

IPSOS UPDATE

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

October 2023

IPSOS UPDATE OCTOBER 2023

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

This month we can see stagnant global consumer confidence but with variations across regions. Particularly noteworthy is Germany, where just 24% believe things are going in the right direction - the lowest in a decade. As the post pandemic landscape becomes clearer, with persistent inflation and cost of living pressures globally, we are witnessing an increasing "loss of the future" sentiment – with pessimism resulting in a nostalgic yearning for security, reassurance and protection across the West. Both brands and politicians are responding. Populist parties are leveraging this sentiment effectively – although we can see that overall populist values are in gentle decline.

Just as big a story, as a new coronavirus wave takes hold, we see concern for the virus dwindling, now 17th of 18 issues. Instead, it is now mental health that is leaping up the list of public concerns in our new study on health – it has become THE number one health concern globally, ahead even of cancer. Globally, trust in healthcare systems remains high, but concern over their capacity to cope is rising on every continent.

AI, a realm of uncertainty for many, is predicted by 66% to revolutionise our daily life in the next three to five years. We

are currently in the public hype/anxiety stage of adoption of a new technology. As researchers, AI presents both challenges and opportunities – from improving data quality to enhancing storytelling and analysis. We have over 10,000 researchers using it regularly – and its impact has barely been felt so far.

Across the world we find a general dissatisfaction with education systems across the globe, with more people rating it as "poor" than "good". Yet, being educated to degree level continues to be seen as crucial for success.

Finally, many countries have cut infrastructure spending over the last decade – and our recent Global Infrastructure Monitor reveals that 57% believe their country is not doing enough on infrastructure needs. Airports, digital infrastructure, and motorways top the list for more spending, while housing supply, and EV charging infrastructure are seen as less important – but voters are not always right!

We hope this is useful – please do get in touch if you'd like to discuss anything in more detail.

Ben Page, Ipsos CEO



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.

US: Eight in ten parents worry about their children using video or image-sharing apps.

ECUADOR: Nine in ten people have bought white label products, most commonly relating to home cleaning (73%) and dairy (64%).

FRANCE: Six in ten French people say they try to repair electrical equipment themselves when it breaks down.

GB: Almost nine in ten Britons agree that Britain needs a fresh team of leaders.

KUWAIT: 95% of people with a bank account now use digital channels to perform at least one form of transaction.

AUSTRALIA: Six in ten employees feel their organisation has a good mental wellbeing culture.

IN THIS EDITION

CONVERSATIONS WITH AI PART II

Unveiling AI quality in qualitative workstreams

AI provides tangible possibilities to transcribe audio and video files, generate images and videos, and even write code. In this paper, we evaluate the utility and risks associated with AI outputs.

WHAT WORRIES THE WORLD?

Concern about crime reaches post-pandemic peak

Across 29 countries, worry about crime and violence has now reached its highest level since before the pandemic. It now ranks second behind inflation, the top global concern.

EMOTIONS AROUND THE WORLD

A cross-cultural framework for emotion measurement

This paper provides an overview of the Ipsos Emotion Framework - a structured and scalable approach for capturing and quantifying emotional responses across different countries and cultures.

GLOBAL INFRASTRUCTURE INDEX

Citizens recognise infrastructure's 'double dividend'

The 2023 Global Infrastructure Index finds a continued sense that infrastructure provides a 'double dividend', boosting the economy and combatting climate change.

GLOBAL VIEWS ON EDUCATION

Attitudes to education, teachers and AI in classrooms

People across 29 countries are more likely to describe the education system in their country as poor than good; however, attitudes vary considerably between countries.

UNLOCKING THE VALUE OF REPUTATION

The link between reputation and business efficiency

Drawing on data from our latest 24-country Global Reputation Monitor, this paper explores the relationship between a good reputation and better business efficiency.

GLOBAL HEALTH SERVICE MONITOR

Mental health now the world's top health concern

Mental health is now seen as the number one health concern globally, ahead of cancer and coronavirus. While one in two globally say their healthcare system is good, ratings vary greatly by country.

MAKING THE CASE FOR THE OFFICE

Employee experience of hybrid working

Ipsos Karian and Box research finds that three days of office working per week is optimal for key aspects of employee engagement and workplace culture.



