

IPSOS UPDATE

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

April 2024

IPSOS UPDATE APRIL 2024

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

This month marks four years since the start of a series of pandemic-related effects that we are still living with. A mental health crisis, the arrival of hybrid and remote working, an apparent permanent hollowing-out of many city centres, an inflation surge whose effects live on. And it's now just over two years since Putin, now successfully re-elected (we didn't need to do polls to predict that one), invaded Ukraine, recasting European defence industries and expanding NATO membership.

Amidst all this, how are we all feeling, and coping? On a positive note, our annual *Global Happiness Survey* finds 71% across 30 countries saying they are happy these days. People are more upbeat than they were during Covid times (just 63% of us described ourselves as happy back in mid-2020), although we are still some way short of the 77% happiness score recorded in 2011.

And, despite all the talk about the "Great Resignation", we find people are actually rather positive about how things are at work: 73% of us are happy with our jobs and 76% of us like our co-workers!

As ever, it's the people who are closest to us – our family and friends – who make us happiest. We pick up on themes around family in our MENA team's special report on Ramadan. Across the region, nine in ten are spending more time with family during the holy month, and three-quarters say this period evokes a sense of nostalgia, taking them back to cherished times from their younger days.

We find fewer reasons to be cheerful in this month's social and political polling numbers. Our new data for the G7 nations finds more than 60% in each country saying they are dissatisfied with both their economic and political/social situations. The prevailing mood provides a fertile breeding ground for populism, as this big election year starts to shape up.

Our Ipsos Flair special report on one of these G7 members shines a light on the challenges faced by many countries. *Italy: A Divergent Country* explores the "cracks" in society, as our team reflects on its current divisions according to class, geography and generations.

Generational differences emerge as a headline story in our International Women's Day survey. Despite the stereotype of Millennials and Gen Z being "woke", it's younger people who are more conservative when it comes to gender equality. Generation Z men are a particular group to watch. They are particularly likely to say that things have "gone too far" when it comes to supporting or promoting women's equality. A topic we will be exploring further in our upcoming *Ipsos Generations Report* – watch this space.

Throughout this edition, we've provided short summaries on each of our featured topics, together with links to the full reports if you'd like to go deeper. Do get in touch if you want to discuss anything in more detail.

