November 2024

IPSOS UPDATE

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

Ipsos Update November 2024

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

2024 is on course to be a standout year. October came to an end with a candidate described by 49% of the electorate as a "fascist" the narrow favourite to win the US Election. We include our latest poll digest from around the world – watch out for our US team's coverage of the Presidential election and its aftermath through November.

In the UK, a government elected in July with a record majority has seen one of the fastest collapses in support we have measured – their only consolation might be that the Conservative party remains even less popular. We look at Britain's overall reputation in this latest edition – in a country that has taken political instability and made it its own in the last eight years, where is Brand Britain now? (Clue: it's still better than most Brits think).

It's also set to be the hottest year on record. We now treat this as unsurprising; some 81% across 34 countries expected temperatures to rise this year. The public may not always get everything right, as our Perils of Perception research shows, but here their expectations were in line with reality, as witnessed by heatwaves in southeast Asia, droughts in Brazil & southern Africa and the devastating storms. The 11th edition of the *AXA/Ipsos Future Risks Monitor* sounds the alarm loud and clear. Climate change is THE top future risk for experts and public alike, and in all parts of the world.

But as many regions have seen a slowdown in growth this year, the cost of living is back as the number one current concern in our monthly *What Worries the World* survey, with climate change trailing in 8th place. When it comes to the here and now, environmental issues still face a battle for attention.

Looking ahead, electric vehicles provide one route towards a future that's less reliant on fossil fuels. But, as our *How to Keep the Wheels Rolling* report illustrates, this is still a work in progress, with sales concentrated in just a few major markets. Look at our *Global Infrastructure Index*, which highlights real concern about provision of EV charging facilities.

Meanwhile, the acceleration of AI continues to be a source of wonder and worry. We feature how AI can help qualitative researchers get closer to people's lived experiences and how it can give creatives a helping hand with their storytelling.

Elsewhere, we look at the future of the food and drink sector and reflect on how we are all feeling in our annual report for *World Mental Health Day* – concern about mental health and wellbeing is now at record levels globally, with the burden falling most heavily on the young, particularly young women.

Ben Page
Ipsos CEO

Poll Digest

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

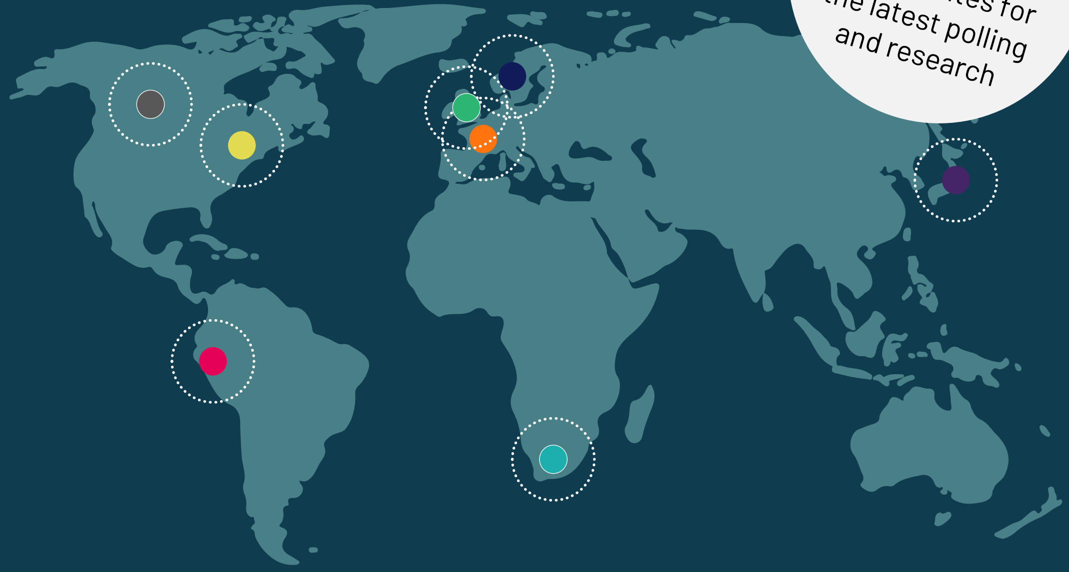
USA:
74% of registered voters fear violent acts will be committed if people aren't happy with the election result.

