

KEYS

AN IPSOS WEBINAR SERIES

“THE DAY AFTER TOMORROW”

28th January 2021



Watch the recording [here](#)

AGENDA

INTRODUCTION

Jennifer Hubber

Head of Ipsos Global Client Organization

NEW YEAR, NEW OPTIMISM?

Simon Atkinson

Chief Knowledge Officer, Ipsos

SHAPING THE FUTURE

Sarah Castell

Head of Futures, Ipsos in the UK

RURAL EVOLUTION IN INDIA: Five Consumer Truths

Pallavi Mathur Lal

Senior Client Officer, Ipsos in India

ARTIFICIAL INTELLIGENCE FOR NEW INSIGHTS

Rich Timpone

Global Head of Data Science and AI, Ipsos



Follow [this link](#) to access resources from the webinars in our KEYS series

KEYS

AN IPSOS WEBINAR SERIES

“NEW YEAR, NEW OPTIMISM?”

Simon Atkinson

2021 Predictions Survey

Further details:

[Full results](#)

[Commentary](#)

[Ipsos/WEF video](#)



Q.

Please indicate if you agree very much, agree somewhat, disagree somewhat or disagree very much with the following statements...?

70%

2020 was a **bad year** for me and my family

2021 Predictions Survey

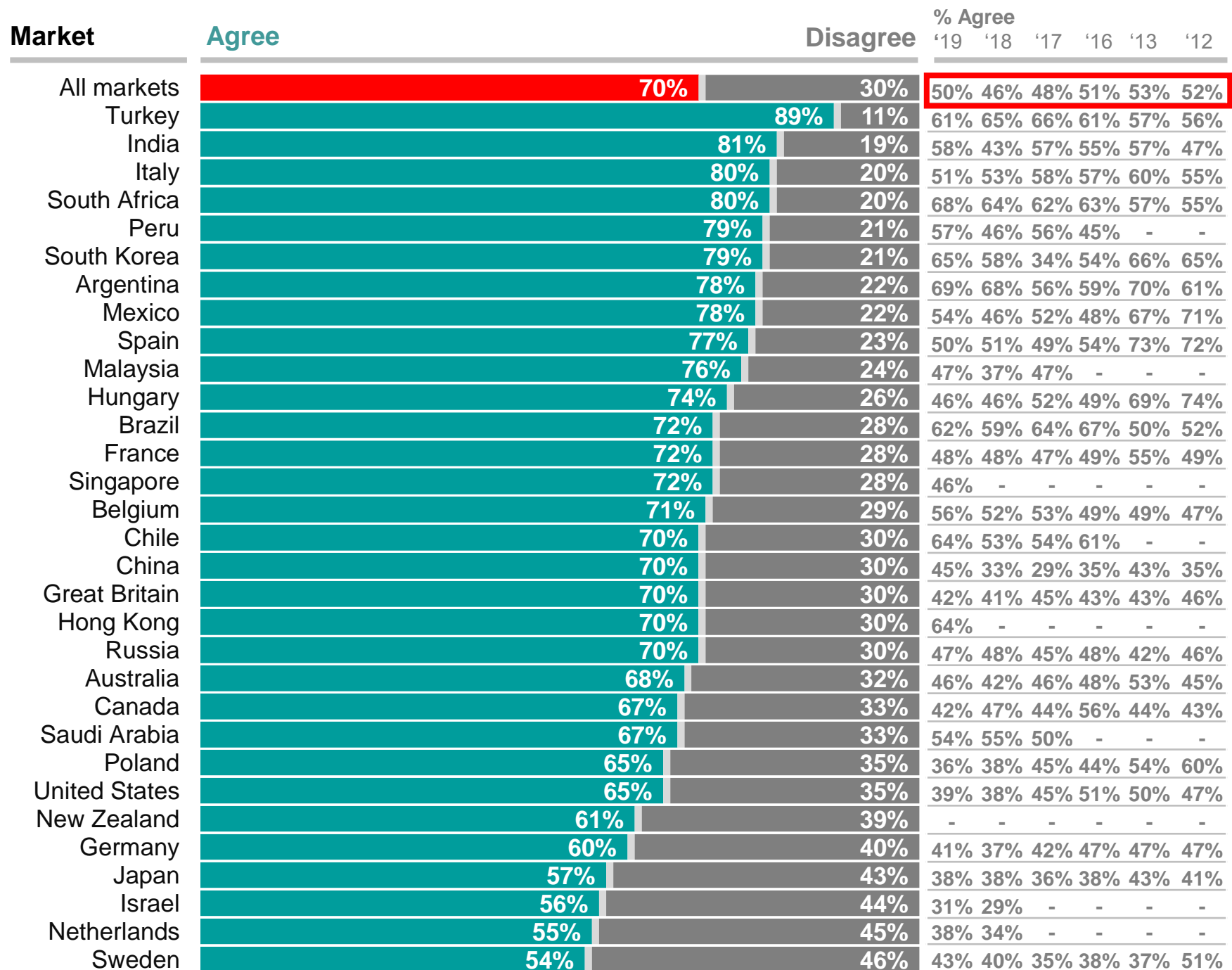
December 2020



Base: c. 15,700 online interviews across 31 markets, 23 October – 6 November 2020.

5

© Ipsos | Global Advisor Predictions | December 2020



Q.

Please indicate if you agree very much, agree somewhat, disagree somewhat or disagree very much with the following statements...?

90%

2020 was a **bad year** for my country



Base: c. 15,700 online interviews across 31 markets, 23 October – 6 November 2020.

6

© Ipsos | Global Advisor Predictions | December 2020

Market

Agree

Disagree

% Agree
2019 2018

Market	Agree	Disagree	% Agree 2019	% Agree 2018
All markets	90%	10%	65%	62%
Argentina	95%	5%	86%	86%
France	95%	5%	71%	78%
South Africa	95%	5%	81%	83%
Great Britain	94%	6%	80%	72%
Turkey	94%	6%	73%	78%
United States	94%	6%	49%	53%
Belgium	93%	7%	66%	69%
Canada	93%	7%	54%	57%
Italy	93%	7%	81%	75%
Netherlands	93%	7%	37%	33%
Spain	93%	7%	79%	79%
Australia	92%	8%	61%	50%
Peru	92%	8%	71%	58%
South Korea	92%	8%	85%	80%
Chile	91%	9%	87%	58%
Hungary	91%	9%	65%	62%
Poland	91%	9%	58%	58%
Singapore	91%	9%	49%	-
Israel	89%	11%	60%	44%
Brazil	88%	12%	74%	85%
India	88%	12%	61%	45%
Malaysia	88%	12%	57%	49%
Mexico	88%	12%	68%	74%
Russia	87%	13%	61%	68%
Sweden	87%	13%	62%	60%
Hong Kong	86%	14%	85%	-
Japan	86%	14%	52%	52%
New Zealand	86%	14%	-	-
Germany	83%	17%	46%	45%
China	79%	21%	42%	30%
Saudi Arabia	74%	26%	46%	59%

Q.

Please indicate if you agree very much, agree somewhat, disagree somewhat or disagree very much with the following statements...?

77%

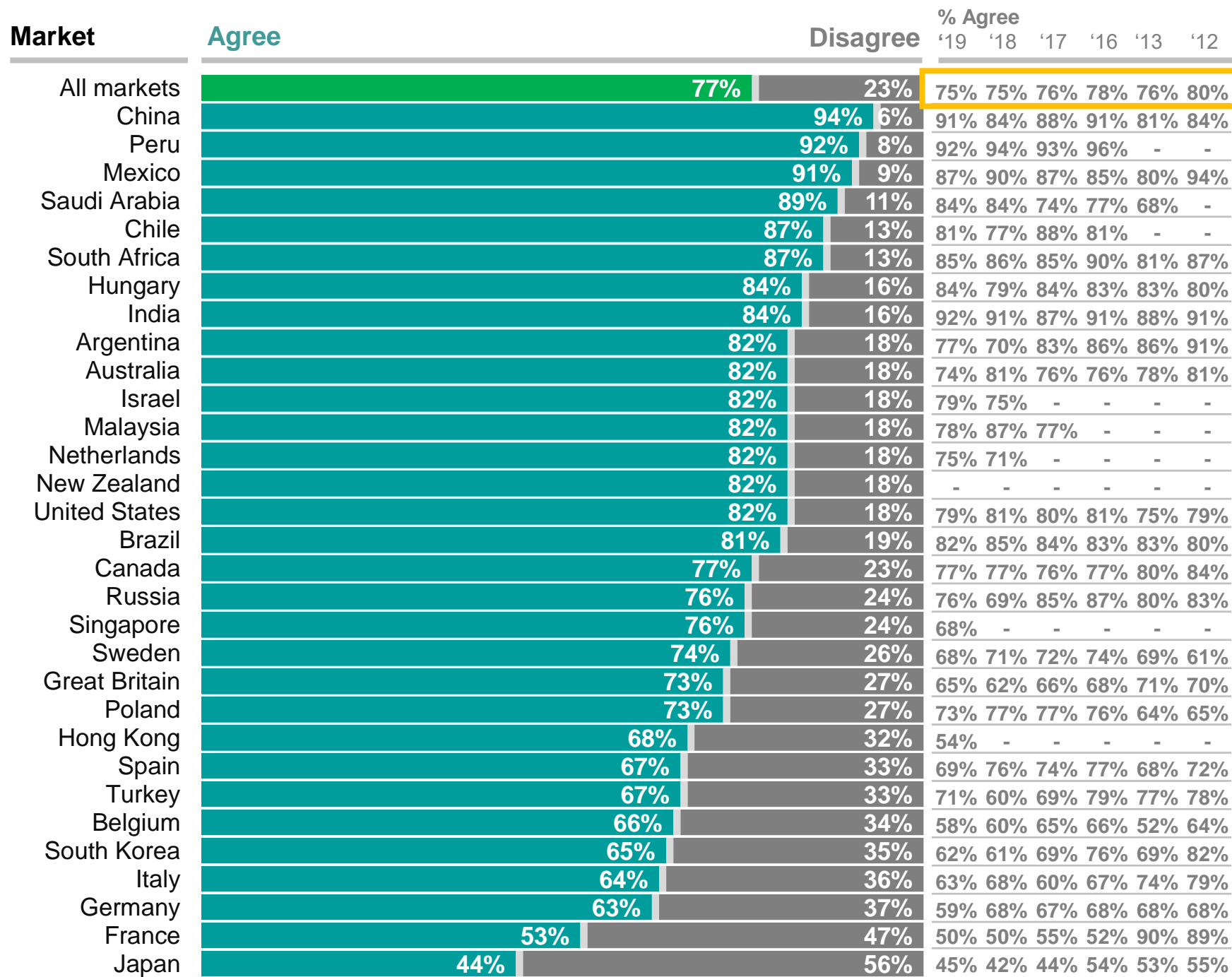
I am optimistic that 2021 will be a better year for me than it was in 2020



Base: c. 15,700 online interviews across 31 markets, 23 October – 6 November 2020.

