

IPSOS UPDATE

A selection of the latest
research and thinking from
Ipsos teams around the world

January 2024

IPSOS UPDATE JANUARY 2024

Our round-up of research and thinking from Ipsos teams around the world

Happy New Year! Every year we ask the public their expectations for the year ahead. For 2023, a majority globally predicted record heat – a correct forecast, as 60% now witness severe local climate effects, and with 71% bracing for worse in 2024.

Russia's invasion of Ukraine casts a long shadow. As its second anniversary looms, only 31% foresee a conclusion to the war this year, amidst over a hundred conflicts worldwide.

Economically, despite a potential inflation plateau and a general expectation of falling interest rates in the second half of 2024, a staggering 79% anticipate declining real incomes – underscoring the fact that while global growth may pick up, inflation's lag effect will persist in depressing consumer demand, and leaving millions facing "the loss of the future" they were taught to expect.

With these multifaceted crises, our political leaders will step into an unprecedented election cycle. Turmoil is expected. Our democracy survey reveals deep dissatisfaction, especially in the US, where only 43% approve of how democracy is working: globally the balance of opinion is that Trump will lose in the USA, but Trump is generally far less popular outside the

United States than at home. Meanwhile this year we have seen a long-term rise in the proportion agreeing "I wish I could slow down the pace of my life" – up from an average this century of c40%, to 62% this year.

Part of the reason is the arrival of AI with awe-inspiring capabilities, stupid hallucinations and daunting risks. Policymakers have rushed to harness AI responsibly; our Humanizing AI report emphasises the necessity of real-world training for these digital minds.

Ipsos' latest Global Trends analysis finds a silver lining: our deep societal resilience amid uncertainty, although our optimism about the coming year is cautious, and remains subdued compared to the pre-pandemic period. Finally, our annual Ipsos Almanac offers insights and forecasts, reflecting on lessons learned and their implications for the months ahead.

As 2024 unfolds, all the best from the team here.

Ben Page, Ipsos CEO



THE IPSOS ALMANAC

Our annual review of the events, trends and surprises of the last year

Our Expert Voice



Our experts reflect on some of the big questions facing organisations around the world as they adapt to today's uncertain environment and plan for the future.

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The View From Here



Our teams from around the world tell us the events that characterised 2023 in their country and look ahead to what those events can tell us about 2024.

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The Events of 2023



Our month-by-month review of 2023 through the lens of public opinion. We look back on the FIFA Women's World Cup, the boom of ChatGPT, the pink wave of Barbie, and more, considering their wider implications along the way.

