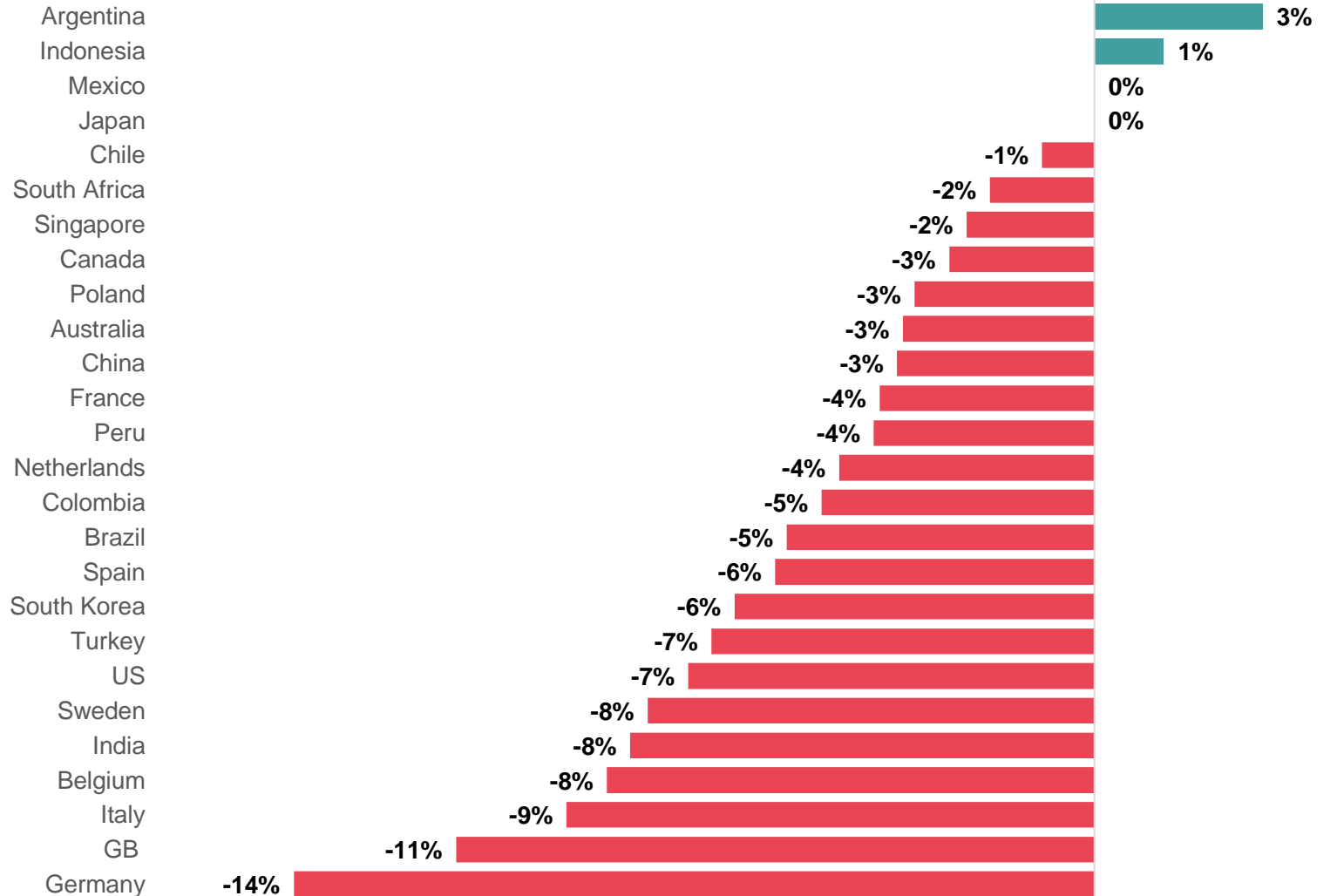


75%

say we are heading for disaster if we don't change our habits quickly

31 countries

Change in % agree 2022-23



Ipsos Global Trends 2023 – 24,220 participants across 31 countries, interviewed online 28 September – 6 October 2023

Online samples in Brazil, China, Chile, Colombia, Indonesia, Ireland, Malaysia, Mexico, New Zealand, Peru, Singapore, South Africa, Thailand, and Turkey tend to be more urban, educated, and/or affluent than the general population



01
JAN
2023

Number of populist world leaders at 20-year low

After Bolsonaro's defeat and Duterte's departure, 1.7 billion people are now living under populist rule, report says

Patrick Wintour and Jessica Elgot
Thu 5 Jan 2023 00.01 GMT

[f](#) [t](#) [e](#)



 A defeated Jair Bolsonaro (centre) looks to his supporters in December, after losing the Brazilian presidential election. Photograph: Sérgio Lima/Poder360/AFP/Getty Images

The number of populist leaders around the world has fallen to a 20-year low after a series of victories for progressives and centrists over the past year, according to analysis from the Tony Blair Institute showing the number of people living under populist rule has fallen by 800 million in two years.





GOING INTO 2024...

12
DEC
2023

Heading into the biggest election year ever, satisfaction with democracy is low

A new survey by Ipsos KnowledgePanel conducted across seven countries - UK, France, Italy, Sweden, Poland, Croatia and US - reveals support for democratic principles such as voting, building consensus, diffusion of power, despite widespread dissatisfaction with a system perceived to favour the rich and powerful.

