

August 2024

# IPSOS UPDATE

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

# Ipsos Update August 2024

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

The headline of the latest World Bank assessment of the global economy is 'Growth Stabilising, But at a Weak Pace'. It notes that growth is set to underperform its 2010s average in nearly 60% of economies, comprising over 80% of the population. And it points to the downside risks when it comes to geopolitics, climate change and digital transitions.

This uncertain mood is most certainly evident in our latest opinion research. Inflation rates may be falling, but cost of living pressures are still front and centre in many people's minds – it occupies top spot our [What Worries the World](#) survey for the 28th month in

succession. Even where the economic overview may be reasonable on paper, this does not necessarily translate to a feel-good factor on the ground – just one of the many challenges President Biden had been facing in his re-election campaign.

When it comes to the American election, everything feels up in the air right now. Our [special feature](#), drawing on the latest from our US team, describes how public opinion is unfolding. With 92% of Democrats and 87% of Republicans worried that acts of violence may throw the country into chaos, this is at least one subject which Americans can agree on.

Wherever we are in the world, France will be on our TV screens for much of August as the Paris Games unfold. Our [research finds particular enthusiasm for the events](#) in China, Thailand and Indonesia, while soccer (among younger people) and athletics (among older people) are the key draws.

August is a time for holidays in many countries and our annual [Ipsos/Europ Assistance Holiday Barometer](#) continues to take the temperature of travellers around the world. Despite so many lingering uncertainties, we see the post-pandemic rebound continuing: 80% of Europeans are enthusiastic about travelling this year,

while 53% of urban Indians say they are really excited about embarking on new adventures.

As ever, we hope there is some useful and thought-provoking material in here for you. Please contact your Ipsos team with any questions, thoughts or ideas.



Ben Page  
Ipsos CEO

# Poll Digest

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

### Canada:

86% of residents in Greater Toronto and Hamilton Area agree that there is a traffic and congestion crisis in the region.

### Kuwait:

27% frequently worry about money and their financial situation.

### Türkiye:

Three in 10 (31%) young people state that they do not have enough money for social activities.

### Italy:

74% of Italians say they are interested in sustainable fashion.



### Morocco:

Two-fifths (41%) rely on word of mouth before making a brand purchase.

### Norway:

28% agree that there should be a third legal gender for non-binary people.

### Poland:

67% believe same-sex couples should be able to marry or legalise their relationship in other ways.

### Pakistan:

Half (51%) think AI will decrease future job opportunities.

# CONTENTS



## AI in Advertising Research

Humanizing AI to Spark Creativity and Brand Success.

1



## AI and the Future of CX

Designing empathetic and meaningful experiences.

2



## Attitudes to the 2024 Paris Games

People across the world see the Games as a unifying event.

3



## What Worries the World?

Inflation has been the top concern for 28 consecutive months.

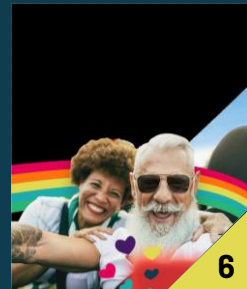
4



## WTF: Leisure

Americans want more from their free time in the future.

5



## Advertising for Better Representation

DEI initiatives not just good for society, but good for business.

6



## A Divided United States

The latest insights from Ipsos in the US on the upcoming election.

7



## Holiday Barometer

Emerging trends and changing preferences in the future of travel.

8



# AI in Advertising Research

## Humanizing AI to Spark Creativity and Brand Success

The Artificial Intelligence (AI) revolution in advertising will have a seismic impact on how ads are created and how effectiveness is measured, bringing about significant reductions in production and research costs. Yet without considered Human Intelligence (HI) these cost reductions could come at a price of creativity and effectiveness.


The advent of Generative AI means that machines powered by models can now create text, audio, images, and video with human prompting, saving significant human labour time, in turn

increasing productivity. AI tools also improve the speed and cost of measurement, with Analytical AI models able to create a near real-time cycle of creation, measurement, selection and optimization of the most effective ads.

But for all the productivity gains they may bring, AI tools also introduce the risk of drops to creativity – and by extension drops to effectiveness in terms of sales lift and market share growth.

Using insights from our AI ad evaluation solution **Creative|Spark AI**, in this paper we explore these

risks and outline a vision for how AI ad evaluation tools can be more connected to human creativity, used more widely in advertising research, and in turn, help brands to get to more effective advertising.

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**The pursuit of these AI productivity gains ... also poses a risk to the soul of advertising as we know and love it.**

# AI and the Future of CX

## Designing empathetic and meaningful experiences

Exceptional Customer Experience is no longer a luxury, but a necessity to build brand loyalty and drive growth.

