

October 2024

IPSOS UPDATE

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

Ipsos Update October 2024

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

10 years ago, we started our Ipsos Global Trends series. Our latest edition, called "In Search of a New Consensus", distils insights from 50 countries and five million data points into 23 key human values and nine global trends for you. We've got three big tensions to unpack: a yearning for the past despite a more global outlook; a rising self-focus that feels like a retreat from global uncertainty to what people can control: either to self-actualisation, or just "nouveau nihilism"; and finally, growing environmental worry coupled with fatalism.

In the [report](#) we delve into how these trends play out in your world. For example, "Technowonder" highlights how AI can generate great ideas, even if it struggles with human emotions, and the cognitive polyphasia billions feel everyday encompassing both growing dependence on digital technology and anxiety about its impact on privacy, mental health and employment.

Meanwhile, our monthly [What Worries the World](#) report reveals crime and violence has now overtaken inflation as the top global

concern for the first time in years, and our annual study on [health services](#) shows mental health worries surpassing those about cancer again – a different world from the pre-pandemic period.

In the US, our tracking shows a continued tight race in the election, and our pre-election report examines the [future of news](#). While many Americans fondly remember home-delivered newspapers, today they're concerned about bias and division in the media. They still see staying informed as key to being a productive member of society, even

if the sources of that information are regarded with more suspicion than ever.

There's all this and more here – do get in touch with your Ipsos contacts to discuss how our analysis can be put to work for you.



Ben Page
Ipsos CEO

Poll Digest

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

Canada:

79% agree that recent heatwaves have made them think about the importance of trees in cities.

USA:

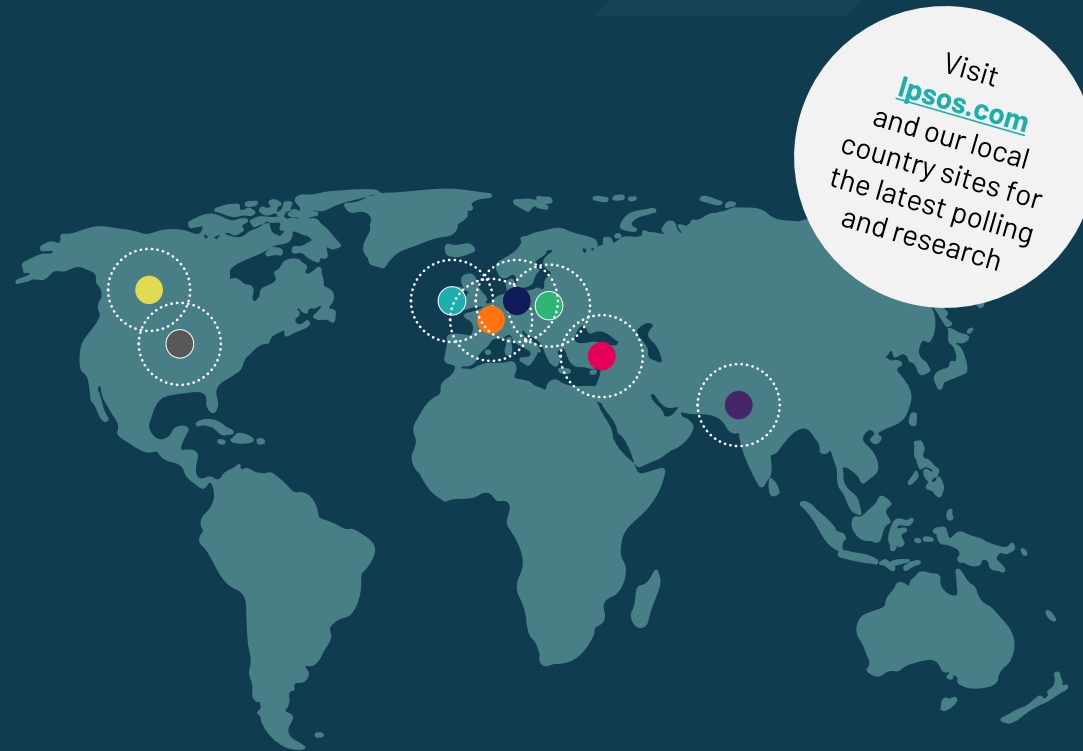
49% think they will never get Covid-19 again.

