

July 2024

# IPSOS UPDATE

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



# Ipsos Update July 2024

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

I'm writing these notes having just returned from the [Cannes Lions International Festival of Creativity](#) – a unique gathering of experts from our clients and partners around the world. It's a great opportunity to take stock, learn from success and debate tomorrow's challenges. We enjoyed meeting many clients and friends on the beach with RTL and we will be back next year!

The Cannes proceedings included a preview of our new Ipsos Global Trends Report, now marking its 10th anniversary. The 2024 edition includes 14 key trends such as *globalisation fractures, segmented societies and technowonders*; 57% of us feel technology is destroying our lives, but then again, 71% say it's key to solving our future problems! Our [Global AI Monitor](#)

finds a similar contest between the wonder and the worry of AI.

Ipsos Global Trends highlights the tension between public pessimism and personal optimism being more strained than ever, presenting opportunities for brands to understand context, display empathy and support consumers as they navigate a volatile and uncertain present. We are running briefing sessions – do get in touch if you would like one.

As we reflect on the big macro forces that will shape all our futures, the annual Ipsos/UNHCR survey for [World Refugee Day](#) provides sombre reading. The number of forcibly displaced people has reached a new record of more than 120 million, with 43 million classified as refugees. This

year's research finds public compassion towards refugees remaining strong; 73% believe in offering refuge to those fleeing war and persecution. But at the same time, 44% believe their country should close its borders entirely – reflecting widespread perceptions of overload and competition for resources – real or not.

When it comes to today's intractable global challenges, who can we turn to on the international stage to make a positive difference? Our new [Global Leadership Report](#) comparing countries and global institutions finds recognition for both the UN and the EU, while vividly charting Russia's fall from grace in the eyes of the public around the world. See how your country performs [here](#).

Elsewhere in this edition, we take a look at what people see as the causes of crime in their country – and the disconnect between [actual crime and fear of crime](#). We review the latest [consumer confidence data](#) and share a state of the nation [Ipsos Flair report on Indonesia](#), Southeast Asia's largest economy. As ever, please do contact your Ipsos team if you'd like to discuss anything in more detail.



Ben Page  
Ipsos CEO

# Poll Digest

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

### USA:

58% of women say it's important to advance in their job (vs. 73% of men).

### Mexico:

Half (49%) believe Claudia Sheinbaum's new government will bring improvements to their personal lives.

### Peru:

73% say former president, Alberto Fujimori, doesn't have the right to run for presidency again.

### Great Britain:

Just one in five (20%) would describe Britain as doing 'great'.



### Germany:

Three-quarters (73%) support compulsory national service like military service.

### France:

Two-thirds (67%) say football is a 'unifying sport'.

### Czech Republic:

Just over a fifth (22%) say they have received some kind of Deepfake content.

### India:

The defence forces are the most trusted institution, with a majority (54%) listing it.

# CONTENTS



## The New Era of Innovation

Shattering the stage gate with Generative AI.

1



## The Ipsos AI Monitor 2024

Is AI a friend or foe? Mixed outlook to the potentials of AI.

2



## World Refugee Day 2024

Enduring public support for refugees.

3



## What Worries the World?

Inflation top concern for 27 months.

4



## Global Attitudes to Crime & Law Enforcement

Crime perceived to be rising, despite contradictory data.

5



## Flair Indonesia 2024

How are sustainability, automotive and beauty shaping Indonesia?

6



## Global Leadership

Positive and negative influences on the world stage.

7



## WTF: Creativity

How AI is reshaping the ways we create, work and play.

8



# The New Era of Innovation

## Shattering the Stage Gates with Generative AI

Artificial intelligence (AI) has triggered a seismic shift in innovation development, enabling businesses to bring better products and services into our world.

