IPSOS UPDATE

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

December 2023

Ipsos Knowledge Centre

GAME CHANGERS Ipsos

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

A year ago, inflation dominated our final edition of 2022. While inflation is now finally falling, it remains the #1 concern of consumers globally as it has done for 20 months consecutively. Central bankers face a dilemma: having been too slow to increase interest rates in 2021, do they now risk being too slow in reducing them? As our new Ipsos Global Trends report shows, the delicate states of economies around the world are symptoms of today's ongoing polycrisis.

With this economic background, the need to take action on climate change is colliding with day-to-day realities on the ground. Going into 2023, 57% of people said they believed it would be the hottest year on record. They were right. Some 75% say we are heading for disaster if we don't change our habits quickly. And for the first time, climate change ranks as the top issue for both experts and the general public in the Ipsos/AXA Future Risks report.

Yet we are also seeing the urgency for taking action on climate change is decreasing in many countries. As people grapple with the rising cost of living, they - and their governments - are becoming more cautious.

Upheaval in the world has also meant that for the first time in 15 years, neither the US or Germany ranks as the #1 most respected country in the Anholt-Ipsos global Nation Brands Index, as Japan takes top spot overall. Switzerland is in pole position when it comes to being seen as trustworthy, with Germany still doing well when it comes to being associated with strength and confidence.

Meanwhile, our report for the Halifax International Security Forum finds Canada to be the country seen as most likely to have a positive impact on world affairs in future, for the 7th year in a row.

Generative AI had a triumphant year, but the Cambridge English Dictionary "word of the year" is "hallucinate", which you will get plenty of unless you use it intelligently. The latest Ipsos/AXA report finds threats associated with AI and big data rising up the experts' worry list (it's moved from 14th to 4th). Yet the latest in our own Conversations with AI series reminds us of the opportunities it can bring, working side by side with research teams, to encourage novel thinking and new ideas.

We do hope that some of the research here can be useful in your own work – as ever, please get in touch if you'd like to discuss anything in more detail.

Finally, I wanted to take this opportunity to wish you all a great end to 2023. We look forward to being with you next year as we chart the twists and turns of today's dynamic world together. As we often say, the only certainty is uncertainty!

Ben Page, Ipsos CEO

POLL DIGEST

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

FRANCE: 35% of French people are considering entrepreneurship in the next five years.

CANADA: Only 17% said they would be willing to cut donations to charities this holiday season.

CZECH REPUBLIC: A quarter of the Czech population plans to consume more plant-based products.

MALAYSIA: 35% of Malaysians have made an online purchase via TikTok.

PERU: Two in ten say they have been a victim of cell phone robbery in the last 12 months.

SOUTH AFRICA: Two-fifths (39%) say abortion should be illegal in most or all cases.

IN THIS EDITION

AXA FUTURE RISKS REPORT
A world in polycrisis

The 10th edition of the AXA Future Risks Report finds both risk experts and the public, in all regions of the world, putting climate change top. Cyber security and geopolitical instability risks follow.

CONVERSATIONS WITH AI PART III
Using AI to boost creativity in ideation workshops

Rather than being a lone creator or tool, generative AI should be viewed as a member of the team, able to contribute to the whole process of ideation workshops.

WHAT WORRIES THE WORLD?
Inflation the #1 worry top for 20 consecutive months

While rising prices is still the biggest issue globally, we also see an uptick in worry around terrorism and military conflict between nations since the Israel-Hamas war began.

IPSOS GLOBAL TRENDS
Polarisation, pessimism and positivity

Political instability, climate change, war… the polycrisis grinds on. With the ongoing global turmoil, we see people starting to focus inwardly on themselves.

HISF-IPSOS THREAT INDEX
Cyberhacking seen as biggest threat globally

The 15th anniversary of the Halifax International Security Forum finds natural disasters to be the fastest growing threat among global citizens.

NATION BRANDS INDEX 2023
Japan takes the top spot for the first time

The Anholt-Ipsos NBI measures global perceptions of 60 nations against six aspects of the nation's 'brand image': exports, governance, culture, people, tourism, and immigration & investment.

