

IPSOS UPDATE

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

March 2024

IPSOS UPDATE MARCH 2024

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

The year may still be young, but so much of the latest data is revealing familiar patterns. Consumer confidence is down in six out of seven G7 countries (Japan being the notable exception). February has seen record heat levels broken at weather stations all around the world. And the public remain rather unsettled by what they see all around them.

Take a dive into our new Populism survey. It finds a majority in 21 out of 28 countries saying that “society is broken”. Two in three believe their country’s economy to be rigged in favour of the rich and powerful. And, in this bumper election year, half say that what’s needed to fix things is a strong leader willing to break the rules.

Donald Trump is one politician who could be set to capitalise again on this widespread “system is broken” feeling. Our US election special takes us through the latest evidence, with a number of indicators now pointing to a Trump second term. But many uncertainties remain. If the US economy continues to perform well, Biden’s fortunes may rise. And the prospect of having two previous occupants of the White House adds to the mix. The American public may be famously divided, but there is one thing they do agree on: 59% say both Trump and Biden are “too old” for another term as president.

Meanwhile, our annual Ipsos Reputation Council Report sees us take a look at how senior communicators in some of the world’s largest organisations view things right now. Geopolitical uncertainty, polarisation and culture wars top the list of what keeps them up at night.

As with our research among the wider public, communication pros display a degree of wonder about all things AI (87% say it will fundamentally transform the way businesses operate) alongside a good deal of anxiety. Eight in ten Reputation Council members say existing ethical practices in their business are simply “insufficient” in the world of AI.

Corporate communicators are also feeling increasingly stressed about fake news and disinformation, with 74% now saying it poses a material threat to their business, up ten points on last year.

Against this backdrop, we hope that the material presented here – from how to conduct accessible UX to our new research on the power of out-of-home advertising – provides useful and reliable information to guide you in your own work.

For all of us involved in commissioning, conducting and using surveys, the imperative to pay attention to design and detail is as strong as ever these days. For a worked example, take a look at how our new research, taking inspiration from a famous UK TV series, illustrates the importance of question ordering, framing and wording. [Yes, Prime Minister](#), questionnaire design matters!

As ever, we’ve provided short summaries on each of our featured topics, together with links to the full reports if you’d like to go deeper. Do get in touch if you want 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.

CANADA: People are divided on whether Ukraine should keep fighting (39%) or settle with Russia (30%).

FRANCE: Two-fifths (40%) of 11–15-year-olds say that school bores them.

ECUADOR: Four-fifths (80%) trust the military, considering it essential to security.

CHILE: 77% believe recent wildfires were caused on purpose.

GREAT BRITAIN: 53% of Scots support Scottish independence.

EGYPT: 93% have sensed an increase in prices in the past six months.

PAKISTAN: 70% of youth say they will vote in upcoming elections.

IN THIS EDITION

POPULISM IN 2024

Widespread anti-elite sentiment

Ahead of the biggest election year in history, our new 28-country survey finds widespread suspicion of elites, anti-establishment sentiment and a feeling that the system is broken.

WHY ACCESSIBLE UX MATTERS

Tips for delivering a great user experience

Accessibility in user experience (UX) is moving from a 'nice to have' feature to a necessity for brands and organisations. Remember, accessible UX is good UX.

THINKING OUTSIDE THE BILLBOARD

Unlocking the potential of out-of-home advertising

Out-of-home (OOH) advertising has the potential to deliver greater reach than other major media channels, yet it remains unexplored terrain for many advertisers.

REPUTATION COUNCIL 2024

Latest thinking in corporate reputation management

This definitive report aims to understand the issues facing communicators and looks at the key trends today, like AI, global vs. local communication and corporate sponsorships.

WHAT WORRIES THE WORLD?

Inflation top for 23 consecutive months

However, worry over rising prices has now been falling for four successive months. Meanwhile, concern about military conflict has overtaken terrorism.

FROM CHAOS TO CLARITY

Portfolio strategy against economic uncertainty

The pandemic, inflation, geopolitical issues, market disruptions, and climate crisis are creating an economic storm. This paper outlines how businesses can navigate these tumultuous times.

LOVE LIFE SATISFACTION

Millennials most satisfied with their romantic/sex life

On average across 28 surveyed countries, a clear majority of those surveyed expressed happiness in their relationship. However, there are some outliers who aren't so content.