Türkiye:

80% think they wouldn't be able to find a home on their budget if they had to move today.

Ireland:

Nurses are the most trusted profession (97%), followed by pharmacists (96%) and doctors (94%).



France:

68% say they have felt unsafe on public transport, despite it being the preferred mode of travel.

Czechia:

70% of consumers check whether food products are local or not before buying.

Germany:

Half (51%) believe Germany should stop sending arms to Ukraine.

Pakistan:

54% cite their fellow citizens as their favourite thing about their country.

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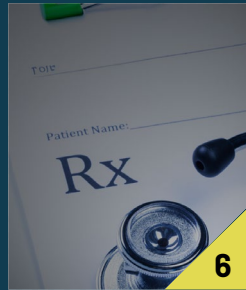
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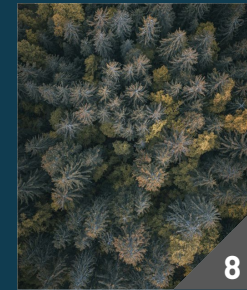
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Global Trends

In search of a new consensus: From tension to intention

Our annual *Ipsos Global Trends* survey is designed to delve into the evolving attitudes and values of individuals across the globe.

In this special 10th anniversary edition, we unveil a refreshed framework of nine Trends based on more than 50,000 interviews across 50 markets that represent three-quarters of the world's population and 90% of its GDP. This broad coverage ensures a comprehensive understanding of people's shifting attitudes and values.

Our new framework harnesses advanced analytics from 5 million data points, distilled into 23 core

human values that anchor the trends.

Key takeaways:

- There are constants
- There are tensions at all levels
- There are also tensions *within* each of the trends
- Brands, businesses, organisations and governments have roles to play
- As the world gets more complex, people focus on what they think they can control: themselves

Ipsos Global Trends is intended to get you thinking and give you tools to help you understand society, markets and people today – and through applied foresight– into tomorrow.

In addition to the report, you can listen to our experts, including Ipsos CEO Ben Page, discussing the key overarching insights from the Trends in our latest [KEYS webinar](#).

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Trends are holistic narratives that help to unearth opportunities and navigate potential threats, acting as compelling conversation starters within your organisation.

Ipsos Health Service Report 2024

Mental health seen as the biggest health issue

While the Covid-19 virus is a respiratory disease, perhaps the pandemic's biggest long-term effect on public health will be on mental health.

We have seen a fundamental shift in attitudes to mental health compared to 2018, when we first started the Ipsos Health Service Report, and today. Six years ago, 27% chose mental health as one of the biggest health problems, putting it third, today that figure is 45% on average across 31 countries, and it's now in first place. Additionally, stress is ranked third, with 31% saying it is one of the biggest issues.

However, alongside looking at the global picture, we should also note the big differences in attitudes between countries and genders. In all but two countries (India and Thailand) women are more likely to choose mental health as a health concern.

The gender gap on mental health is much greater amongst young people; 55% of Gen Z women choose mental health as one of the biggest health problems, compared to 37% of Gen Z men. Amongst the oldest generation in this survey, the gap between men and women Baby Boomers is much smaller (27% and 26% respectively).

While mental health is the top health concern on average, it is not for Baby Boomers. Cancer, a disease traditionally more likely to affect older people, is the number one health problem according to those born between 1945 and 1965 (46%), and a little more so in women (48%) compared to men (44%).

