

2024

WHAT JUST HAPPENED?

AND WHY?

Kelly Beaver MBE
Chief Executive
Ipsos UK

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Elections, what just happened?
February 2025 | Version 1 | Public



Democracy's biggest year...

1,652,687,766

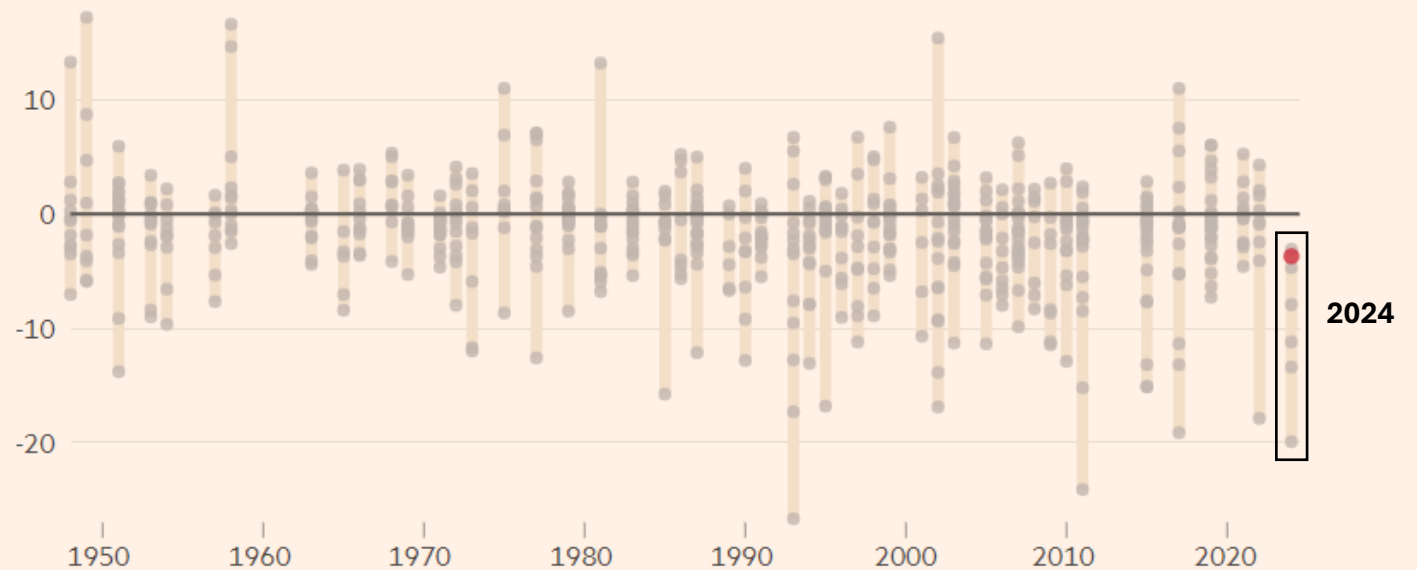
votes cast – at least...

But fewer were for incumbents than ever before

Every governing party facing election in a developed country this year lost vote share, the first time this has ever happened

Rise/fall in vote share for governing parties in national elections (% pts), by year

