September 2024

IPSOS UPDATE

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

Ipsos Update September 2024

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

The US Election has become a real contest. Kamala Harris is lifting Democrat hopes and is even slightly ahead in some key states in Ipsos polling for the Washington Post and ABC. We await the impact of the Trump/Harris live debate – and whether Trump can sustain his current nine-point lead on the economy.

Meanwhile, as interest rates start falling, we aren't seeing any feel-good factor globally. Monthly Ipsos polling shows cost of living as THE key global concern for the 29th successive month. It's worth noting that the US is one of the countries particularly worried about prices, even as the Fed looks to cut interest rates.

September is a back-to-school month in many parts of the world and our new *Global Education Monitor* tells us how people really feel about the education system in their country. This is yet another area where we see a gap between perceptions (such as parental ratings of the school system) and the reality (as measured by PISA attainment scores). Our research finds parents judging schools on far more than just exam performance, with discipline and overall wellbeing often seen as equally or more important.

One thing that is clear from our education survey is global support for banning children from social media: 65% of people favour a ban on under 14s using social media inside and outside of school!

Elsewhere we detail Ipsos' programme of research on AI and business transformation, including a look at its role helping human curators and company insights specialists do a better job at helping organisations to "know what you know".

We also feature our new State of the Nation report on Morocco, which looks back at a year of shocks alongside national successes.

And finally, September sees the tenth-anniversary release of our Ipsos Global Trends report, which is one of the largest yet, covering 50 countries and 5 million data points - condensed into 23 key human values and the nine global trends we think you need to focus on. I'll be reviewing the findings in these pages next month and at a series of events around the world, so stay tuned!

Ben Page
Ipsos CEO

Poll Digest

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

Canada:
80% are worried about household food waste.

USA:
61% say owning a pet costs more than they thought it would.

Chile:
Half (49%) believe talking about money and personal finances is taboo.

Peru:
64% think that Congress has more power now than the president.

Visit **Ipsos.com** and our local country sites for the latest polling and research

Great Britain:
85% say Britain is divided as concern about extremism rises.

Ireland:
Housing is the number one issue, with 20% saying it's a worry.

Norway:
2% say environmental concerns influence their summer holiday plans.

India:
70% of Indians, considering all aspects of their life, say they are happy.

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Flair Morocco

Achievements and accelerations

Flair Morocco looks back on a year marked by a series of major shocks alongside encouraging signs of international success. Moroccan consumers have changed and, as a result, they have higher demands and expectations of brands. In our Flair Morocco 2024 report, our local experts invite you to learn more about these challenges, and the strategies needed to succeed.

<u>Topics include:</u>

- **Major Global Trends**
  Our review centres on six themes including climate emergency, technology, and health.

> **The emergence of a middle class is bringing about change in many sectors including education, leisure, new technologies, housing and inflation.**

- **Inflation**
  Overall, there is a change in priorities, with a split between what is essential vs. what is wanted – because of consumers having less money to spend.

- **The Big Winner: Authenticity**
  Creating a positive brand image, trust and transparency are important factors in achieving authenticity.

- **The Key Change: Pressure on the middle classes**
  The emergence of a middle class in Morocco is due to three factors: 1) the increase in the number of women working, 2) more people developing online commercial activities, and 3) having the highest minimum wage in North Africa.

- **Pride and Dissatisfaction**
  A tension between pride and dissatisfaction defines Moroccan society. Personal pride is based mainly on living in a nice neighbourhood, travel conditions, and harmonising income and purchasing power.

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Synthetic Data

From hype to reality: a guide to responsible adoption

In this *Ipsos Views* paper, we demystify synthetic data and provide recommendations on when, where, how, and who to trust for responsible, safe, and value-adding implementation.

When using Generative AI to create synthetic data, remember that this technology is not magic – it is maths. It may appear magical when used correctly, but that's only when it combines the best of human and artificial intelligence: when experienced researchers combine proprietary analytics frameworks, select the right AI/model for the specific task at hand, inject fresh, purposeful consumer data from real people, apply prompt engineering from domain experts, tap into fine-tuned data science algorithms, and leverage norms databases and data assets.

Simply put, the quality and reliability of synthetic data is entirely dependent on the real human data used to create and update it, as well as the expertise of the people behind it all.