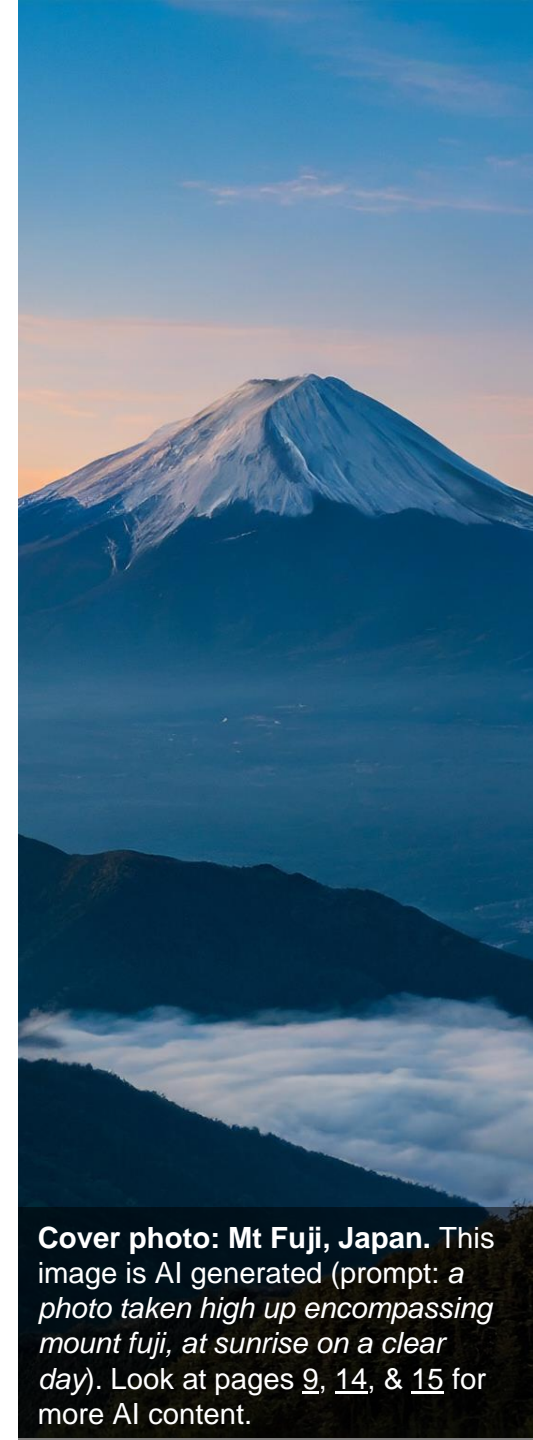## MAPPING OUT DEMAND SPACES BY CONTEXT
New demand space segmentation approach

Demand space analysis is a valuable tool for examining context and gaining insights, clarity and direction for growth, and can be applied to a wide range of products and services.

DISINFORMATION & HATE SPEECH
Concern over misinformation in upcoming elections

This study, conducted by Ipsos on behalf of UNESCO, examines people's perceptions when it comes to disinformation and hate speech across 16 countries facing elections in 2024.

Cover photo: Mt Fuji, Japan. This image is AI generated (prompt: *a photo taken high up encompassing mount fuji, at sunrise on a clear day*). Look at pages 9, 14, & 15 for more AI content.

AXA FUTURE RISKS REPORT

A world in polycrisis

This year, for the first time, climate change ranks top among both risk experts and the general public in all regions of the world, as the risk with the biggest potential impact on society over the next five to ten years.

Although concern about climate change has risen among the general public globally (last year Asia and Africa saw pandemics seen as a greater risk than climate change), just 13% of experts think the public are fully aware of the implications of climate change. The report also finds that even if all current policy pledges were to be met in full, the projected global temperature increase would still fall between 3 and 3.2 degrees – well above the Paris Agreement's target of 1.5 degrees.

Other environmental risks also rank in the top ten. Experts now place risks related to natural resources and biodiversity in 6th position; for the general public this ranks 10th. The public also remain concerned about pollution (8th).

Among global experts, cyber security risks rank 2nd, with nine in ten experts saying the risk of a massive cyberattack is significant at a global level. Experts are most concerned about the potential shutdown of essential services and critical infrastructure, while the general public (for whom cyber risks rank 3rd) are more concerned by the threat of identity theft.

Geopolitical instability (#3), AI and big data (#4) and energy risks (#5) complete experts' top five biggest risks. On a regional basis we see some deviation. Asian experts worry about the future of work, financial stability ranks more highly in Asia and Africa, whereas social tensions are a notable concern in Europe and the US.