● Individual election ● US 2024



Excludes years where fewer than five countries had elections

FT graphic: John Burn-Murdoch / @jburnmurdoch

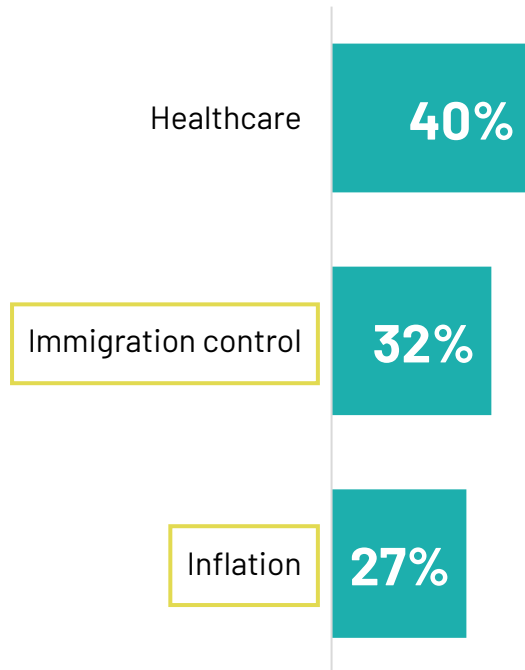
Sources: [ParlGov](#), FT research

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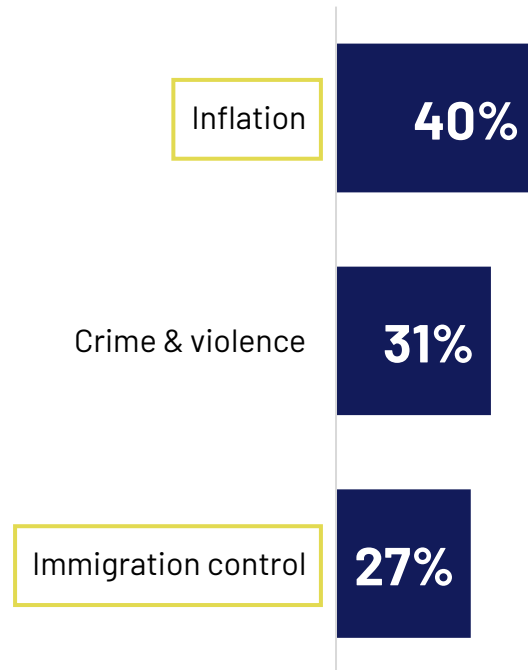
Despite local nuance, the drivers are global

Q: Which three of the following topics do you find the most worrying in your country? Top three worries

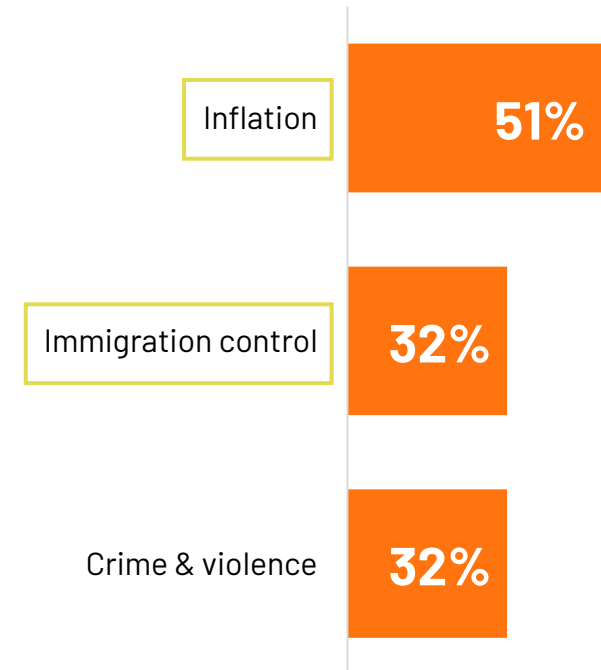
GB, June 2024



France, June 2024



US, October 2024



Sources:

Ipsos What Worries the World? France June 2024, GB June 2024, US October 2024

Base sizes: c.1000 adults in each country, France & GB surveyed 24 May – June 7, US surveyed 20 September – October 4

A new twist on an old saw:

Are you better off than you were before the pandemic?

France

44%

feel worse off

Britain

42%

feel worse off

US

38%

feel worse off

Do you think you are better or worse off, if either, than you were in early 2020, before the COVID-19 pandemic occurred?

Base: 22,720 online adults under age 75 across 32 countries, interviewed October 25 – November 8, 2024