7

© Ipsos | Global Advisor Predictions | December 2020



IMPACT OF COVID-19 CONTINUES THROUGH 2021?

Hopes and Fears

54%

Agree the global economy **will be stronger** in 2021 than in 2020

61%

Likely that most people will **wear a mask** in public places a year from now

52%

Unlikely that life will have **got back to normal** after the effects of the COVID-19 pandemic

59%

Unlikely that the world **will change for the better** because of the pandemic

Base: c. 15,700 online interviews across 31 markets, 23 October – 6 November 2020

WHAT WORRIES THE WORLD



**“What Worries the World?”:
Concern about COVID-19 is at its
highest level since May 2020**

January 2021

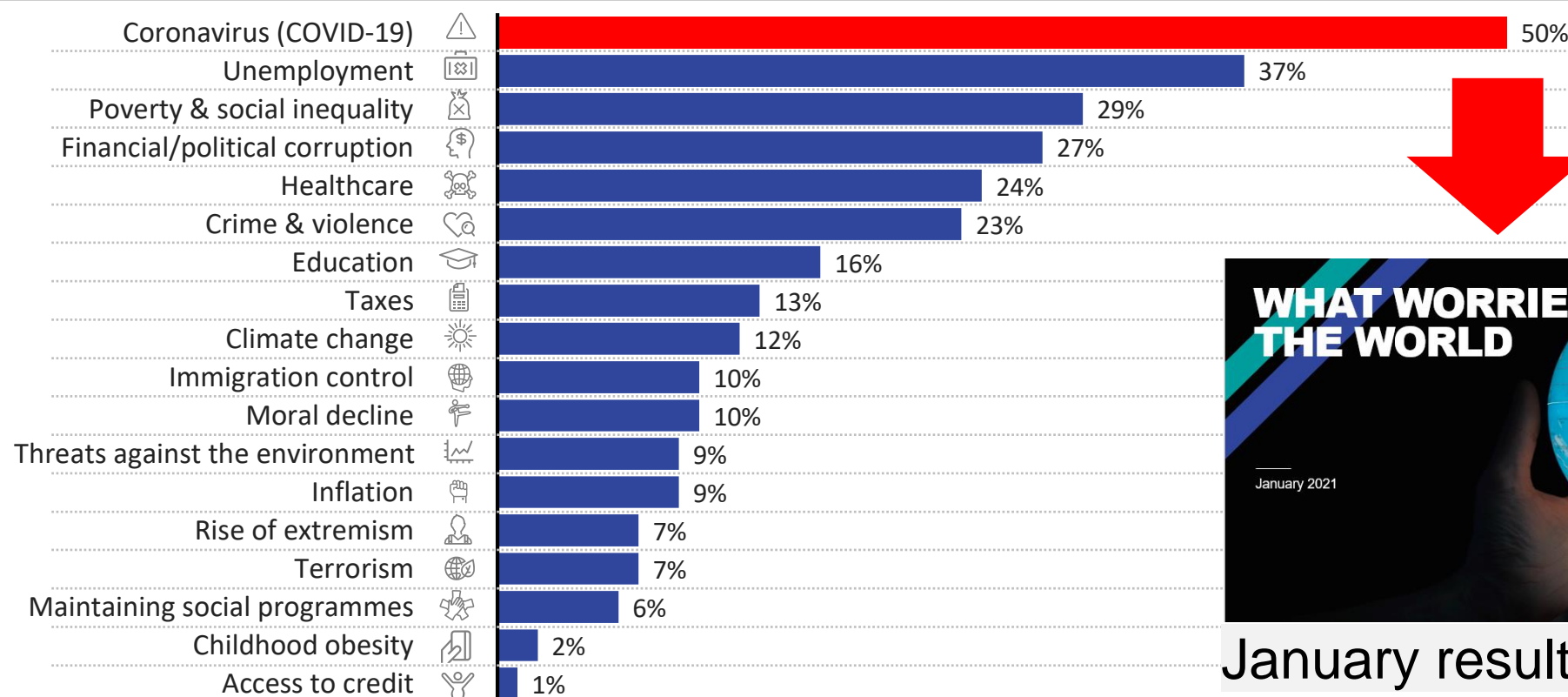
GAME CHANGERS



WORLD WORRIES: THE FULL LIST

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

Mentioned in January 2021 (%)



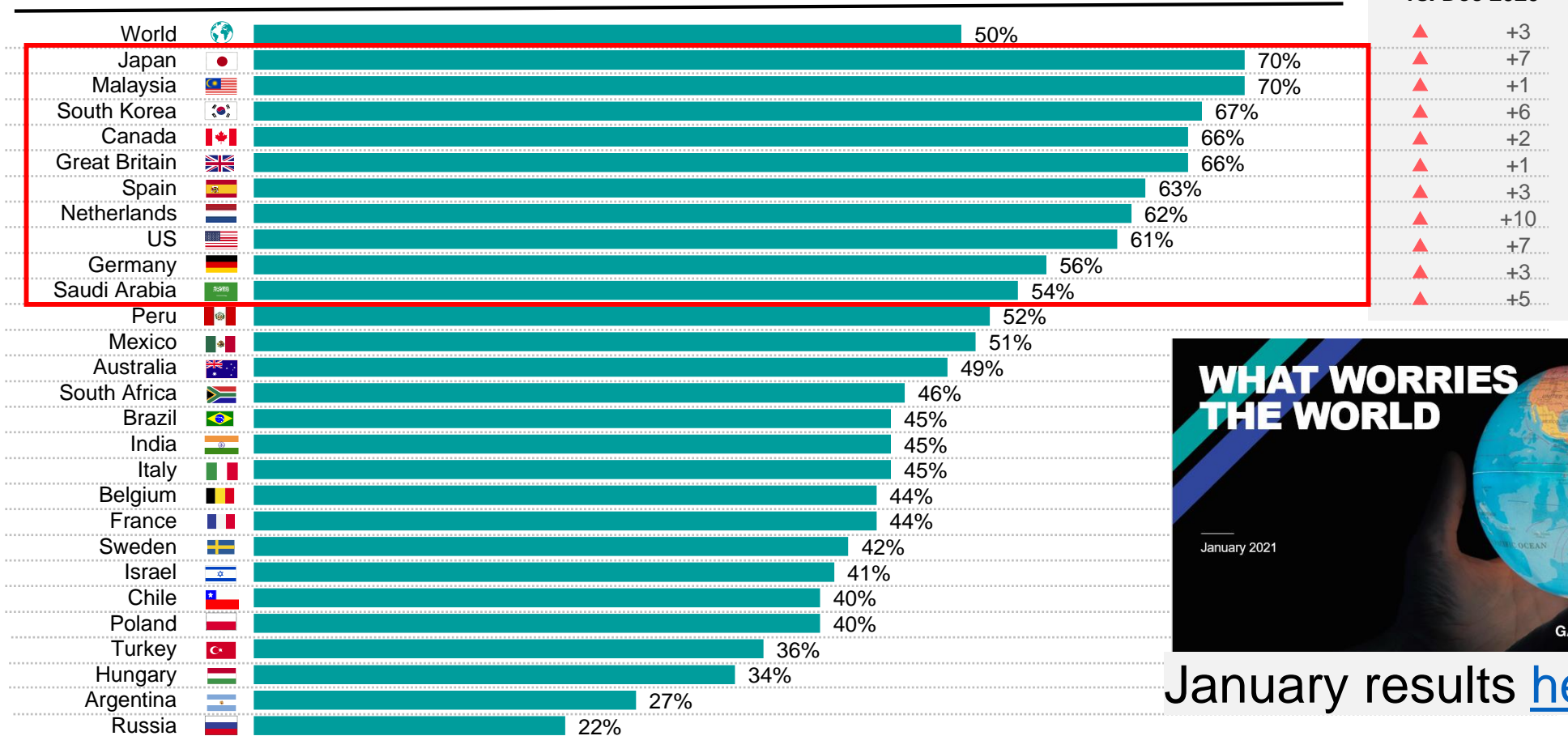
January results [here](#)

Base: Representative sample of 22,003 adults aged 16-74 in 27 participating countries, December 18th 2020 - January 1st 2021.

Source: Ipsos Global Advisor

WORRY ABOUT CORONAVIRUS BY COUNTRY

(%) worried in January 2021 in each country



Base: Representative sample of 22,003 adults aged 16-74 in 27 participating countries, December 18th 2020 - January 1st 2021.

