PERSONAS IN THE AGE OF AI

Promises and limitations

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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 Human Intelligence stems from our expertise in prompt engineering, data science, and our unique, high quality datasets – which embeds creativity, curiosity, ethics, and rigor into our AI solutions, powered by our Ipsos Facto Gen AI platform. Our clients benefit from insights that are safer, faster and grounded in the human context.

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Introduction

A persona represents a consumer group through a psychological and behavioral profile, making it more relatable and actionable.

While the rise of generative AI seems to offer a quick and accessible way to generate personas from simple prompts, the current excitement around AI raises fundamental questions:

- What defines a "good" persona?

- What are the limitations of AI-generated personas?

- How can we ensure that they accurately reflect the reality of the market and customers?

Answering these questions now leads us to re-examine the role and construction of personas at a deeper level. This requires us to take a step back, think about the fundamental purpose of a persona and how they are used in different research processes, and then think about our approach from there. **It is about finding a balance between the promise of AI and the demands of a rigorous strategic approach.**

By exploring these issues, we will be able to make the most of AI technologies to build truly actionable personas.

In this paper, we explore the evolution of personas, how AI is changing the way personas are created and used, and the benefits and limitations of AI-powered persona bots.

> " Personas humanize abstract profiles or segments by transforming them into memorable, emblematic "characters".

A short history of the persona

Personas originated in the late 19th century as sociological tools to represent the characteristics of specific population groups and their defining factors. Max Weber (1864-1920) pioneered the concept, transforming abstract social categories into fictional yet realistic "characters" to highlight key factors for decision-making.

Max Weber emphasized that it was not crucial for personas to be perfectly accurate representations of reality. **Their purpose is to embody and bring to life, sometimes by exaggeration, the strategic points that must be considered to make impactful decisions.**

Subsequently, sociologists like George Gallup, Jean Stoetzel, Didier Truchot, and Jean-Marc Lech – founders of research institutes Gallup (1935), Ifop (1938), and Ipsos (1975) – helped transition personas from social research to market research. They used personas to isolate different uses, motivations, and expectations influencing product usage and purchasing decisions.

In the 1980s, UX research became the first field to adopt personas for simplifying and developing software. Archetypes like **"Early Adopters"** and today's **"Digital Nomads"** were created to bridge the gap between a designer's intentions and what users actually need, or can, accomplish.

By the 1990s, marketing and strategy departments began using personas to define buyer communities with coherent identities, isolate target profiles, and address them with greater precision. Many have been so successful that they have become part of our everyday vernacular: **"the Eco-Conscious Consumer", "the Multitasking Mom", "the Hipster", "the Empty Nester"** and **"the Social Influencers"** to name but a few.

The four functions of personas

Personas have evolved over the years to perform several functions.

1. Bringing data to life

Making ideas tangible: Personas humanize abstract profiles or segments by transforming them into memorable, emblematic "characters".

Creating a discussion platform: Personas spark conversations around product features or minimal viable products (MVPs), acting as a starting point for co-creation and iterative development, much like assembling a LEGO® model that evolves over time.

2. Aligning teams internally

Driving consistency: Personas help unify an organization around target definitions, naming conventions, and communication strategies.

Ensuring communication clarity: They streamline the flow of insights from marketing to other teams, ensuring data is shared in a clear and controlled manner.

Empowering employees: By representing user needs, personas inspire alignment among project teams, especially in large or complex initiatives.

3. Limiting risks

Testing ideas: Personas provide a framework to test and refine ideas, ensuring alignment with real user needs. Simple questions like, "What does this persona need?" or "What would this persona like?" help tailor products, messages, and innovations.

Documenting decisions: Personas act as a guiding thread, documenting project choices, justifying strategies, and guarding against unnecessary deviations.

4. Inspiring creativity

Sparking innovation: Personas capture emotions and viewpoints, inspiring creative thinking. Tools like storyboarding can engage developers and marketers with fictional narratives, making them especially useful for advertising and casting decisions.