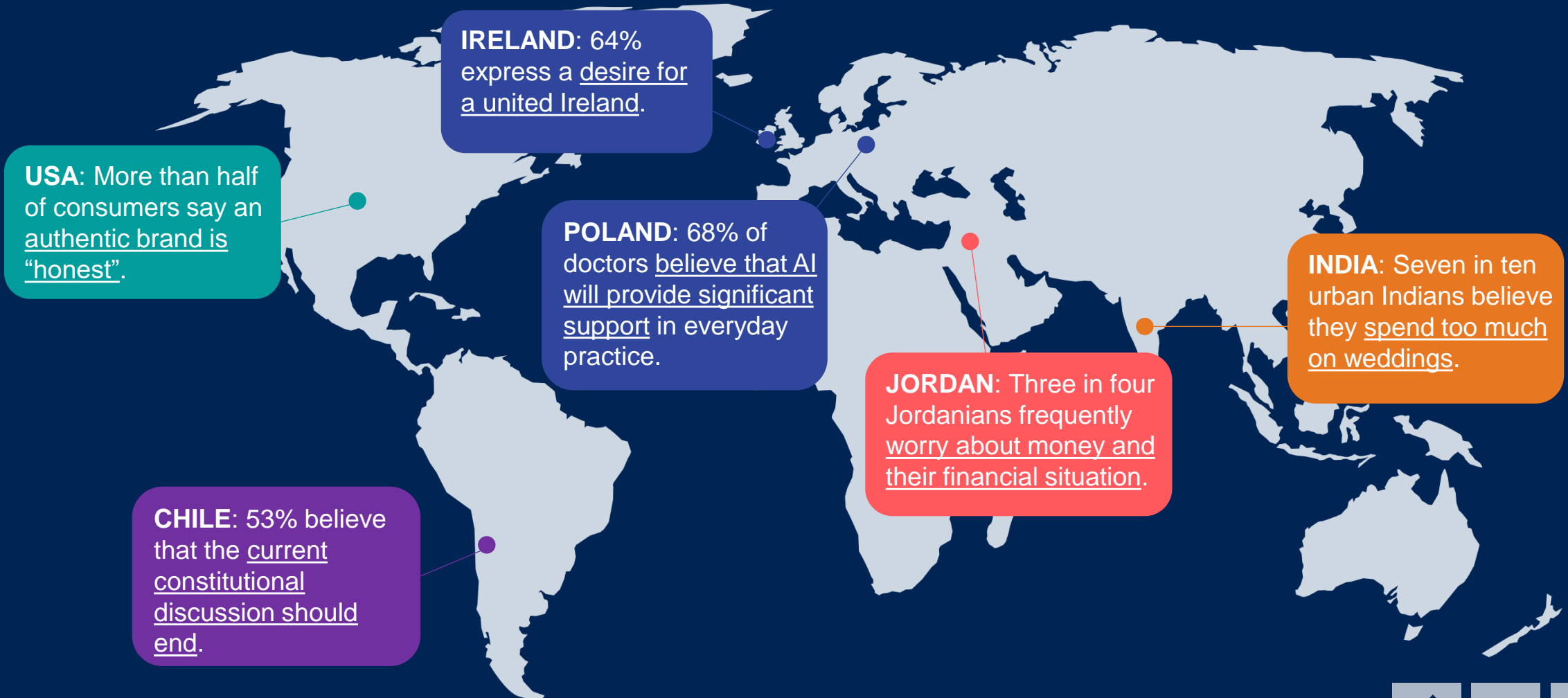
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POLL DIGEST

Visit [ipsos.com](https://www.ipsos.com) and our local country sites for the latest polling and research.

Some of this month's findings from Ipsos polling around the world.



IN THIS EDITION

HUMANIZING AI

Real data for better innovations

Training AI models on select data will only produce limited results. Our new paper shows how using real world human data in your AI models is the best way forward for quality innovations.

GLOBAL INFLATION MONITOR

Cautious economic optimism for the future

Despite the absence of a global recession, many people believe their country has experienced one. And although inflation remains high, the public expect better conditions for 2024.

WHAT WORRIES THE WORLD?

Inflation, terrorism, military conflict and elections

Inflation is the number one worry for 21 months in a row. Meanwhile, in the wake of recent elections, Argentina and Poland see their “right direction” score at record levels.

2024 PREDICTIONS

Optimism on the rise for the year ahead

2023 has been a tumultuous year for many, with new geopolitical tensions, rapid AI advancements and extreme weather events. Yet the global public are optimistic for the year ahead.

UNDERSTANDING CONSUMPTION MOMENTS

Why context matters

We highlight why understanding the context at a *given moment* of consumption is key, and how brands can use this information to inform their strategy and create a positive business impact.

GLOBAL VIEWS ON CLIMATE CHANGE

Impact, information, action

Our 31-country study looks at perceptions of the impact of climate change, whether citizens are being given enough information by key players, and whether they feel enough action is being taken.