Source: Ipsos Global Advisor

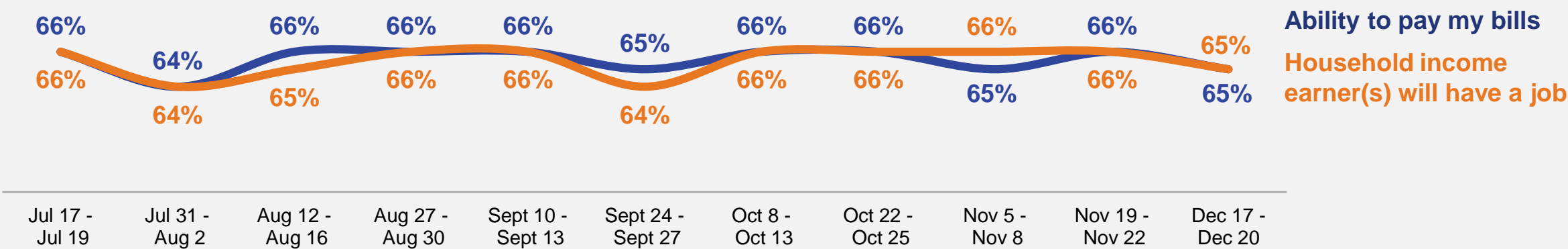
**A crisis
which
affects
all of us**



THE ECONOMIC DIMENSION

“Thinking ahead to one month from now, how concerned are you about each of the following?”

Perceived Threats
(% Very / Somewhat Concerned)



[I will be diagnosed with COVID-19] (n=13817), [Ability to pay my bills] (n=14545), [I/ my household earner will have a job] (n=14545). Source: Ipsos Essential Report December 17th – 20th 2020

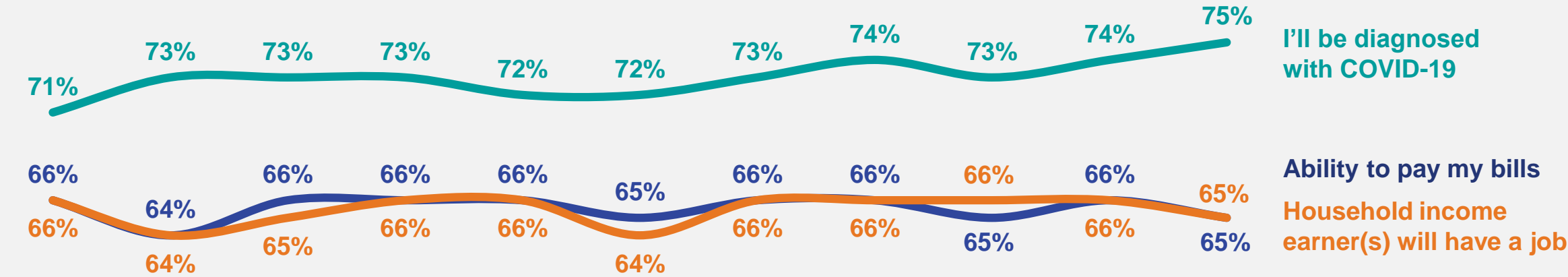


THE PERCEIVED HEALTH THREAT IS EVEN MORE PROMINENT

“Thinking ahead to one month from now, how concerned are you about each of the following?”

Perceived Threats

(% Very / Somewhat Concerned)



[I will be diagnosed with COVID-19] (n=13817), [Ability to pay my bills] (n=14545), [I/ my household earner will have a job] (n=14545). Source: Ipsos Essential Report December 17th – 20th 2020

EVOLVING ATTITUDES TO COVID-19 VACCINES

Latest analysis [here](#)

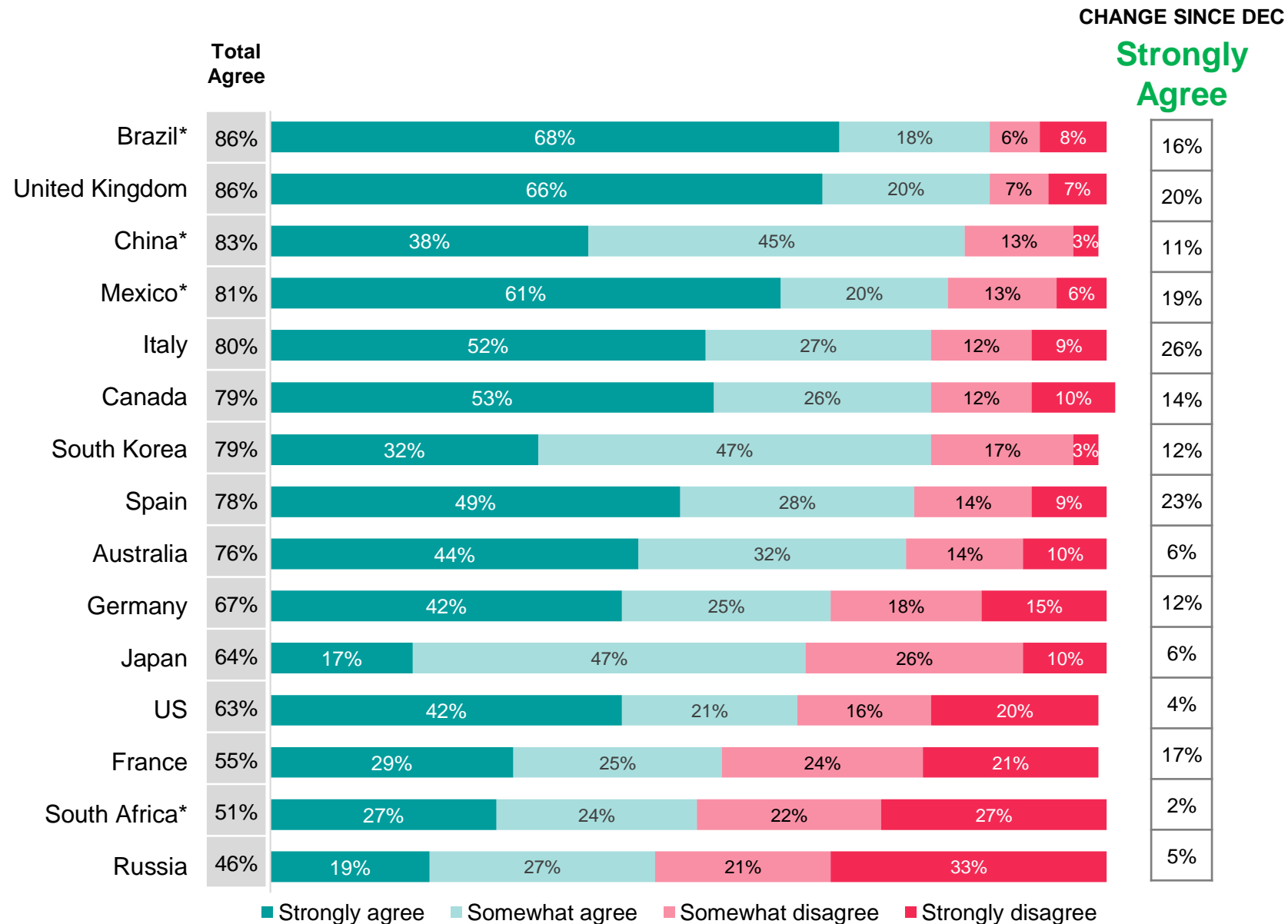
GAME CHANGERS



INTENTION TO GET THE VACCINE HAS SHOWN A SHARP INCREASE

“If a vaccine for COVID-19 were available, I would get it”

January 14-17



[If a vaccine for COVID-19 were available, I would get it] (n=12777 online adults aged 16-74 across 15 countries (excludes those who report receiving the vaccine)) Source: Ipsos Global Advisor January 14th – 17th 2021

* Online samples in Brazil, China, Mexico, Russia, and South Africa tend to be more urban, educated, and/or affluent than the general population

IPSOS ESSENTIALS

JAN 14-17

Tracking consumer attitudes and behavior in a time of crisis

Fortnightly syndicated study

For further information, please contact our team at Essentials@ipsos.com

Every other week, we connect with 1,000 consumers in:

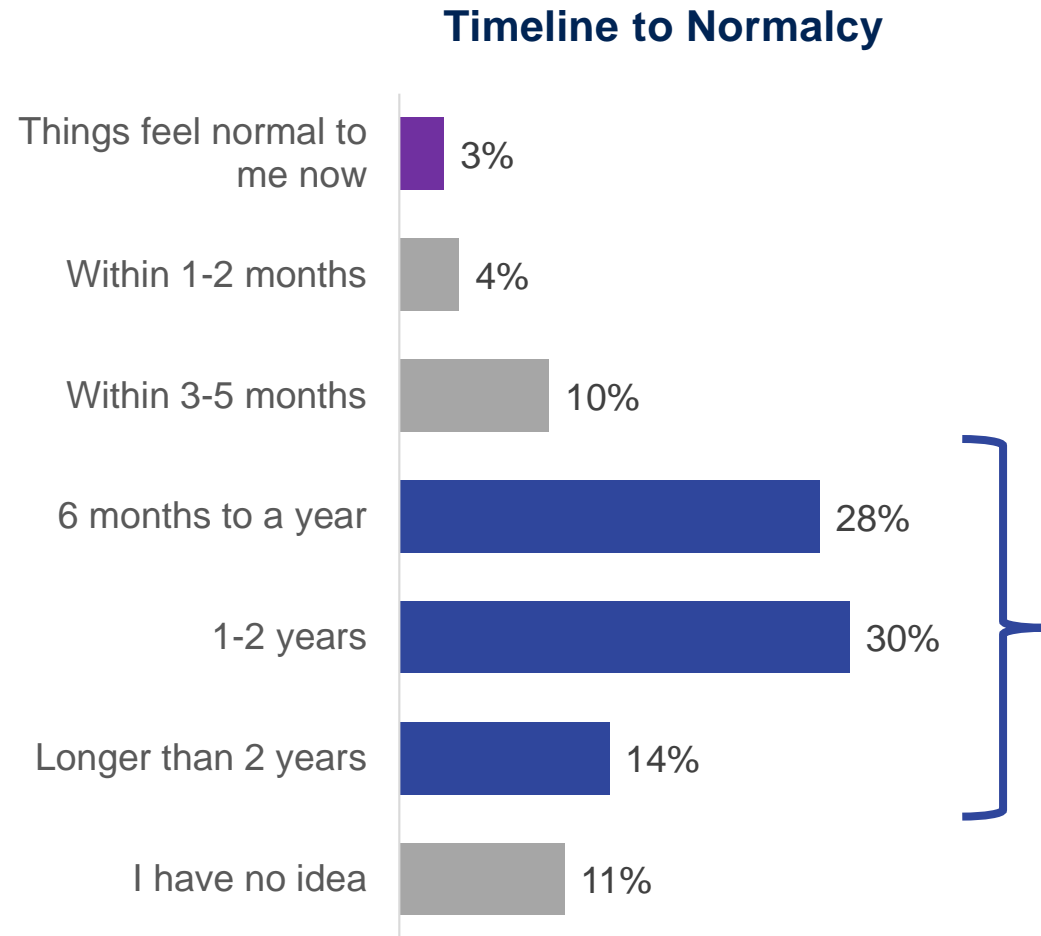
Australia, Brazil, Canada, China, France, Germany, India, Italy, Japan, Mexico*, Russia*, South Africa*, South Korea, Spain, UK and the USA