12 December 2023 International / Politics / Election

Democracy survey results [here](#)

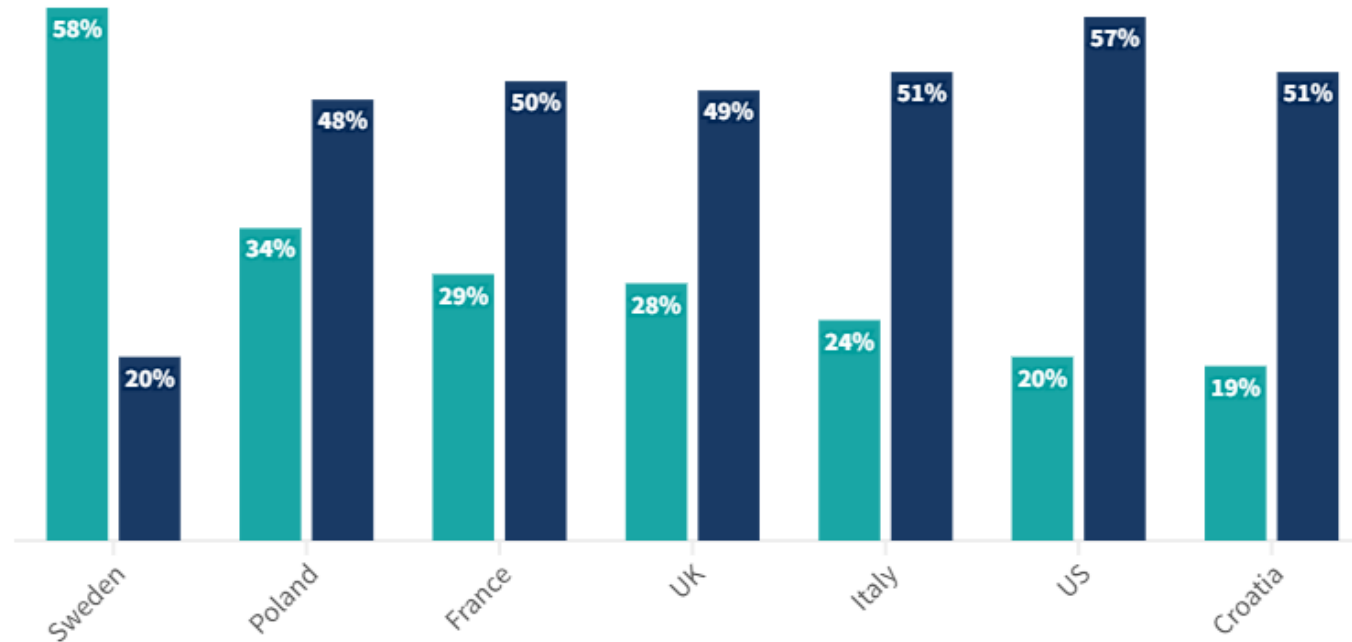
12
DEC
2023

Sweden is the only country where people are more likely to be satisfied with democracy than dissatisfied

Q: Overall, how satisfied or dissatisfied are you with the way democracy is working in [COUNTRY]?

All

Satisfied Dissatisfied



Source: Ipsos KnowledgePanel • Base: Adults aged 16+, Sweden = 1,424, France = 1,324, Poland = 1,153, UK = 5,266, US = 1,053, Italy = 1,229, Croatia = 1,017



GOING INTO 2023

01
JAN
2023

“The war in Ukraine will end in 2023”



40%
likely



37%
unlikely

14
DEC
2023

DAY

659

TODAY'S ARMED CONFLICTS

Our Rule of Law in Armed Conflict Online Portal (RULAC) classifies all situations of armed violence that amount to an armed conflict under international humanitarian law.

Today, it monitors more than 110 armed conflicts and provides information about parties, the latest developments, and applicable international law. Some of these conflicts make the headlines, others do not. Some of them started recently, while others have lasted for more than 50 years.



GOING INTO 2023: POPULATION MILESTONES

01
JAN
2023

BBC Sign in Home News Sport Weather iPlayer

NEWS

Home | Israel-Gaza war | Cost of Living | War in Ukraine | Climate | UK | World | Business | Politics | Culture

Asia | China | India

China's population falls for first time since 1961

© 17 January



GETTY IMAGES

China's birth rate has hit a record low

By Kelly Ng
BBC News

China's population has fallen for the first time in 60 years, with the national birth rate hitting a record low - 6.77 births per 1,000 people.