This *Ipsos Views* paper introduces our philosophy for innovation with Gen AI which empowers insights functions to produce bolder innovations, with faster development cycles and smarter processes. Specifically, we explore how Gen AI:

**Shatters traditional stage gates –** Gen AI breaks down innovation silos, fostering collaboration and agility for faster, bolder innovations.

**Builds breakthroughs from barriers –** Gen AI analyses consumer data to generate business insights and smarter innovation.

**Powers insight professionals with new possibilities –** Gen AI enhances insight divisions, elevating human expertise for strategic, intelligent, and responsible innovation.

**Requires responsible AI –** Responsible AI practices are crucial for safe and transformative AI integration, especially data privacy and human oversight.

While AI advancements like video generation and quantum

computing offer boundless potential for innovation, human ingenuity remains crucial. The new era of innovation, where humans and AI work in tandem, promises a future filled with possibilities for creating extraordinary products that bring businesses even closer to consumers.

[READ MORE](#)

[DOWNLOAD](#)

[CONTACT](#)



**AI is shattering traditional innovation cycles, crashing through silos with unique capabilities to fuel new product development.**

# The Ipsos AI Monitor 2024

## Is Artificial Intelligence a friend or a foe?

This latest Monitor offers valuable insights into public perception of AI. The findings reveal a mixed outlook, highlighting both the potential benefits and concerns surrounding this transformative technology.

Nearly four in ten (37%) believe AI will enhance their jobs, while a smaller proportion (16%) fear it will have a negative impact. However, concerns about AI replacing jobs does exist, particularly among individuals with higher education levels.

AI's growing presence seems to be reflected in people's knowledge.

52% of respondents say they can identify products and services that utilise AI.

Additionally, a clear generational divide exists, at least to a degree, in terms of AI understanding. Younger people, particularly Gen Z (72%) and Millennials (71%), demonstrate greater comfort and knowledge, compared to Baby Boomers (58%).

While 53% express enthusiasm for AI-powered products and services, half (50%) also harbour concerns about its potential implications. Notably, the impact on online disinformation – 37% believe AI will

worsen the problem. Countries like Sweden, Australia, and New Zealand express a stronger belief that AI will exacerbate disinformation.

Make sure to also watch the latest [KEYS](#) webinar, which explores all things AI.

READ MORE

DOWNLOAD

CONTACT



**37% believe AI will exacerbate the problems around online disinformation.**



# World Refugee Day 2024

## Enduring public support for refugees

This 52-country report, conducted with UNHCR, takes place against a backdrop of unprecedented levels of forced displacement. More than 120 million people have been forcibly displaced globally, as of May 2024, as a result of persecution, conflict, violence, human rights violations, or events seriously disturbing public order.

This year's survey seeks to capture public understanding of the term "refugees". Overall, the large majority of people surveyed, 75% (52-country average), correctly understand the term "refugee" to mean someone who has left their

home country due to conflict, violence, or persecution or has sought and been granted asylum.

Support for offering refuge to people seeking safety from the above remains high. Almost three in four (73%) express support for offering help.

There is also significant support or 'openness' among the public to finding solutions that enable refugees to access their rights. While attitudes vary, half of those surveyed believe in refugees being able to integrate and, for example, access their full right to education. Nearly as many support their full

access to healthcare and jobs (44% and 42%, respectively). Around three-quarters (77%) express support, to a varying degree, for policies that allow refugee families to be reunited in the country of asylum.

Please note, the survey has been conducted since 2017. Countries change each year, so global country averages aren't directly comparable.

[READ MORE](#)[DOWNLOAD](#)[CONTACT](#)

**73%, on average, express support for offering refuge to those fleeing war or persecution.**

# What Worries the World?

## Inflation remains the number one concern for the 27<sup>th</sup> consecutive month

A third (33%) say inflation is one of the three biggest issues affecting their country, a slight decrease from last month. This score is 7pp lower than this time last year.

This month, a 13pp drop in concern sees Singapore fall from the most concerned country about inflation in May (59%) down to 6<sup>th</sup> (46%). This is Singapore's lowest level of concern since we added the country to What Worries the World in November 2022.