We'll also help you steer clear of the "snake oil salesmen" that have emerged in the wake of Generative AI's potential, who lack the proper controls, reputation, expertise, or validation of their claims, and can wreak havoc on brands and businesses.

This point of view aims to help you make sense of the current landscape and what the future may hold. It will help you form an objective opinion of synthetic data, demonstrate both its potential and its risks, and refine the questions you need to ask yourself and your partners before you start considering it.

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Synthetic data refers to artificially generated data that does not directly correspond to actual events or people.

Change Means Friction

Measuring and leveraging cognitive conflict to drive behaviour change

Every day we are faced with a wide range of decisions that affect every aspect of our lives. Some follow standard routines and habits, while others require more thought and deliberation before reaching a final decision.

Cognitive conflict describes our mental state when we are confronted with new information that clashes with our existing experiences, attitudes, beliefs, and habits. It is a critical component of decision making and a key driver in shifting from habitual, mindless choices to more thoughtful, conscious choices.

In this *Ipsos Views* paper, we explore why cognitive conflict matters and what measures are available to help us better understand people's decisions, drawing on case studies to illustrate how closely cognitive conflict is linked to behaviour change.

In particular, the paper focuses on Decision Process Tracing, a proprietary and patented solution developed by Ipsos. This methodology measures the amount of conflict present in a decision by analysing the physical path of a trace that people make

when choosing between two options. It can distinguish heuristic brand selection from more deliberative brand choice, including identifying the different types of evaluation across different brands by the same individuals in the same category. It has also been able to identify where significant numbers of people's stated preferences are conflicted, and prone to change.

> " By understanding and leveraging cognitive conflict, stakeholders can develop more effective strategies for driving behaviour change.

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What Worries the World?

Inflation has been the top issue for 29 consecutive months

Around one in three (32%) across 29 countries say rising prices is an issue facing their country.

Argentina and Poland have been historically worried countries, and their level of concern remains relatively high. However, looking back over the year, Argentina's score is down 17 points, and Poland's score has fallen 10 points. Argentina was the most concerned country for 18 months in a row (between November 2022 – April 2024).

Meanwhile, the proportion mentioning poverty & social inequality has risen marginally this

month to just over three in ten (31%), putting this issue close to equal footing with inflation.

Peruvians are particularly worried about inequality. The proportion saying they are concerned is up 26 points to half (51%). Not only is this 18 points higher than a year ago, but it is also the highest level we've recorded for the nation.

Despite recent unrest, Great Britain is showing increased optimism in the wake of its general election. Since last month, the proportion saying the country is going in the right direction is up sixteen points to over two-fifths

(44%). This is 11 points higher than a year ago and is also the highest score for Britain since July 2021, when the level was at 46%.

For further context, explore the latest Ipsos Global Consumer Confidence Index, which, this month, shows Mexico falling sharply in sentiment while Peru and Colombia make significant gains.

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This month sees a slight decrease in worry about inflation and worry levels are five points lower than a year ago.

Bringing Healthcare Segmentation to Life

The dawn of the GenAI-powered persona

In the high-stakes world of the pharmaceutical industry, effective marketing hinges on how we can better understand diverse healthcare professionals' intricate needs and motivations.

Generative AI, ushering in a new era of possibility with the advent of the persona bot, offers a transformative solution to activate segmentation studies by injecting a much-needed dose of dynamism.

Persona bots, fuelled by sophisticated algorithms and trained on robust datasets, embody the attitudes, behaviours, and preferences of real-world doctors, patients, and pharmacists.

By transforming static reports into dynamic and interactive tools, these AI-powered avatars enable marketers to engage in interactive 'dialogues', providing deeper understanding and real-time feedback. However, realising this potential requires careful planning, ethical considerations, and a commitment to continuous learning and adaptation.

In this paper, we explore persona bots' existing and promising applications in healthcare market research, including virtual focus groups, streamlined message testing, and optimising omnichannel strategies. We're also analysing emerging trends in this field, including the potential of multimodal inputs and outputs as well as VR.

> **Generative AI offers a transformative solution to activate segmentation studies by injecting a much-needed dose of dynamism.**

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Conversations with AI Part IV

AI-assisted knowledge libraries & curation, the search for trusted output

This Ipsos Views white paper explores the role of AI as part of curation and how human expertise and AI speed can work best together.