The future of personas

As technology advances, personas have become more sophisticated, blending traditional research with AI-driven tools that transform them from static character sketches into more lifelike, interactive beings that researchers can talk to and ask questions of.

The challenge is to balance their simplicity with the depth of insight they provide.

We explore these evolving methods and the opportunities they offer for better decision-making, collaboration, and innovation.

How to create a persona

Traditionally, personas have been created from qualitative and/or quantitative research, often combining different sources of data: analysis of values expressed in qual (such as focus groups and individual interviews), usage and attitude studies, combined with demographic elements and personality profiles. They may also include economic, cultural and lifestyle factors.

Over the last few decades, we have gained access to an increasing number of tools to enrich personas. Behavioral data from social networks or website analytics tools complement traditional data sources. This allows us to build target audience personas based on online behaviors, enabling more targeted advertising and predictive profiling.

Within Ipsos, the Synthesio Profiler[1] tool can generate digital personas based on quantitative data from segmentation or other behavioral data definitions. Profiler allows you to choose behavioral characteristics to build an audience profile – for example, 18–34-year-olds in the UK who frequent nightclubs and are intrepid travelers – and understand other online behaviors, such as frequently used apps, movies, brands and sports that the digital persona enjoys the most.

Generative AI and Agentic AI[2] revolutionize persona development through AI-powered chatbots known as "persona bots" that allow lifelike conversations with personas. This AI-driven embodiment, combined with expanded data sources, is taking personas to an unprecedented level of depth and realism, far beyond static descriptions.

Ipsos has pioneered the development of Ipsos PersonaBot[3], powered by Ipsos Facto, Ipsos' proprietary AI platform. This new tool enables stakeholders across an organization to interact with personas representing their target audiences. Through a secure portal, they can ask questions about all types of topics, including: attitudes and behaviors, communication needs, messaging and channel preferences, etc. Personas can be interviewed individually or together, almost like a focus group. The platform also directly connects with activation frameworks, such as templates to brief communication agencies.

A persona bot could be seen as a new class of synthetic data[4] that emulates consumer segments or individual respondents, providing directional input based on synthesized responses from research data.

Persona bots versus synthetic samples, what's the difference?

As explained earlier, **a persona is the embodiment of an audience archetype** that represents an audience group holistically and so may have exaggerated perspectives that differentiate it from other groups. **It is important not to confuse an AI persona with a "synthetic sample", which is a set of artificial respondents designed to match real individual respondents** or a "digital twin", which is a synthetic anonymized copy of a real respondent.

As an example, we asked Ipsos Facto to design two personas based on the following prompts:

Jean-Pierre, 64 years old, loves to travel alone. He has just retired and has a comfortable income that allows him to go wherever he wants, but without ostentation.

Patricia, 58 years old, a fashionista, very flashy, also loves to travel alone but prefers tropical countries where she dreams of the 70s.

The images created represent two very different profiles. We then asked Ipsos Facto where these two people might meet and how they would get to know each other. The answer generated was:

"They will meet in Dubai and might start a conversation by discussing their favorite travel experiences and the luxury destinations they have explored. They might exchange views on their tastes in fashion and accessories, sharing anecdotes about unforgettable purchases".

> **A persona bot needs to be primed with concise, well-curated and thoughtful pre-processed summaries of all the available material in a clear, structured and well-organized way.**