Malaysia's concern about inflation is relatively low at 29%. This is reflected in their positive economic sentiment, this month

up +11pp with 58% saying their country's economy is in a "good" state. The Netherlands and Great Britain also see large increases to their good economy score this month (both +8pp to 65% and 39%, respectively.)

Meanwhile, concern about crime and violence has risen 5pp in Germany to the country's highest level in over four years (30%, tying with February 2020).

Despite reaching a record level last month, Israel's level of concern about military conflict has now fallen 16pp to 33%. This is the lowest level of worry since the

start of the conflict in October 2023. However, it remains 16pp higher than it was a year ago.

This moves Poland to the top of our list, with just over a third (35%) of Poles concerned about military conflict.

For further context on global sentiment, make sure to check out our [Global Consumer Confidence Index](#).

READ MORE

DOWNLOAD

CONTACT



**Poland is now the most concerned country about military conflict, with over a third (35%) worried, and overtaking Israel.**



# Global Attitudes to Crime & Law Enforcement

## Crime perceived to be rising, despite contradictory data

This 31-country study tracks how people around the world see crime playing out in their communities, what they want governments to do, and how much trust they have in law enforcement.

Although crime is a key concern, the economy is front and centre. Half (50%) believe governments should prioritise job creation and economic growth over protecting local citizens' health and environment (27%), and reducing crime (24%).

While 31% on average perceive crime to be rising in their neighbourhood, according to UN

data this does not correlate with actual increases in crime (2012-2022), highlighting the "perils of perception".

Poverty and unemployment are seen as the main causes of crime and violence by 53% of respondents, followed by drug and alcohol abuse (43%) and ineffective law enforcement (37%).

Generational differences exist, with Boomers more likely to attribute crime to drug and alcohol abuse and a breakdown of traditional values, while Gen Z emphasise lack of education.

On average, 35% agree that sometimes the law must be ignored to do the right thing, while 65% believe in always obeying the law, even if it interferes with personal interests. Countries like Israel, Türkiye, and Chile show strong adherence to law and order, while Belgium, the Netherlands, and Japan are more likely to say that sometimes the law must be ignored.

[READ MORE](#)[DOWNLOAD](#)[CONTACT](#)

**31% say crime is on the rise. However, there is little correlation between perceptions that crime is rising and actual crime levels.**

# Flair Indonesia 2024

## Unstoppable?

Indonesia is the latest release in our Ipsos Flair collection, which explores the social, economic, and political context of a country. This year's edition includes chapters on:

### Sustainability

Indonesians are increasingly concerned about climate change and its impact on their lives, recognising the intersectionality of environmental issues with poverty, health, and education. The country faces challenges from rising sea levels, extreme weather events, and pollution, exacerbating inequalities.

### Beauty

Indonesia's beauty market is the fastest growing in Southeast Asia, fuelled by local brands, Korean beauty trends and a demand for halal and natural ingredients.

### Automotive

The automotive sector in Indonesia is a growing and increasingly strategic industry. But when it comes to electric vehicles, high costs and lack of infrastructure remain significant barriers, despite government promotions.

### Brands and digital

Indonesia has a rapidly growing digital economy, with a large social media user base. Consumers are increasingly discerning and price-conscious, seeking value and entertainment. Brands must adapt their marketing strategies to engage these consumers by offering affordability, empathy, and engaging content across digital platforms.

READ MORE

DOWNLOAD

CONTACT



**Sustainable transportation is a particular challenge in most cities in Indonesia as public transport is not commonly and equally available.**



# Global Leadership

## Positive and negative influence on the world stage

Russia, Iran, Israel and China rank worst for global influence, according to a new 31-country study from Ipsos in partnership with Kings College London.

Russia leads with the most negative perceptions; almost one in two (48%) say Russia mostly uses its influence for bad around the world. This is an increase of 22 percentage points since 2019.