CONVERSATIONS WITH AI

Unveiling AI quality in qualitative workstreams

The potential applications of AI are no longer abstract ideas but tangible possibilities that can transcribe audio and video files, generate images and videos, and even write code.

While there is excitement about the productivity and creativity that AI can bring, there is also a sense of caution due to the biases, errors, and hallucinations that can occur in AI systems. To navigate this sea of change, we emphasise the importance of cautious and thoughtful use of AI technologies.

In *Conversations with AI Part II*, we conducted a series of tests to evaluate the utility and risks associated with AI outputs. These tests assessed AI suppliers in transcription, translation, and sentiment analysis using qualitative research platforms.

The results showed variations in the quality of AI transcriptions, with machine transcriptions achieving higher accuracy in widely used languages like English. The accuracy of AI translations depended on the use of human transcriptions as starting points.

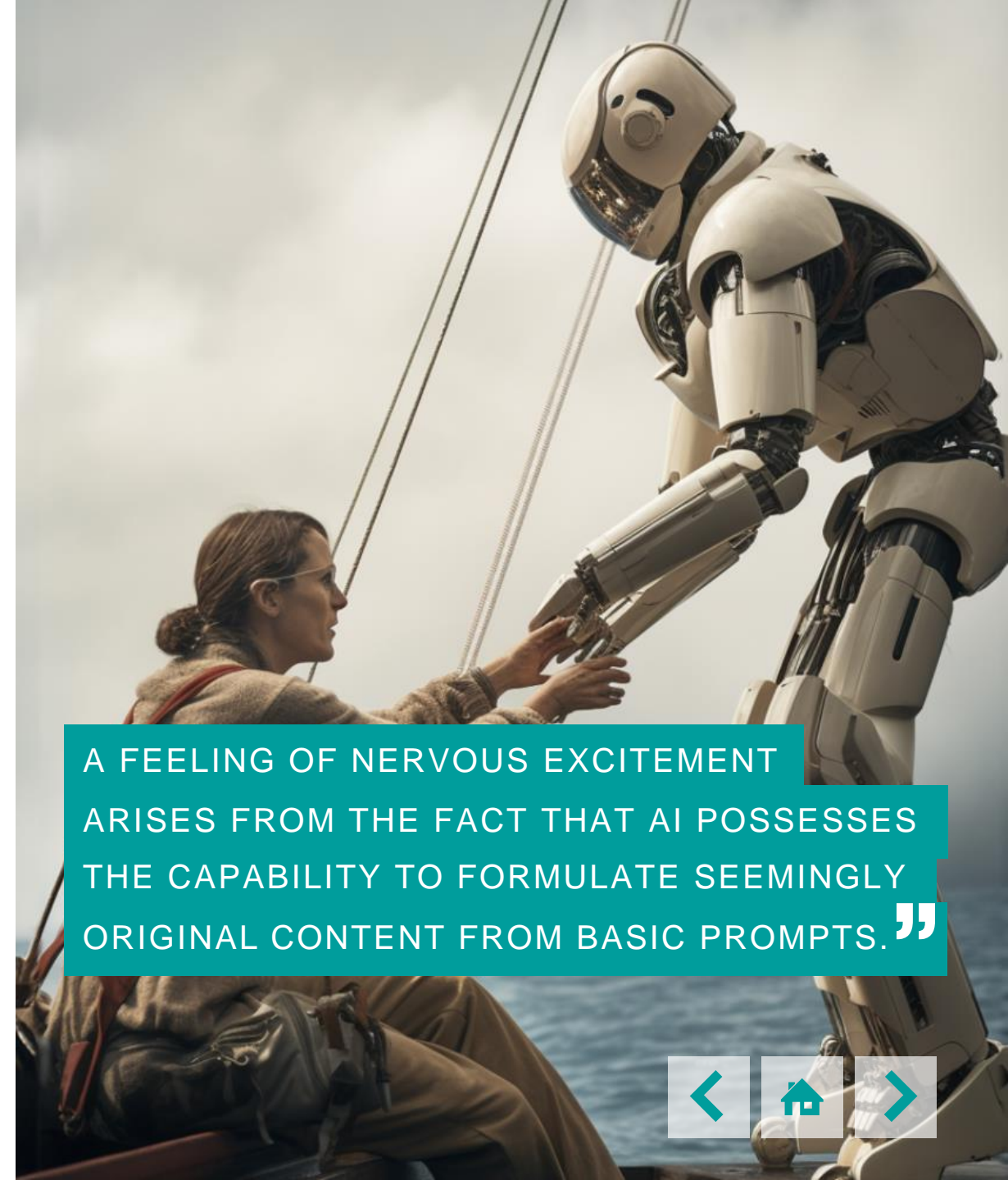
In terms of sentiment analysis, AI models showed varying levels of accuracy, with some models performing as well as human-coded sentiment analysis. In thematic analysis, generative AI provided good topline summaries but struggled to elevate insights and draw business implications compared to human researchers.