2024 THE YEAR OF POPULISM?



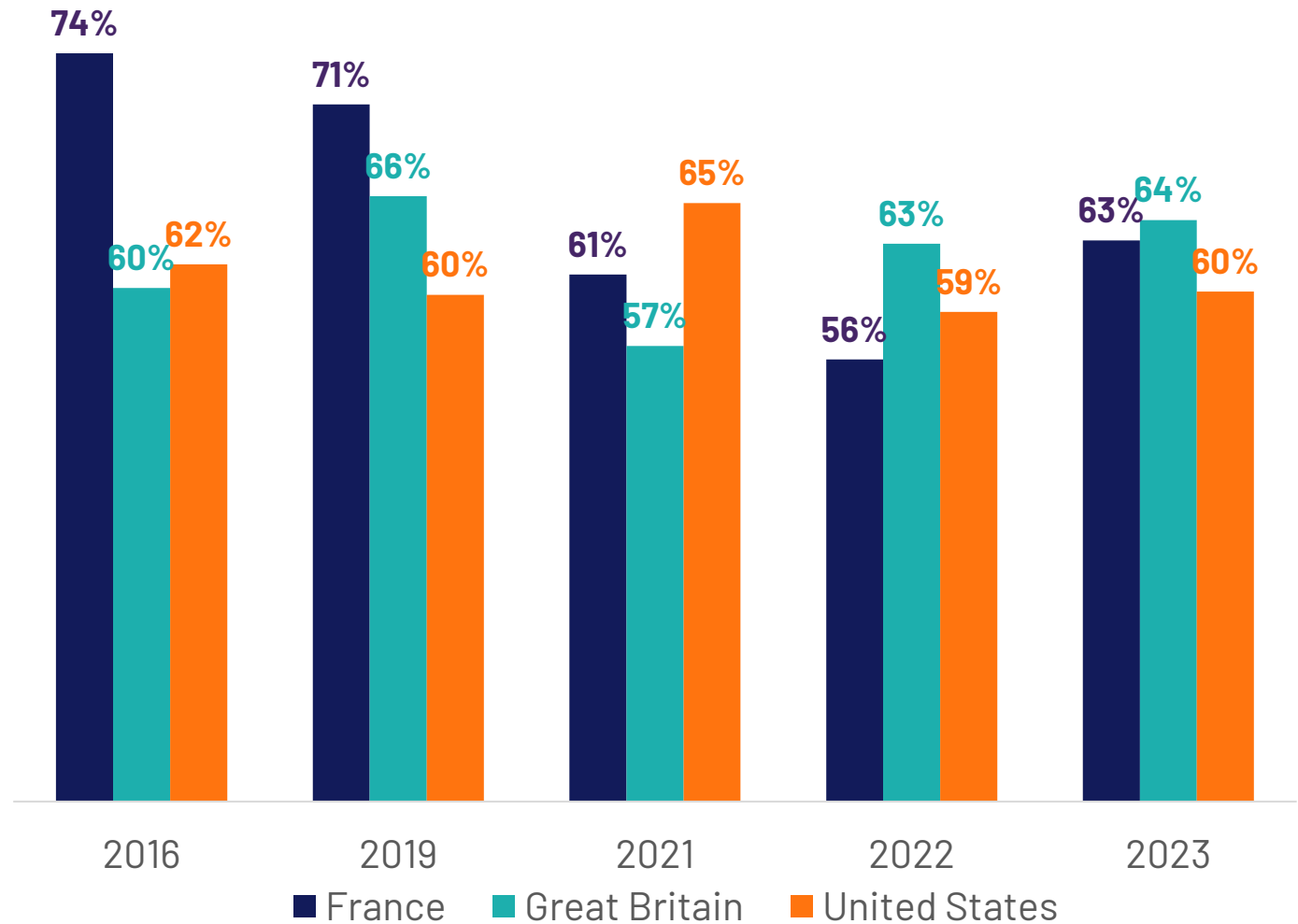
Populists aren't "insurgents" Many have been well-known for years



The sentiment driving their appeal isn't new, either

Ipsos "Broken System" Index

- *The [country's] economy is rigged to advantage the rich and powerful*
- *Traditional parties and politicians don't care about people like me*
- *To fix [COUNTRY], we need a strong leader willing to break the rules*
- *[COUNTRY] needs a strong leader to take the country back from the rich and powerful*
- *Experts in this country don't understand the lives of people like me*



So what's new?

Concerns about state capacity are heightened

People want change and are willing to roll the dice

"I am worried that government and public services in my country are doing too little to help people in the years ahead"

Britain

80%

France

76%

US

72%

WHAT DOES THE FUTURE HOLD?