Our paper explores how Generative Artificial Intelligence (Gen AI) can revolutionise experiences by balancing digital efficiency with human interaction.

When designed and managed well, Gen AI has the power to understand and respond to customer requests with true precision, as well as improve efficiency, enable personalisation, and ensure 24/7 service availability.

At the heart of experience remains the fundamental need for brands to understand people and the role they play in their lives.

We show how Gen AI can interact with Ipsos' [Forces of CX](#) framework and the six key dimensions of Fair Treatment, Certainty, Control, Status, Belonging and Enjoyment that are critical to building strong customer relationships.

We also provide an overview of our CX HI+AI toolkit, along with a clear roadmap for designing Gen AI experiences, emphasising the importance of applying the [service design approach](#), and determining

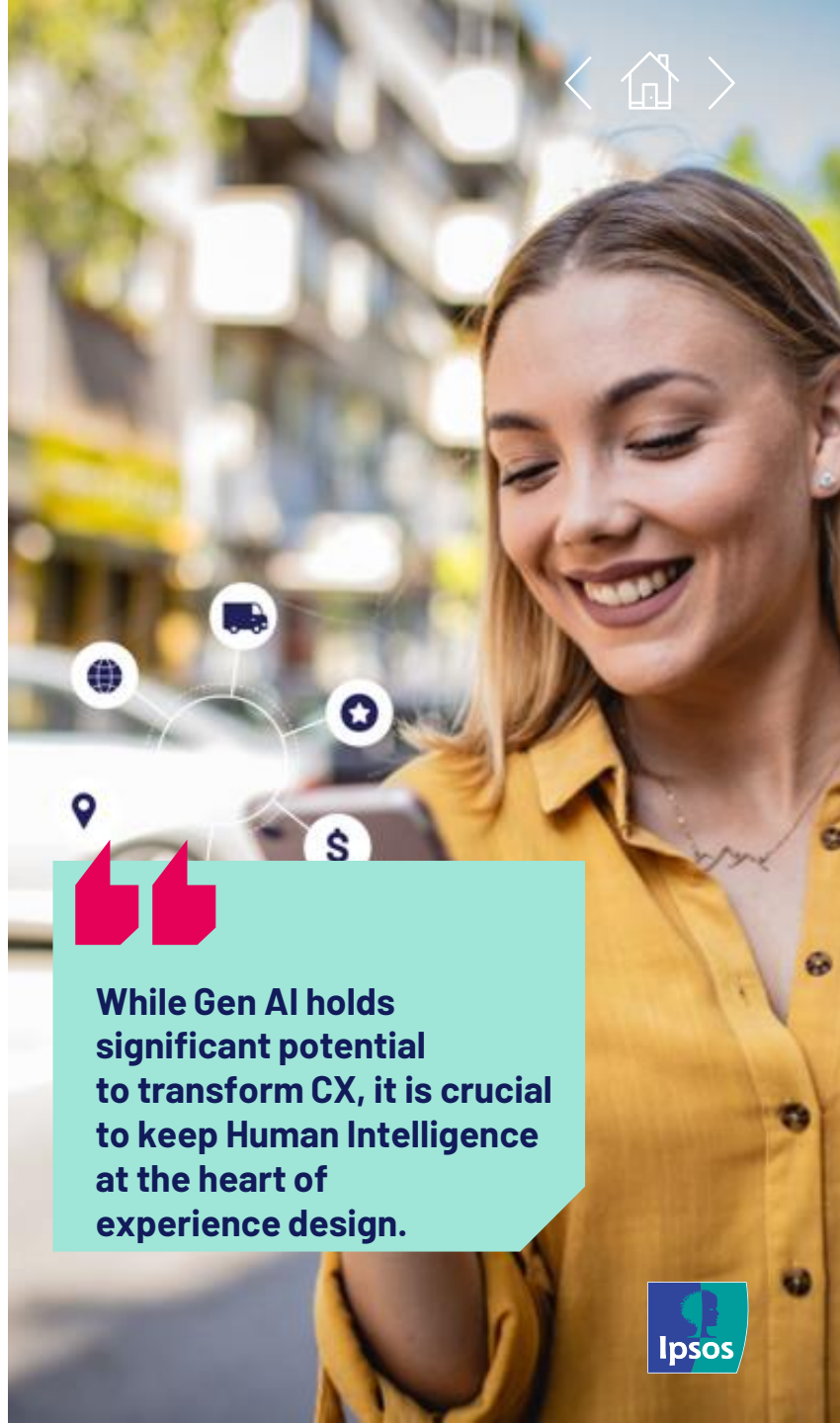
the [Return on CX Investment \(ROCXI\)](#).