* n=500 in Mexico, Russia and South Africa

GAME CHANGERS



It is a long road



72%

think it will be six months or longer before things are back to normal

An extended view of restricted living

- As case counts increase and consequently, restrictions are implemented or extended, the return to normal feels further away.
- **Consequently, many citizens have given up on making plans for the future.**

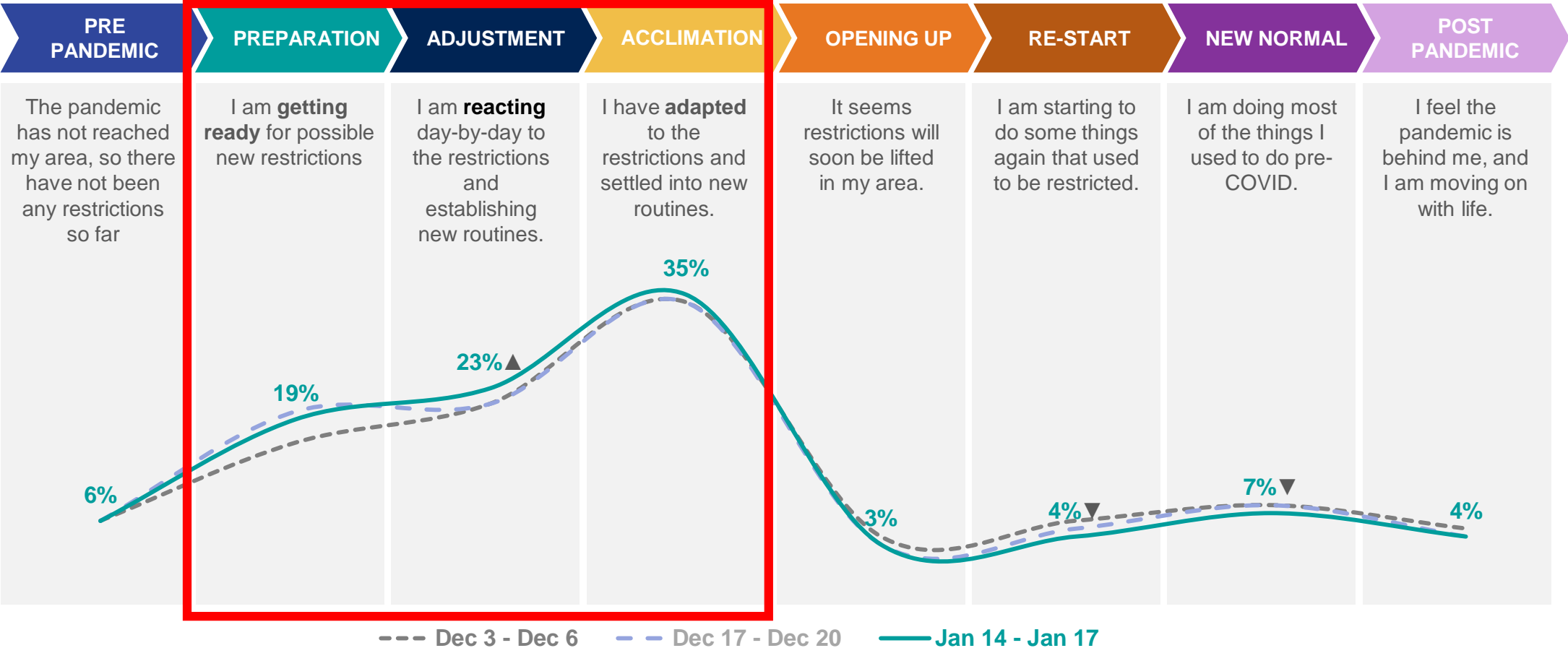


"I don't feel like I can really concentrate on investing in anything that is future based. I am really concentrating on the now."

Pinny, UK ethnographic respondent

New year, same pandemic – following the holidays, more citizens are living under restrictions and lockdowns

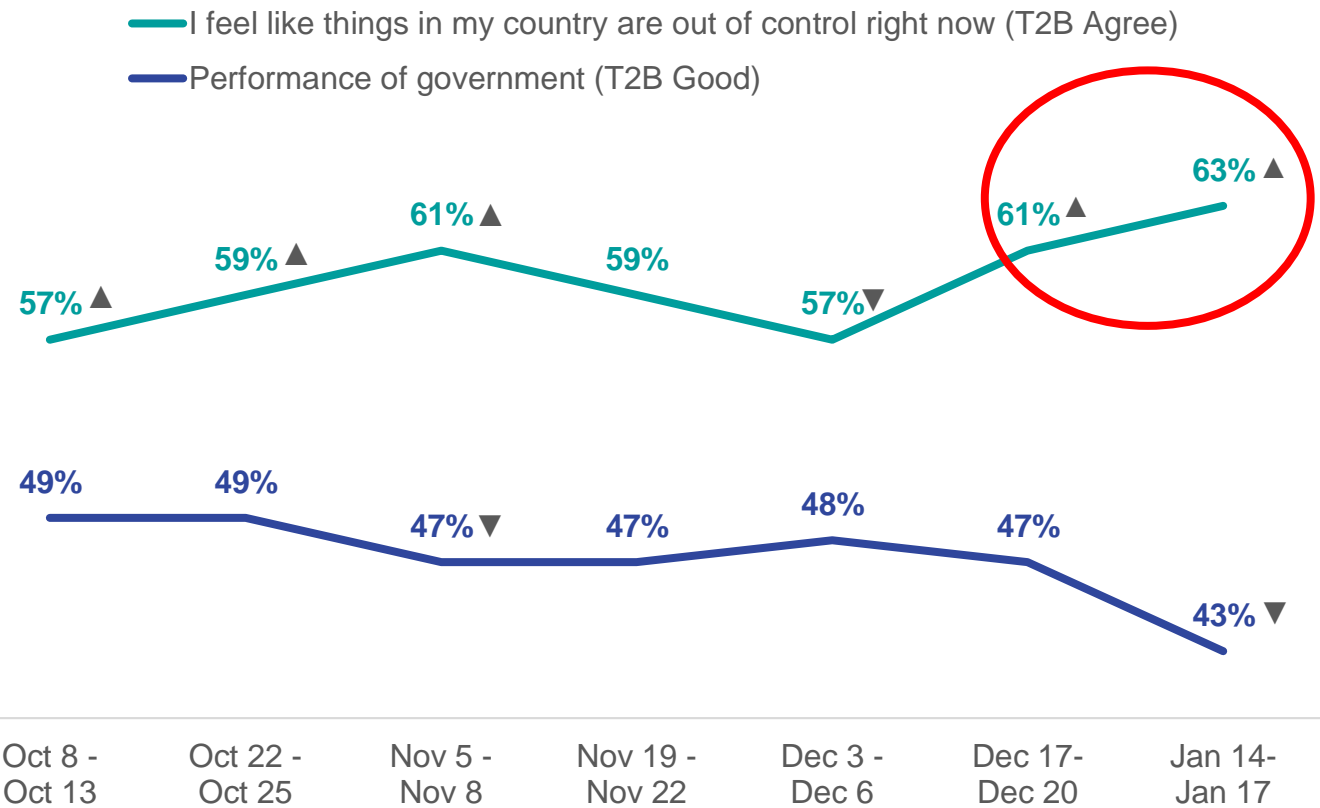
“Which one of the following phases do you feel best describes your current situation regarding the COVID-19 pandemic?”



Q. There are often several phases or stages that people go through when times are hard. Which one of the following phases do you feel best describes your current situation regarding the covid-19 pandemic (n=14523)
▼ or ▲ indicate change vs. previous wave (statistically significant @ 95% C.I.)