For many major businesses around the world, knowing what you know is a more difficult prospect than it can seem. What's more, finding the right information when you need it can be even harder. The challenge for many working in insights is locating the right sources and writing a thorough and succinct report that's ready to socialise. The experts who do this are curators.

We see the need to evolve our curators into certified AI curators who are experts at applying the latest advances in Generative AI to the curation process and who know how to apply analytical frameworks to a large corpus of data. The headline: we see speed as the primary benefit that AI could deliver.
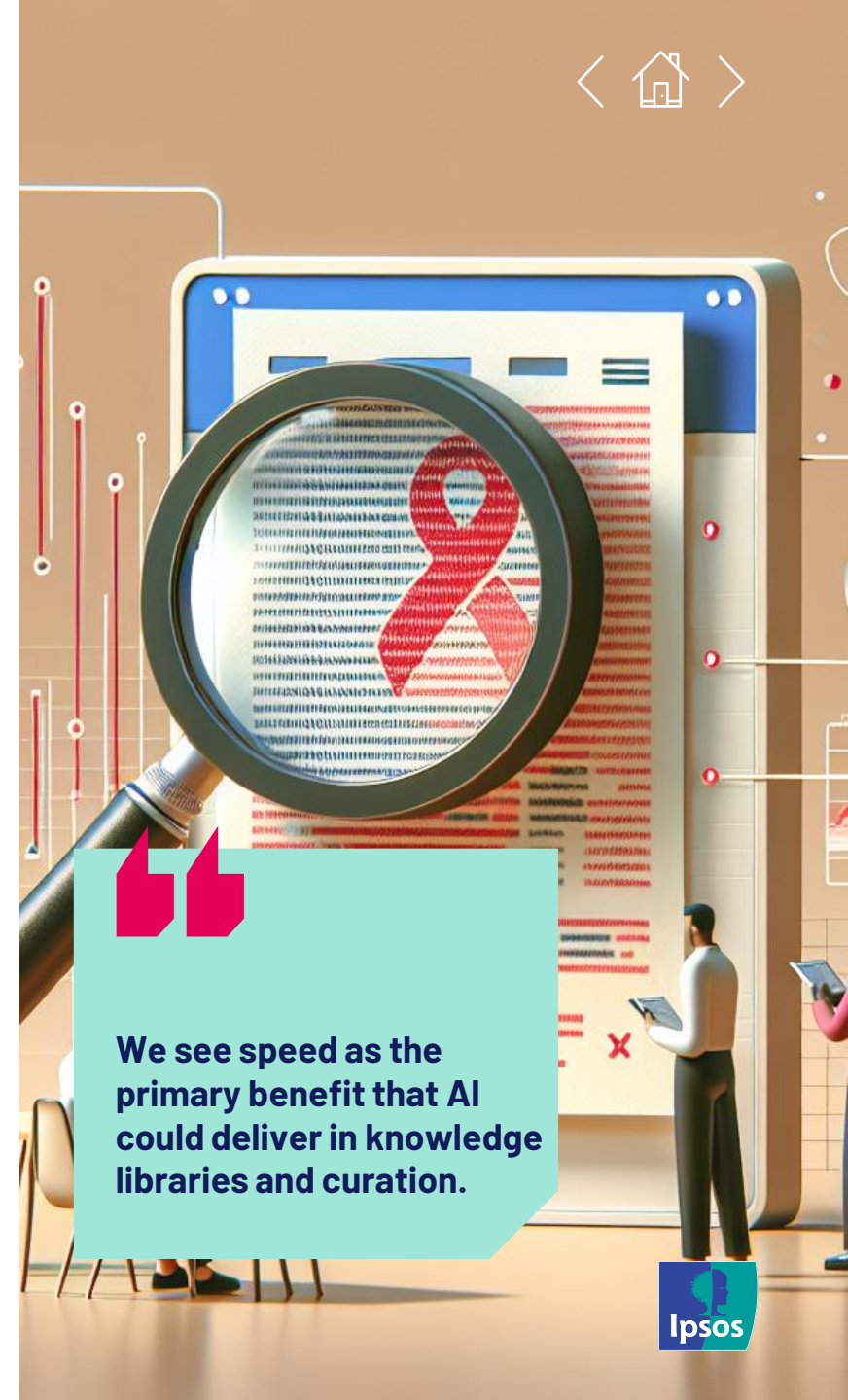
Ipsos is developing our own custom AI-assisted knowledge library and curation solution to align with client needs. To inform this solution, Ipsos ran two pilots with the goal of evaluating if and how AI could speed up curation

without sacrificing accuracy or the need for human judgement in conveying meaningful insights. The pilots aimed to balance efficient AI document handling with expert curation, storytelling, and drawing substantive conclusions.