India overtakes China to become world's most populous country

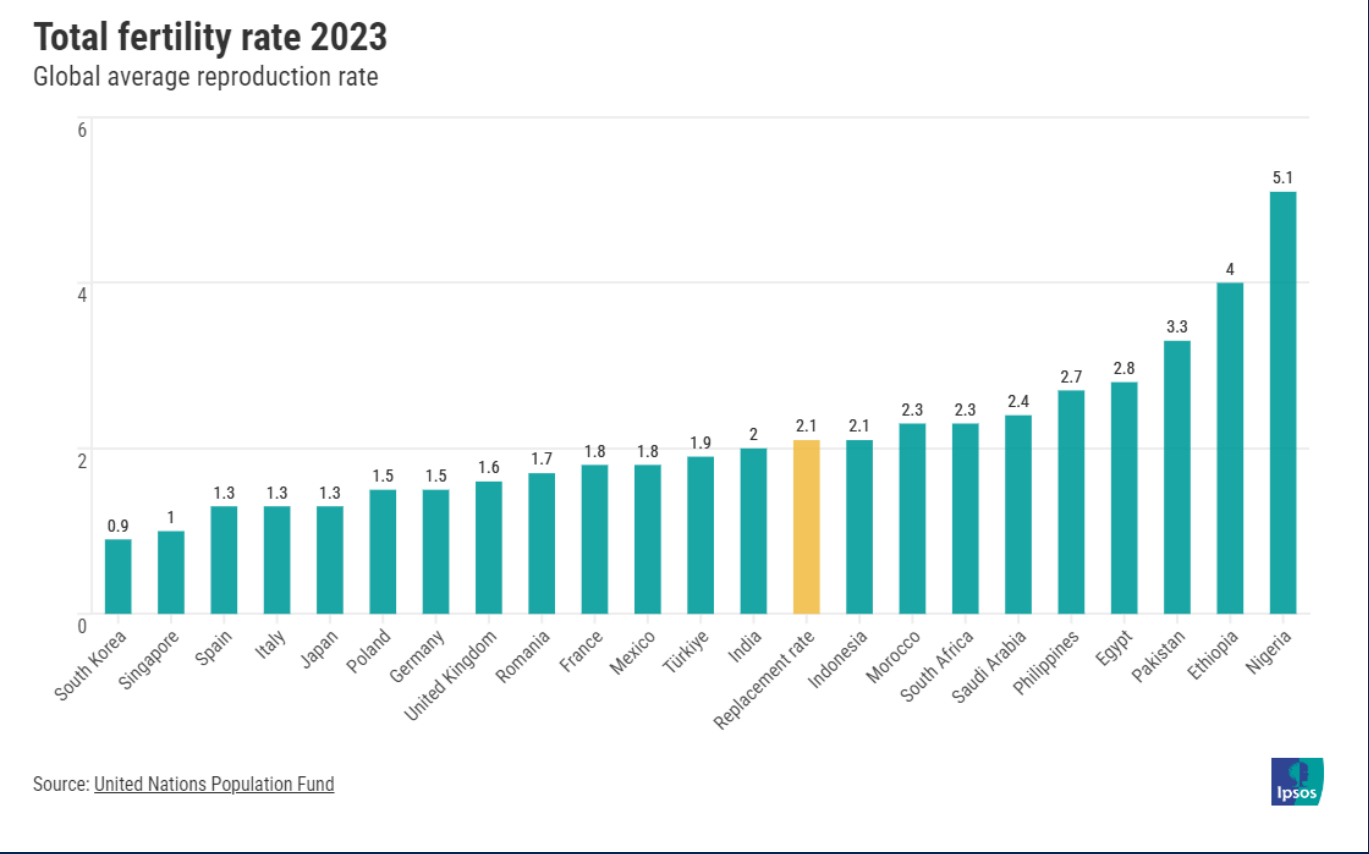
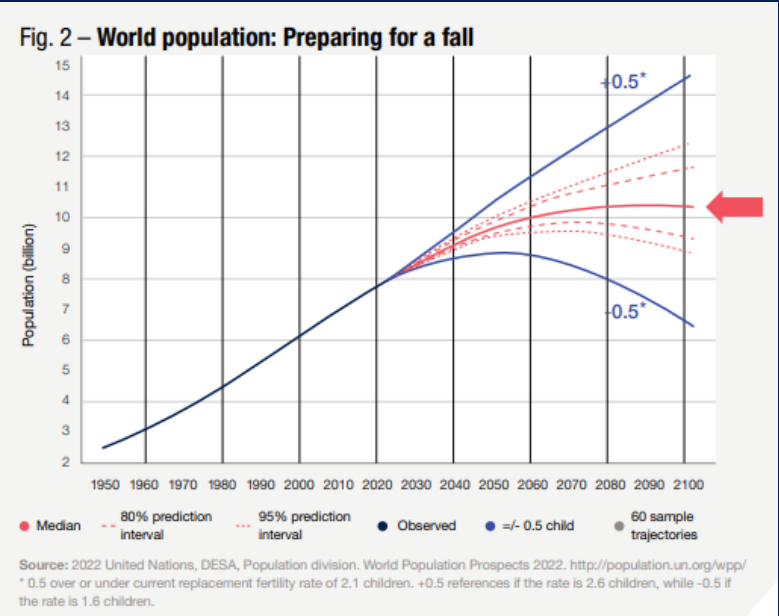
Milestone marks the first time since 1950 that China has dropped to second place in global population ranks



India has overtaken China as the world's most populous country, according to UN estimates. Photograph: Altaf Qadri/AP

India has overtaken **China** as the world's most populous country, according to UN population estimates, the most significant shift in global demographics since records began.

36 COUNTRIES ARE LOSING POPULATION ALREADY





THE PUBLIC MOOD IN 2023

Cost of living
Political instability
Conflict
Climate Change
Population pressures

RESILIENCE...

THE IPSOS ALMANAC

INTRODUCTION

WELCOME TO THE IPSOS ALMANAC

Welcome to the Ipsos Almanac – our annual review of how the events, trends and surprises of the last 12 months will shape what happens next.

OUR EXPERT VOICE

Navigating the change cyclone: four lessons for leaders

The conversation around change is louder and more prominent than ever before. Change itself has become the status quo, as we see businesses reshaping, refocusing and rethinking in the post-Covid era.

OUR EXPERT VOICE

Four critical trends that will drive brand growth in 2024 and beyond

We examine how brands will make positive contributions to our lives and the world around us in 2024.