US ELECTION SPECIAL

Polling for the upcoming election

A collection of the most recent research from our teams in the US, on what's set to be a potentially divisive election. Delve into America's polling on the hottest issues.

POPULISM IN 2024

Widespread anti-elite sentiment

Ahead of the biggest election year in history, with half of the world's population taking to the polls, our global survey finds widespread suspicion of elites, anti-establishment sentiment and a feeling that the system is broken.

Across 28 countries, almost six in ten (58%) say their country is in decline. This rises to more than seven in ten in South Africa (72%), Netherlands and Sweden (both 71%).

In almost all countries surveyed, more people agree than disagree that their country's society is broken (57% vs 19% on average globally). South Africa again tops the table, with 76% expressing the view their society is broken, followed by Sweden (73%) and Hungary (69%). At the lower end of the table is Singapore, a notable outlier at just 27%.

On average globally, more than six in ten say that their country's economy is rigged to advantage the rich and powerful (67%), that traditional parties and politicians don't care about them (64%) and that the political and economic elite don't care about hard-working people (67%).

In comparison to the other countries surveyed, South Africa and Thailand are more likely to agree with these statements. In contrast, people in Singapore, the Netherlands and Sweden are consistently among the least likely to agree.

Globally, attitudes towards immigrants and immigration vary widely. More than seven in ten in Türkiye (77%) and India (75%) agree that their country would be stronger if it stopped immigration – but fewer than one in five agree with this in Japan (16%) and South Korea (19%).

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IN ALMOST ALL COUNTRIES SURVEYED, MORE PEOPLE AGREE THAN DISAGREE THAT THEIR COUNTRY'S SOCIETY IS BROKEN.”



WHAT WORRIES THE WORLD?

Inflation is the top concern for 23rd consecutive month

Around a third (34%) choose inflation as a top concern in their country. This number has been decreasing for the last four months, now reaching its lowest point since May 2022 (when it was also mentioned by 34%). This time last year, worry about rising prices had reached its peak at 43%.

However, some parts of Europe are witnessing an increase in worry about rising prices. Concern in Belgium has now reached just over a third (34%), after a month-on-month increase of 10pp. Great Britain is also up by 7pp to 40% and France, too, is up by 4pp to 44%. However, Poland (46%) has reached their lowest level of worry since December 2021, when it was 47%.

Three in ten (30%) across 29 countries choose crime & violence as a top worry in their nation, up slightly from last month. In a month which saw [Ecuador declare war on gangs](#), five of the six Latin American countries on our list have crime as their primary concern. Seven in ten (69%) Chileans mention crime & violence, up 5pp from March: the highest level of worry for the

nation in our records.

Military conflict between nations has risen in our rankings from 13th to 11th this month, after the proportion mentioning it marginally increased. It now ranks ahead of terrorism.

Israel's level of worry over conflict remains elevated and continues to rise from last month. This month sees 45% considering it as a top concern, up 4pp.

February 24 marks two years since Russia's invasion of Ukraine. Across Europe, we have seen the level of concern about military conflict between nations increasing. This is most notable in Great Britain (20%) which is up 11pp on last month. The Netherlands (19%) has increased by 8pp, Poland (29%) by 6pp, Germany (20%) by 5pp, and France (11%) has risen by 4pp.

Additionally, read the latest [Consumer Confidence Index](#), which is used to track our economic indicator in this survey.

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UNEMPLOYMENT IS NOW
INDIA'S TOP CONCERN
AFTER MARGINALLY RISING
TO TWO-FIFTHS (40%).”



WHY ACCESSIBLE UX MATTERS

Tips for delivering a great user experience

Accessibility in the user experience (UX) journey is an area that is moving from 'nice to have' to 'must have' for brands and organisations.

Providing accessible design for people with disabilities, including the world's ageing population, is a growing market – one in six people globally are estimated to experience disability.

People with disabilities have considerable purchasing power, so inclusive design can significantly increase a brand's market share while demonstrating its commitment to diversity and inclusion. In addition, accessible UX simplifies the user experience and appeals to a wide range of users, as demonstrated by features such as speech-to-text technology and hands-free voice control.

In this paper, our Ipsos UX team draw on their rich experience in conducting user testing with people who use assistive technology, discussing:

- Why accessible UX is so important, including three key reasons to make it a priority.
- What things to consider when designing to support assistive technology.
- Advice for conducting accessibility research and how to make it successful.
- How to get started with accessible UX.