Canada:
75% say their friends have cancelled plans on them.

Peru:
18% of women say they feel very satisfied when looking in the mirror.

South Africa:
40% now believe, after 100 days of a new government, that the country is heading in the right direction.

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



France:
81% say they are emotionally attached to their car which "accompanies them through the different stages of their life".

Great Britain:
69% believe celebrities are entitled to prioritise their mental health – even if it means cancelling events.

Norway:
22% think politicians should be allowed to own shares while in office.

Japan:
95% say they have experienced price increases for food products in the past year.

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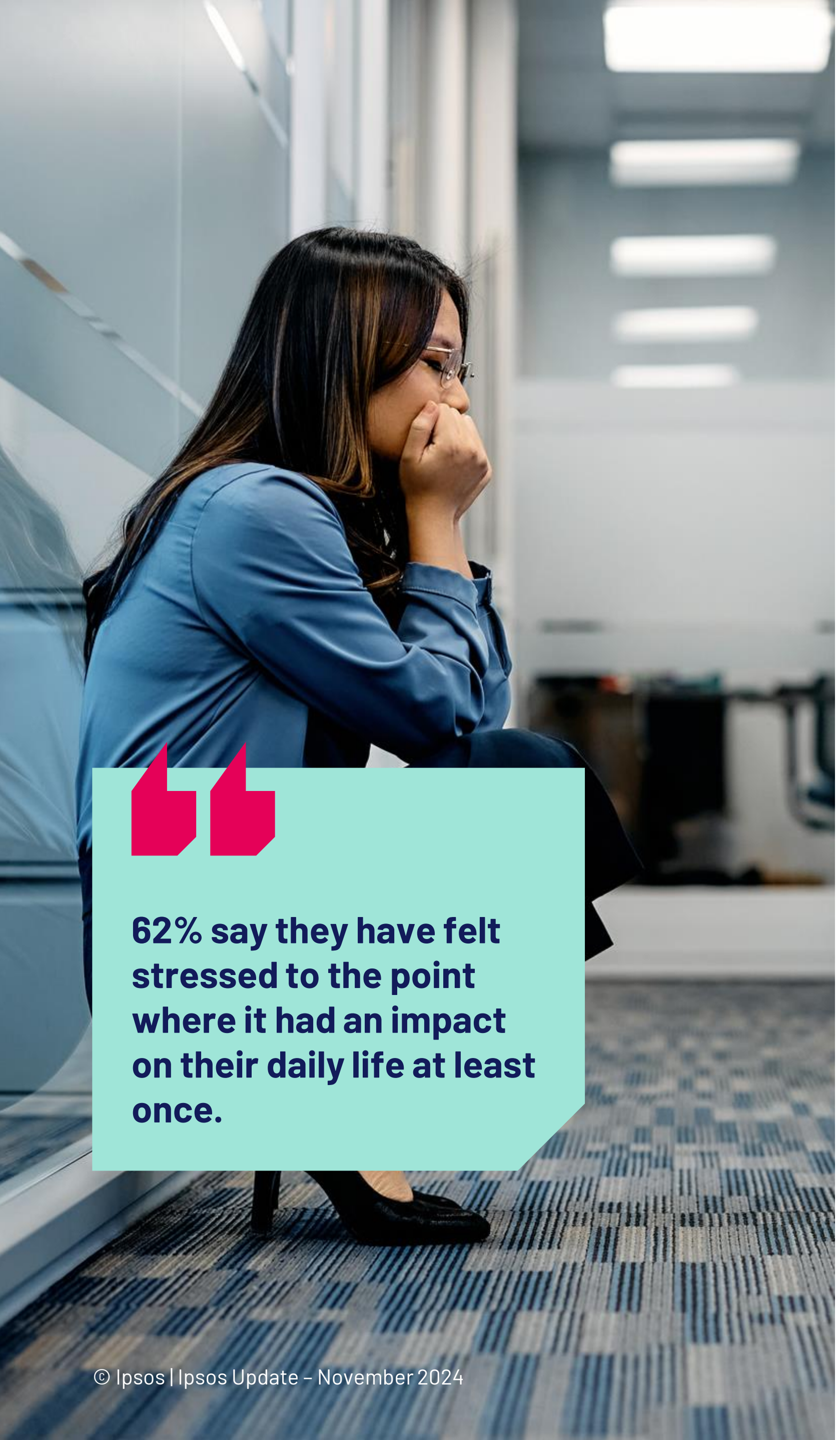