Globally, perceptions are most divided when it comes to the US. Almost as many people across 31 countries say the United States uses its influence for good (21%) as for bad (19%). Even more say it's a bit of both (36%).

While no country has more positive perceptions of the US than the US itself, the proportion of Americans saying their country uses its influence for good has decreased significantly since 2019 (-14pp to 34%).

When it comes to views of their own country, three in ten say their country uses its influence for good on the world stage. This is highest in Indonesia, where more than one in two agree (53%).

Almost six in ten (57%) agree that the European Union offers a political and economic model they would like their country to


emulate. The EU model is most popular in Thailand (79%), Colombia (74%) and Peru (73%).

Almost one in two globally (47%) say they would like their country to emulate the American political and economic model, an increase of 7pp since 2019. Desire to follow the American model has increased most in Japan (+29pp to 59%) and Türkiye (+25pp to 54%).

[READ MORE](#)

[DOWNLOAD](#)

[CONTACT](#)



**Almost as many people across 31 countries say the United States uses its influence for good (21%) as for bad (19%).**

# What The Future: Creativity

## How AI is reshaping the ways we create, work and play

The ever-accelerating pace of AI innovation is changing how businesses generate ideas, and how they realise them. It's also making people rethink everything from intellectual property to the nature of art.

Is this a golden age or a hype cycle? Will creatives come out on top, or be out of a job? And from the culture industry to heavy industry, how can brands harness the power of these tools today without exposing themselves to risk tomorrow?

In the latest edition of our *What the Future* series, we talk

to leaders from Meta and Snap, an AI artist, an agency creative, and leading academics to get their perspectives on the philosophical and practical implications of AI for everything from marketing and entertainment to education and economics.

We uncover people's perceptions of creativity, technology, and the value of human artistry in an AI-driven world, while providing key insights for brands and agencies navigating this evolving creative landscape, including:

- Importance of creativity at work and in daily life

- Concerns about the future of creativity, media, and advertising
- Trust in AI-created advertising across industries
- Preferences for human vs AI-generated content
- Attitudes towards AI in art and education