We also present a recent case study on the online job search experience for users with disabilities, highlighting common barriers in website design, navigation and language.

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WHEN WE TALK ABOUT ACCESSIBLE UX, WE ARE MOSTLY REFERRING TO MAKING AN EXPERIENCE ACCESSIBLE TO PEOPLE WHO USE ASSISTIVE TECHNOLOGY. ”



FROM CHAOS TO CLARITY

Portfolio strategy against economic uncertainty

The pandemic, inflation, geopolitical issues, market disruptions, and climate crisis are creating an economic storm, causing global anxiety among consumers and potentially leading to recessions.

Even during periods of economic downturn and slow growth, Ipsos research suggests that consumers are still receptive to innovation during tough times, as their status quo and behaviour significantly shift.

We have found that innovations introduced during crises or periods of higher inflation had a greater rate of success, emphasising the importance of continuous innovation, despite perceived affordability challenges.

Indeed, personal changes and disruption – like those experienced during the Covid-19 pandemic – have a big impact on consumer behaviour. Rapid adjustments

during a crisis provide opportunities for adaptive marketers.

Economists agree that an impending downturn will affect consumers in varied ways, with inflation driving stockpiling and recessions disproportionately impacting lower socio-economic groups.

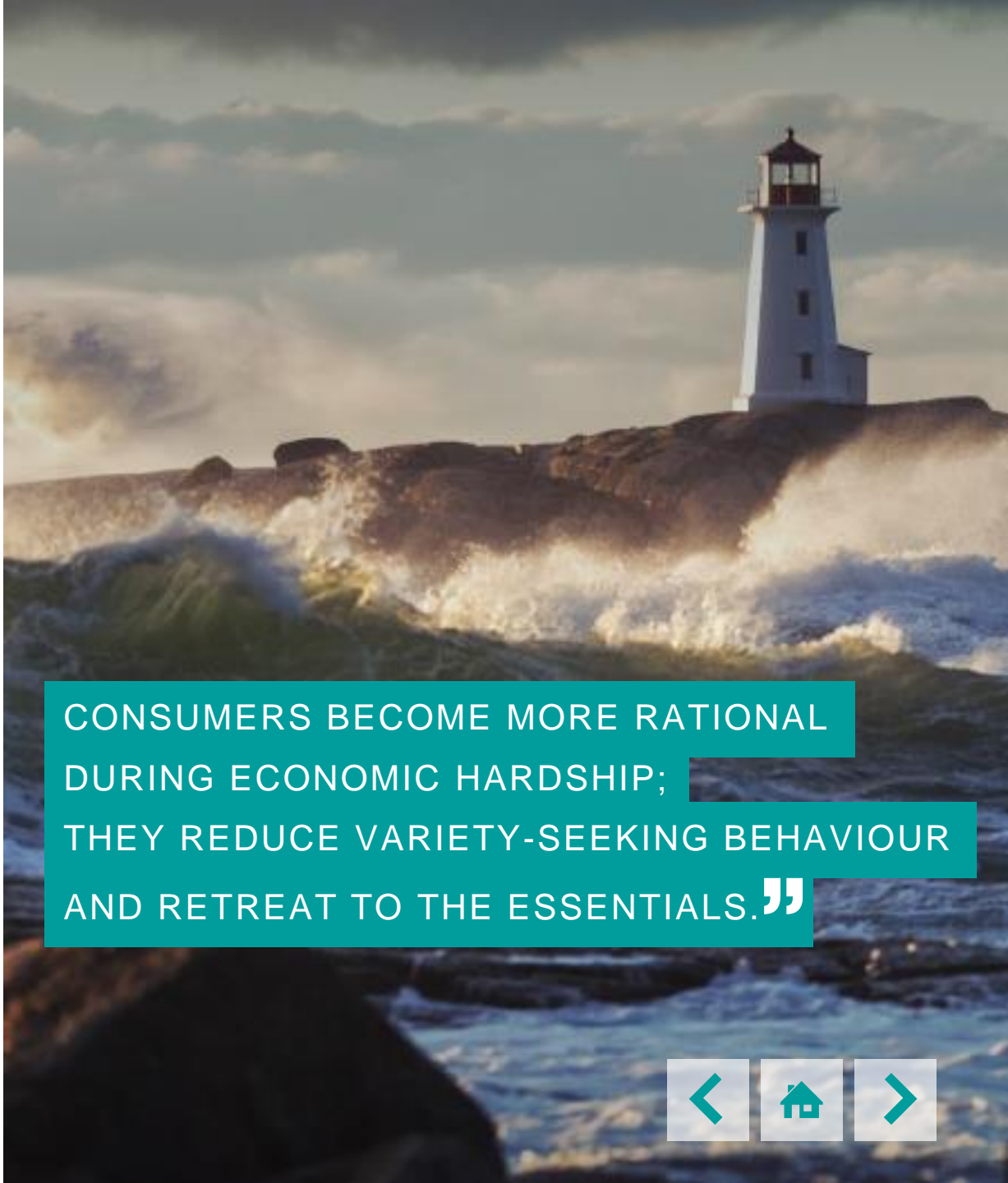
During economic downturns, premium brands can employ strategies like emphasising product superiority, affordable indulgences, and launching 'fighter variants'. Innovation during these times can strengthen brands.