62% say they have felt stressed to the point where it had an impact on their daily life at least once.

World Mental Health Day Report 2024

Younger people are most likely to feel depressed and take time off work

The fifth edition of the *Ipsos World Mental Health Day* report is a 31-country study looking at people's perceptions of mental health and how they think their healthcare systems treat mental wellbeing.

Globally most people have been feeling stressed. Just over three in five (62%) say they have felt stressed to the point where it had an impact on their daily life at least once, over the last year. Levels of stress range from a high of 76% in Türkiye to a low of 44% in Japan. Overall, a slightly higher proportion of women (66%) are more likely to report feeling stressed than men (58%).

Specifically, Gen Z women are the most likely to experience low points, with 40% at a global level saying that, several times over the past year, they have felt sad or hopeless almost every day for a period of a couple of weeks or more.

Looking broadly at health issues, mental health is the number one stated concern, according to our latest [Health Service Report](), with 45% citing mental health as a key issue facing their country – this is higher than concern for cancer. Additionally, health of mind and body are seen to be equal – just over three quarters (76%) say they are just as important as each other.

With that said, however, healthcare systems are perceived to prioritise physical issues. 41% say physical health is treated as more important than mental health by their country's current healthcare system, 13% say mental health is treated as more important and 31% say both are treated equally.

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Golden Years, Golden Opportunities

Preparing your business for an ageing world

Across the world, as people live longer and birth rates decline, the global population is slowly but surely getting older.

In comparison to some of the disruptive events experienced in recent times – a pandemic, high inflation, political upheavals, and the explosion of generative AI – this slower, less dramatic change can attract less attention.

But by 2050, one out of every five people in the world is projected to be 60 or over. This ratio is projected to be one in three for Europe and North America. At that point, it will be impossible to ignore this older age group.

But are businesses prepared for the challenges and opportunities presented by an ageing world?

In this Ipsos Views paper, we explore what an ageing consumer base means for businesses, how to tap into the wealth held by this cohort, and who among older adults is spending – and on what.

The key to successfully targeting older consumers starts with a better understanding of how older adults differ on dimensions that impact marketing and innovation.

In this vein, the paper also shares a new segmentation of older consumers, based on a pilot of 1,500 consumers aged 60 and over from across four countries – the United States, the United Kingdom, Italy and Japan. The pilot uncovered four segments based on their financial situation, and their attitudes towards consumption, ageing, food and beauty: **Simple Contentment**, **Strivers**, **Strugglers**, and **Chill Indulgence**.