OUR EXPERT VOICE

From "Everything Everywhere All at Once" to "Not Much, Anywhere, Anytime Soon"?

A reflection on ESG in 2023 and guidelines for 2024.

OUR EXPERT VOICE

LEADERSHIP

OUR EXPERT VOICE

BRANDS

OUR EXPERT VOICE

ESG

THE EVENTS OF 2023

KEY NUMBERS

The stats of the year

Customise your stats by country and month. Includes: GDP, inflation, unemployment, and more.

| | | |
|---|---|---|
| Gen AI goes mainstream January: 2023 began with GenAI's rising into the mainstream. | Global views on inflation February: The global view on inflation has shifted. | Between confidence and confusion March: Between confidence and confusion, the global view on the economy has shifted. |
| Demographic matters April: The global view on demographics has shifted. | Pride and prejudice May: The global view on Pride and prejudice has shifted. | We are not the same June: The global view on the world has shifted. |
| Moving forward July: The global view on the world has shifted. | The pink wave August: The global view on the world has shifted. | Driving change September: The global view on the world has shifted. |
| A more dangerous place October: The global view on the world has shifted. | It never rains but it pours November: The global view on the world has shifted. | On the path that ends all illness? December: The global view on the world has shifted. |

PERSPECTIVES FROM OUR TEAMS AROUND THE WORLD

COUNTRY MATTERS

The view from here

Our teams from around the world look at the events that shaped 2023 in their country and look ahead to what's ahead in 2024.

| | |
|---|--|
| UNITED KINGDOM The UK: The calm before the storm? | FRANCE France: From pension reforms to pre-olympic jitters |
| UNITED STATES The US in 2023: Economy, AI, Politics | CHINA China: Economic growth, population decline |
| INDIA A tale of two Indias | BRAZIL Brazil: A new moment |



STATS OF THE YEAR

2023

SPOTLIGHT ON GENERATIVE AI



Michel Guidi
Chief Operating Officer
Ipsos



OUR EXPERT VOICE

Gen AI: The need for Human Intelligence (HI) with Artificial Intelligence (AI)

Generative AI has the potential to change many aspects of our worlds, but it still needs a human inside.

November 2022: with the launch of ChatGPT, Generative AI (GenAI) emerges as a driving technological force, a tidal wave similar in its impact to the advent of the Internet. GenAI is poised to change the world as we know it: how we work, consume, communicate, get informed and educated, etc.

Twelve months later, it's time to remember Amara's Law – coined by the American scientist Roy Amara in the 1970s: 'we tend to overestimate the effect of a technology in the short run and underestimate the effect in the long run'. GenAI will significantly impact the world as we know it, but it will take longer than some first thought.

At Ipsos, we have been very excited about GenAI since day one. In June 2023, we started a "mass experiment" by launching Ipsos Facto, our generative AI platform, with three goals – to democratise GenAI, embedding it in the daily lives of our employees; to operate by creating new applications to gain speed and efficiency in a range of tasks such as transcription, codification, translation, summarisation, extraction of themes, generation of topline, etc.; and to innovate leveraging the new technology to improve existing products and build new ones.



GenAI is like an exoskeleton: it can help you run faster, jump higher or carry more weight, **but it still needs a human inside.**



Ipsos Facto has been a remarkable success. As I write this article, 51% of the Ipsos workforce have already used Ipsos Facto, and we saw 200,000+ prompts generated within just one month – and these numbers keep growing. Our challenge in 2024 is to embed Ipsos Facto in the daily lives of more people, and see it used more often and better – remember Amara's Law!

We've learned a lot over the past twelve months, and we did so while avoiding the major pitfalls you may have seen in the news:

- Security problems like the one Samsung [suffered in April 2023](#).
- Hallucinations, exemplified by the crazy story of a [senior lawyer in New York](#) who presented a court filing based on fictional texts of law, in May 2023.
- Bias issues [induced by GenAI](#), a source of great concern, considering our mission to understand the diversity and complexity of the world.
- Loss of control, as exemplified by the ['crazy' AI poll](#) generated automatically by Microsoft beside a news article.

We have been busy this past year, using GenAI for efficiency with tasks such as text analytics, desk research, translation, data processing, quality checks, interview guides, etc. Even more importantly, we have been working with our clients to pilot new or improved products and approaches leveraging GenAI: we have launched new products such as Ipsos Signals GenAI, Ipsos RISE, InnoPredict AI, AI-powered communities, AI-boosted ideation workshops, Spark AI, Persona Bot, etc. We are leveraging GenAI to spot early signals; identify unmet needs; generate new ideas; write concepts; optimise product and develop pack; use persona bots to validate ideas; converse with data in our reporting and dashboarding tools, etc.



Once you apply GenAI to your project properly, **the speed you can work with is crazy.**

Let's take the example of Ipsos Signals GenAI, which can explore social data by using AI and, with AI-powered interpretation of the data, generate predictions. From those predictions, we can start creating projects of future innovation. We can complete this entire process in just five days – once you apply GenAI to your project properly, the speed you can work with is crazy.



And there is even more on the horizon. In 2024, we are making Ipsos Facto available to our clients, with access to our library of guided prompts. We will supercharge our storytelling with text to image, text to video, text to avatar, text to music. We will continue to work on ever-larger prompts, allowing more context and bespoke responses (our longest prompt today, leveraging Censydlum, is 33-pages long!). We will work towards developing new language models, beyond English. And we will launch more new products and applications, such as AI-Assisted Ideation workshops, Transcript and Knowledge curation, AI-generated segmentation insights, etc.!