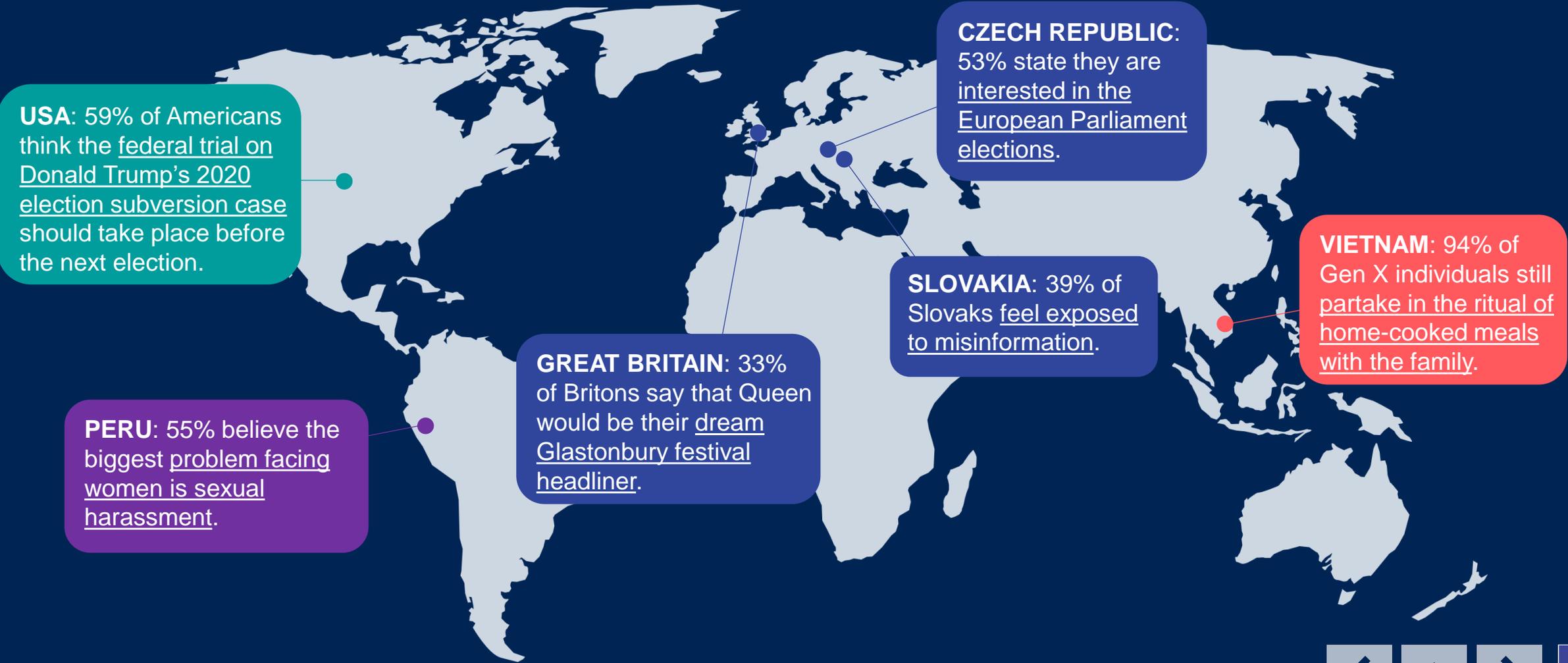
Ben Page, Ipsos CEO



POLL DIGEST

Visit [ipsos.com](https://www.ipsos.com) and our local country sites for the latest polling and research.

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



IN THIS EDITION

THE VIBRANT FRINGES

Spotting opportunities beyond the mainstream

People relegated to the fringes are often the source of disruptive innovation, breakthrough ideas and the bellwether of emerging trends. Find out how to tap into these opportunities.

INTERNATIONAL WOMEN'S DAY 2024

Key challenges facing gender equality today

A majority believe women won't achieve equality unless men take action to help. Findings also show that generational stereotypes may be misguided.

UKRAINE IN FOCUS

Regional intentions report number five

This report for the United Nations High Commissioner for Refugees looks at the opinions and attitudes of Internally Displaced Persons (IDPs) and Ukrainian refugees.

SPOTLIGHT MENA: RAMADAN HANDBOOK

How to engage with consumers during Ramadan

This in-depth report delves into the attitudes and behaviours of consumers across the MENA region during the holy month; from food and shopping to nostalgia.

GLOBAL HAPPINESS SURVEY

71% across 30 countries say they are happy

This year's survey finds people, on the whole, happy – particularly in comparison with pandemic times. However, the level of happiness hasn't rebounded to the same level reached in the 2010s.

ESG & SHOPPER BEHAVIOUR

How to drive behaviour change

A state of inertia exists among shoppers when it comes to positive ESG behaviours. This paper shares how manufacturers and retailers can help drive behaviour change.

WHAT WORRIES THE WORLD?

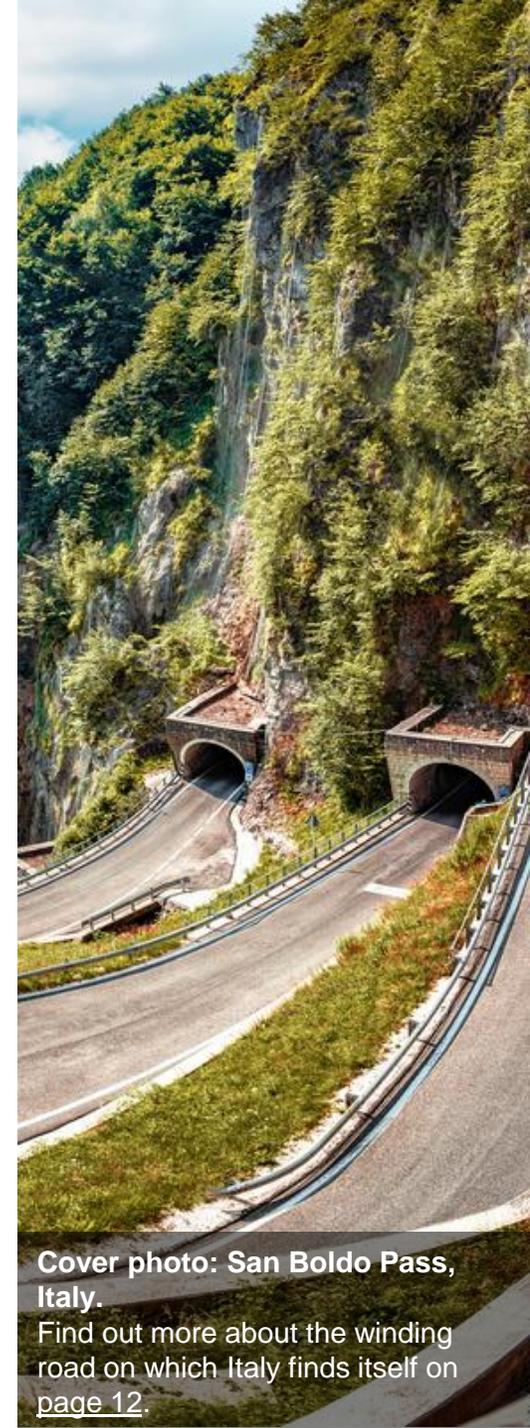
Inflation the number one concern for two years