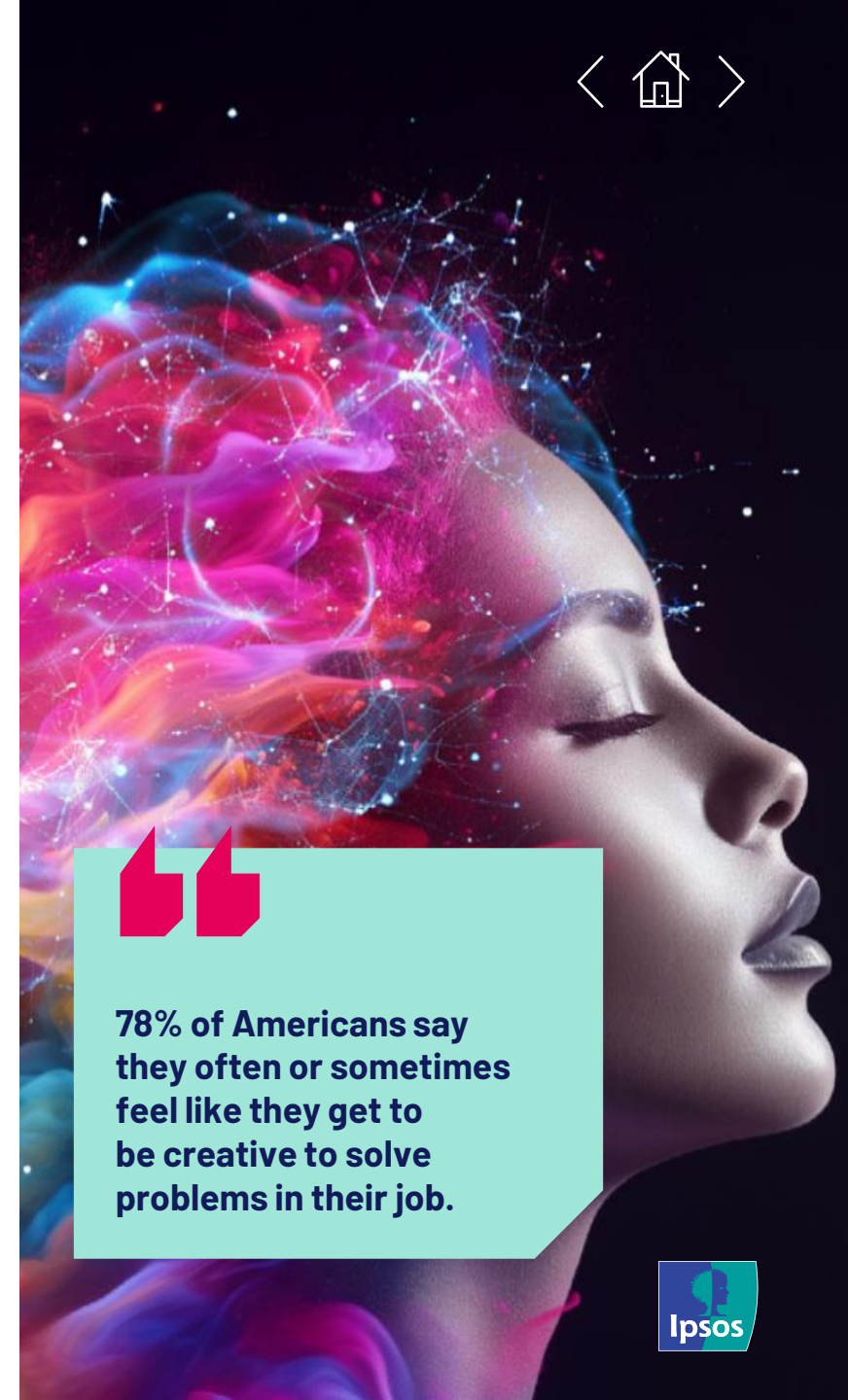
READ MORE

DOWNLOAD

CONTACT



**78% of Americans say they often or sometimes feel like they get to be creative to solve problems in their job.**





# Shortcuts



## KEYS – The Wonder & The Worry of AI

Although not as new as it is sometimes made out to be, AI has grown dramatically in recent years, driven by computing power and the use of vast amounts of data.

Our latest webinar finds us reviewing recent experiences, sharing new research and setting out key questions to keep in mind as we all explore the wonder – and the worry – of AI.

WATCH HERE



## Ipsos @ Cannes Lions 2024

Cannes Lions Festival of Creativity has wrapped up for another year but fear not! You can still catch all the insights and expert views presented by Ipsos.

Discover the program at Cannes and watch the panel discussions from those at Ipsos and industry leaders, including an introduction from Ben Page at the beach.

READ MORE



## A Dose of Digital

Can pharma make Digital Therapeutics (DTx) a healthy business?

DTx are emerging as a potential game-changer in healthcare, offering evidence-based digital interventions to help prevent, manage, or treat specific conditions.

In this paper, we present Ipsos' 5-stage framework for developing a resilient and scalable DTx business.

READ MORE



## How Electric Vehicles Incentives Can Charge the Market

The EV market in the US is set to grow this year but some are speculating that interest is slowing due to consumer concerns around cost and convenience.

We look at what policymakers need to know about public opinion to create an equitable and accessible EV market across the country and in key states.

READ MORE



# 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](mailto:IKC@ipsos.com) with any comments, including ideas for future content.

Cover photo: **Semanggi Interchange, Jakarta, Indonesia.** Find out the latest insights on the nation in our edition of Flair Indonesia, [page 10](#).

[www.ipsos.com](http://www.ipsos.com)

@Ipsos

© Ipsos