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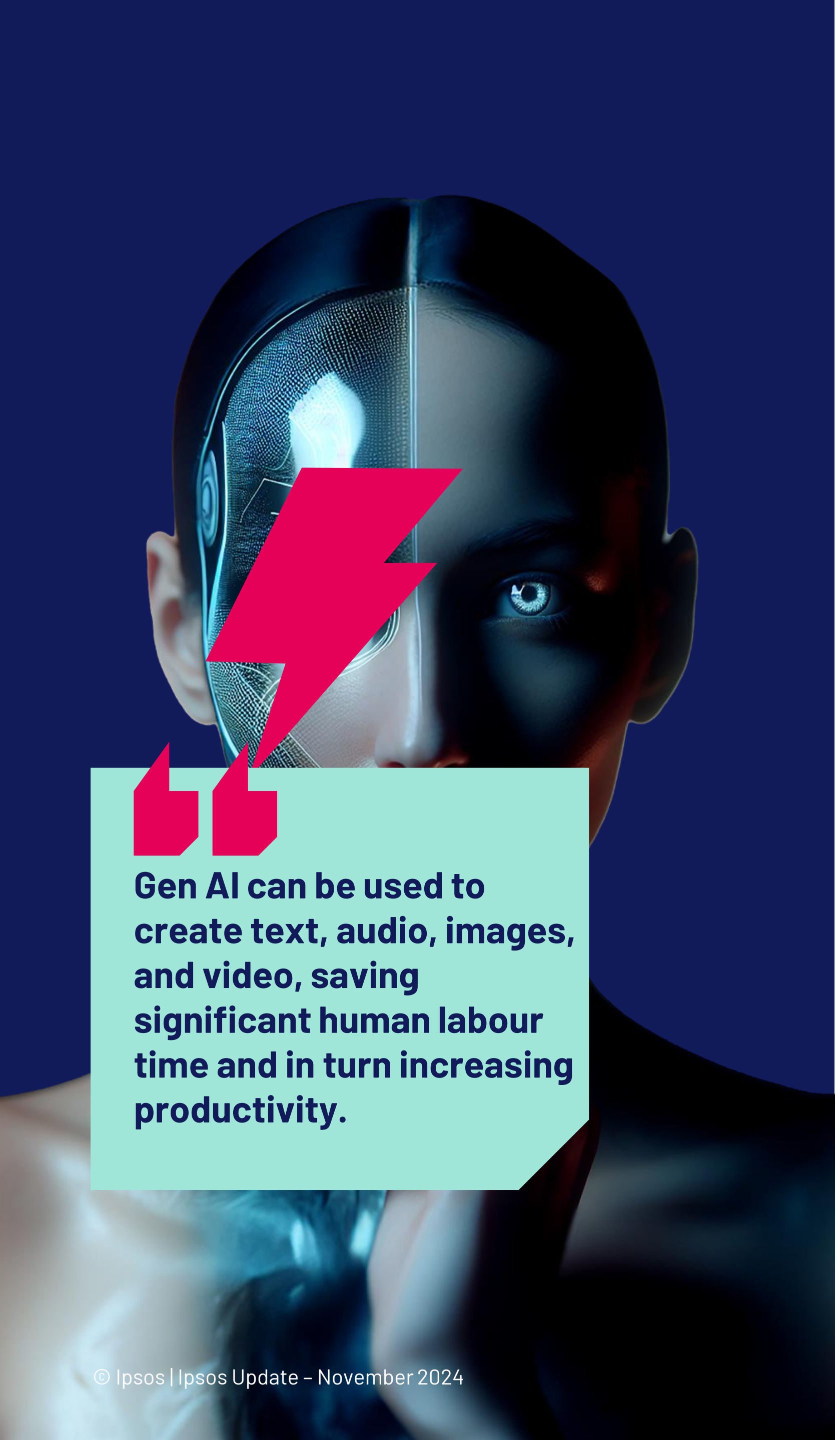
By 2050, one in five people will be 60 and over – are businesses ready for an ageing world?



> **Gen AI can be used to create text, audio, images, and video, saving significant human labour time and in turn increasing productivity.**

Misfits and the Machine

Why AI alone can't crack creative effectiveness

Gen AI has been the source of a huge transformation within the advertising ecosystem.

With limited human prompting, marketers can now use Gen AI to create text, audio, images, and video, saving significant human labour time and in turn increasing productivity.

Where previous versions of AI were used for more analytical tasks, we can now use AI to outsource our thinking and creativity. For the first time ever, we are in the position of stepping back and allowing the machine to become the creator.

However, while marketers might save hundreds of thousands in production, what about the millions lost in potential sales? The key question is: **can a machine create effective advertising?**

To explore this question, we tested 10 ads from major brands across a range of industries, using our sales validated pre-testing solution Creative|Spark.