WHAT THE FUTURE: TEEN

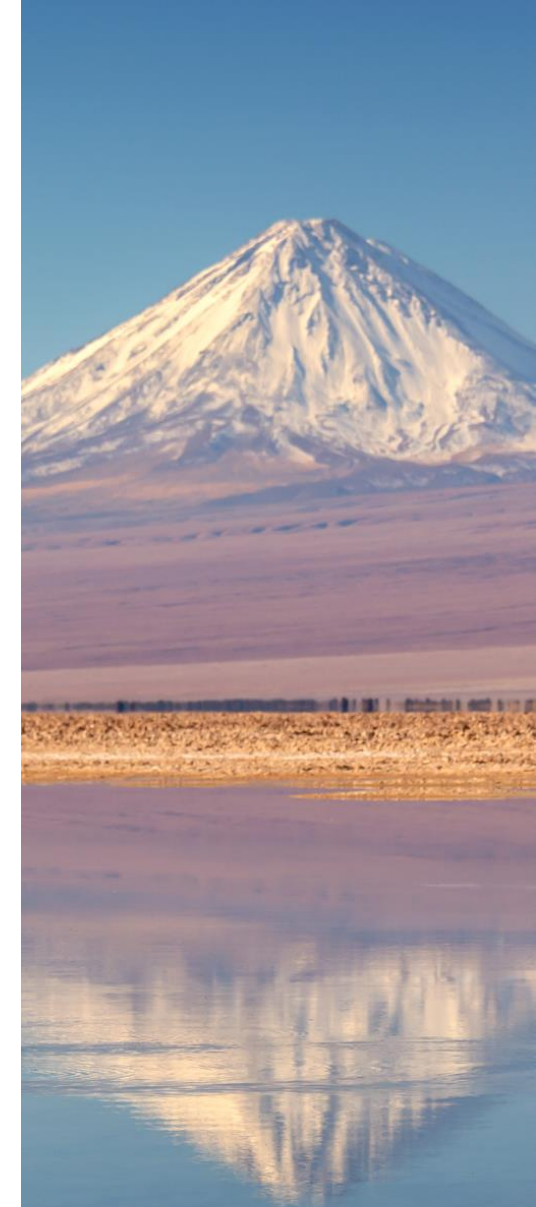
Teenagers aren't what you think anymore

How will life stage shifts, anxieties and hopes define teenage years in the decades to come? The latest issue of *What the Future* explores how teens will come of age in a fast-changing world.

FLAIR CHILE

Navigating a challenging year

In this first ever edition of Flair Chile, our local experts share their perspectives on topics including identity, generations, sustainability, feminism and innovation.



Cover photo: Laguna Chaxa, Salar de Atacama, Chile. Explore the first edition of [Flair Chile](#), where we examine themes of sustainability, equality and generations.



HUMANIZING AI

Real data for better innovations

Humanizing AI: Real Human Data to Generate and Predict Real Innovation Success explores the importance of using real human data to train AI models for innovation success. AI presents an opportunity to improve the speed, and potentially, the success rate of new innovations, and how we go about doing this will determine whether we succeed.

Brains are like sponges; they absorb what they are exposed to, and AI is no different. The development of AI requires data, and the quality of the data determines the quality of the AI model. There are two main forms of learning for AI models: **supervised learning**, where a human teaches the AI what to learn, and **self-supervised learning**, where the AI is fed with a large amount of text to generate predictions.

New product ideas are more likely to succeed if the ideation and evaluation

phases are grounded in data reflecting consumers' intrinsically human needs and desires. This data needs to be timeless, or at minimum, up to date. As data is so central to AI, *Humanizing AI* starts by explaining how training data determines the accuracy of its model.

For this reason, off-the-shelf AI models have their limitations because what is needed is real consumer data to generate and predict better innovations. Ipsos, for example, uses human reactions to new product concepts to train AI models for concept evaluation.

This paper calls for the use of real human data to better understand and predict real human behaviour. By incorporating relevant, representative, and timeless data, AI models can be more accurate and effective in driving innovation success.

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THE ONLINE WORLD IS NOT A COMPLETE REPRESENTATION OF THE REAL WORLD. ONLINE CONTENT IS POSTED BY ONLY THOSE WHO ARE ACTIVE ONLINE. ”



UNDERSTAND THE CONTEXT OF CONSUMPTION MOMENTS

A path to brand success

As marketers strive to grow their brands in a rapidly changing world, we know that successful brands are those that shape consumer expectations so that only they can meet them. This needs to be done by understanding the context in which people live, and then acting with empathy. One person can have different needs and preferences at different moments.