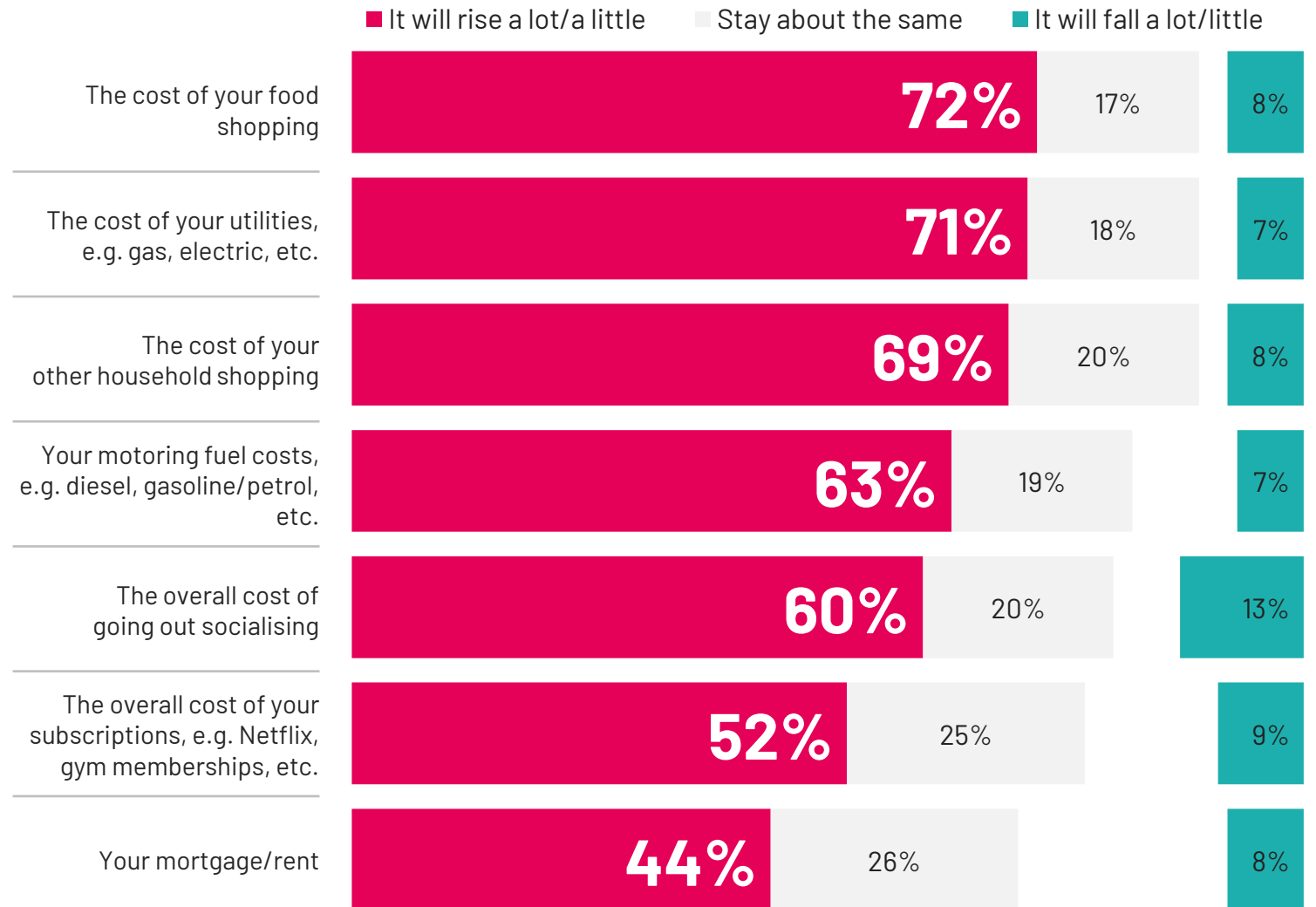
2024 was not an aberration... ...expect more of the same in 2025



A global expectation for things to get worse

Thinking now about your household spend in the next six months, for each of the following types of spend, please say whether you expect it to increase, decrease, or stay the same as it is now