Gen AI can significantly enhance how experiences are designed, delivered and measured. By embracing Gen AI to improve efficiency and effectiveness, staying attuned to customer needs, and designing empathetic experiences, organisations can successfully navigate the future of CX.

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**While Gen AI holds significant potential to transform CX, it is crucial to keep Human Intelligence at the heart of experience design.**

# Attitudes to the 2024 Paris Games

## People across the world see the Games as a unifying event

Our new global polling finds the vast majority (72% on average across 33 countries) think the Games in Paris will bring their country together and 57% say they're interested in the event. This is up from 46% who said they were interested in the lead up to the [2020 Summer Games in Tokyo, which were postponed until July-August 2021](#) due to the COVID-19 pandemic.

People in the host country, though, are notably less enthused. The French rank 28 out of 33 countries in terms of interest, with almost half (46%) of people in France

saying they're not interested. They're even lower on the list, coming in 31, when it comes to whether the event will bring their country together, with 46% saying it won't.

The run-up to the Games saw much publicity about how Parisians' day-to-day lives will be disrupted, it will [cost about €9 billion](#) and is being held amid several serious crises.

Yet, almost three in five (72%) globally and 69% of those in France agree the Games should go ahead, regardless of the world's economy and conflicts, for

example, wars in Ukraine and the Middle East, and 75% agree the event will be an important opportunity to come together.

Meanwhile, 72% agree it's important that global events like these happen despite the climate impact of travel and construction. Organisers have honed in on environmental issues this time around and claim this will be the "[greenest Games ever](#)."

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**72% agree it's important events like these happen despite the climate impact of travel and construction.**



# What Worries the World?

## Inflation remains top, albeit at a relatively low level

Inflation remains the number one concern for the 28th consecutive month, but worry is at its lowest since April 2022 – now at a third (33%) expressing concern.

There's a mixed economic outlook in the US. Worry over inflation is up for Americans this month, recording their second highest score. They've also experienced the biggest month-on-month increase in the proportion of people saying the economy is in "good" shape.

In South Africa, the proportion saying their country is headed in the right direction is at a record

high of 36% – this is the highest score since May 2020. Conversely, France's right direction score puts them second from bottom on our list after falling 11pp to 20%.

Elsewhere in Europe, Great Britain has reached a historic level of concern for healthcare this month. Increasing by 10pp to one in two (50%) Brits expressing worry, this is 11pp higher than last July and is the highest level we have seen in Britain in the last ten years.

France has also recorded its joint highest score in ten years, now at 30% saying they're worried about healthcare. The last time it

recorded a figure this high was in June 2022 (also 30%).

In the same vein, the number of Singaporeans mentioning healthcare has significantly risen this July. Worry in the country is up 18pp to 44%.

Also, take a look at the [Global Consumer confidence Index](#), where confidence in Asia-Pacific is mixed.

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**Great Britain has reached its highest level of concern over healthcare in 10 years, with a half (50%) worried.**



# What The Future: Leisure

## Americans want more from their free time in the future

Consumers have more options for leisure than ever before thanks to digital technology and new work models. But Ipsos research shows they also feel time-pressed, and how they afford and spend their leisure time hardly feels like a break.

In our always-on culture, relaxation feels out of reach. Even planning a vacation can be stressful. For businesses, this presents both a challenge and an opportunity. Consumers need leisure options that offer simplicity, ease and genuine enjoyment. There are lessons

beyond leisure itself, too. Overwhelmed people are looking for that simplicity in everything: from user- to customer-experiences.

Could new work models help us find more leisure time? Can media conglomerates create sustainable business models to produce quality TV content? How will climate change and digital technologies shape our leisure?

In What the Future: Leisure, expert academics and senior leaders from Visa, Hilton and WNDR Museum explore Americans' shifting attitudes and outlooks on

their evolving pastimes, and how climate and technology will influence everything from travel and entertainment to financial services and culture.

Register for the accompanying [webinar on the 13<sup>th</sup> August](#), where we'll interview experts from the aforementioned companies.

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**In an always-on culture, there are opportunities (and challenges) for businesses to provide leisure for hardworking consumers.**

# Advertising for Better Representation

## Creativity for all

Diversity, equity and inclusion (DEI) initiatives are not just good for society, they're also good for business. Whether measured in terms of boosting innovation, increasing cash flow per employee or resulting in higher revenue, DEI has a transformative power.

Advertisers and brands have an opportunity to tap into this power and gain real value from embracing DEI in their advertising. Not just for purpose-led and equity campaigns, but also for product and social creatives.

Advertising can play a role in connecting the audience with the

people shown on screen. However, there is a gap between who we see represented in advertising and the real-world population – particularly for seniors, people with disabilities and LGBTQ+ people.