Brand research surveys traditionally take a bird's-eye view of consumption by asking consumers overall about the products they know or prefer most. However, these approaches often lack granularity and bypass the nuances of the moment.

Marketers need a higher level of specificity to identify growth opportunities and optimise their product portfolio. Targeting general consumption is no longer sufficient. Instead, we need to understand the context of consumer consumption moments.

In this paper, we explore ways to dissect the moment and how to approach moment-based research, while looking at how brands can use this information to inform their strategy and create a positive business impact.

A more accurate, granular, and timely understanding of context is increasingly critical to developing strategies that stand out – enabling brands to play a key role in consumers' lives that competitors may be missing.

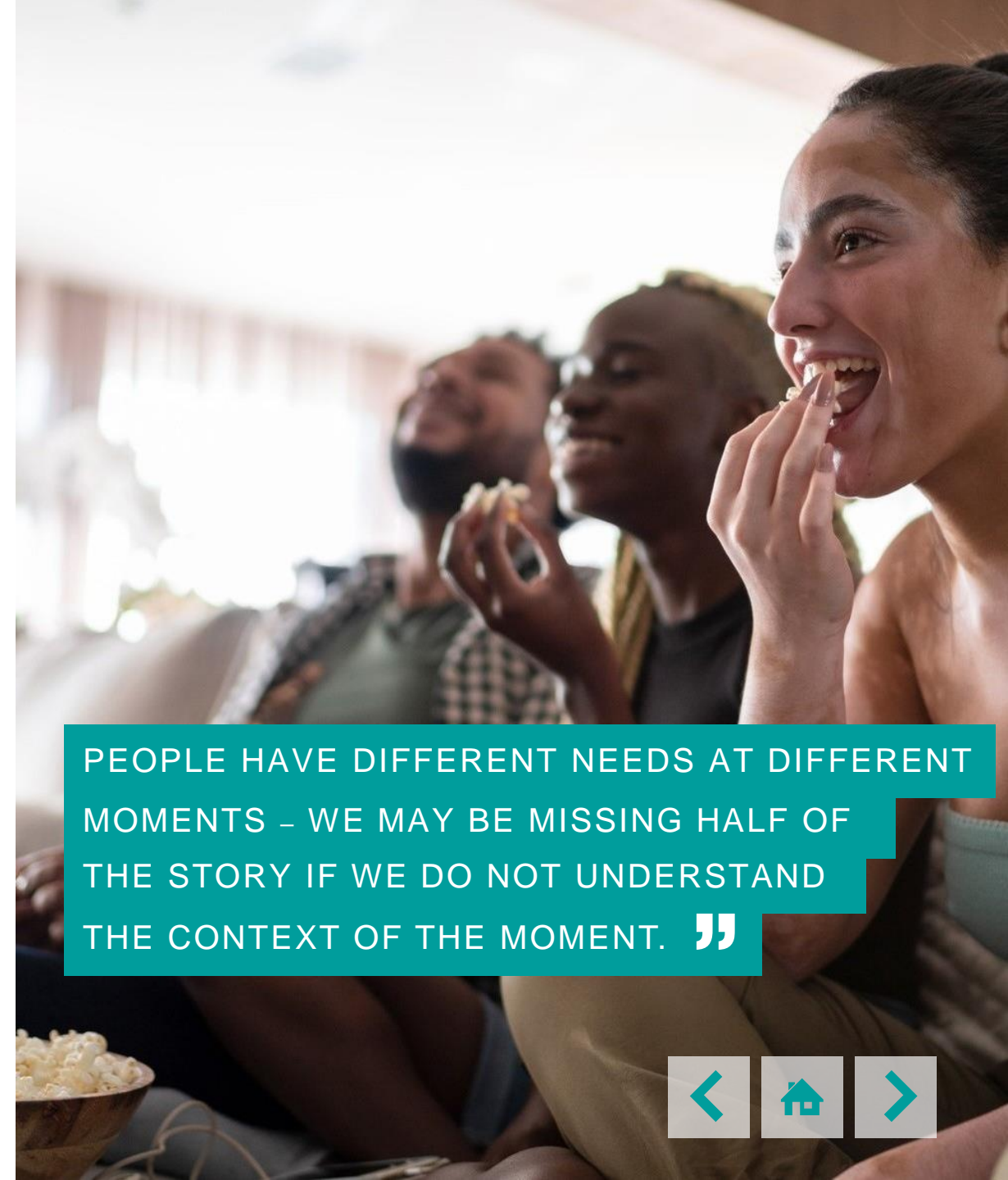
This paper forms part of our three-part series on understanding the impact of context on brand choice. You can download the first paper here: [Mapping Out Demand Spaces by Context](#).