> **To guide commercial decisions effectively, personas should be grounded in real, audience-representative market research data.**
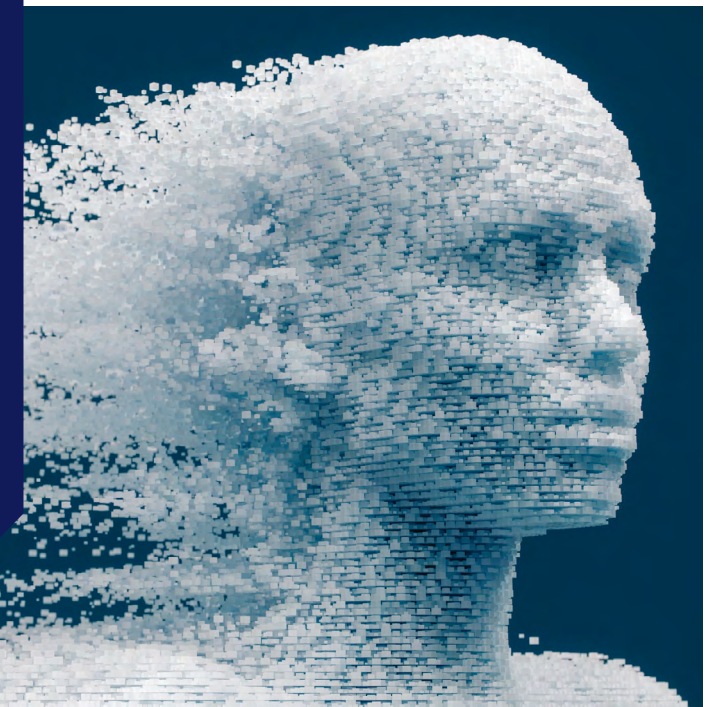
Creating a persona bot

The techniques for effectively creating a persona bot are evolving rapidly, but Ipsos has quickly learned that you cannot simply feed raw data or reports into a persona bot and expect it to make sense of it. A persona bot needs to be primed with concise, well-curated and thoughtful pre-processed summaries of all the available material in a clear, structured and well-organized way.

In addition to the basic description of a persona (the **who**), in order to have a conversation with a persona bot, it is also essential for an AI system to have an understanding of the motivations/needs and attitudes of the persona (the **why**), the lifestyle and typical behaviors of that persona, the types of brands or products they might use for example (the **what**), the occasions (the **when**) and reasons for using and choosing brands and products in the category in different circumstances (the **where**) and also a picture of their general lifestyle, interests, and media consumption habits. All these elements help to make an AI persona more relatable.

A persona bot needs to be primed not only with factual information, but also with examples of the persona's language, attitudes and personality traits so that it can understand their personality and way of thinking. It also needs to be primed with images, not just words. Images can help to add much more depth to the persona profile. However, when using Gen AI to create priming images, great care must be taken to ensure that these priming images do not recycle biases in the Gen AI creation algorithm – for example, the tendency to present "white man in suit with close-cropped beard who looks like a model".

Test and learn. Accept that you will not get it right the first time. You need to build a prototype first and get those who know your audience to test it to breaking point, from which the prompts can be expanded and refined, and their limitations clearly identified.

The amount of priming information managed by AI tools is increasing constantly. Until now, the limitations of Gen AI tools have been the amount of priming information they could process, but we have moved rapidly from Large Language Models (LLMs) being able to handle only paragraphs, to pages, and now to books worth of information, making these tools increasingly more sophisticated and removing any barrier to the depth of priming information they are able to handle. Leading models can currently intake more than 1,000 pages of text and this is set to increase in the future.

Biases and limitations in creating and using personas

While personas help designers and marketers understand their audiences and assess target profiles, they have limitations that require careful consideration. Whether created by humans or AI, these representations are not perfect reflections of real behavior. Here are some key points to consider:

Realism of a persona: Personas must be based on thorough observation and analysis. With AI, it's all too easy to create personas that appear realistic but don't represent actual consumer groups. The credibility of a persona depends heavily on the segmentation analysis and the expertise of the researcher, especially if it is based on limited interviews or observations.

Representativeness of a persona: It is a mistake to consider a persona as a monolithic construct. They are archetypes that are only valid in relation to a market, a country, an object and a purpose. For example, a consumer might be a frugal "Austere Pragmatic" when grocery shopping but a lavish "Affluent Traveler" in the travel industry.

Specific AI criteria for personas also apply:

- **Priming material quality:** For AI-generated personas, the quality and depth of priming data are crucial. Incomplete or biased data can lead to inaccuracies, making comprehensive background information essential.

- **Perspective limitations:** If a persona bot is primed solely with market segmentation data, it will not be able to reliably answer questions beyond this scope. Even well-primed AI personas lack the depth of true human data. They may capture broad ideas but miss nuanced, diverse views, leading to recycled insights. Thus, AI personas should complement, not replace, human-led ideation.