But how can brands ensure they get representation right, avoiding stereotypes and understanding cultural differences at country levels?

In this paper, we dive into the findings of Ipsos' DEI metric, drawing on the learnings derived from Ipsos' creative evaluation solution, Creative|Spark, to demonstrate how displaying


positive and inclusive representation within advertising can lead to Brand Success.

Looking at a range of award-winning DEI campaigns, we outline the principles that marketers can adopt to increase DEI effectiveness and Brand Success, while exploring the perceived inclusivity and business returns, through a range of cases.

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**How can brands ensure they get representation right? Or ensure they get a signal that something may be off prior to going to air?**

# A divided United States

## The latest insights from Ipsos USA on the upcoming election

America's upcoming general election in November is set to be one of the most contentious elections yet. The month of July witnessed an assassination attempt on Donald Trump and the stepping aside of President Joe Biden, with Kamala Harris now in the running as the Democratic nominee.

Ipsos in the US has been keeping up-to-date with the latest polling and insights.

The latest [Reuters/Ipsos Core Political poll](#) shows that Americans are concerned with the economy, followed by political extremism

and immigration. By party affiliation, Democrats are most concerned about political extremism, Republicans are most concerned about immigration, and Independents are most concerned about the economy. The latest approval ratings puts Biden at 36%.

However, 78% of Americans, as well as 86% of Democrats, supported Biden leaving the race. About half (48%) of Americans support Harris running as the Democratic nominee. At the moment, it's too close to call between Harris and Trump, with current polling standing at [44% vs](#)

[42%, respectively.](#)

Find out more on our [US opinion polling](#), from Trump's court cases, consumer behaviour, economic attitudes to the war in Gaza.

Also, join senior colleagues from Ipsos Public Affairs US on the 21<sup>st</sup> August for the regular [Inside Track webinar](#), where they'll look at the latest data and trends.

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**The current polling shows it is too close to call between Kamala Harris or Donald Trump winning the election (44% vs. 42%, respectively).**



# Holiday Barometer 2024

## Insights into travel preferences

The 2024 Europ Assistance / Ipsos Holiday Barometer sheds light on emerging trends and changing consumer preferences shaping the future of travel, along with notable variations observed among the 21 countries included in the survey.

Key themes include:

**Travel enthusiasm remains strong:** Despite lingering uncertainties, travel enthusiasm has been rising significantly since 2022, especially in Australia but also in Europe and North America, signalling an eagerness to travel after the pandemic.

**An intense desire to escape and change scenery:** The allure of

international travel remains strong. Notably, 49% of European and 50% of North Asian travellers wish to embark on international trips this summer, indicating a pent-up demand for cross-border travel experiences.

**Navigating inflationary pressures:** Despite the constraints of rising inflation and economic uncertainty, travellers are adapting by seeking cost-effective alternatives and adjusting their spending habits.

**Balancing travel and environmental concerns:** While travellers express a growing awareness of environmental issues, their commitment to

sustainable travel practices remains nuanced. Only 18% of European travellers say that the ecological footprint of travel is a consideration.

**Emerging travel trends:** The survey identifies a range of emerging travel trends, including the rise of niche travel segments such as “workation”, slow tourism, and culinary tours.

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**Amid global uncertainty, travel emerges as a refreshing escape and a means of anxiety relief.**



# Shortcuts



## KEYS – Generation Myths & Demographic Realities

Media excitement about the idiosyncrasies of each generation is never far away. But a quick dive into the evidence reveals a more complex picture.

We explore how businesses can foster connections with diverse generational groups and take the right steps to prepare for an ageing populations.

WATCH HERE



## Brand Talk – Candidates as Brands

What happens when you apply the principles of brand success (Empathy, Context, and Expectations) to politics, and consider candidates as though they were brands?

Our Brand Talk series is back, for a very special edition focussing on the recent UK election and the upcoming one in the US.

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## The Directory

The Ipsos Knowledge Centre brings together Ipsos' latest research and thinking on a wide range of topics in The Directory.

Browse our selection of white papers, reports, podcasts and specialist publications – all providing key insights from our different markets across the world.

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## Ipsos PersonaBot

Designed to augment the utility and value of segmentation studies, Ipsos PersonaBot uses AI to enable stakeholders across the organisation to interact with the personas identified in their segmentation study as if they were real people.

It has been developed as both a consumer solution and a solution for the healthcare sector.

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

Cover photo: **Bay Bridge, San Francisco, California.** With the recent nomination of Kamala Harris, the campaign is taking a new turn in America. Explore the latest insights around the election on [page 11](#).

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