32 -country average %



Source

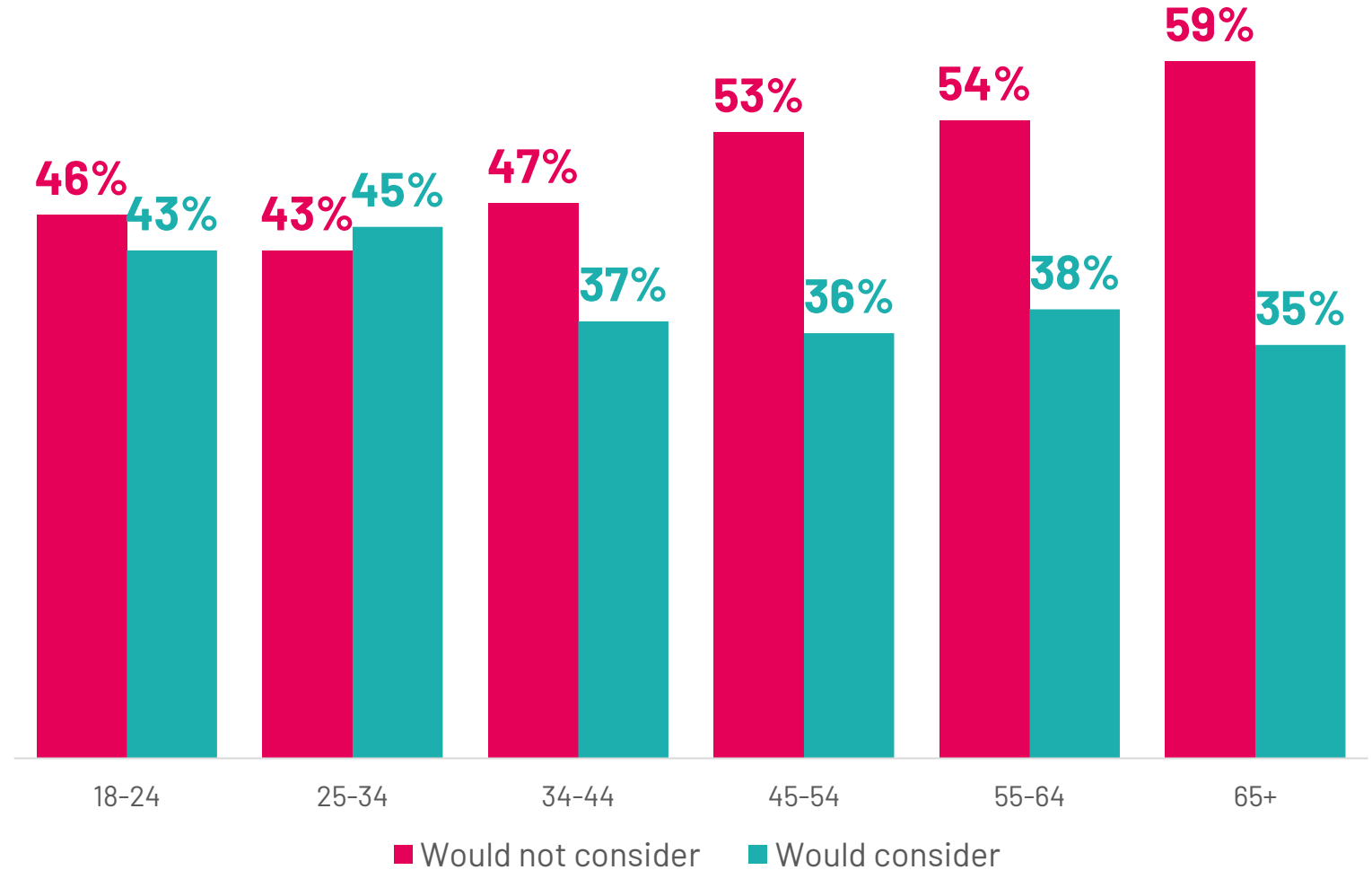
Ipsos Cost of Living Monitor, November 2024
 Base: 22,720 online adults under age 75 across 32 countries, interviewed October 25 – November 8, 2024



Younger groups in the UK are “populism curious”

Regardless of your current voting intention, would you or would you not consider voting for the following parties at the next general election?

Reform UK by age groups



Source
Survation, 2,030 respondents sampled 12-16 December 2024

Populist incumbents:

How harshly will they be assessed?