In the meantime, please visit our Ipsos [Brand Success](#) microsite for more information.

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PEOPLE HAVE DIFFERENT NEEDS AT DIFFERENT MOMENTS – WE MAY BE MISSING HALF OF THE STORY IF WE DO NOT UNDERSTAND THE CONTEXT OF THE MOMENT. ”



GLOBAL INFLATION MONITOR

Cautious economic optimism for the future

The *Ipsos Global Inflation Monitor* paints a vivid picture of the ongoing cost-of-living crisis and the economic concerns gripping people worldwide. Despite the absence of a global recession, nearly half (46%), across 33 countries perceive their country to be in recession. This sentiment is particularly strong in South Korea (79%), Hungary (77%), and Türkiye (77%).

The spectre of rising unemployment looms large, with 59% of the global population anticipating fewer jobs in 2024. This apprehension is particularly pronounced in Great Britain, where expectations for unemployment to increase have reached a record high of 62%.

Financial pressures continue to weigh heavily on individuals, with six out of ten people globally experiencing some level of financial strain. Almost three in ten (27%) report finding it difficult to make ends meet, while a further 33% indicate

that they are just about managing.

While inflation rates have shown signs of easing in some countries, it remains a significant concern for the global public. 62% of people surveyed expect inflation to rise over the coming year. This concern is reflected in inflation having been the top worry for the last 21 months in our [What Worries the World](#) survey.