While AI presents opportunities for innovation and growth, businesses need to carefully assess and evaluate AI tools to unlock their maximum value while mitigating potential risks.

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A FEELING OF NERVOUS EXCITEMENT
ARISES FROM THE FACT THAT AI POSSESSES
THE CAPABILITY TO FORMULATE SEEMINGLY
ORIGINAL CONTENT FROM BASIC PROMPTS.”



GLOBAL VIEWS ON EDUCATION

Attitudes towards education, teachers, and AI in classrooms

People across 29 countries are more likely to describe the education system in their country as poor than good, the inaugural Ipsos Global Education Monitor has found. However, attitudes vary considerably between countries.

Singapore is the most positive country, with three in four (74%) saying their education system is good, including 27% who say it is very good. Ireland is second with 63% believing it is good and Australia third (57%).

At the other end of the spectrum, Hungary is least satisfied with the level of education their students are receiving, with two-thirds (67%) saying the standard is poor. People in LATAM also have particularly low levels of positivity on the education available in their countries. After Hungary (8%), Peru (10%), Chile (11%) and Argentina (15%) have the lowest number of people in their country who describe the education as good.

Meanwhile, when it comes to teachers, there is appreciation for how difficult the job of teaching is, with two-thirds (67%) saying teachers work hard.


However, people are divided about whether teachers get paid enough; 46% say teachers are adequately paid while the same amount disagree. Belief that teachers are paid enough is highest in India, Singapore, and Malaysia. In Argentina and Hungary, three in four say teachers are not adequately paid.

On the role of AI in the classroom, one in three (33%) think it will be positive while 18% believe it will have a negative impact. Support for AI is highest in Indonesia, with 54% saying it will be a positive addition. In Canada, the US and France, people are more likely to think AI will have a negative impact on schools. In these countries, people are also more likely to think AI should be banned in schools.

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ONE IN THREE (33%) DESCRIBE THE EDUCATION SYSTEM IN THEIR COUNTRY AS GOOD, WHILE 36% DESCRIBE IT AS POOR. ”



WHAT WORRIES THE WORLD?

Concern about crime reaches post-pandemic peak

Worry about crime & violence is now at its highest level since before the coronavirus pandemic, with one in three (32%) across 29 countries saying it is a top issue in their country.

Concern about crime now ranks second, having risen steadily since January when only one in four (26%) considered it a top issue. On average globally, concern now sits at one of its highest levels in eight years.

Following a [series of violent attacks](#), concern has risen most since last month in South Korea (up 18pts). Over four in ten (42%) consider it a top issue, a 35pt rise on February 2023 when concern for crime & violence was just 7%.

Despite rises in concerns about crime, inflation remains the top global concern for the 18th consecutive month. At the global level, almost four in ten (38%) consider it a

top worry facing their country. This is 4pt lower than the peak level of concern six months ago (42%).

Concern remains highest in Argentina (66%), with Singapore (59%) in second place after a 10pt rise since last month.

Poverty & social inequality (31%), financial/political corruption (26%), and unemployment (26%) complete the global top five biggest worries.

Globally, just over a third of people (36%) say their country is heading in the right direction. In Germany, this number has fallen to just one in four (24%) – the country's lowest score in a decade – after a 16pt drop over the past two months. This pessimism is mirrored in how Germans perceive the country's economy: 36% describe it as "good", Germany's lowest recorded score.

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FOLLOWING A SERIES OF VIOLENT ATTACKS, CONCERN ABOUT CRIME HAS RISEN MOST SINCE LAST MONTH IN SOUTH KOREA (UP 18PTS). ”



UNLOCKING THE VALUE OF REPUTATION

The link between corporate reputation and business efficiency

Reputation is the grease on the wheels of industry. Building trust gives companies an advantage in telling their story in times of crisis, marketing their products efficiently, and turning stakeholders into advocates.