This month marks the second anniversary of inflation as the top global concern, with over a third across 29 countries mentioning it. However, we're now starting to see other worries move up the list.

FLAIR ITALY 2024

A diverging country

Explore the most pressing issues facing the nation today. We explore what a declining population will mean for generational attitudes, culture, food, brands and so much more.



THE VIBRANT FRINGES

Spotting opportunities beyond the mainstream

People relegated to the fringes are often the source of **disruptive innovation**, **breakthrough ideas** and the **bellwether of emerging trends**.

As global demographics continue to evolve and our world becomes more diverse in a myriad of ways, the definition of 'mainstream' is in unprecedented flux. We increasingly find ourselves belonging to many different groups, based on different aspects of who we are and the changing context in which we live. Identity is being continually redefined.

"Fringes" refer to niche or unconventional segments of the market that exist outside the average consumer base. These fringes have traditionally been seen as smaller opportunities and distractions from the needs of the broader market. However, this paper demonstrates how engaging with people in these colourful spaces – **Vibrant Fringes** – will uncover

valuable insights and help organisations get ahead of and navigate the desires and demands of tomorrow.

In *The Vibrant Fringes* we share:

- How targeting people on the Vibrant Fringes unlocks new opportunities and innovations that would otherwise be missed.
- How getting ahead of changes will provide organisations with opportunities to meet the needs of a dynamic consumer base, communicate genuinely, and create loyal brand followers.
- Ipsos' six-step model to help businesses and brands identify the initiatives with the greatest potential for success.

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PEOPLE RELEGATED TO THE FRINGES
ARE OFTEN THE SOURCE OF DISRUPTIVE
INNOVATION, BREAKTHROUGH IDEAS AND
THE BELLWETHER OF EMERGING TRENDS. ”



GLOBAL HAPPINESS 2024

71% across 30 countries say they are happy

People are happier now than they were during the pandemic – but still not as happy as they were in the early 2010s.

Seven in ten (71%) across 30 countries describe themselves as happy. This is down slightly compared with last year (73%), but slightly higher than during the pandemic years of 2020 and 2021, when 63% and 67% said they were happy.

In 2024, the Netherlands has the highest proportion of people describing themselves as happy, at 85%. They are followed by Mexico (83%) and Indonesia (82%). At the other end of the scale, Hungary and South Korea (48%) are the least happy. Happiness among South Koreans has fallen nine percentage points compared to last year and has fallen 23pp since we first asked about happiness in 2011.

While there has been a significant decline in happiness in South Korea, this is not

where we see the biggest drop compared with the first wave of our survey. In 2011, 89% in Türkiye reported being happy, in 2024 this is down to 59%. Although higher than Türkiye's all-time low score of 42% in December 2021, this year remains 30pp lower than 2011.

When it comes to people's lives, it is family and friends that people are most satisfied with. While their country's politics and economy, as well as their own personal financial situation, are the areas of their lives where satisfaction is lowest.

Looking at how different generations perceive their lives there is little difference between the age groups in terms of how happy they feel. However, Gen Z, the youngest generation included in this survey, are more likely to feel like their life is out of control compared to older generations. Meanwhile, Baby Boomers are less likely to be satisfied with their country's economy.

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PEOPLE ARE HAPPIER NOW THAN THEY WERE DURING THE PANDEMIC – BUT STILL NOT AS HAPPY AS THEY WERE IN THE EARLY 2010s. ”



INTERNATIONAL WOMEN'S DAY 2024

Key challenges facing gender equality today

Despite the stereotype of Millennials and Gen Z being “woke”, younger generations are more conservative on the issue of gender equality.