Governments take the blame as things get more “out of control”

Out of Control vs. Performance of Government



Citizens seem fed up

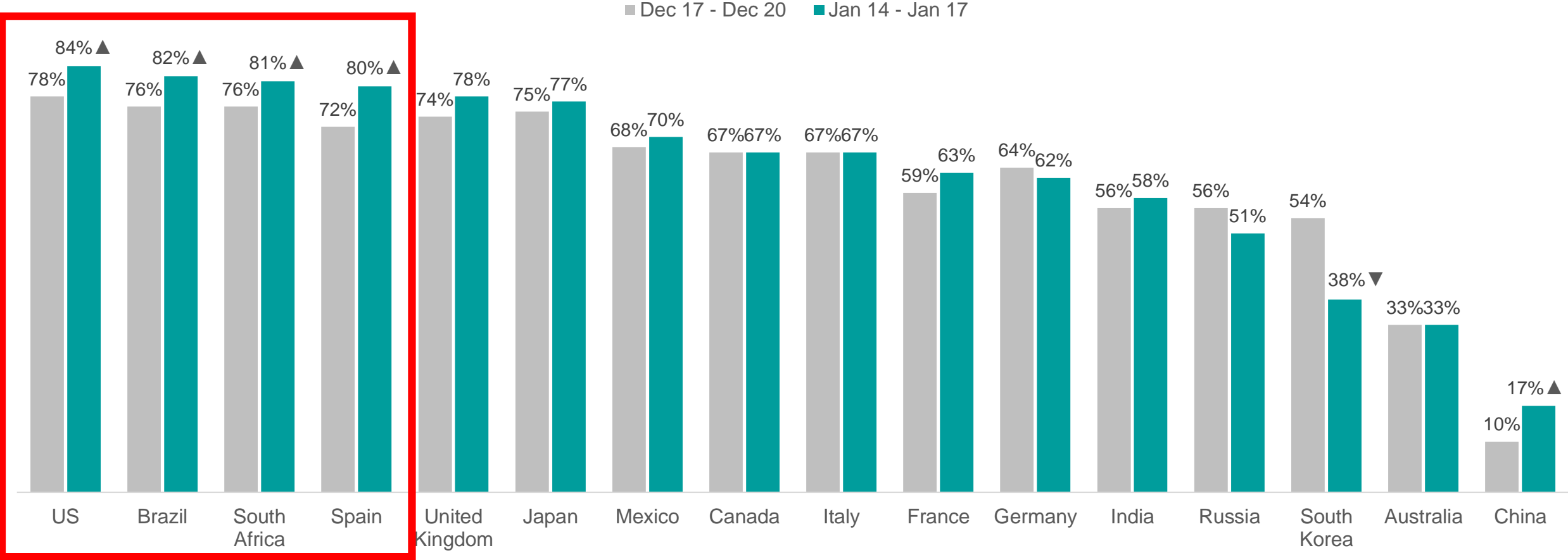
- The New Year has not brought new feelings: **frustration and skepticism** continue to build.
- Many **blame their governments**.
- Countries with more COVID infections tend to be more likely to feel like things **are out of control**...

▼ or ▲ indicate change vs. previous wave (statistically significant @ 95% C.I.)

The USA leads the world in feeling like things are ‘out of control’

(citizens were polled less than two weeks after the Capitol riots and prior to the inauguration of the new government)

“I feel like things in my country are out of control right now”
(Top-2 Box Agreement)



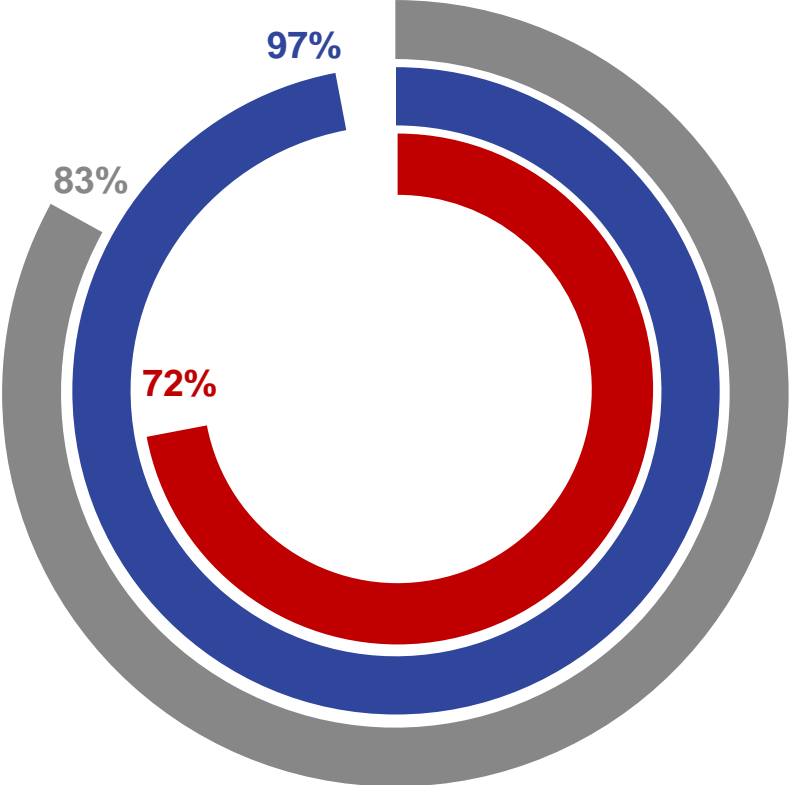
Q: (T2B Summary) To what extent do you agree or disagree with each of the following? [I feel like things in my country are out of control right now] (n=14523)
▼ or ▲ indicate change vs. previous wave (statistically significant @ 95% C.I.)



There is hope in the USA for a better path forward

A flash poll conducted on January 20th showed **bipartisan** agreement that President Joe Biden's inauguration speech was well-received

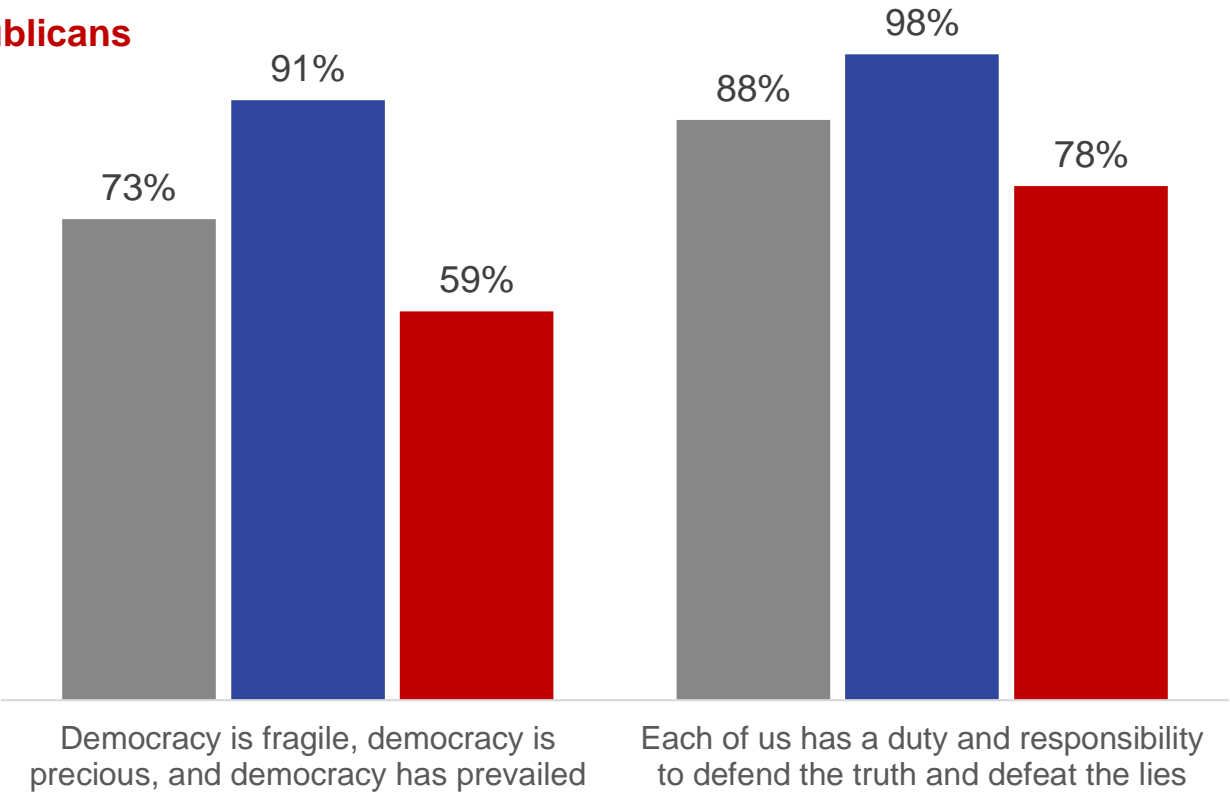
Evaluation of President Joe Biden's Inaugural Address **
(Very / Somewhat Good)



Q. How would you evaluate Biden's inauguration speech? Base: Americans (n=498)
Q. Do you agree or disagree with the following statements? Base: Americans (n=498)

Agreement with Themes of Democracy & Action **
(Strongly / Somewhat Agree)

Total Americans
Democrats
Republicans



For latest analysis, follow [@IpsosUS](#)

** From a separate poll conducted on January 20, 2021 after the Inauguration.

KEYS

AN IPSOS WEBINAR SERIES

“NEW YEAR, NEW OPTIMISM?”

2021 PREDICTIONS SURVEY



WHAT WORRIES THE WORLD

January 2021

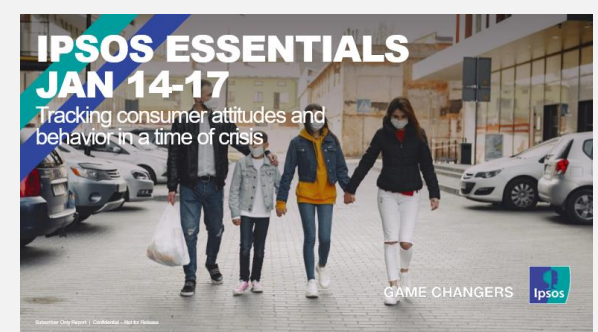


EVOLVING ATTITUDES TO COVID-19 VACCINES



IPSOS ESSENTIALS JAN 14-17

Tracking consumer attitudes and behavior in a time of crisis



KEYS

AN IPSOS WEBINAR SERIES

“SHAPING 2025”

Sarah Castell





Shaping 2025 And Beyond

Visioning the near term future

January 2021

GAME CHANGERS



You are about to hear some stories of the near future. In our vision of 2025, the world has started to move on from COVID-19, but is entering a period of continued change.