We categorised each ad based on five distinct areas of the ad development process – concept, script, audio, visual, and production – with a score of 1-5, with one point being assigned for each area that distinctly uses AI according to the ad production notes.

Using this score, we classified each ad as being human-led, or as being AI-led.

In this paper, we explore how human-led and AI-led ads compare on capturing attention, delivering creative experiences, and producing creative ideas.

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How to Keep the Wheels Rolling

Barriers and considerations for electric car purchases

The path to vehicle electrification is clear for car manufacturers. However, the pace of consumer adoption remains uncertain. Battery life, infrastructure, driving range and costs continue to pose barriers to battery electric vehicle (BEV) adoption. But government incentives, such as tax credits and purchase subsidies can also have a major influence.

To navigate the shift to electrification successfully, a nuanced understanding of consumer motivations and pain points in major markets is essential.

In this paper, we examine the key differences, barriers, and motivations across the three largest EV markets – China, the US, and Germany.

We've laid out a potential roadmap for manufacturers so they can keep the wheels rolling and lead the charge in the EV revolution.

Key takeaways include:

- Electrification is a one-way road for car makers, due to the high capital expenditures for transitioning from internal combustion engines to EVs.
- Government policies and incentives have a significant influence on EV adoption.
- Some commonalities exist among potential buyers of EVs across markets – these include age, income, and where they live.

For more Ipsos automotive insights, visit our [Future of Mobility]() page.

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Consumers face many pain points when purchasing EVs like range, cost, and infrastructure which manufacturers must address.

Conversations with AI Part VI

AI-powered moderator bots: Enhancing empathy or eroding connection?

> **With the advancements of AI, can moderator bots hold a candle to human qualitative researchers?**

In the rapidly evolving narrative of our age, AI has taken centre stage, weaving its influence into every facet of the conversation. The sheer velocity of innovation in this space is unparalleled – multi-modal, voice, and beyond. As with any transformative technology, there are polarised perspectives. Qualitative research is no exception to this unfolding dialogue.

Some within qualitative research have championed the potential benefits of Gen AI. They envision it as a powerful tool that could liberate researchers from mundane tasks. Conversely, there exists a contingent that views AI's encroachment into qualitative research with apprehension, advocating for caution and, for some, resistance against its pervasive influence.

Navigating the complexities of AI in this space can be difficult, and this challenge is amplified by the rapidly expanding use cases being added at breakneck speed. One such capability being explored in academic circles is Gen AI's conversational abilities. Could this have a role in qualitative research? What if you dialled into a virtual qualitative interview moderated by a bot powered by Gen AI? Would it be able to build rapport and interpret non-verbal cues effectively?

Recognising these questions and challenges, we saw the need for reliable information to separate the hype from reality. Hence, we undertook this self-funded research to explore the potential of Gen AI in assuming the role of a qualitative research moderator. We aimed to answer a fundamental question: Can a moderator bot powered by Gen AI play a role in qualitative research. Would it foster greater empathy, or does it leave us feeling empty?

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AXA/Ipsos Future Risks Report 2024

As the polycrisis continues, feelings of vulnerability increase

The 11th edition of the *AXA Future Risks Report*, conducted in collaboration with Ipsos, explores emerging risks we may face in the future. Based on survey results from 19,000 people from across 15 countries and over 3,000 risk experts, the report ranks emerging risks on their potential to impact society over the next five to ten years.

Climate change remains the top concern, while risks related to AI are at number four, while concerns about societal and political instability have continued to rise.

The polycrisis is still being felt, with nine out of ten (90%) people surveyed believing the number of crises are increasing. This is a finding shared among 93% of risk experts.

Fears regarding societal and political risks have progressed within the general population and notably geopolitical instability, tensions and social movements and new threats to security and terrorism. This is particularly the case in Europe where these risks take 2nd, 3rd and 4th place, respectively.

In a context of a violent presidential campaign in the US, fears of threats to security and terrorism is 3rd and tensions and social movements is in 4th place.