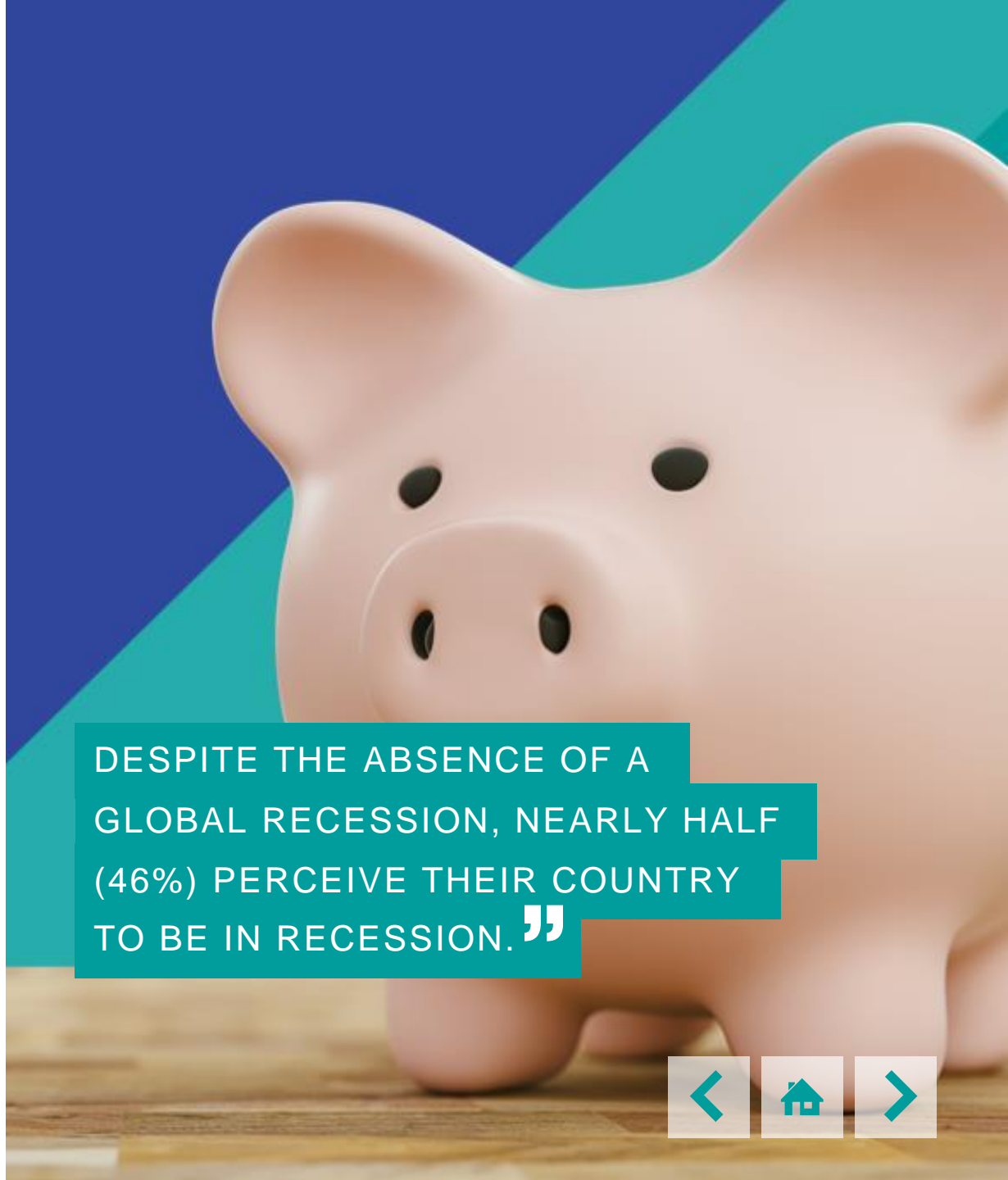
One notable trend highlighted by the survey is the practice of 'shrinkflation', where product sizes are reduced while prices remain the same. Almost half (46%) have noticed this practice, with European countries reporting the highest instances.

While there are signs of cautious optimism, the cost-of-living crisis and inflation remain pressing issues that continue to impact individuals and economies globally.

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DESPITE THE ABSENCE OF A GLOBAL RECESSION, NEARLY HALF (46%) PERCEIVE THEIR COUNTRY TO BE IN RECESSION.”



GLOBAL VIEWS ON CLIMATE CHANGE

Impact, information, action

Across 31 countries, seven in ten people (71%) expect to see severe effects of climate change in their area over the next 10 years. This rises to almost nine in ten in South Korea (88%) and Türkiye (87%). A majority of people globally (57%) say they are **already** seeing severe effects in their area.

Four in ten (38%) expect that at some point in the next 25 years, it's likely that climate change will displace them or their family from their home. A majority see this as a likely outcome in Türkiye (68%), Brazil (61%), India (57%), Malaysia (53%) and Indonesia (51%).

But do citizens feel empowered to act? Globally, six in ten people say that neither the government (59%) nor businesses in their country (61%) are providing enough information to help them make better choices to tackle climate change. Against this global average, India stands out. A

third say they are being given **too much** information. Only in Thailand do a majority of people say government and businesses are sharing the right amount.

When it comes to action, globally, a majority feel that government (56%), businesses (59%) and citizens themselves (59%) are not working hard enough, or at all, to tackle climate change.


But there are strong country-level differences, with people in China eight times as likely to say businesses are working hard and nine times as likely to say their government is working hard than people in Argentina.

Globally, seven in ten (71%) agree that businesses at least occasionally use environmental claims without solid commitments; almost four in ten (37%) say they do this regularly.

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SEVEN IN TEN PEOPLE EXPECT TO SEE SEVERE EFFECTS OF CLIMATE CHANGE IN THEIR AREA OVER THE NEXT 10 YEARS.”