“

The future is
uncertain because
cause and effect are
rarely simple.

Margaret Heffernan

**We need to get
comfortable
with
uncertainty**

How we created our scenarios

1

A robust literature review from a global expert Ipsos team

2

Workshopped over 40 drivers of change

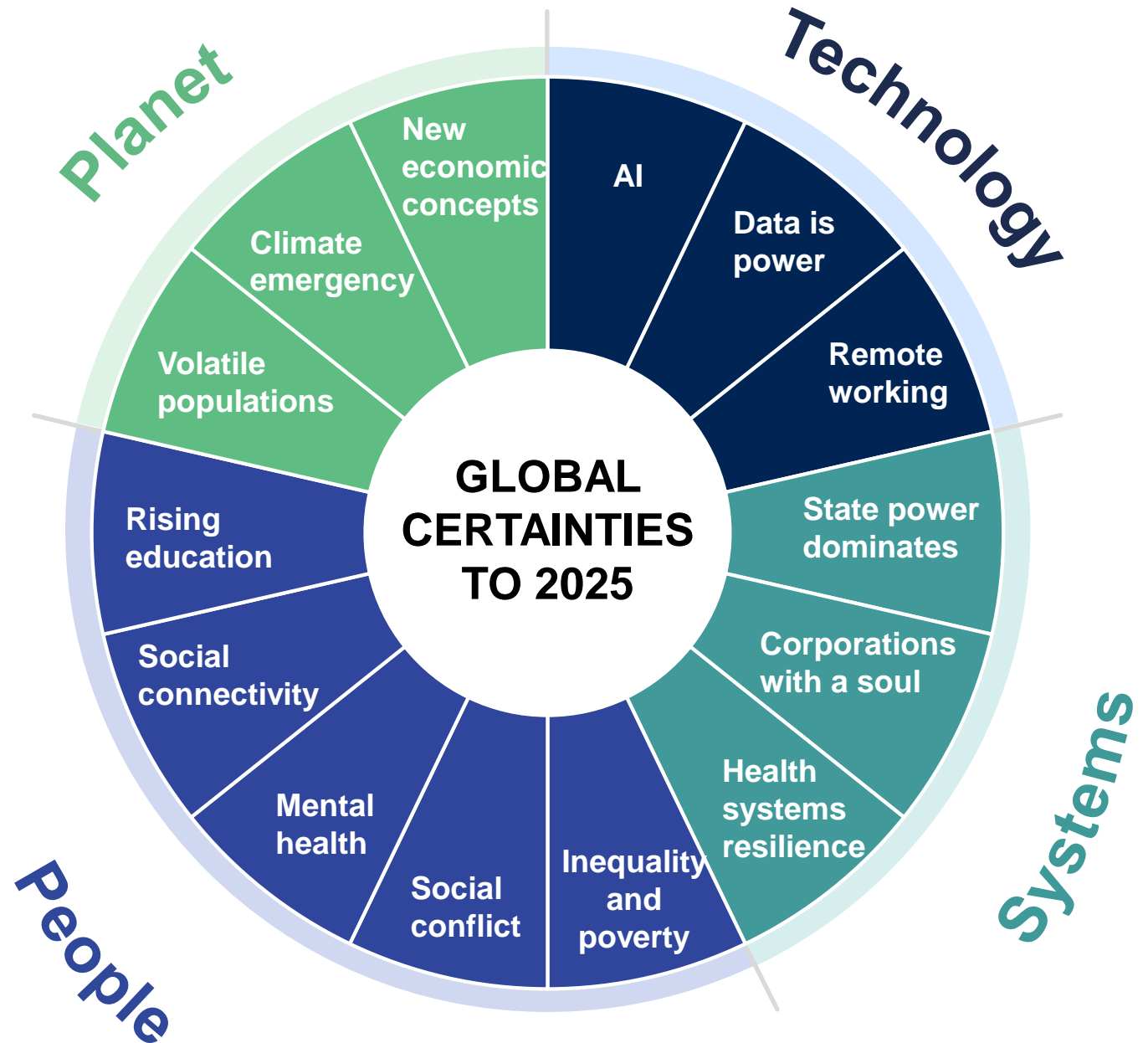
3

Collaborative analysis

4

Developing core scenario & three divergent narratives

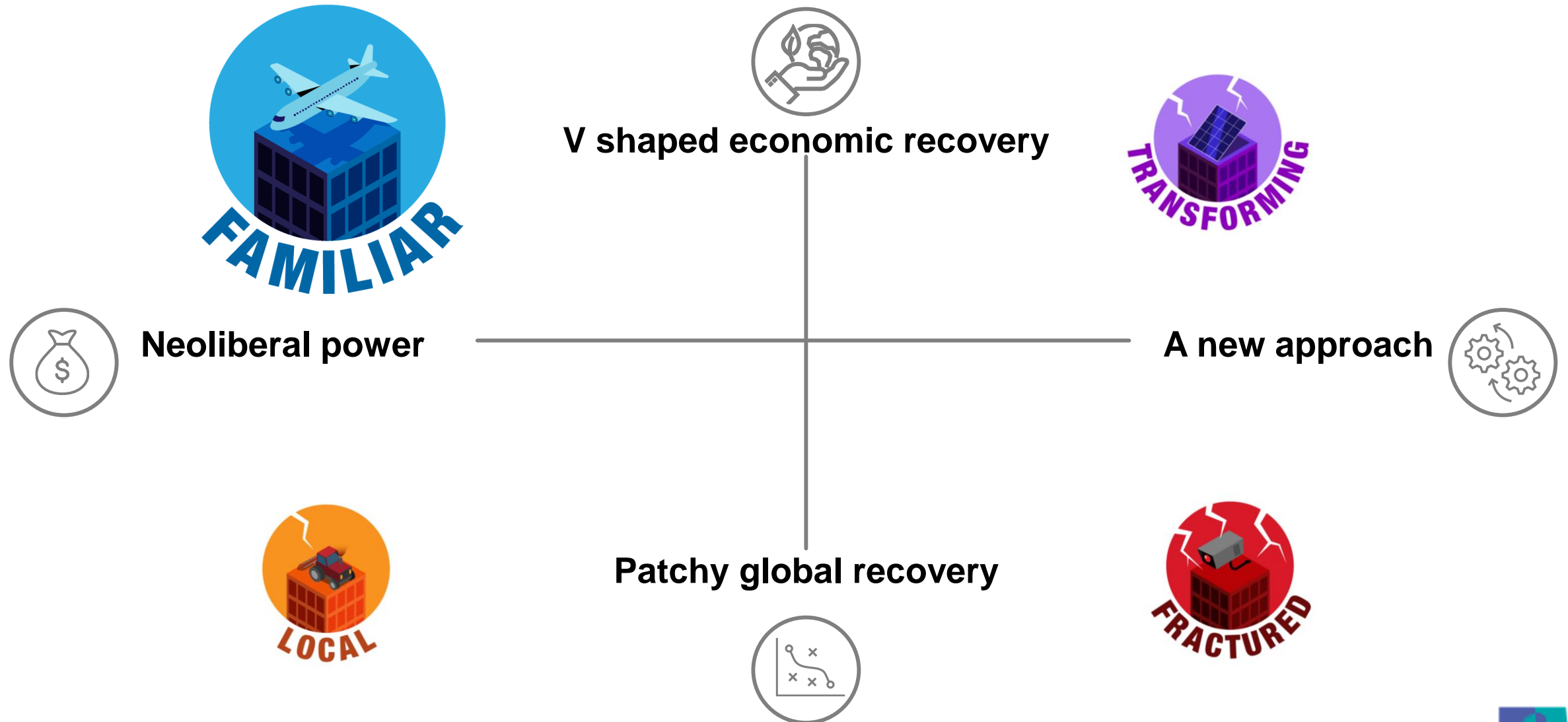
These things are certain



GAME CHANGERS



The key uncertainties give us different futures



Our core scenario: Familiar Power

We work hard to return to the comfort of the world we knew



This world feels like 2019, but less resilient, with debt & weaker global collaboration.

Standards of living improve for the global middle classes but stability is short-term.

Familiar Power world in focus

Technology

- AI, automated vehicles and robotics
- Science attracts venture capital

Social Values

- Desire for pre-COVID normality
- Generational clash

Consumption

- Brand purpose: from functional to ethical
- Supply chain challenges for fast fashion, food supply
- High-tech personalisation

But the core narrative is not the whole story

Three divergent narratives suggest changing global power balance

Transforming Power

An emerging metamorphosis of society with new voices being heard

Local Power

Protecting our communities and struggling regional economies

Fractured Power

Increasingly fragile states as a result of weak economies and civil protests

We have the power to influence the future

**Understanding uncertainty allows us
to thrive within it**

THANK YOU.

Sarah
Castell
Head of Futures
Ipsos MORI

Sarah.Castell@Ipsos.com

GAME CHANGERS



KEYS

AN IPSOS WEBINAR SERIES

“RURAL EVOLUTION IN INDIA”

Pallavi Mathur Lal



Watch: the full webinar on Rural India is available [here](#)

FIVE CONSUMER TRUTHS

RURAL EVOLUTION IN INDIA

GAME CHANGERS



‘BHARAT’ HOLDS POTENTIAL

**USD
200 Billion
Opportunity**

250 M HHs

60%
Rural

8%
Semi-U.