Today's polycrisis is complicating how we manage the risks of the future. Three-quarters of risk experts (75%), agree that risks are becoming increasingly interconnected, needing transversal and holistic solutions.

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FUTURE RISKS REPORT 2023
10TH EDITION

> THREE-QUARTERS OF RISK EXPERTS (75%) AGREE THAT RISKS ARE BECOMING INCREASINGLY INTERCONNECTED, NEEDING TRANSVERSAL AND HOLISTIC SOLUTIONS."

HALIFAX INTERNATIONAL SECURITY FORUM

Natural disasters seen as leading threat globally

After yet another year filled with record-breaking heat, forest fires and floods, people around the world are clearly concerned.

A new Ipsos poll of more than 23,000 people – the HISF-Ipsos Threat Index – conducted by Ipsos for the Halifax International Security Forum finds the proportion who feel a major natural disaster taking place in their country is a real threat rose to a global country average of 70% in 2023, up from 66% in 2022 and 58% in 2015.

Given the sweltering summer filled with fires and flooding in the Northern Hemisphere, the proportion of people in Canada and the US who feel a natural disaster is a threat has risen slightly year-over-year, and concern outpaces the global country average (74% and 84% respectively).

Concern about a nuclear, biological, or chemical attack happening somewhere in the world surged in the wake of the invasion of Ukraine in early 2022, but has since dropped (71%, -4pp) in 2023. Despite the decline, concern about a possible attack is still widespread and seen as a real threat by majorities in every country surveyed, ranging from 58% (-5pp) in France to 85% in Thailand.

This year though, once again, sees cyberhacking as the #1 "real threat". cyberhacking has remained a leading concern for years and stayed put at 74% year-over-year.

Since 2015, hacking for fraudulent or espionage purposes has been seen as the threat most widely found to be real, except for in 2020 (the year the COVID-19 pandemic was declared) and 2022 (the year Russia invaded Ukraine).

EIGHT IN TEN (79%) GLOBALLY SAY, GIVEN THE ECONOMIC ISSUES IN THEIR COUNTRY, THEY SHOULD FOCUS LESS ON THE WORLD AND MORE AT HOME. "

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CONVERSATIONS WITH AI PART III

How to use AI to boost creativity in ideation workshops

Workshops can turbocharge new innovations, providing a creative environment to drive change. But traditional approaches can fall short of expectations. Ipsos has identified three hurdles framing the problem, familiarity bias, fixedness and fear. We've been exploring how smart use of AI can encourage divergent thinking and broaden possibilities.

By changing perspectives and rephrasing the issue, better answers can be found. For example, when conducting a study on travellers' experiences at an international airport, a "How Might We" statement like "How can we expedite the boarding process for prompt departure?" effectively focuses on improving boarding efficiency.

Generative AI offers enormous potential for encouraging alternative thinking and producing novel ideas. It can help individuals convey their ideas in a simple yet expressive manner by integrating existing concepts in innovative ways. AI may produce a variety of "how might we" queries using well-crafted prompts, challenging teams' knowledge of an issue and encouraging them to reconsider their aims.

It is vital to stress that Generative AI is trained to offer logical responses, whereas reframing necessitates non-obvious queries to inspire creativity. Obvious prompts may not offer many fresh concepts. Workshop participants are critical in reframing the topic and curating statements effectively. Rather from being the lone creator, generative AI should be viewed as a valued team member who contributes to the whole process.

Ipsos has developed intellectual property in its workshop reframing prompts, which can be used to generate a wide range of ideas and concepts by drawing inspiration from other industries. This helps break away from familiar patterns and encourages exploration of unconventional and novel ideas.

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INTEGRATE GENERATIVE AI INTO THE WHOLE IDEATION PROCESS TO ACHIEVE THE BEST AND MOST CREATIVE RESULTS. "

NATION BRANDS INDEX

Japan takes the lead for the first time in NBI history

For the first time in 15 years, neither the US or Germany ranks #1 in the Anholt-Ipsos Nation Brands Index (NBI). A rise in the global popularity of Japan has seen it rise to the top spot, knocking Germany down into second place.

The NBI measures global perceptions of 60 nations against six aspects of the nation's 'brand image': exports, governance, culture, people, tourism, and immigration & investment.