WHAT WORRIES THE WORLD?

Inflation, terrorism, military conflict and elections

Despite concern falling for the second month in a row, inflation remains the number one issue for the 21st month in a row in our monthly survey.

Less than four in ten (37%) choose inflation as a top concern in their country, the lowest score since August and 3pp lower than December 2022. Argentina remains top of our list, with seven in ten (70%) choosing it as a top issue.

Terrorism (mentioned by 9%) ranks 12th in our list of global worries. Despite many countries seeing a fall in concern, worry about terrorism remains high in Israel. The nation is the most concerned country with 64% saying it is an issue. In September, before the attack by Hamas, concern about terrorism was 34%. This has now increased 30pp over recent months and rose again in December – up 4pp.

Like terrorism, military conflict between nations has fallen this month (-2pp, 8%).

Israel is also top – with over a third (36%) picking it. Although falling 7pp this month, it is still 20pp higher than it was before October.

Meanwhile, in the wake of recent elections, Argentina and Poland's "country moving in the right direction" scores have improved significantly. Argentina's score increased by 30pp compared to last month to half (49%). This is Argentina's highest score since May 2020. Similarly, Poland's score is up 13pp to 50% – 28pp higher than January and the highest score for the nation in ten years of our survey.

Also, take a look at our [new survey by KnowledgePanel](#) conducted across seven countries - UK, France, Italy, Sweden, Poland, Croatia and the US – which reveals support for democratic principles such as voting, building consensus and diffusion of power, but also dissatisfaction with a system perceived to favour the rich and powerful.

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ONE IN TWO (50%) POLES SAY THEIR COUNTRY IS HEADED IN THE RIGHT DIRECTION, 28PP HIGHER THAN JANUARY'S SCORE AND THE HIGHEST EVER SCORE FOR POLAND.”



WHAT THE FUTURE: TEEN

Teens aren't what you think anymore

Today's teens are coming of age in a fast-changing world, and they're doing it differently from the teens of the past.

The latest issue of What the Future dives into what it means to be young in today's world, what this cohort might look like tomorrow, and what "being a teen" might look like in the future.

Our research reveals differences in behaviours, how teens spend their time and how they view education. There are also differences in teenagers' relationships with brands, content, creators and institutions.

Key findings include:

- Six in ten teenagers in the US think that **access to affordable housing** (62%), the **ability to afford college** (62%) and **political stability** (63%) will get worse over the next five years – notably more pessimistic than most adults.
- US teenagers think they are **safer from gun violence at school** than adults perceive them as being. 41% of teenagers say they feel safe from gun violence in their school vs. 17% of people aged 18-34, 25% of people aged 35-54, and 8% of those aged 55+.
- 47% of teens prefer to buy from brands and companies that have a **positive impact on society** vs. 61% of 18-34s
- Teens have a more negative view of the prevalence of **harassment and toxic culture in gaming** than older gamers.
- Teenagers and adults agree that **AI will divide society**, but teens are much less optimistic that **AI will create enough new opportunities** to make up for the jobs that AI will make redundant.

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TEENS IN THE US HAVE A MORE NEGATIVE VIEW OF THE PREVALENCE OF HARASSMENT AND TOXIC CULTURE IN GAMING THAN OLDER GAMERS. ”



2024 PREDICTIONS

Optimism on the rise for the year ahead

2023 witnessed a decline in Covid-19 impacts, with the WHO ending its global emergency status for the virus in May.

However, the decline in health crises was accompanied by an escalation in conflicts. The war in Ukraine shows no signs of easing and a new conflict between Israel and Hamas has worsened geopolitical tensions.

Increasingly volatile weather and the hottest year on record has made the public anxious about the climate's future. 81% expect temperatures to rise in 2024 and 71% think there will be more extreme weather events in their country.

The public are divided on AI, with 56% expecting regular use of AI by doctors and 43% predicting job creation. However, 64% fear AI will lead to job losses. Social media use is expected to decline, with 41% intending to use it less.