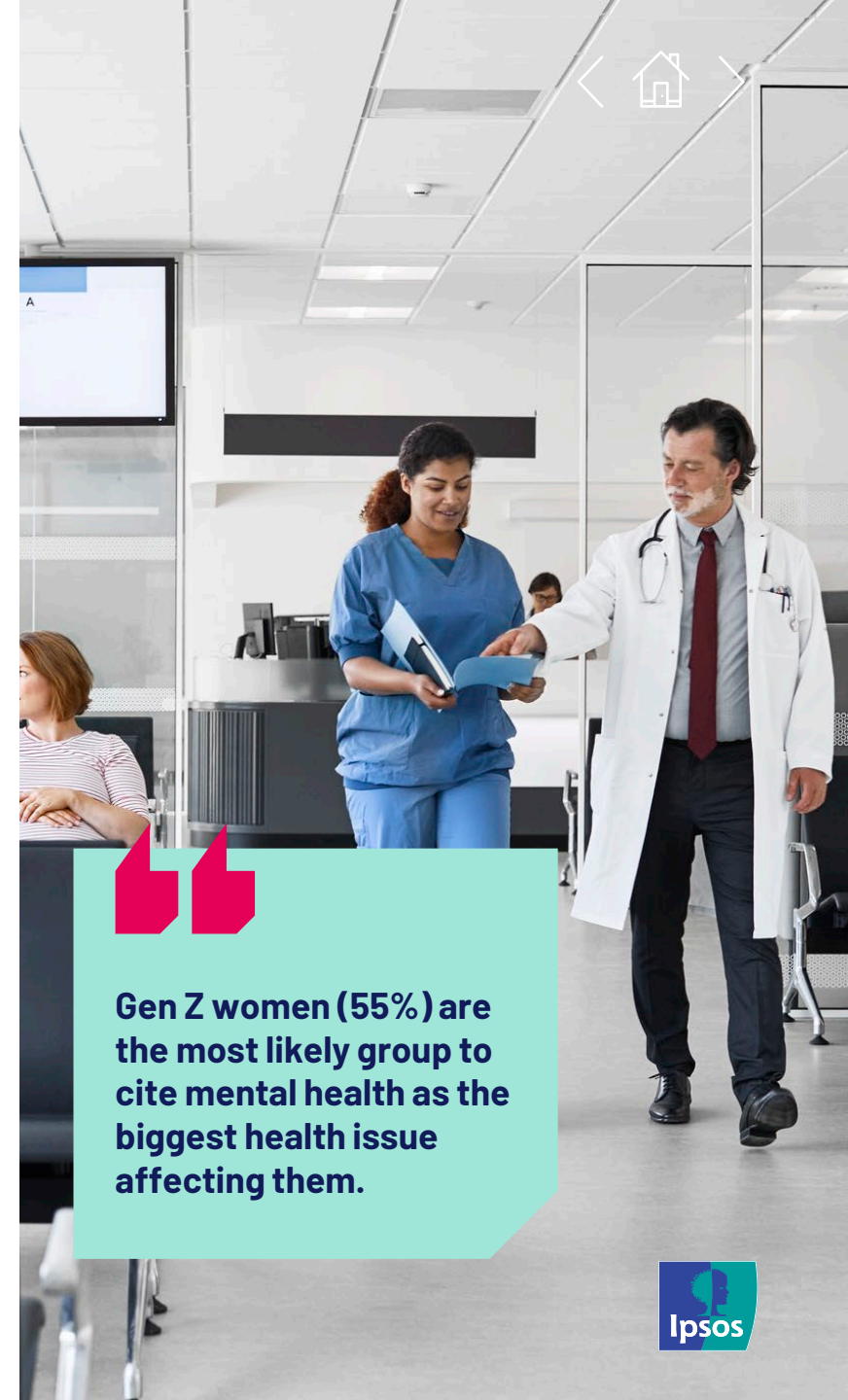
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Gen Z women (55%) are the most likely group to cite mental health as the biggest health issue affecting them.



Conversations with AI Part V

Is there depth and empathy with AI twins?

Synthetic respondents – AI ‘twins’ of real human respondents – are created from real-world data to understand market dynamics and predict consumer behaviour, without direct human involvement.

AI twins represent a significant opportunity for market research, offering a new way of capturing insights with increased efficiency and scalability. They have the potential to streamline the data collection process and reduce the need for extensive human participation.