At Ipsos, we champion the unique blend of Human Intelligence (HI) and Artificial Intelligence (AI) to propel innovation and deliver impactful, human-centric insights for our clients.

Our HI stems from our expertise in prompt engineering, data science, and our unique, high quality data sets – which embeds creativity, curiosity, ethics, and rigour into our AI solutions, powered by our Ipsos Facto GenAI platform.

Our clients benefit from insights that are safer, faster and rooted in the human context.

Let's unlock the potential of HI+AI!

SPOTLIGHT ON GENERATIVE AI: THE WONDER

54%

say products and
services using AI
make me excited



SPOTLIGHT ON GENERATIVE AI: **THE WORRY**

52%

say products and
services using AI
make me nervous

Attack of the drones: six in ten perceive threat from AI-based defense systems

Yet, only 43% of respondents are confident in their government's ability to respond to such a threat.

17 November 2023

International / Security / Pu

Books

al Advisor

'Hallucinate' chosen as Cambridge dictionary's word of the year

The psychological verb gained an extra meaning in 2023 that 'gets
to the heart of why people are talking about artificial intelligence'

Ella Creamer

Wed 15 Nov 2023 13.54 GMT



107



'It's so easy to anthropomorphise these systems' ... large language model AIs are notorious for
'hallucinating' false information. Photograph: Andrew Ostrovsky/Alamy
Cambridge dictionary's word of the year for 2023 is "hallucinate" - a verb
that gained an additional meaning this year.

AGENDA



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China's Next Phase

Patrick Xiang

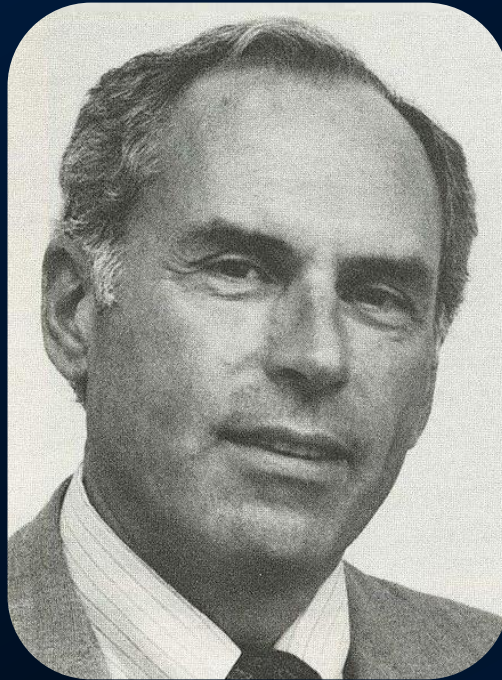
Marketing Director, Ipsos in
China

GENERATIVE AI: WHERE DO I START?