- **Reliability of priming data sources:** Relying only on a language model without curated priming information is risky. LLMs vary in knowledge depth across topics and this knowledge can be outdated and derivative, frequently based on older market research, which may not accurately represent current consumer insights. Much of LLM content also reflects marketing language, risking feedback loops in AI personas.

To guide commercial decisions effectively, personas should be grounded in real, audience-representative market research data. While AI-generated personas can be enhanced with LLM data, caution is needed to avoid overreliance on LLM-driven insights.

- **Algorithm-driven personas and non-causal connections:** AI's interpretation of unsupervised data can result in non-causal connections and irrelevant insights by conflating correlation with causes.

An AI imitating human reasoning could, for example, assert that "eating more ice cream causes more drownings", a nonsense proposition that requires human expertise to be disregarded.

To be truly operational, personas must be based on real, current market research data that is representative of the target audience. In other words, while AI-generated personas can be enhanced with LLM data, one must not place absolute trust in information primarily based on them.

The application of persona bots

As the roles and uses of personas have evolved over the last century, we are at the dawn of exploring the new roles and uses for persona bots. What do we know so far about what they do well and what they can be used for in the future?

Bringing a persona to life in an organization: Having a persona segment described in a document and presentation is one thing, but being able to talk to one and ask them questions adds a whole new dimension to how they can be used. The success and excitement of AI persona bots among early adopters has centered on the ability for marketers to really explore and test their thoughts and ideas with a level of immediacy. For example, in the middle of a discussion or on the way to a meeting, you can use a persona bot for a sense check.

Rationalize, connect the dots and theorize: Persona bots are very good at connecting the dots, theorizing, making logical arguments and articulating the needs, motivations and even feelings of a persona archetype - but it is important to remember that these are simply theories and not facts, so mark the starting point of the research and not the end point.

Surfacing needs: These needs may not be real needs, and the idea a persona bot comes up with is by no means definitive, but again they can be a great starting point for further research and augmentation of human-based ideation.

CASE STUDY 1:
Using an Ipsos PersonaBot to supercharge a CSR marketing strategy[5]

Orange, a leading telecom company, has embarked on an innovative journey to further its CSR (corporate social responsibility) marketing strategy, with a particular focus on significantly reducing its carbon footprint. Thanks to the strategic integration of AI-powered persona bots, the company is redefining the way it accelerates consumer response

within the development of CSR offers and initiatives.

Ipsos created a set of persona bots primed with detailed segmentation conducted around consumers' attitudes towards sustainability, which can be broken down into four clear archetypes:

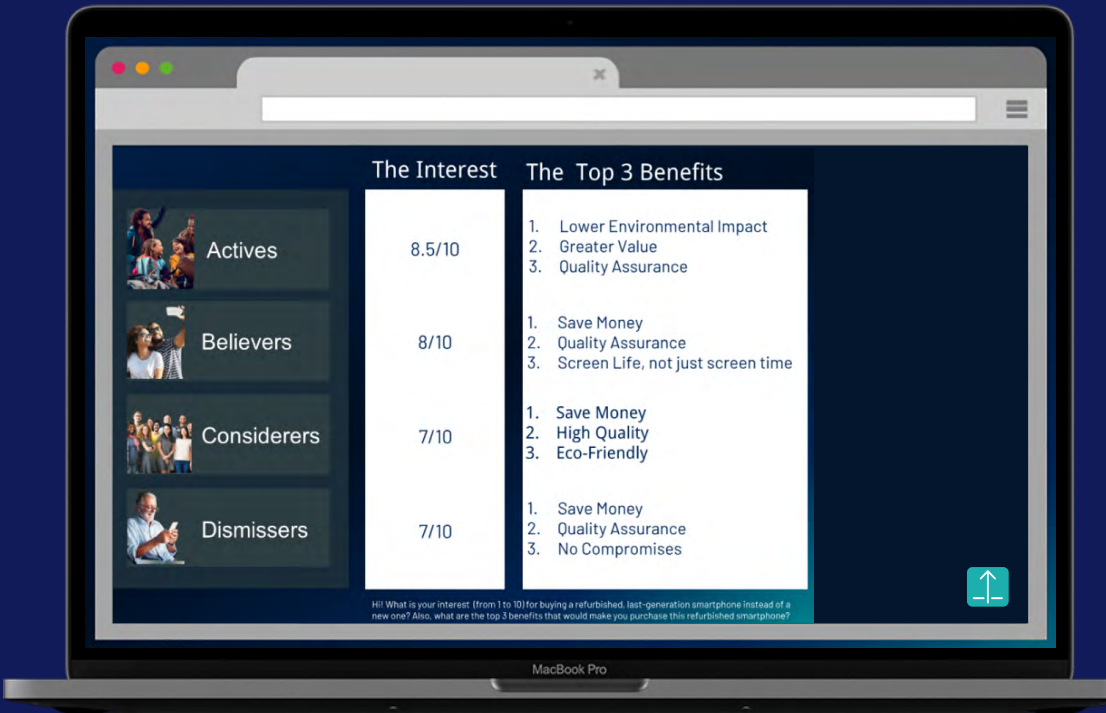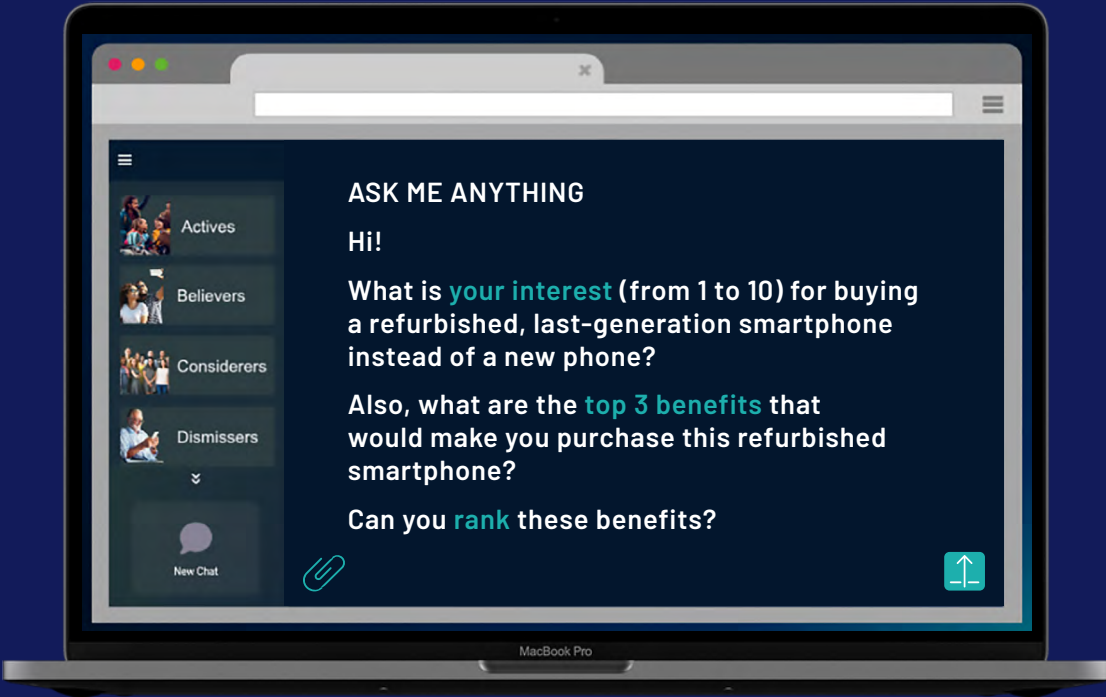**Actives**   **Believers**   **Considerers**   **Dismissers**