Forward-thinking marketers are turning challenges into opportunities, using tools for growth strategies. Newly formed consumer habits, like online shopping, present opportunities. Marketers should also identify and quickly seize transient opportunities in their evolving competitive landscapes.

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CONSUMERS BECOME MORE RATIONAL DURING ECONOMIC HARDSHIP; THEY REDUCE VARIETY-SEEKING BEHAVIOUR AND RETREAT TO THE ESSENTIALS.”



THINKING OUTSIDE THE BILLBOARD

Unlocking the potential of out-of-home advertising

The potential for creativity in advertising seems boundless, yet out-of-home (OOH) often finds itself overshadowed by other media channels in campaign planning. OOH has the potential to deliver more reach than other major media channels, yet it is unexplored terrain for many advertisers.

OOH advertising presents a remarkable opportunity for brands to connect with their target audience in a dynamic and impactful manner. And contrary to the perception of it being a declining medium, digital OOH advertising is experiencing growth and remains a powerful channel to reach consumers.

To unlock the potential of OOH advertising, we must better understand the experience it delivers to the audience and how this has the potential to increase end sales for brand growth.

By thinking outside the traditional advertising box, brands can captivate audiences and create memorable experiences.

The key lies in leveraging the unique characteristics of OOH, such as strategic ad placements, eye-catching visuals, and engaging storytelling.