Michel Guidi

Chief Operating Officer, Ipsos

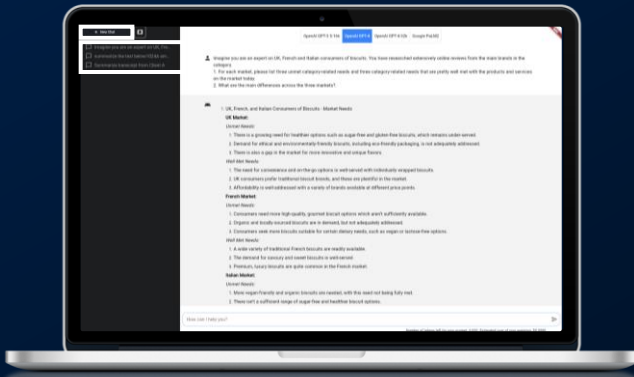
Amara's Law & Generative AI



**We tend to overestimate
the effect of a technology
in the short run and
underestimate the effect
in the long run.”**

**Roy Charles Amara, Researcher, Scientist,
Futurist and President of the Institute for the Future.**

We launched our Gen AI Platform, Ipsos Facto



Democratise

Embed Gen AI in the daily lives of all Ipsos employees

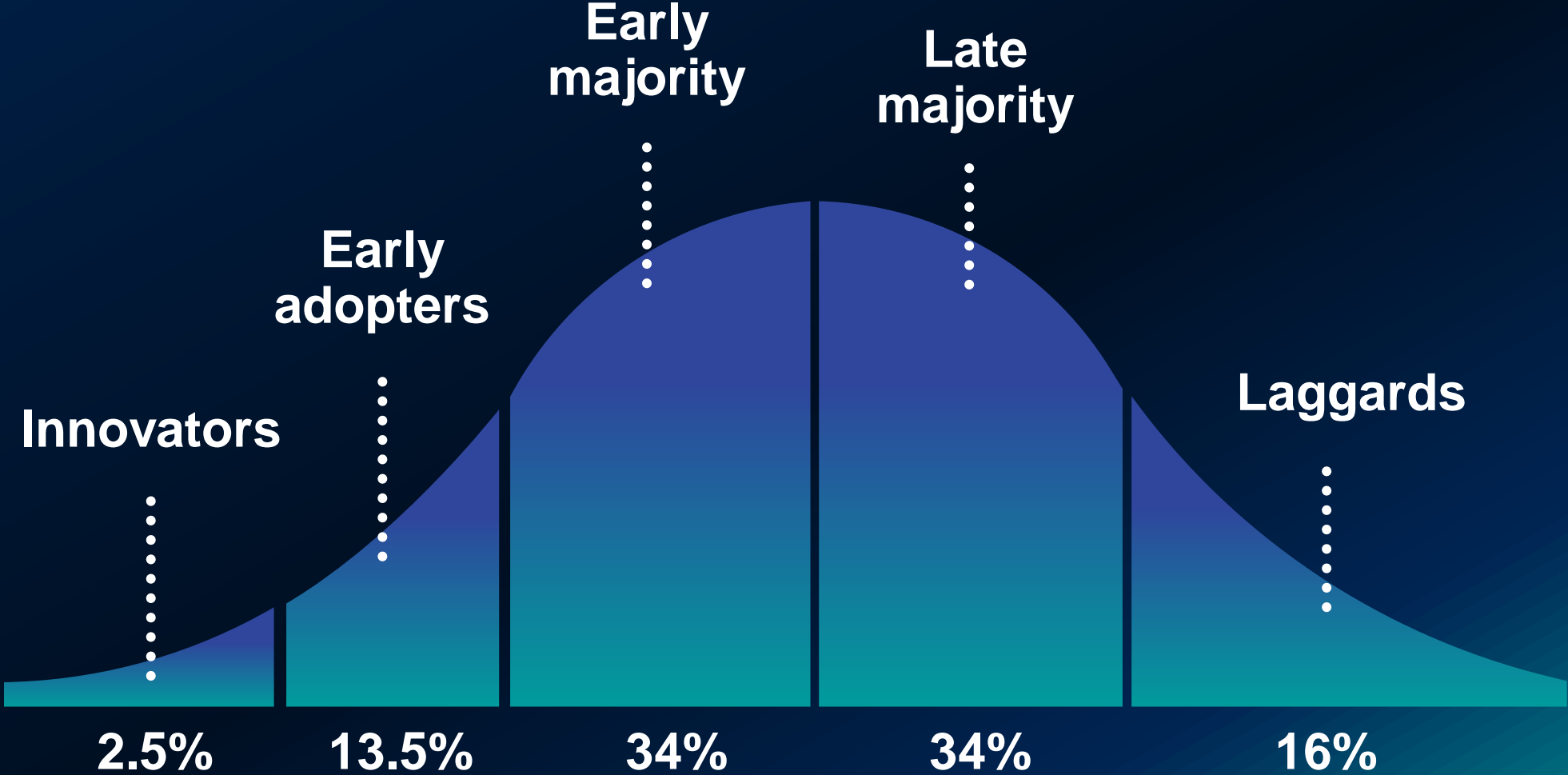
Operate

Transcribe, codify, extract themes, translate, summarise, generate topline data, ideas...

Innovate

New products and applications in Innovation, Reporting, Brand Tracking, Qualitative...

Innovation adoption lifecycle



Security

Confidentiality,
your compliance
team's nightmare

Samsung workers made a major error by using ChatGPT

News

By Lewis Maddison published April 04, 2023

Samsung meeting notes and new source code are now in the wild after being leaked in ChatGPT



Hallucinations

Can have a heavy toll IRL

The New York Times



By [Benjamin Weis](#)

Meta's A.I. Characters ChatGPT's Image Generator Google's Bard Extensions

May 27, 2023

Here's What Happens When Your Lawyer Uses ChatGPT

A lawyer representing a man who sued an airline relied on artificial intelligence to help prepare a court filing. It did not go well.

Bias

The reign of the White Male

Bloomberg

**HUMANS ARE BIASED.
GENERATIVE AI
IS EVEN WORSE**

Stable Diffusion's text-to-image model amplifies stereotypes about race and gender – here's why that matters

By [Leonardo Nicoletti](#) and [Dina Bass](#) for **Bloomberg Technology + Equality**

The need for an **evaluation framework**

TRUTH

Is AI delivering **Accuracy**?
How do we avoid
hallucinations and false
fabrications?

BEAUTY

Explainability... Can we
see inside the mechanism
to understand how
it works?

JUSTICE

**Ethics, Fairness, Security,
Privacy, Rights &
Responsibilities.** How do
we treat participant and
client data with integrity?



Loss of Control

Let AI roam
free at your
own expense

The New York Times

Microsoft Criticized for Embedding 'Crass' A.I. Poll Beside News Article

A poll generated by artificial intelligence, embedded next to a Guardian article on Microsoft's news aggregator platform, asked readers to speculate on the cause of a woman's death.

The Guardian + Follow

Woman found dead at St Andrew's school in Sydney identified as water polo coach Lilie James

Story by Tamsin Rose and Nino Bucci • 4d



By **Jenny Gross**
Reporting from London

Nov. 2, 2023

Woman's body found at central Sydney schoo... 14 Comments

What do you think is the reason behind the
woman's death?

2 votes · 14 comments · 4 days ago

Murder

Accident

Suicide

Insights from AI



Share your thoughts

AR

Allan Roberts · 4d

This has to be the most pathetic, disgusting poll I've ever seen. The author should be ashamed.