The Orange research and marketing teams used these Ipsos persona bots to provide them with instant feedback on the views and opinions of these archetypal groups; helping them to test ideas, get a feel for how each group might respond to different marketing initiatives, and refine and optimize these initiatives towards those
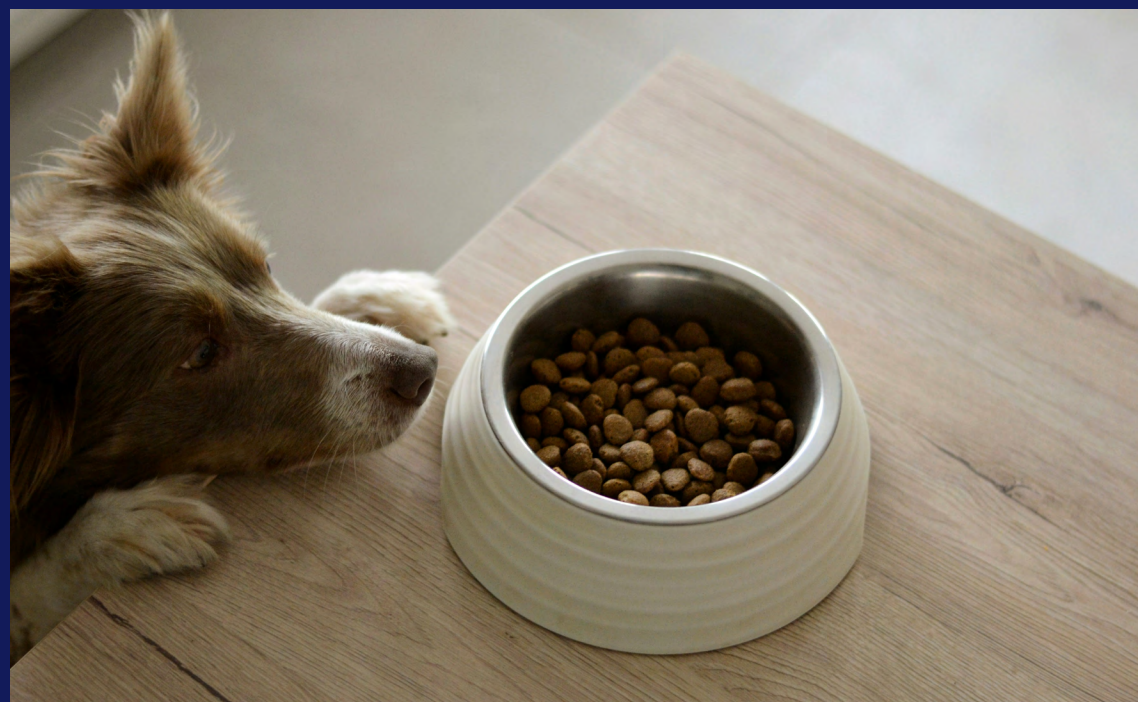
with good potential impact. The persona bots became part of the decision process, along with other factors (such as financial costs and production accessibility) and played a role in developing initiatives to meet the distinct needs of different customer segments.

> The integration of Gen AI persona bots into the CSR marketing strategy has supercharged Orange's approach towards achieving their goals. The persona bots have not only made the communication messages more interactive but have also accelerated the process of incorporating more consumer centricity into the decision-making process across various functions of the company.

Example of a question asked to each persona bot and a summary of the reaction:

ASK ME ANYTHING

Hi!

What is your interest (from 1 to 10) for buying a refurbished, last-generation smartphone instead of a new phone?

Also, what are the top 3 benefits that would make you purchase this refurbished smartphone?

Can you rank these benefits?

	The Interest	The Top 3 Benefits
Actives	8.5/10	1. Lower Environmental Impact 2. Greater Value 3. Quality Assurance
Believers	8/10	1. Save Money 2. Quality Assurance 3. Screen Life, not just screen time
Considerers	7/10	1. Save Money 2. High Quality 3. Eco-Friendly
Dismissers	7/10	1. Save Money 2. Quality Assurance 3. No Compromises

CASE STUDY 2:
Getting more mileage from your segmentation

A global pet food company was looking for a solution to help them realize the full impact of their segmentation studies. Specifically, they were looking to provide simpler access to existing insights so all cross-functional teams could leverage their segmentations in their day-to-day work.