32%
Urban

1210 M (Total Pop)

70%
Rural

8%
Semi-U.

22%
Urban

Source: Ipsos Research and Analysis – Nabard NAFIS
2016-17, ICE 360 Survey 2014, Census Data

Note: Semi-Urban is defined with a population between
10,000 and 1,00,000. As per Census 2011, 1 INR equals
0.014 USD as of 16 Sep 2020

1. RURAL ≠ ONLY AGRICULTURE





Only **23%**
contribution is linked to Cultivation &
Livestock Farming

Data Source: Ipsos Research and Analysis – NITI
Aayog



**Multiple income sources;
Many family members**



A man with dark hair and a mustache, wearing a plaid shirt, is looking down at a smartphone in his right hand. He has white earphones in his ears. The background is slightly blurred, showing what appears to be a wall with some posters or notices. One poster has the text "A few minutes of our previous life." and another has "INTERVIEW".

2.

EXTENSION OF THE 'CORE'

New 'Core' aspirations → New Categories entering

Led by Youth, Women and Reverse Migration...



3. RISE OF THE INDIVIDUAL WITHIN THE COLLECTIVE



**The knowledge of the younger generation is valued
over the wisdom of the collective...**

**...As long as the
collective codes,
authority is not
challenged**



4. 'VALUE DIMENSIONS'





**Product
Delivery & Benefit**

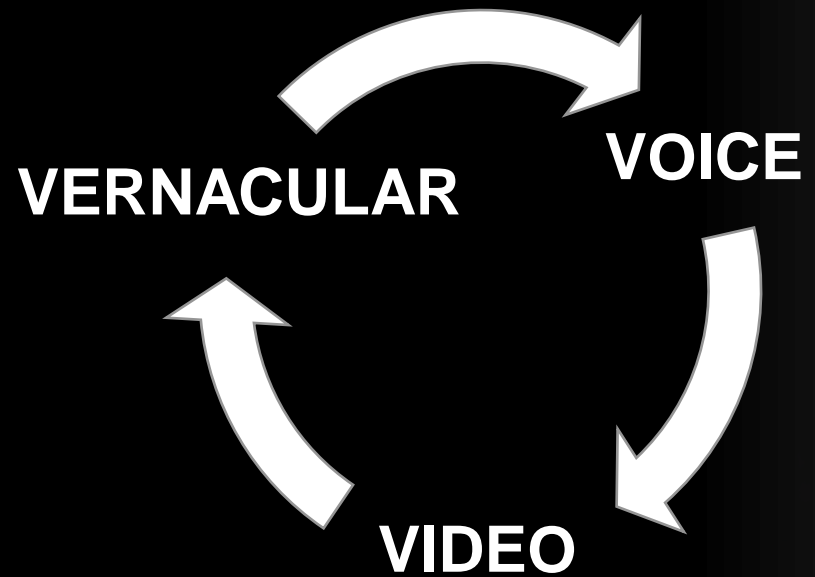
**Price Point
Sensitivity**

**Increasing
Availability**

Local Brands and E-commerce

- Availability and accessibility is the key

5. DIGITAL



IMPLICATIONS

RURAL,
*A MINI-
CULTURE*
TO BE
UNDERSTOOD
DEEPLY





RURAL-FIRST THINKING



RE-DESIGN FOR RURAL

KEYS

AN IPSOS WEBINAR SERIES

“AI FOR NEW INSIGHTS”

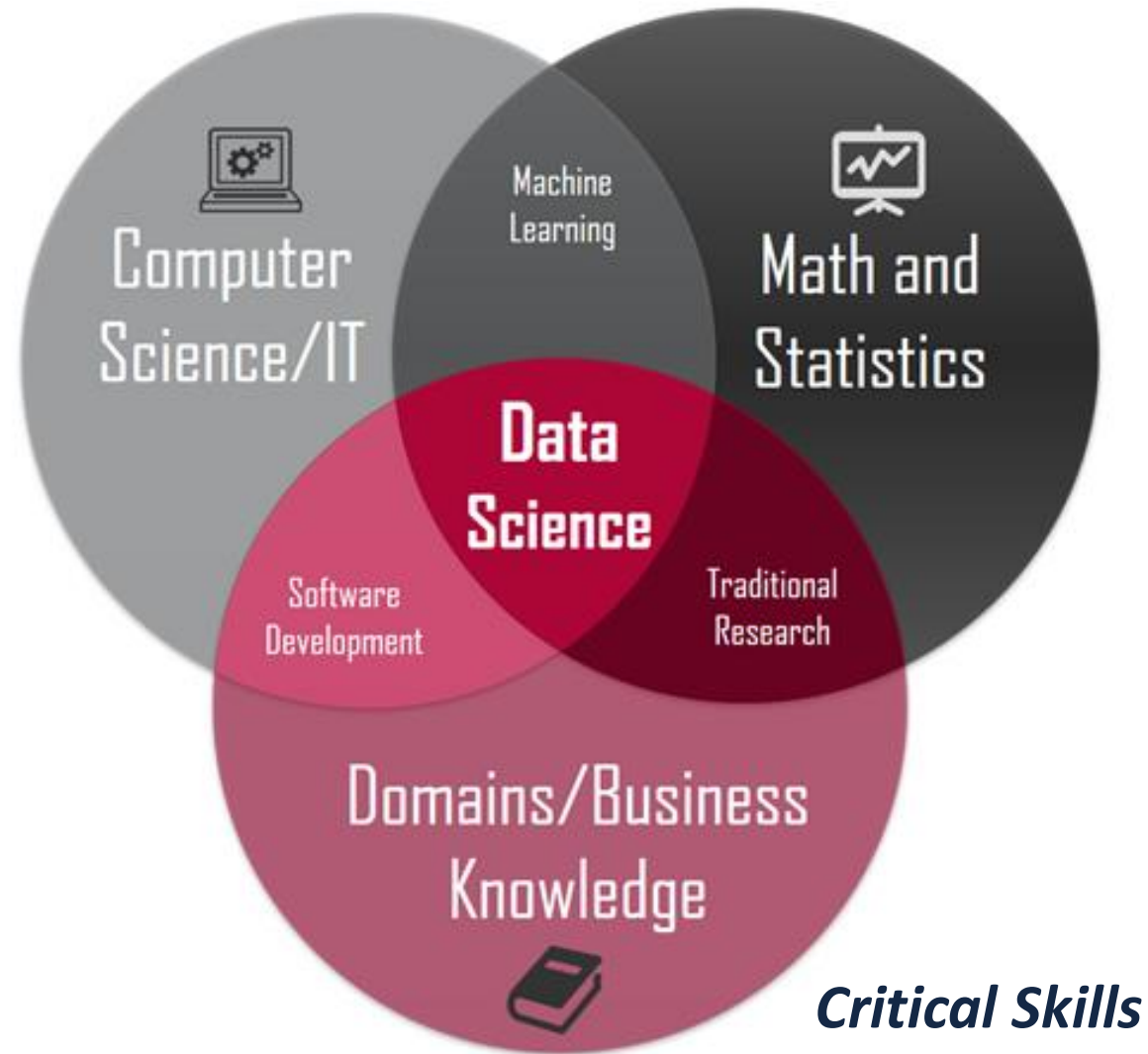
Rich Timpone, PhD



AI is Changing Our World

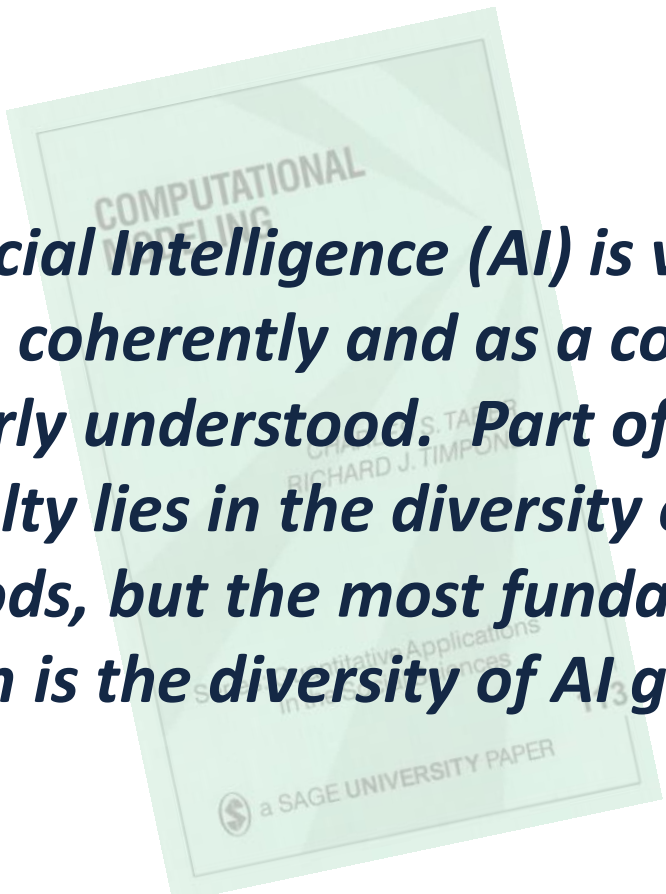


DATA SCIENCE & AI EXPAND THE METHODS USED TO OBTAIN INSIGHTS



*Source: G. Saporta. 2017. "Training Data Scientists: a few challenges" [International Journal of Data Science and Analytics](#)

Evolution and Diversity of AI Leads to Confusion



“Artificial Intelligence (AI) is very hard to define coherently and as a consequence is poorly understood. Part of the difficulty lies in the diversity of AI methods, but the most fundamental reason is the diversity of AI goals.”