At the global level, following climate change are Geopolitical Instability in 2nd, Cyber Security Risk in 3rd, Risks related to AI in 4th, and Social Tensions and Movements in 5th.

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Climate change remains the number one concern among the public and experts as a risk facing the world.

> **As GLP-1 drugs gain traction for obesity treatments, food companies will need to adjust to people's changing tastes.**

What The Future: Food

Pharmaceuticals, prices, politics – factors shaping what we eat

Multiple shifts are converging to reshape America's food industry in the coming decade, and companies and brands across the food chain need to get ahead of the changes.

As GLP-1 drugs gain traction for obesity treatment, food companies will need to adjust to people's changing tastes and food preferences. With a growing global population, food manufacturers and farmers need to meet rising demand for protein, including meat alternatives. Grocers are seeking new ways to differentiate beyond price with private-label brands. Institutions and policymakers are flexing new influence to make our food systems healthier. And bars and restaurants are evolving with consumers as they change how, when and where they gather and celebrate moments big and small away from home.

This edition of What the Future serves up exclusive consumer polling and expert analysis from leaders and change-makers explaining these trends and tensions and their implications for the future.

What the Future: Food is for grocery retailers, restaurateurs, institutional food service providers, pharmaceutical companies, policymakers shaping nutrition and sustainability guidelines, packaging suppliers responding to clean label demands, farmers and agricultural companies, appliance makers catering to new cooking and eating habits, and brands and agencies tracking where food trends go viral.

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Global Infrastructure Index 2024

A general sentiment that not enough is being done

The third edition of the *Global Infrastructure Index*, conducted on behalf of the Global Infrastructure Investor Association (GIIA), finds people are more satisfied than last year with their country's infrastructure, but feel more still needs to be done (only 14% believe enough is being done).

More than half (56%) of citizens, across 32 countries, think their country is not doing enough to meet its infrastructure needs. There is also a general sentiment that spending should be increased to improve infrastructure, even if that means raising taxes (40% agree this should be the case vs. 26% who disagree).

A majority (56%) of people also believe that developing infrastructure is an important step to combatting climate change, with flood defences, water supply and sewerage, and solar energy also among the top priorities.

Furthermore, there's a strong consensus (68%) that investing in infrastructure will create jobs and boost the economy.

Looking deeper, however, we find considerable variation in sentiment between countries. The survey finds a gap of 59 percentage points in overall levels of satisfaction with infrastructure across all countries. As in 2023, citizens in Singapore (74%), India (73%), Indonesia (64%) and Netherlands (64%) are among the most positive, with Peru (24%), Italy (23%), Hungary (19%) and Romania (15%) among the most negative.

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Shortcuts

What Worries the World – October

After falling out of the top spot last month, inflation is the top concern again, with 19 out of the 29 countries seeing their level of worry about the cost-of-living rise.

Meanwhile, concern for healthcare reaches the highest level we've recorded for South Korea – with just over a third (34%) now worried.

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Wellbeing That Works

The latest Ipsos Karian and Box survey, based on interviews with over 2,500 UK employees, aims to understand the factors driving high levels of burnout.

The report examines who's most in need of reducing the risk of burning out, how managers and leaders affect wellbeing, and what employees want their employers to prioritise to maximise wellbeing.

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Food & You 2

Since 2020, Ipsos in the UK has been running the Food Standards Agency's flagship consumer survey which looks at all aspects of consumer food habits.

This year's edition reveals 24% of participants across England, Wales, and Northern Ireland have reported being 'food insecure', which means having limited or uncertain access to adequate food.

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Be Distinctive Britain

If Britain were a brand, what kind of shape would it be in? Has it lost its way, or is it still punching above its weight? Great Britain or not so Great Britain? Ipsos, in partnership with JKR and The British Chambers of Commerce surveyed 3,000 consumers and 1,100 UK business leaders to find out.

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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: **Bucharest, Romania.** According to our Infrastructure Index on page 12, Romania has the lowest satisfaction with their country's infrastructure.

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