Ipsos helped to develop dynamic persona bots representing each key segment. These persona bots facilitated the straightforward and consistent dissemination of segmentation insights through everyday conversations, promoting a people-centric approach to idea generation, and the opportunity to get instant preliminary feedback on marketing stimuli, providing valuable insights before formal testing. This collaboration empowered the company to maximize the utility of its segmentation studies, enhancing its ability to innovate and better meet consumer needs across the board.

> These persona bots facilitated the straightforward and consistent dissemination of segmentation insights through everyday conversations, promoting a people-centric approach to idea generation.

> As a guiding principle, we need to recognize that an AI persona is a tool for inspiration and ideas, not a judge or jury for marketing decisions.

Key takeaways

Personas have long been a valuable tool for researchers and marketing teams, used to bring audience segments to life to drive consistency and inspiration. **A new generation of AI-powered personas is taking their role to a whole new level, from a passive to a dynamic tool you can engage with**. Ask them questions, bounce ideas off them, test concepts and strategies.

Persona bots have quickly become one of the most popular tools in the Ipsos research portfolio and are now central to our Gen AI innovation efforts. We believe we are only at the beginning of creating fully interactive AI personas. As we enrich them with increasingly sophisticated intelligence from multiple sources, **we expect these tools to become the foundation of large-scale research projects in the future.**

Clearly, with new solutions like these, some guardrails are needed to understand the boundaries of what they can and cannot be used for. As a guiding principle, we need to recognize that an AI persona is a tool for inspiration and ideas, not a judge or jury for marketing decisions.

Whether created by a human or by a machine, the embodiment of a segment of consumers or citizens in psychological and behavioral personas has limitations. Their effectiveness depends on the personal intuition, experience and talent of the researchers, as well as the depth and quality of the priming material from which they are created.

> **Persona bots are set to fundamentally transform how businesses cultivate a people-centric culture by providing real-time, nuanced, consumer insights.**

Five rules to follow when working with Gen AI powered personas

RULE 1

Always root personas in human data – qual, quant, social, curation, etc.

RULE 2

Always validate personas before launching

RULE 3

Human intelligence should always be part of the process

RULE 4

Personas should always be designed with a specific purpose

RULE 5

Persona applications should always link with a client's business reality (e.g. integrating marketing frameworks, etc.)

Persona bots are set to fundamentally transform how businesses cultivate a people-centric culture by providing real-time, nuanced, consumer insights. These AI-driven tools enable organizations to dynamically engage with their target audience, fostering more personalized and responsive strategies.

By facilitating deeper interactions and understanding, persona bots help businesses not only anticipate consumer needs but also adapt swiftly to market changes, thus embedding a truly customer-centric ethos across all levels of the organization.