Models of the Human Mind

Expert Systems

Machine Learning

Deep Learning

Source: C. Taber and R. Timponi. 1996. Computational Modeling. Sage University Paper Series on Quantitative Applications in the Social Sciences.

Companies feed and benefit from confusion and hype

But Some Confusion is Also Intentional

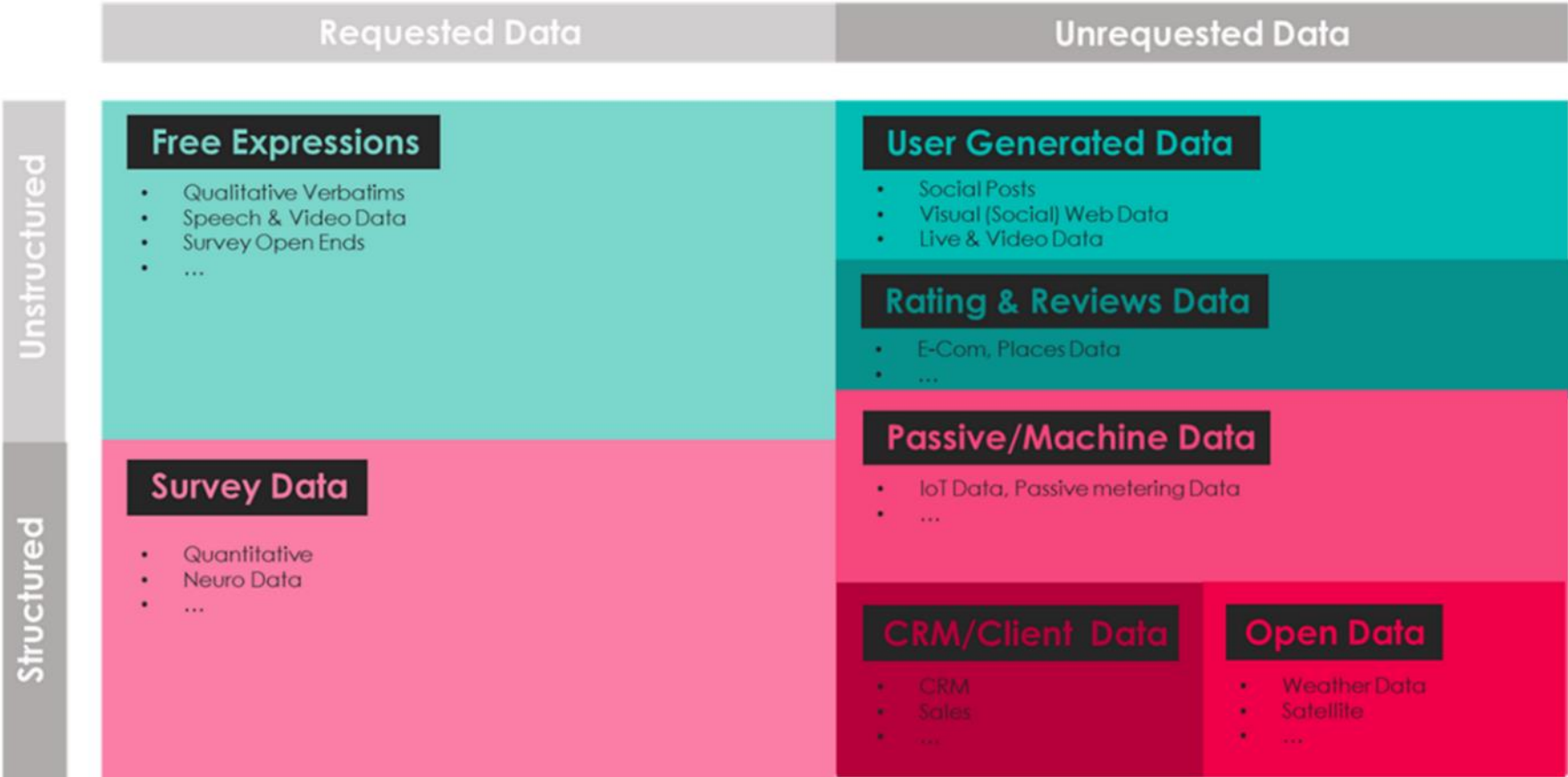
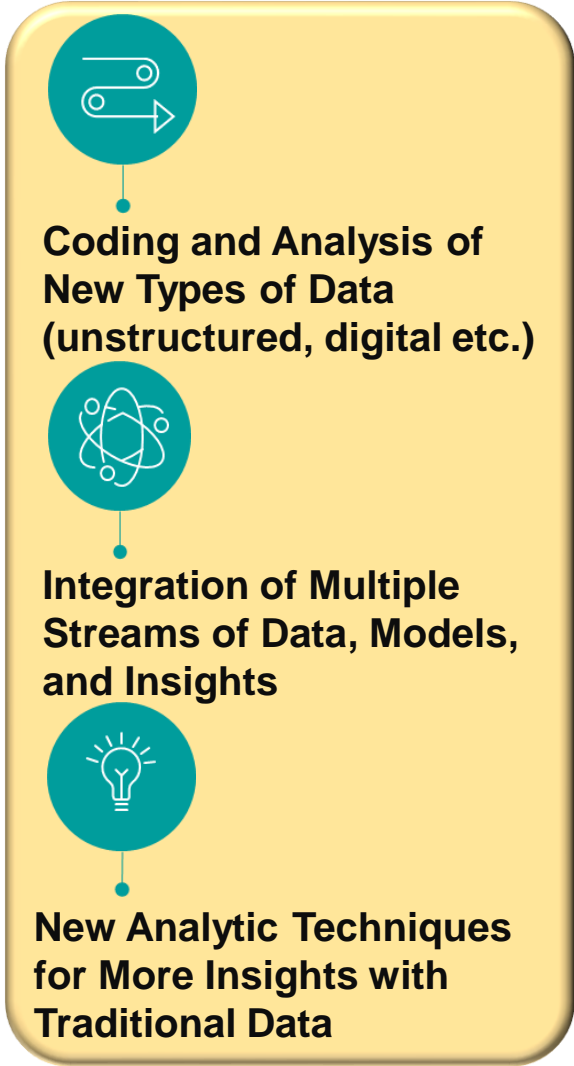
Forbes



'40% of European firms that are classified as an "AI startup" don't exploit the field of study in any material way for their business'

Source: Parmy Olson. March 4, 2019. <https://www.forbes.com/sites/parmyolson/2019/03/04/nearly-half-of-all-ai-startups-are-cashing-in-on-hype/#5635ecf1d022>

LEVERAGING DATA SCIENCE TO EXPAND MARKET RESEARCH



A FRAMEWORK FOR AI APPLICATIONS



AI FOR ENGAGEMENT

Systems that allow technology to engage directly and effectively with respondents and clients



AI FOR INSIGHT

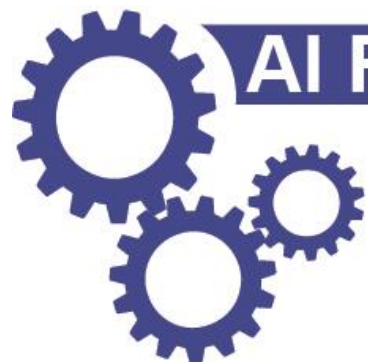
Extracting Insights from new types of data or new insights that would not be possible otherwise



AI FOR PROCESS AUTOMATION

Automating specific processes and tasks to make things more efficient, faster, & less prone to error

Framework adapted from Davenport and Ronanki. 2018. Jan-Feb. "Artificial Intelligence for the Real World", Harvard Business Review




AI FOR PROCESS AUTOMATION

AI enables survey question and answer wording recommendations in the Ipsos Question Library

The screenshot displays the Ipsos Question Library interface. At the top left is the Ipsos logo. In the top right corner, there is a 'My Account' link with a dropdown arrow. Below the header, there are two tags: '#259811' and '#5A'. On the far right, a red link says 'delete all speak parts'. The main question text is 'Which of the following beverages do you drink most often? Select one.' The words 'beverages', 'drink', 'most', and 'often?' are highlighted in different colors (teal, green, blue, and yellow respectively). To the right of the question text are links for 'Edit' and 'Blacklist'. Below the question text, there is a 'Question area' label with an information icon. A 'Business question' label is also present. A 'Rate question quality' section with a dropdown menu is on the right. A central pop-up menu lists several options: 'Add as adverb', 'Add as action verb', 'Add as category/product', 'Add as brand', 'Add as timestamp', 'Add as attribute', 'Add as location', 'Add as number of units', and 'Add as instruction'. The background shows various question templates like 'Attitudes twds category', 'Demographics', 'Past/usual purchase/us', 'preferred language', 'Brand image/attitudes', 'Checks/training', 'Comms awareness', 'Comms evaluation', 'Intent to act', 'Intro', 'Media', 'Descr. of recent occasion', 'Product/idea/pack evaluation', and 'Special Modules'. At the bottom, there is a text input field 'Type in a new question area' and a note 'Press Enter to save'.



 If voice-to-text is offered through your device, you can use it here.

Can you tell me more about where the wind noise is coming from? For example, the front passenger window, or driver's side door.





AI FOR INSIGHT

AI enables leveraging many sources of data such as those employed by Ipsos to support the crisis response to the warehouse explosion in Beirut



Data Science solutions are as good as what you put into them...

Human Intelligence is Important for DSci and AI



DATA QUALITY

- Accurate
- Representative
- Measurement is understood
- Generalizable



DATA RELEVANCE

- Reflects current conditions
- Varied sources
- Linked to the business objective



DATA INTELLIGENCE

- Human intelligence & knowledge to build the right hypotheses & data connections with business questions



Rich Timpone, Ph.D.

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Global Lead of Ipsos Science Lab
Global Science Org., Ipsos

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