42 · 4 · Reply

See 1 more reply

TU

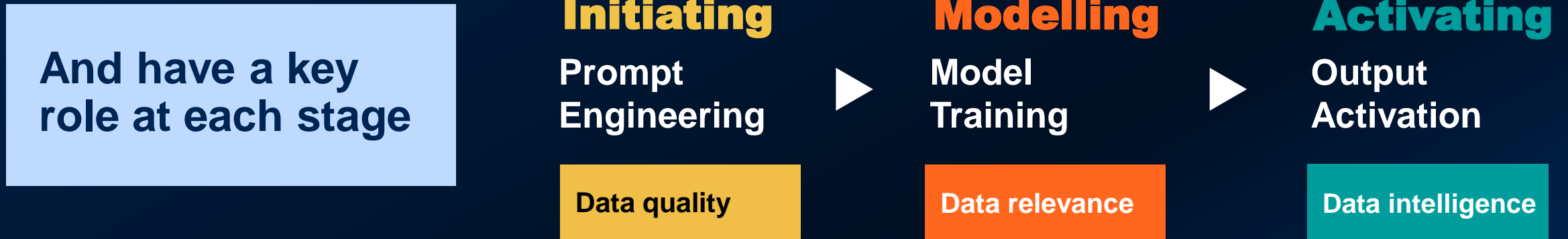
This User · 4d

nice to know we can take a poll on how this woman died

25 · 4 · Reply

See 2 more replies

Researchers must be in the loop



The human in the loop: safe & agnostic tech platform + evaluation framework + the art of the question + trained data + verification & activation



**Creativity and
innovation are the
bigger goals.**



TO CONCLUDE

(Gen) AI as an **enabler** for speed, efficiencies, innovation and creativity

Human Intelligence must remain at the heart

A wide open future where **more innovations** will emerge

CREATIVE CONNECTIONS

REFLECTING ON SUCCESSFUL
ADVERTISING STRATEGIES IN 2023

Aurelie Jacquemin
Chief Growth Officer,
Creative Excellence, Ipsos

2023: ADVERTISING STRATEGIES FOR BRAND SUCCESS

RELY ON 3 DIMENSIONS

1

**Shaping
Expectations**

2

**Integrating
Context**

3

**Acting with
Empathy**

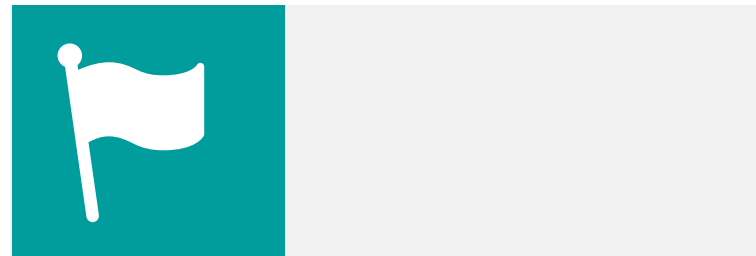
PEOPLE RATHER TRUST BRANDS THAN GOVERNMENTS TO HELP

Source: Ipsos Global Inflation Monitor, April 2023



45%

think businesses are good at
planning for the long-term future



36%

say the same about their
national government

CORONA EXTRA LIME ANSWERING THE POLYCRISIS MACRO CONTEXT



Corona/ABI China
Titanium Lion winner

INFLATION CONTEXT & HOLIDAYS ANSWERING PEOPLE'S ASPIRATIONS FACING INFLATION



Hilton and TBWA\London launch Hilton's biggest ever UK ad campaign to support the global brand platform, 'Hilton. For The Stay' - News (adforum.com)



+ HUMOUR

75% | +4pts
Share of EU
intending to
travel despite inflation

Highest score since
2011

Source: Ipsos



BRANDS STILL NEED TO BREAK STEREOTYPES AND CLOSE THE GENDER GAP

41%

think the main **role of women in society is to be good mothers and wives!!** (and 85% in Pakistan)

25%

agree that “**a man who stays at home to look after his children is less of a man**” - including 22% of women



Is laundry only a woman's job?



**CREATIVITY IS
SENSITIVITY**
IN A WORLD WHERE
NO ONE IS LISTENING



Ipsos | How to surf the polycrisis



20%

Combined with creativity, Empathy brings a lift in ad effectiveness

2023: ADVERTISING STRATEGIES FOR BRAND SUCCESS

1

Shaping Expectations

Reflect on what people feel and believe about a brand

2

Integrating Context

Take into consideration what is happening in people's lives, macro & micro context matter

3

Acting with Empathy

Understanding what is important for the people, showing we share their values

CHINA'S NEXT PHASE

Patrick Xiang
Chief Marketing Officer,
Ipsos in China

FULL OF HOPE IN THE BEGINNING OF 2023

Domestic travels during the 2023 Chinese New Year

+23.1%

vs. 2022

88.6%

of 2019

Source: Ministry of Culture and Tourism of the People's Republic of China

TOUGHER THAN THOUGHT

GDP (YTD Q3)

+5.2%

vs. 2022

CPI (YTD Q3)