Drawing on data from our latest 24-country Global Reputation Monitor, this paper explores the relationship between a good reputation and better business efficiency.

Globally, people are generally willing to give companies the benefit of the doubt in a crisis (21% definitely and 49% probably). This willingness is tightly linked to overall trust; as trust increases, so does the potential for support in challenging times. Among people who trust a company a great deal, 51% say they would definitely give that company the benefit of the doubt in a crisis.

Among people who are feel neutral towards a company, that percentage shrinks to just 10%.

Trust also has an enormous impact on advertising and product use. Consumers are more likely to engage with and act upon advertising from the companies they trust. Trust also positively impacts buyers' feelings towards a company's products/services and their willingness to pay a premium.

For corporate communications professionals, the value of being trusted is clear. The benefits from increased marketing efficiency and consumer engagement, and the value of nurturing deep reserves of goodwill, represent a strong business case for investing time, money and resources into the actions and messaging that will help to foster trust.

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BUILDING A STRONG REPUTATION TO GAIN BENEFIT OF THE DOUBT IS CRUCIAL IN ALL SECTORS, ESPECIALLY HIGH RISK ONES. ”



EMOTIONS AROUND THE WORLD

A cross-cultural framework for emotion measurement

In collaboration with academic partners and building on insights gleaned from decades of research within cognitive sciences and neuroscience, Ipsos has developed the Ipsos Emotion Framework. This innovative framework is designed to capture emotional responses across diverse cultures and languages.

The framework is built around three essential dimensions:

- 1. Valence**, showing whether an emotional response is positive or negative.
- 2. Arousal**, defining the intensity of an emotional response.
- 3. Control**, revealing the degree of influence a person feels they possess in a situation.

One of the defining features of the framework is its robust cross-cultural database. Emotion needs to be understood and interpreted through a multicultural lens. This crucial aspect is front and centre of the framework, offering an invaluable tool for global organisations to discern and appreciate the cultural nuances of emotional responses.

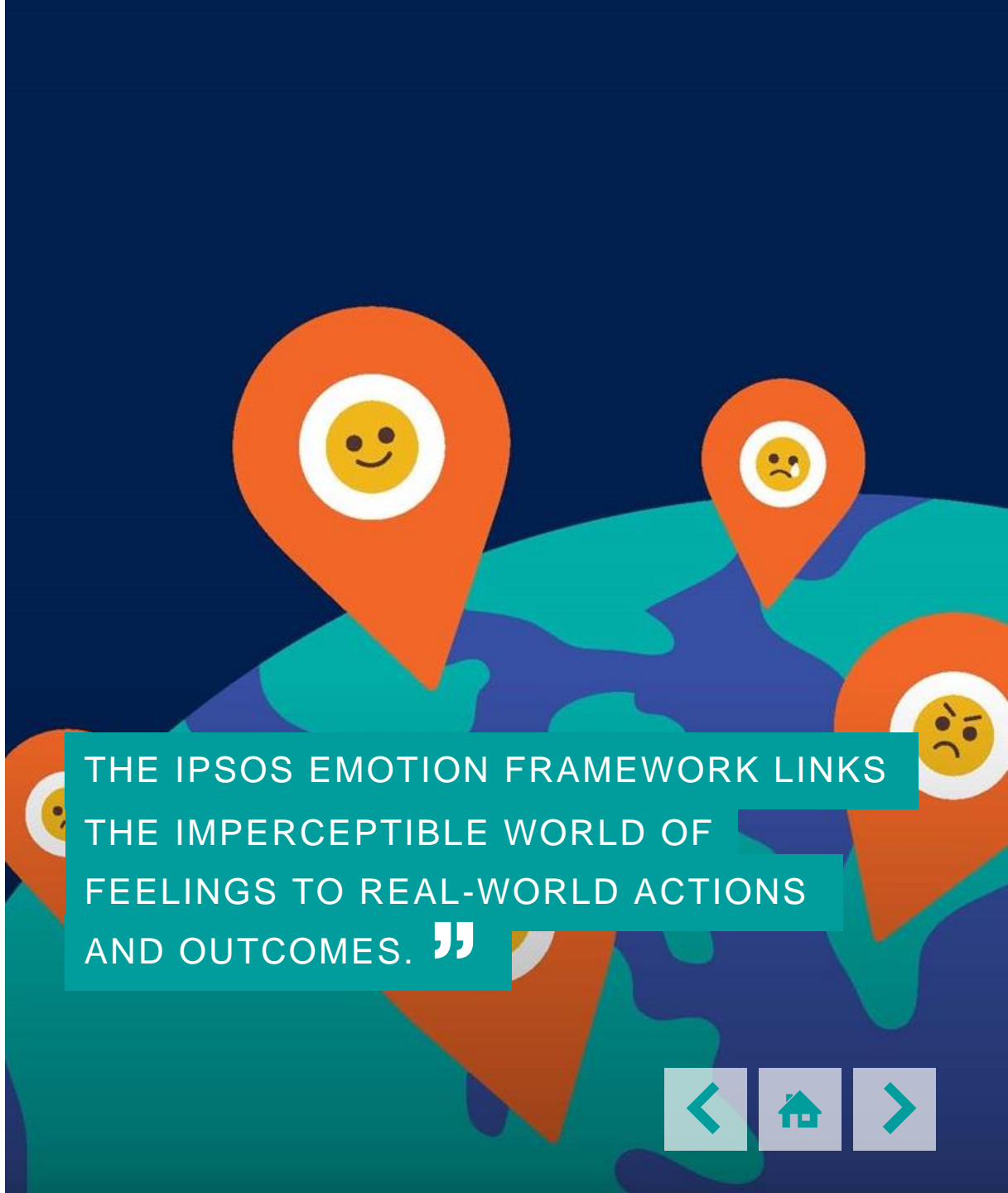
Furthermore, the framework has found successful applications in varied real-world scenarios, for example, from enhancing customer experiences to boosting advertising impact.