After dropping out of the top five last year, the UK reemerges in 4th place. The US also climbs two places into 6th. Meanwhile, France falls three places down to 8th – its lowest ever ranking – and despite a stable overall score, improvements in other countries' rankings sees Ukraine fall from 47th to 57th.

New this year to the NBI are common interest questions, exploring how people characterise each nation and topics of growing importance to a nation's reputation.

Switzerland ranks #1 as the world's most trustworthy nation, Japan takes 'most creative', and Germany is the nation most associated with strength and with competence. Meanwhile, Russia is the nation most associated with being arrogant, deceitful and dangerous. China also ranks as the nation most associated with being greedy.

Governance – one of the six NBI aspects – measures how people perceive the honesty of a nation's government, its treatment of its citizens, as well as its global behaviour to protect the environment and reduce world poverty. This year's NBI also includes additional questions on sustainability. Sweden scores consistently highly, as do Switzerland, Canada, Norway and Germany.

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> A RISE IN THE GLOBAL POPULARITY OF JAPAN HAS SEEN IT CLIMB TO THE TOP SPOT, KNOCKING GERMANY DOWN INTO SECOND PLACE. "

WHAT WORRIES THE WORLD?

Inflation top concern for 20 consecutive months

Inflation is yet again the highest worry, now top for the 20th consecutive month. This month the proportion mentioning it as one of the big issues facing their country is marginally lower than last month, sitting just below two-fifths (38%).

Malaysia's concern around inflation has experienced the sharpest fall of any nation this month, with a 9pp reduction in worry to 37%, which marks the lowest level since March 2023.

Since the conflict in Gaza, mentions of terrorism has increased by 5pp to 12% and military conflict between nations is up 3pp to 10%.

Terrorism has become Israel's biggest concern by a considerable margin. After a hike of 24pp, nearly two-thirds (63%) of Israelis are worried. This is the highest it's been in the country since December 2015.

The biggest month-on-month jump, however, has been from France (now on 33%), who place second after increasing 26pp. Belgium is also significantly concerned, with a quarter (24%) listing terrorism – an 18pp spike.

Sweden is also up again after a fall in October – rising 7pp to nearly a quarter (23%).

Much like their concern over terrorism, concern over military conflict has now significantly increased for Israelis (to 43%) – a rise of 27pp. It's the nation's second biggest worry and the highest level since we started recording this category in April 2022.

This new conflict seems to have spread anxiety over conflict to other nations. Since the war in Ukraine began, Poland (where 27% single it out) has remained high on this list and stays elevated after a 5pp rise.

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ISRAEL'S CONCERN AROUND TERRORISM REACHES AN ALL-TIME HIGH FOR ANY NATION, HITTING 63%."

MAPPING OUT DEMAND SPACES BY CONTEXT

Introducing Ipsos' demand space segmentation approach

Successful brands need to take context into account, as it can strongly influence consumer decisions. Context is what's happening in people's lives and in the world around them, and understanding this context is critical to understanding consumer expectations.

Our research shows that contextual influences significantly drive brand choice, contributing to over 50% of the decision-making process, depending on the product category.

Demand space analysis is a valuable tool examining context and gaining insights, clarity and direction for growth, and can be applied to a wide range of products and services.

This paper introduces our unique demand space segmentation approach, examining the intersection of people, needs and context to help you understand growth opportunities through a multi-dimensional lens.

Using machine learning tools to identify the key drivers of choice, we map demand spaces for your brand that reflect reality and help you to understand what levers to pull, what to communicate, and who to target for each space.

As our world continues to change and evolve from the impacts of global events such as climate change and inflation, we outline why a clear understanding of what drives consumer choice is increasingly important. We need to start the journey by stepping into the individual's shoes.

ENSURING YOU HAVE A CLEAR ROADMAP TO GUIDE THE MARKETING ACTIONS OF YOUR COMPANY IS INCREASINGLY IMPORTANT. "

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IPSOS GLOBAL TRENDS

Polarisation, Pessimism and Positivity

2023 draws to a close; the polycrisis grinds on. Each component – political uncertainty, climate change, and war to name a few – has arguably worsened. This is reflected in our Ipsos Global Trends end of year update, and in the increasing sense of pessimism we felt as we wrote it.