Overall, public sentiment regarding 2023 was negative, with 70% considering it a bad year for their country and 53% for themselves and their families. Despite this, it is a slight improvement from 2022 and 70% say 2024 will be better than 2023. Half (50%) also foresee a stronger global economy, even with persisting concerns over inflation and interest rates.


Expectations for 2024 include the possibility of Trump's re-election, predicted by 35% of respondents, and a 31% expectation of the Ukraine war ending.

Public opinion predicts increased immigration and a return to office work, reflecting the changing social norms in a post-Covid era, with a majority (59%) believing we'll spend more time working in the office in 2024.

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70% SAY THIS YEAR WAS A BAD YEAR FOR THEIR COUNTRY, BUT 70% ALSO SAY 2024 WILL BE A BETTER YEAR THAN 2023.”



FLAIR CHILE

Navigating global disorder amidst huge challenges



Despite its location in a corner of the world isolated by its natural borders, Chile is not immune to the social, political and economic upheavals the world is experiencing.

No one is surprised by the bleak picture that Chileans see in the aftermath of recent years (73% of Chileans believe things in their country are "off on the wrong track", according to our latest What Worries the World survey.) Yet, 2023 revealed some surprises. Inflation, which had been rising in recent years, has begun to ease. And consumer confidence has seen a slow but steady rise this year.

In this first ever edition of Flair Chile, our local experts share their perspectives on themes including identity, generations, sustainability, ways of working, and technological advances.

Welcome to Flair Chile, we hope you enjoy the read!

INTRODUCTION:

2023 has been an eventful year for the world. How has Chile reacted?

FEMINISM IN CHILE:

A movement that is progressing, albeit slowly.

GLOBAL VIEW OF CHILE:

Presenting the results of a recent study.

SUSTAINABLE DEVELOPMENT:

The shift from Corporate Social Responsibility (CSR) to Sustainability.

GEN Z:

Is the "snowflake generation" label fair?

INNOVATION:

Is it possible to innovate in a disruptive way in Chile?

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SHORTCUTS

KEYS – The Year in Review

At the start of 2023, we hoped that cost of living concerns had peaked, but instead inflation remained the number one concern ever since.

The war in Ukraine shows no sign of ending, with today's news now dominated by the Israel-Hamas conflict.

It was the hottest year on record, yet the urgency for climate change action is declining in many places.

Chat GPT burst onto the scene, leaving governments, businesses and citizens oscillating between the wonder and the worry of AI.

Watch the final KEYS of the year, with special guests from around world, as they ponder and reflect upon the big topics of 2023.

WATCH HERE

Perils of Perception

The gap between reality and perception is often massive. This is illustrated by a new survey carried out for the Royaumont Talks, whose theme this year was "Believing". The results were presented at Royaumont Abbey by Didier Truchot, founder and chairman of Ipsos.

In this survey, Ipsos tested the beliefs of the population in ten major countries – Australia, Argentina, France, Germany, Italy, Japan, Poland, Turkey, UK, and the US – on a range of social, political, economic and current affairs issues – and compared them with actual data.

The results make for an interesting read. For instance, over half (53%) of Americans believe in ghosts and two-fifths (39%) think clairvoyancy is real.

But it also touches on some more serious issues around trust, politics, and misinformation.

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People, Planet, Prosperity

This podcast series examines how our partners across various sectors are addressing the environmental, social, and governance challenges of the 2020s, what they're doing to ensure that their businesses remain sustainable, and how they're helping the world to successfully adapt.

Episode 13 features Radhecka Roy (Global Service Leader: Strategic Curation) in conversation with Parijat Chakraborty (Group Leader Public Affairs, India) and Sally Braidwood (Corporate Reputation Service Line Leader, Australia) about the importance of culture in understanding people's priorities, attitudes and behaviours, particularly where these concern our relationship with nature, our personal agency, and what we find rewarding.

The conversation is a deeper dive into the topics previously raised in our paper [ESG Across Borders](#).

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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 website and social media outlets.

Please email IKC@ipsos.com with any comments, including ideas for future content.

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