It is also scalable and cost-effective. Moving beyond the constraints of traditional research methods, the approach makes emotion measurement not merely possible but also feasible for a broad spectrum of organisations, ultimately delivering core insights into human behaviour and decision-making.

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THE IPSOS EMOTION FRAMEWORK LINKS
THE IMPERCEPTIBLE WORLD OF
FEELINGS TO REAL-WORLD ACTIONS
AND OUTCOMES. ”



GLOBAL HEALTH SERVICE MONITOR

Mental health now the world's top health concern

Across 31 countries, people consider mental health to be the top health concern facing their country. Since the first edition of this survey in 2018, worry about mental health has increased by 17pts, up to 44%. Concern about stress (30%) is also on the rise and it now ranks third behind cancer (40%).

On average globally, just under one in two people (48%) describe the healthcare system in their country as good. But this global average hides a 57-point difference. Seven in ten people rate the quality of their healthcare as good in Singapore (71%) and Switzerland (68%) but this falls to fewer than two in ten in Poland (14%), Hungary (15%) and Peru (16%).

Over the past five years, there has also been a steady rise in the proportion of people saying the healthcare system in

their country is overstretched. A global country average of 62% – and a majority in 25 countries – now agree with this, up from 54% in 2018. This rises to more than eight in ten in France (82%) and Britain (81%).


Despite this, trust in healthcare remains stable. One in two globally (51%), trust their country's healthcare system to provide them with the best treatment. Hungary stands out as an exception: almost seven in ten (68%) **do not** trust they will receive the best treatment.

A third globally (35%) do not believe that their country's healthcare system provides the same standard of care to everyone. More than one in two people share this sentiment in Hungary (68%), Chile (58%), Poland (55%), Ireland and South Africa (both 51%).

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THERE HAS ALSO BEEN A STEADY RISE IN THE PROPORTION OF PEOPLE SAYING THE HEALTHCARE SYSTEM IN THEIR COUNTRY IS OVERSTRETCHED. ”



GLOBAL INFRASTRUCTURE INDEX

Citizens recognise infrastructure's 'double dividend'

The 2023 edition of the Global Infrastructure Index, carried out in collaboration with the Global Infrastructure Investor Association, finds a continued sense that infrastructure provides a 'double dividend', boosting the economy and combatting climate change.

Across 31 countries, seven in ten people (69%) agree that investing in infrastructure will create new jobs and boost the economy. A global country average of 59% – and a majority in most countries – think infrastructure can also make an important contribution when it comes to tackling climate change.