+0.4%

vs. 2022

Source: National Bureau of Statistics



WHAT TO WATCH

THE PROPERTY DEBT

China Evergrande Group

\$333bn
total debt

\$42bn
overdue debt by Oct 2023

China's Top 20 Developers

liabilities to assets

< 70%

cash to short term debt

> 1.4

POPULATION AND AGEING

China's newborn in 2012

19,731,000

China's newborn in 2022

9,560,000

China's population in 2022

-850,000

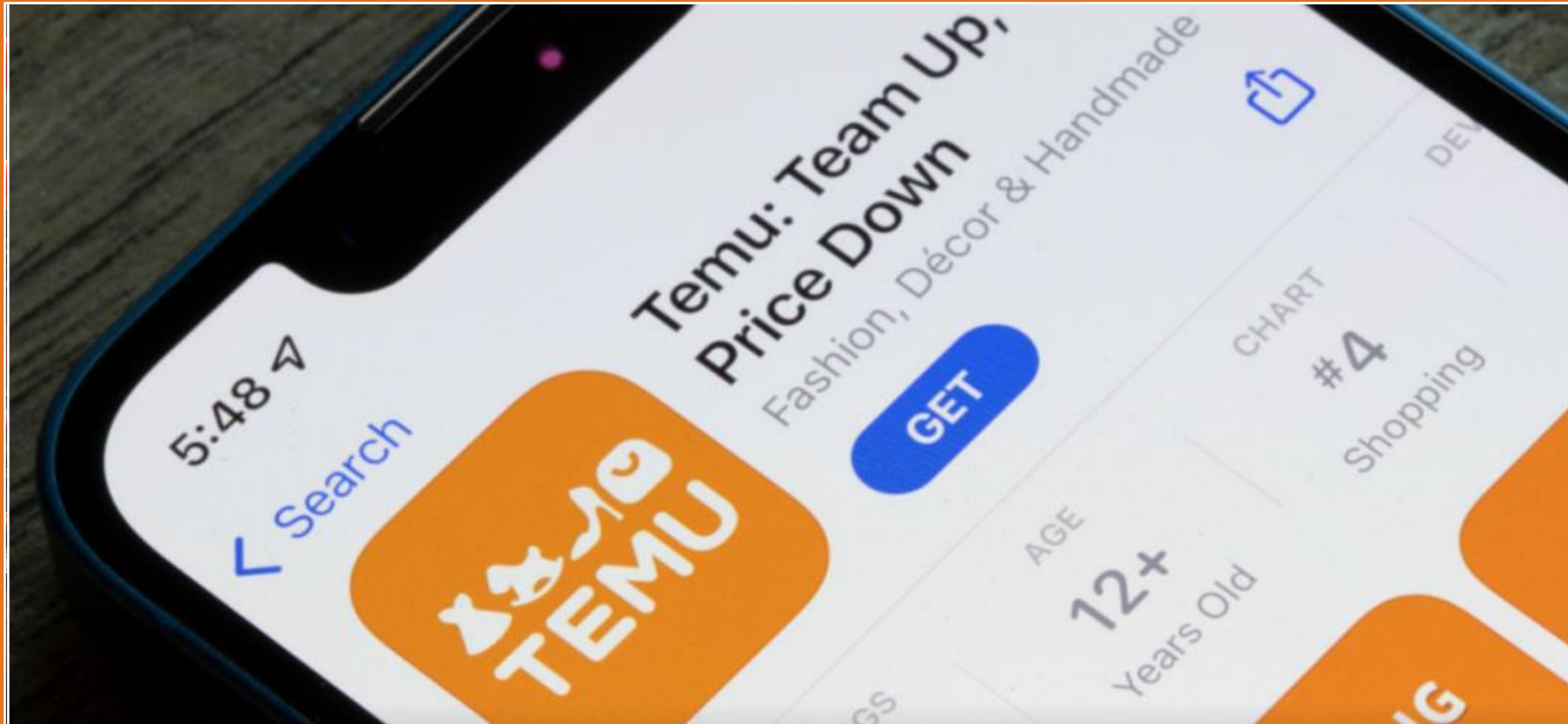
OPPORTUNITIES FOR VALUE BRANDS

The average travel spending decreased

Value brands won over livestreaming commerce

Luckin's huge success

PDD's market cap surpassed Alibaba



KEEP AN EYE ON THE NEW TECH

AI



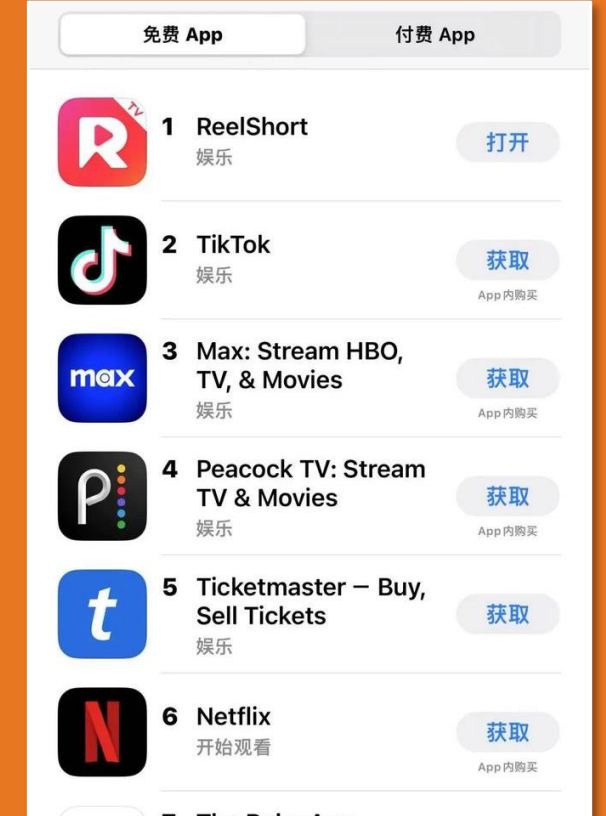
New energy



Automobile



Social media



UNDERSTAND THE RESILIENCE

- Huge economy base
- Solid growth volume
- The culture of perseverance

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