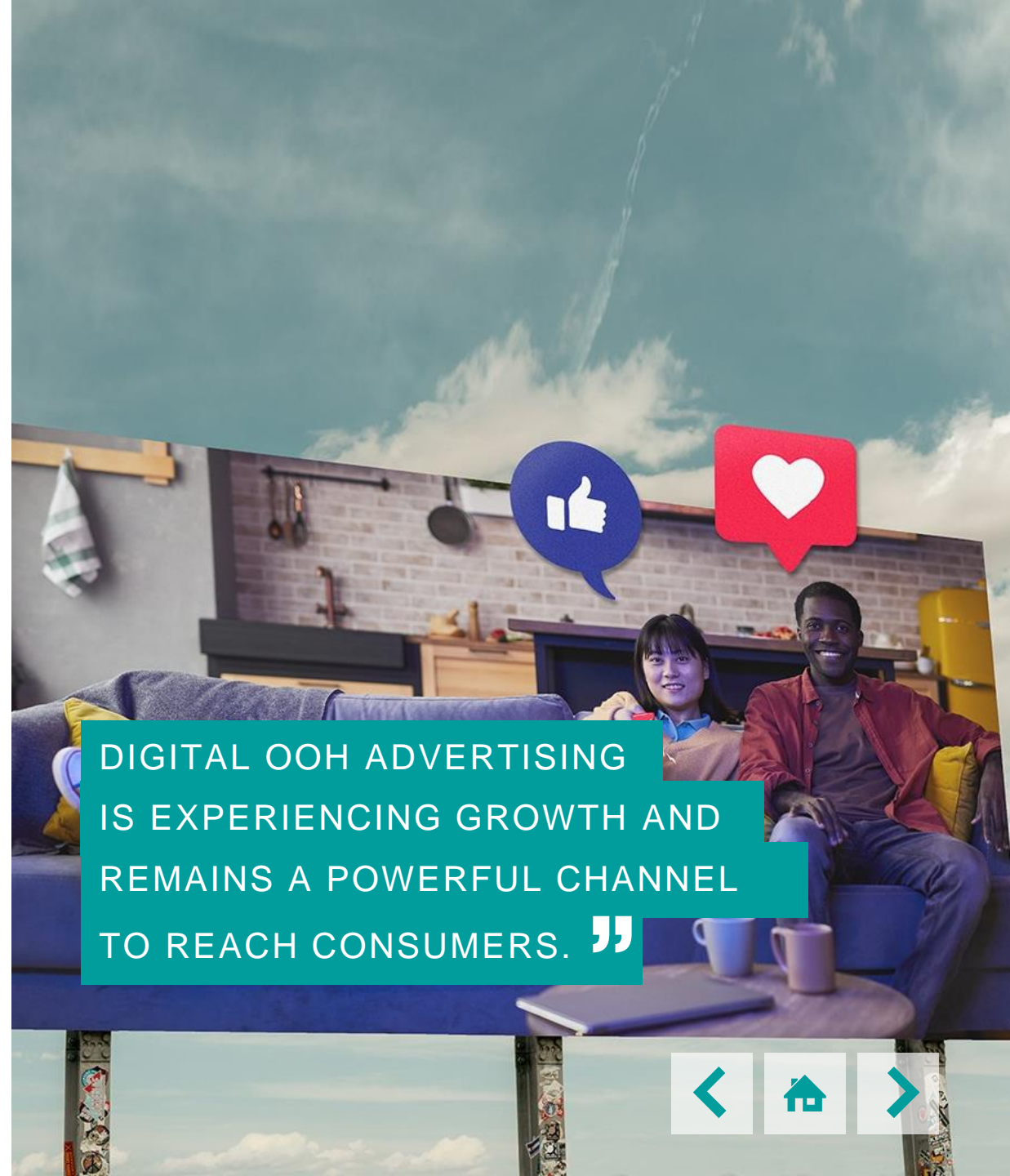
The creative power of OOH sits in crafting compelling narratives, leveraging the environment, and seamlessly integrating with the surroundings to create an immersive and unforgettable brand experience.

Thinking outside the billboard outlines how leveraging a brand's distinctive assets, having a clear message and being empathetic, can help unleash the full potential of OOH.

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DIGITAL OOH ADVERTISING
IS EXPERIENCING GROWTH AND
REMAINS A POWERFUL CHANNEL
TO REACH CONSUMERS. ”

LOVE LIFE SATISFACTION

Millennials most satisfied with their romantic/sex life

Ipsos's annual Global Love Life Satisfaction survey finds a strong majority (83% on average across 31 countries) of those who are in a romantic relationship say they are happy with their spouse/partner.

Married/partnered people in Thailand (92%), the Netherlands (91%), Indonesia (88%), Malaysia (88%), Peru (88%) and New Zealand (88%) are the most likely to be satisfied with their spouse/partner. While those in South Korea (68%), Japan (69%) and Italy (72%) are the least likely to say they're satisfied with their spouse/partner.

Money may not buy love but those with more income are slightly more likely to report being satisfied with their relationship than those with less money. At a global level, people in higher-income households are the most likely (85%) to say they're satisfied with their

spouse/partner, followed by those in 82% in medium-income households and 78% of respondents in lower-income households.

Love – whether it's familial, platonic or romantic – makes the world go round and most (74% on average globally) say they're satisfied with how loved they feel. People in Colombia (86%), Peru (86%) and India (84%) are the most likely to be satisfied with feeling loved, while those in Japan (51%), South Korea (63%), Italy (63%), Brazil (68%) and Sweden (68%) are the least likely to be satisfied with feeling loved.

On a down note, almost one in three (30% on average globally) say they're not satisfied with their romantic/sex life. On the upside, the majority are satisfied (62%) while the remaining 8% prefer not to say.

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THOSE WHO ARE MARRIED/PARTNERED ARE SIGNIFICANTLY MORE LIKELY TO BE SATISFIED WITH FEELING LOVED COMPARED TO THOSE WHO ARE NOT (82% VS 68%). ”



IPSOS REPUTATION COUNCIL REPORT 2024

Latest thinking in corporate reputation management

The Ipsos Reputation Council is a definitive guide to the latest thinking and practice in corporate communications and corporate reputation management, from senior communicators at many of the world's most respected companies.