But can they accurately reflect human thought processes and

emotions, particularly in complex, emotionally driven and socially nuanced contexts?

In our latest "Conversations with AI" paper, we share the results of a research study conducted to test the capabilities of AI twins. The study compared the performance of twins against real human respondents for exploration, ideation, and evaluation within the category of women’s health. Find out:

- How AI twins perform in identifying key emotional themes in the context of **exploration** and conveying

nuanced experiences.

- AI twins’ capabilities to offer well-developed product ideas in the **ideation** stage.
- The analytic abilities of AI twins and how these compare in the **evaluation** stage.
- The opportunities available by combining the efficiency of AI with the empathy of real human respondents.

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How do synthetic respondents fall short of capturing the human experience?

What Worries the World?

Inflation is no longer the leading worry after 29 months

Inflation has been the number one global concern overall in our *What Worries the World* survey for over two years but has now fallen to second place.

Crime and violence is now the number one concern across 29 countries this month, but only due to inflation worry dropping. March 2022 was the last time a worry other than inflation was top, when it was poverty and social inequality.

Despite 25 of the 29 countries surveyed seeing a decline in worry about inflation over the last year, concern in the US is up 5pp

compared to September 2023. It's the only country where we have seen a significant increase in the last 12 months.

On the contrary, inflation concerns in Germany have dropped the most over the last year, falling 19pp since September 2023. They are also experiencing a swell in optimism after their "country heading in the right direction" score rose 13pp to 38%. Likewise, the proportion saying their nation's economy is "good" has also risen by 13pp.

Looking at the bigger picture, concern for financial/political

corruption is lower than its pre-pandemic level. Back in March 2023, the month before Coronavirus was added, 31% chose corruption as an issue, and worry has not risen to that level from a global perspective in the last four and a half years.

Meanwhile, the [Global Consumer Confidence Index](#) shows stability for the sixth consecutive month.

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After 29 consecutive month inflation is no longer the number concern across 29 countries.

What The Future: News

Why news is worth protecting

The news landscape is at a crossroads. Our world is inundated with an ever-increasing flow of information, disinformation and corporate influence. Yet consumers still crave trustworthy and reliable news sources. At the same time, the news industry continues to struggle with a broken business model while news consumers expect quality news to be free. And digital platforms and generative AI offer an easy way for anyone of any stripe, bias or agenda to publish content.

The challenges facing the future of news are challenges shared by most organisations: staying relevant,

building trust and loyalty, and finding a sustainable business model in a rapidly changing digital landscape. As the news industry navigates these complex challenges, key questions about the way forward are emerging.

Can diversified revenue streams and content bundles give consumers the content, value and convenience they demand? How can brands help consumers distinguish quality journalism and rebuild trust in the news media? And can news literacy education help create a better-informed citizens?

In our latest issue of *What the*

Future, we explore the possible futures and solutions for trust, news avoidance, generational differences and sustaining local news. We also identify potential roles for businesses and brands to help keep trustworthy, quality news accessible and affordable for audiences, and profitable for publishers, advertisers and sponsors.

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69% of Americans say it is important to stay current with news to be a productive member of society.

A New Era for Pharmaceutical Advertising

New fair-balance rules are here

The pharmaceutical industry is undergoing a transformative shift in the landscape of direct-to-consumer (DTC) advertising, with new US federal government regulations requiring even more prominent disclosures of side effects.

To date, fair-balance communication, which lists side effects and contraindications of the drug advertised, is often presented quickly and visually minimised, using fast-paced narration and small text, potentially hindering viewers' comprehension. The new regulations are designed to enable greater transparency on the risks

associated with the advertised drugs.

At Ipsos, we see the new fair-balance regulations as a potential opportunity to re-think creativity for DTC pharmaceutical advertising that can lead to even stronger effectiveness.

Key takeaways from the paper:

- New rules on DTC pharmaceutical advertising require more prominent disclosure of drug side effects.
- Brands concerned about complying with the new rules should avoid shifting fully to

generic disease-state awareness campaigns, which tend to be less effective with consumers.