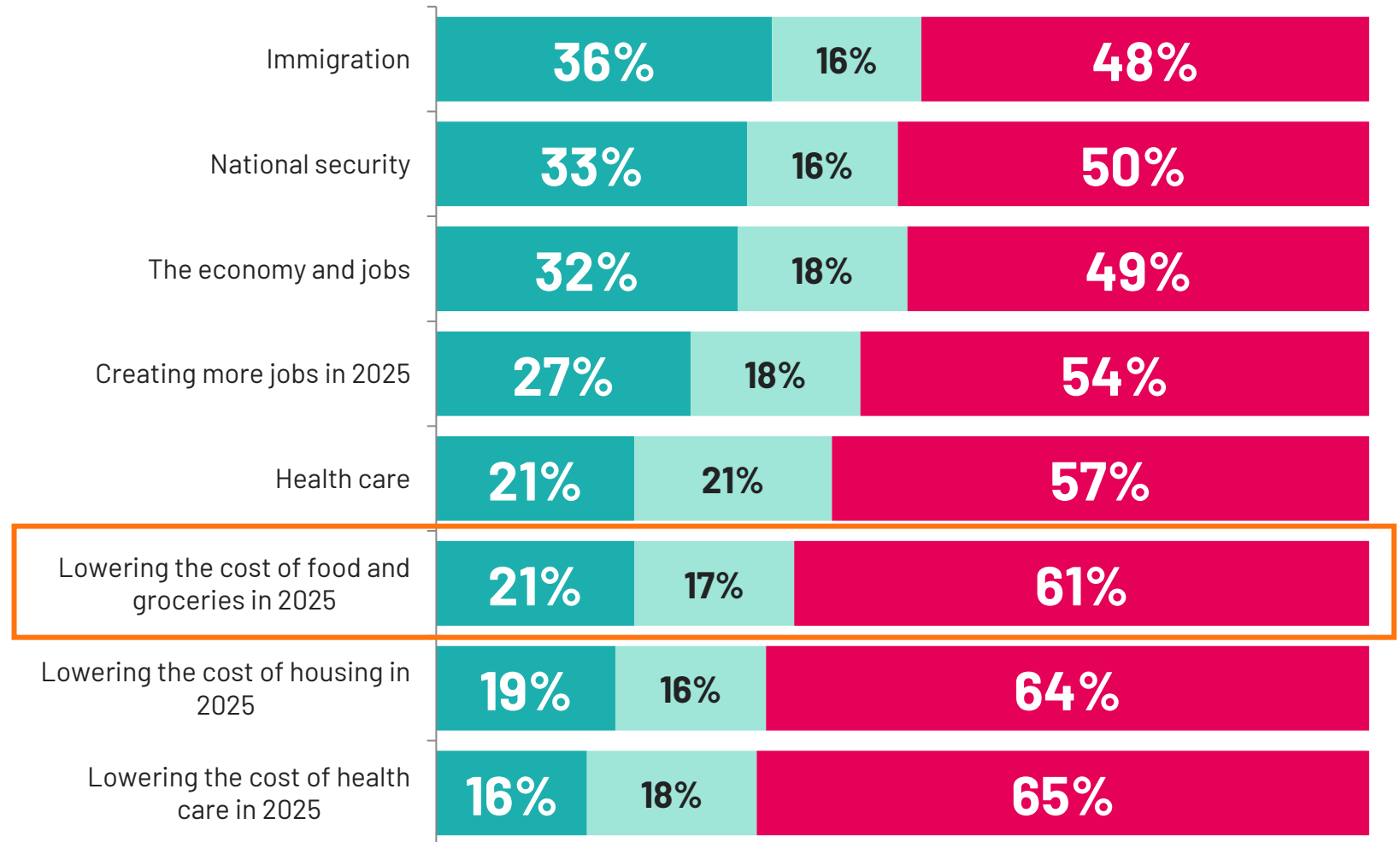
How confident are you in Donald Trump's ability to handle each of the following in 2025?

Source

AP NORC: [Most adults are skeptical that Trump can address costs and other economic issues](#)

Poll conducted January 9-13, 2025 with 1147 adults nationwide

■ Extremely/very confident ■ Moderately confident ■ Slightly/not at all confident



How to respond?



A reminder: narrative and attention matter

Perceptions *are* reality



Do you really know what matters to people?

And can you deliver in a timeline they care about?



People are willing to take a chance on “established disrupters”

THANK YOU

Kelly Beaver MBE

Kelly.Beaver@Ipsos.com

@KellyIpsosUK