Our study, comprised of 24,220 interviews across 31 markets, shows signs that today's crises are causing people to retreat and focus more inwardly on themselves and their world rather than on the broader problems swirling around them.

We highlight five stories to monitor and prepare for:

- **Story 1**: The polycrisis wears on.
- **Story 2**: Climate action collides with reality.
- **Story 3**: Brand values lose ground to value brands.
- **Story 4**: Science faces headwinds.
- **Story 5**: Globalisation: a local story.

Our Ipsos Global Trends programme, which has been running since 2013, provides the evidence and data needed to inform decisions across a range of plausible future scenarios.

In this short update, we share how six macro forces are interacting to amplify both positive and negative outcomes over the next few decades, and we review the changes we see in our Global Trends framework.

Please stay tuned for a major launch next year, where Ipsos will be celebrating 10 years since the launch of this flagship programme.

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AS THE POLYCRISIS GRINDS ON, IT WILL TAKE SYSTEMIC THINKING, COLLABORATION AND FORESIGHT TO PREPARE FOR BOTH OPPORTUNITIES AND THREATS. "

DISINFORMATION & HATE SPEECH

Concern over the integrity of upcoming elections

With the reliability of online information being crucial during elections, Ipsos conducted a survey for UNESCO on the impact of online disinformation and hate speech, looking at 16 countries who will be holding elections in 2024.

The study found that nearly nine out of ten (87%) respondents expressed concern about the impact of disinformation on upcoming elections in their country.

This seems to be reflected with those who use the internet and experience a high amount of disinformation. Over half (56%) of internet users say they use social media frequently, with more than two-thirds (68%) indicating that disinformation is most widespread on those platforms.

Sixty-seven percent of internet users have also encountered hate speech online, with a majority believing it's most prevalent on

Facebook (58%). As such, there's a strong call for regulation, with 88% believing that both governments and regulatory bodies, and social media platforms (90%), should address disinformation and hate speech issues.

Public support for governments and regulators to require social media platforms to put in place trust and safety measures during campaigns to protect the integrity of elections is overwhelming. Nine in ten (89%) endorse this proposal.

Trust in traditional media, however, remains high, with two-thirds (66%) of those surveyed trusting television news, 63% trusting radio news, and 61% trusting print media news. Those from wealthier countries are more likely to say they get their information from television.

NEARLY HALF (47%) ARE "VERY CONCERNED" ABOUT THE IMPACT OF DISINFORMATION ON UPCOMING ELECTIONS IN THEIR COUNTRY."

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SHORTCUTS

Whatever Happened to the New Normal?

The term "New Normal" first came to prominence in the wake of the 2008 financial crash, as businesses tried to come to terms with the implications of what just happened. And it returned to the scene in early 2020, as organisations started to imagine what post-pandemic life might look like.

The latest KEYS webinar investigates the dynamics of our recent times, looking to diagnose what's changed – and what's stayed the same.

Our experts discuss how the public conversation is changing against the backdrop of misinformation and fake news, as well as how organisations can navigate turbulent times and how brands can understand consumer sentiments.

Register now for the 'The Year in Review' webinar.

WATCH HERE

Debating Responsible AI

Our new report explores the pressing technological issue of responsible AI with insights from ten distinguished UK experts.

In an era where AI is rapidly evolving and permeating every facet of our lives, it holds immense potential for individuals, organisations, and societies. However, it also presents complex challenges and risks that underscore the need for responsible AI development and usage.

This report examines the current debates surrounding the definition of responsible AI, explores the myriad of benefits and significant drawbacks and highlights the role of regulation in enabling responsible practices. By sparking a thoughtful discussion and providing practical insights, we aim to promote a better understanding of responsible AI and its application in real-world scenarios as we discover how it can shape the future.

READ MORE

Brand Talk Podcast

Episode 6: Stay relevant or say goodbye, is the second half of our interview with Jody Bilney - one of the most experienced and knowledgeable brand strategists of today.

Jody was kind enough to share her rich history and show how her skills in consumer experience and marketing within boardrooms remain fundamental.

She talks about how she joined Humana, an established health insurance company, and used her experience from the restaurant sector to revitalise their consumer journey.

She also talks about Generational Equity Transfer: how to ensure that longstanding organisations can stay relevant for future generations. Listen to the end for some real jewels of wisdom - especially if you're a marketer!

LISTEN HERE

CONTACT

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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