- Pharmaceutical companies should consider this an opportunity to think more ambitiously about how creativity can deliver distinctiveness in a category that can often suffer from a "sea of sameness".

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Branded DTC remains a critical component for driving brand growth and should continue to be a key consideration in marketing campaigns.

2024 Social Threats to Ageing Well in America

Barriers preventing seniors from thriving in their later years

Ageing in place, lack of transportation and access to medical care, and economic insecurity are the three biggest threats to US seniors ageing well, according to a new report conducted in partnership with Alignment Health.

The survey examines the social and environmental factors preventing seniors in the United States from thriving in their later years.

Nine in ten seniors (91%) are impacted by at least one of the social determinants of health included in the survey.

The most cited barrier to health and wellbeing is ageing in place (69%) – continuing to live in their own homes as they age, rather than moving to assisted living facilities. While most seniors want to stay in at home, their homes may not be safe or adequately equipped for their changing needs as they grow older.

Second most cited is a lack of reliable transportation and /or access (64%), resulting in seniors skipping medical care. Seven in ten (71%) respondents say they would use transportation benefits, such as rides to medical

appointments, if offered by their health insurance.

Economic instability is also a major barrier (56%) and the third most cited of the factors in the survey. 44% of those impacted by economic barriers have medical debt. Other older adults struggle economically due to rising housing costs, groceries and other expenses.

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Nine in ten seniors (91%) are impacted by at least one of the social determinants of health.

Global Commons Survey 2024

Attitudes towards nature and planetary stewardship

Earth4All and the Global Commons Alliance have released their second report on global attitudes towards nature and planetary stewardship, based on research conducted between March and April 2024 by Ipsos.

The Global Commons Survey ran across 22 countries (18 countries within the G20, plus Austria, Denmark, Kenya and Sweden) and measures attitudes to societal transformations, political/economic systems and planetary stewardship. In particular, the survey is focused on values and worldviews, attitudes towards nature, attitudes towards

national and global political and economic systems and levels of support for Earth4All policy recommendations.

Concern for nature and awareness of the need for urgent action is high – while half feel exposed to climate change. Three in five across the G20 are extremely or very worried about the state of nature, both today (59%) and the state in which we will leave it for future generations (62%).

People across the G20 are less optimistic about the future of the world and nature. While most respondents are optimistic about

their personal future (62%), only 38% are optimistic about the future of the world.

Most see human and planetary health as connected. Three-quarters (74%) agree that human health and wellbeing are closely connected to the health and wellbeing of nature, but only half (49%) believe nature can meet the needs of humans right now.

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A majority across the G20 are worried about the state of nature – but do not think their government is doing enough to tackle environmental damage.

Shortcuts



UK Education Polling

New polling examines attitudes towards Labour's plans to introduce VAT on private school fees, and towards truancy.

Findings show 55% support Labour's plans to add VAT to private school fees while 60% think it is acceptable for parents to take their children out of school without permission for a day to go to a family wedding.

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US Election update

With not long to go until the election on November 5th, our team in the US is working hard to keep up-to-date with all the latest insights from voting intentions, economic attitudes, consumer behaviour and more.

For example, few think Donald Trump, if he were to lose, will accept the outcome of the election as legitimate (67% believe he is not prepared to).

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Empathy or emptiness

Listen in as Ipsos experts highlight new research from our award-winning paper, "Empathy or Emptiness: Unravelling the Impact of AI on Human Connection in Qualitative Research", which was recognised as the ESOMAR Congress - Best Paper Award 2024, and also the Peter Cooper Award for the Best Qualitative Paper.

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Rare Diseases

The diagnostic journey for individuals with rare diseases is often a complex and prolonged process, filled with uncertainty due to unclear diagnostic pathways.

This article provides valuable insights for market researchers seeking to understand the unique challenges and opportunities within the rare disease landscape.

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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: **London, UK.** Brits are the most likely to say their healthcare system is overstretched, according to our *Health Service Report* on [page 6](#).

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