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> "We see speed as the primary benefit that AI could deliver in knowledge libraries and curation.

Education Monitor 2024

Widespread support for banning social media for under 14s

65% of people on average globally support banning children under 14 from using social media both inside and outside of school, according to our new 30-country survey examining attitudes to education.

Support for a ban rises to eight in ten in France (80%) and Indonesia (79%), falling to 40% in Germany.

On average across 30 countries, a third (33%) rate the education system in their country as good. But there's little correlation between perceived quality and educational achievement, as measured by the international

PISA framework. This may reflect the fact that parents judge schools on far more than just exam performance, with discipline, overall wellbeing and development often seen as equally or more important.

One year on from the explosion of generative AI into the public consciousness and attitudes towards AI have become more divided. Just over a third (36%) now think the use of AI should be banned in schools, up from 29% last year.

This rises to one in two people in Canada (52%), France (51%) and

Australia (49%). Meanwhile, fewer than one in four support banning ChatGPT in schools in Türkiye (24%), Thailand (22%) and Japan (20%).

There's been a similar pushback against technology more broadly too, with a seven-point increase in people predicting that advances in tech will have a more negative than positive impact on education in the future (25%).

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> **Just over a third (36%) now think the use of AI should be banned in schools, up from 29% last year.**

Climate Leadership 2024

Navigating social license, misinformation and greenwashing

Support for Australia transitioning to renewable energy is strong across the country (with 59% support), but 41% are concerned about the negative impacts of the transition to green energy on cost-of-living and household energy bills (up 10 points since 2022), according to the 2024 Ipsos Climate Change study, unveiled at Sydney's Greenhouse Tech Hub.

The Ipsos study provides new insights on Australians' attitudes towards climate change and the transition to green energy, focusing on priorities and concerns for energy transition, and information and understanding around climate change.

We found that Australians are concerned about the negative impact of the shift to green energy on cost-of-living and household energy bills, plus reliability of energy supply. This is despite almost six in 10 (59%) Australians supporting the energy transition away from fossil fuels towards renewable energy generation.

The spike in cost-of-living worries has also changed Australians' priorities around the energy transition. Most Australians (59%) now want to see energy prices – up 13 percentage points since the same time last year - and energy supply reliability to homes and business (57%) prioritised.

Australian scepticism about national climate change action and information is also high. Half of Australians don't think there are any plans around the energy transition, or that it simply won't happen, while 54% say they don't understand the actions being taken around climate change.

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59% of people support Australia transitioning away from fossil fuels and towards renewable energy generation.

Shortcuts

Political aggression polling

Three in four (76%) say Britain is divided (down from 85% in 2018), but the public say problems are less serious than in the US.

New Ipsos polling, taken 22-24 July (before recent events in Southport), examines attitudes towards division and political violence in Great Britain, and whether levels of concern are higher than in the United States.

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Exploring digital: Tapping into the value of mobile gamers

Mobile gaming is having a moment, with increased investment and diversification, and the market is booming.

This presentation explores how widespread gaming is in the market and the potential for brands to use mobile gaming and in-app advertising to reach their audience across different mobile app games audiences.

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Decoding India's beauty boom

India's Beauty and Personal Care sector has seen tremendous growth and evolving trends over the past few years, driven by a range of factors.

In this report, we explore the latest trends and insights that are contributing to this boom, authored by our beauty sector experts, to understand consumer mindsets.

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Biden's inflation orphans

One key word was missing from Kamala Harris' DNC acceptance speech: inflation. Instead, she discussed lowering the cost for households.

Ipsos' team in the US has put together five charts on the economy, Kamala Harris' proposal to eliminate federal taxes on tips, and where that might land her on the economy.

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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.

Cover photo: **Tangier, Morocco.** Explore the first edition of Flair Morocco on page 5 – a nation who has experienced a rollercoaster of highs and lows recently.

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