However, citizens are largely dissatisfied with delivery, with almost six in ten (57%) saying their country is not doing enough to meet its infrastructure needs and four in ten (44%) rating ten infrastructure sectors as being fairly or very poor.

Sentiment varies considerably between countries, with a 65-percentage point difference between the countries who are most and least satisfied with the overall infrastructure in their country. Three-quarters of people (74%) in Singapore say they are satisfied with the country's overall infrastructure compared with just one in ten (9%) in Romania.

Ratings also vary between individual infrastructure sectors, with positive perceptions much higher for airports (68% on average describe as good) than for electric vehicle charging infrastructure (32%) or flood defences (30%).

On average globally, people still think that the environmental impact of infrastructure investment should be prioritised over the impact on the economy (47% vs. 29%) but this preference has weakened since 2021.

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CITIZENS ARE LARGELY DISSATISFIED WITH DELIVERY, WITH ALMOST SIX IN TEN SAYING THEIR COUNTRY IS NOT DOING ENOUGH TO MEET ITS INFRASTRUCTURE NEEDS.”



MAKING THE CASE FOR THE OFFICE

Employee experience of hybrid working

New research from Ipsos Karian and Box provides empirical analysis into the impact that hybrid and remote working are having on employee experience, workplace culture and performance.

Based on a sample of 1,400 full-time UK office workers, the report highlights that while most employees do not want to work full-time in the office, spending three days a week there strikes the right balance for both workers and their employers.

Other key findings include:

- Employees who spend **three days a week in the office** are more likely to have career development conversations with their manager and generate new ideas.

- Just over half of full-time office workers (53%) are currently spending their **preferred number of days** at their employer's location.
- **36%** of office workers who work remotely report feeling **under constant strain at work**, compared to 45% of those who work hybridly and 40% of those who spend all their time at a company location.
- **53% of 18–24-year-olds** report feeling **always or frequently lonely** if they work less than three days a week in the office.

As other studies have shown, employees reported commuting time and costs as the biggest barriers to being in the office more often.

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BETTER WORK-LIFE BALANCE AND SAVING FROM THE COST OF COMMUTING ARE AMONG THE BIGGEST BENEFITS OF WORKING FROM HOME.”



SHORTCUTS

EPA Digest: ESG

The ESG edition of the Ipsos European Public Affairs (EPA) digest shares insights and perspectives from Ipsos' latest work across the EU and beyond. Topics include:

- How businesses can live up to consumer expectations with regard to ESG.
- Using behavioural research and analysis to better understand consumer attitudes towards ESG matters.
- Whether SMEs across the EU, neighbouring countries and the US are meeting the resource efficiency challenge.
- Environmental sustainability in the food supplements sector and how small, medium and multinational companies are responding to new requirements.

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A Woman's Worth

The first volume of Ipsos and Effie UK's Dynamic Effectiveness reports demonstrates the commercial upside for showing a woman's worth.

In Great Britain, 29% of people agree that the main role for women in society is to be good wives and mothers. Alarming, this figure is on the rise, especially amongst 16–24-year-olds. While we can point to phenomena like Andrew Tate or the 229.8M views for #Tradwife on TikTok driving a trend for traditional roles, marketing has done its fair share to reinforce gender bias. Of the ads tested in our database, 58% feature women in traditional roles.

Yet, evidence shows that featuring women in more diverse roles has a commercial upside. Ads with women in non-traditional roles are significantly more likely to score higher on the Gender Equality Measure®, and subsequently are 24% more likely to drive short term sales and 28% more likely to drive brand equity.

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Poverty and Precariousness

Almost a third of Europeans (29%) say they are currently in a precarious financial and material situation, according to the European Barometer on Poverty and Precariousness conducted by Ipsos for French Secours Populaire. Apart from those in precarious situations, the majority of Europeans (56%) say they are getting by, but need to be careful, with only 15% claiming to be in a good situation.

The purchasing power situation of Europeans is still worrying in 2023. More than one in two Europeans surveyed say that their purchasing power has declined over the last three years (55%). This situation is particularly acute in Greece (64%), Serbia (63%) and France (60%).

This drop in purchasing power has a clearly identified cause. Of those who have experienced such a fall, 89% cite rising prices as the reason, well ahead of a fall in income linked to their activity (24%) or new expenses (23%).

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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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