Final thoughts

In the past 12 months, we have seen a host of start-ups emerge who claim they can "do magic" with Gen AI, but persona bots are risky business and can only be trusted to serious players who have the right data science background, long-time research expertise, and access to real human data.
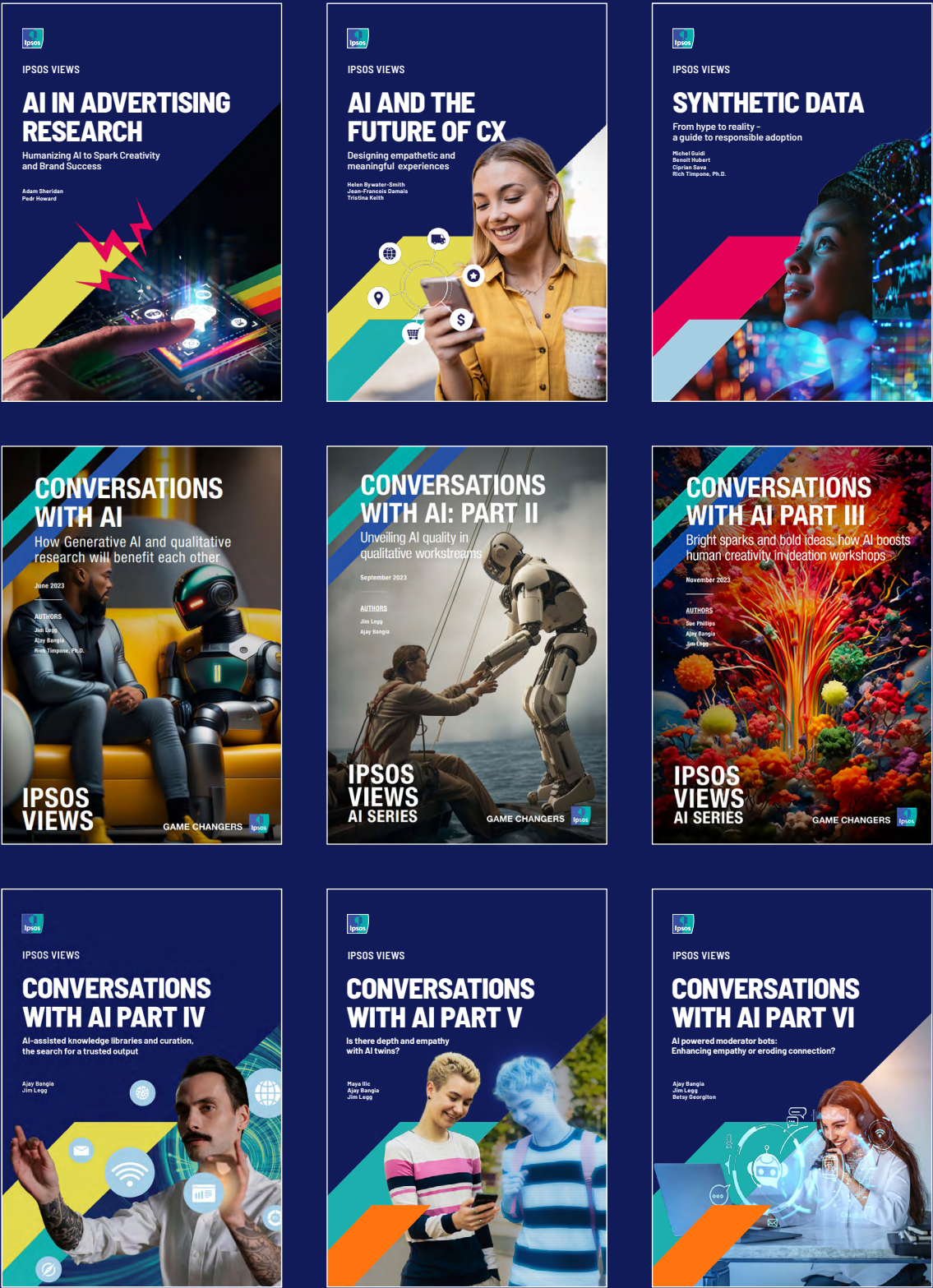
To select the right partner and avoid the "snake oil salesmen" who have sprung up on the back of the technology's potential, we recommend you ask the following questions:

- How long have you been in the business of data science for insights? Not data science alone. Not insights expertise alone. Data science + insight experience together.

- How many data scientists did you have in 2022 (before Generative AI)?

- What data did you ground your models on?

- Do you own that data? If not, who owns it or how was it sourced?

- How did you validate your synthetic data models?

- What is the percentage of reliability of your proposed solutions?

- What are your standards and evaluation criteria?

- How frequently do you update the data models and the data itself behind your synthetic data?

- Is your business dependent on this specific particular or methodology?

Endnotes

1. https://resources.synthesio.com/profiler-audience-insights.html

2. Agentic AI is a type of artificial intelligence that focuses on creating autonomous systems able of making decisions and performing tasks with minimal human intervention or without it

3. https://www.ipsos.com/en/launch-ipsos-personabot-groundbreaking-ai-powered-solution-enhance-segmentation-research

4. https://www.ipsos.com/en/synthetic-data-hype-reality-guide-responsible-adoption

5. https://ana.esomar.org/documents/supercharge-your-csr-marketing-strategy—12607

Further Reading

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