The corporate affairs function has two fundamental objectives – to protect and to promote a company's reputation.

In this report, featuring contributions from 135 senior corporate communicators across 23 global markets, we explore the role of the corporate communicator and learn how their roles are evolving. We also discuss how the imperatives of protecting and promoting organisational reputation are being tested in a variety of ways, including; rapidly evolving technological advancements, the challenges of business acquisitions, the potential

pitfalls of corporate sponsorship and the balance between global and local communications.

The report offers valuable insight into how Generative AI can potentially transform businesses and stakeholder engagement. Despite the benefits, it also warns of risks such as data security breaches.

In addition, it highlights the growing importance of communications during mergers and acquisitions, with two-thirds of Council members being fully involved in developing associated strategies. It further delves into the pros and cons of corporate sponsorship and the process of selecting the right partner. Lastly, it discusses the balance between stakeholder engagement in local markets and consistent messaging through one corporate voice.

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85% STRONGLY AGREE IT IS IMPORTANT FOR CORPORATES TO HAVE A LONG-TERM COMMITMENT TO THE LOCAL MARKETS IN WHICH THEY OPERATE.”



US ELECTION SPECIAL

A divisive election for the biggest economy in the world



2024 is going to be the year of elections, with over 50 scheduled to take place across the globe. The United States of America general election, however, is one that attracts particular attention.

Incumbent Joe Biden is most likely going to face former President Donald Trump for what's potentially going to be a tumultuous re-election.

At Ipsos, we're going to be keeping a keen eye on all things election. Stay up-to-date on the latest US opinion polls – everything from approval ratings, consumer behaviour, public health, the environment and more!

LATEST US OPINION POLLS

We regularly update the latest results of US polling on voting intention, economic attitudes, consumer behaviour and more.

Find out the latest [here](#).

THE INSIDE TRACK – WEBINAR

Join the Ipsos polling team for our regular briefing on the data and trends transforming the country.

Register for the webinar [here](#).

CONTEXT & MEANING – RECORDING

After two contests, former President Donald Trump will most likely win the Republican nomination which begs the question – Trump vs. President Biden – who will win?

[Watch](#) our experts discuss the 2024 election.

ELECTION FORECAST: DOS & DON'TS

Our experts lay out five key factors that are (and aren't) worth paying attention to in the upcoming election.

Read [here](#).

IPSOS US



SHORTCUTS

Influential Brands in Canada

Ipsos, in association with the Canadian Marketing Association, Globe Media Group, and Publicis, have announced the 2023 Most Influential Brands in Canada report: a data-driven analysis of Canada's most impactful brands and the dimensions that contribute to their influence.

In order to decide who is the most influential brand, the report tracks six dimensions: trustworthiness, engagement, corporate citizenship, presence, leading edge and (newly added) empathy.

With a digital ecosystem trusted by millions and groundbreaking implementations of AI technology, Google took the #1 slot for the 12th consecutive year in 2023. The runner-up, Amazon, had an influential 2023 thanks to massive reach and best-in-class operational capabilities.

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ESG in Life Sciences

While certain business sectors are perceived as having a heightened obligation to diminish their environmental footprint, no industry can evade the necessity to act responsibly.

Life sciences companies, encompassing pharma, biotechs, device/diagnostics manufacturers, and others, are already actively developing and implementing policies to improve their ESG profile, but most initiatives are happening at the organisational level. The emphasis must now expand beyond mere "philanthropy" towards a comprehensive reassessment of operational methods across the entire value chain.

In this paper, we explore how life sciences companies can go beyond the organisational level and apply their ESG strategy to individual brands. We also address how doing so with authenticity can serve as an additional factor driving brand success.

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Impact of Covid on Mental Health

Mental illness among teens and young adults has been an increasingly prevalent issue, observed to have been exacerbated by Covid-19. In fact, over the course of the pandemic, youth anxiety and depression doubled globally.

The World Health Organization (WHO) reports that the prevalence of anxiety and depression increased by 25% worldwide during the first year of Covid-19, and that young people were most severely affected. Further, the waning of the pandemic has not led to a return to pre-pandemic levels.

These troubling statistics prompted Ipsos US to explore the experience of mental illness among the younger American population (with focus on ages 13 to 24), how youth mental health conditions have evolved since the start of the pandemic and, most importantly, what these potential impacts could mean for the future as we adjust to a post-pandemic world.

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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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