This is one of the key findings in a new global study carried out in 31 countries by Ipsos in collaboration with the Global Institute for Women’s Leadership at King’s College London for International Women’s Day.

When it comes to the question of whether men are being asked to do too much to support equality, only 43% of Baby Boomers say this is the case, but this rises to more than one in two among Millennials (57%) and Gen Z (54%).

Overall, although there has been little change since last year, the long-term trends show some attitudinal shifts across a 24-country average.

More people now think that when it comes to giving women equal rights with men, things have gone far enough in their country (41% in 2019 vs. 54% today).

However, people are more likely to define themselves as a feminist now, compared with 2019 (39% vs. 33%) and are more likely to think there are actions they can take to promote gender equality (64% today vs. 56% in 2018).

Meanwhile, people tend not to have a preference about the gender of their political or business leaders – a majority of people say they would have no preference towards a man or a woman if given a choice (57% and 58% respectively).

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TWO IN THREE (65%) AGREE THAT WOMEN WON'T ACHIEVE EQUALITY IN THEIR COUNTRY UNLESS MEN TAKE ACTIONS TO SUPPORT WOMEN'S RIGHTS TOO.”



SHIFTING SHOPPERS' ESG ATTITUDES TO ACTION

How to drive behaviour change

When it comes to Environmental, Social and Governance (ESG) policies, it is not always clear to shoppers, manufacturers and retailers who is responsible for what, the steps that can be taken, and the incentives for so doing. Customers are confused about which individual actions will have the biggest impact.

Not only is there confusion over who should be doing what for ESG, there are often barriers and pain points rather than rewards for ESG-related activities. These include higher prices for shoppers buying sustainable products and greater costs for manufacturers and retailers implementing a more sustainable supply and logistics chain.

All of this results in a state of inertia among shoppers with regards to positive ESG behaviours, despite some segments

of the population asserting the high importance of ESG.

Read *Shifting Shoppers' ESG Attitudes to Action* to find out:

- How ESG plays out for shoppers, manufacturers and retailers.
- What the responsibilities are for each party in creating a better world for people and planet.
- How Ipsos' 'Me – My World – The World' framework can help brands align with shoppers' needs.
- How authenticity and relevance can incentivise shoppers to change behaviours and shift from attitude to action.

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BRANDS RISK BEING LOST IN A SEA OF SUSTAINABILITY SAMENESS IF THEY FAIL TO CONNECT WITH THEIR CUSTOMERS BEYOND THE ESG FUNDAMENTALS. ”



UKRAINE IN FOCUS

Regional intentions report #5

This report, conducted by Ipsos in Switzerland for the United Nations High Commissioner for Refugees (UNHCR), explores the plans, perspectives, and intentions of Ukrainian refugees across Europe, internally displaced persons (IDPs) within Ukraine, and refugee returnees.

The research has been designed to ensure the centrality of the voices of Ukrainian refugees and IDPs in discussions about their future, as well as to inform evidence-based policy responses in host countries and in Ukraine. This report presents the summary findings from the fifth round of data collection including, for the first time, findings related to the experiences and current situation of refugee returnees.

Findings reveal the proportion of refugees planning or hoping to return to Ukraine in the future has decreased compared to

one year ago (from 77% to 65%). Furthermore, the share of those who are undecided about returning has increased (from 18% to 24%), as well as those who report no hope to return (from 5% to 11%). And while many refugees and IDPs would definitively return to Ukraine if the full-scale war came to an end in the next twelve months (35% for refugees and 43% for IDPs), a higher proportion report some degree of uncertainty (58% and 49%, respectively).

Meanwhile, the same reasons continue to compel refugees who plan to return in the near future: the desire to go back to their cultural environment (55%) and the desire to reunite with relatives (35%). For internally displaced people, the main reasons for return are taking care of their property (28%) and the desire to reunite with relatives (21%).

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MORE THAN A TENTH OF REFUGEES AND INTERNALLY DISPLACED PEOPLE ARE CONSIDERING RETURNING IN THE NEXT TWELVE MONTHS. ”



WHAT WORRIES THE WORLD?

Inflation the number one concern for two years

Rising prices is the number one concern in our *What Worries the World* survey for the 24th consecutive month. March 2022 was the last time something other than inflation was the biggest worry for people across the world. Twenty-four months is longer than the pandemic spent as the top issue (18 months).

However, while inflation is the number one issue, peak concern has passed. In February 2023, 43% across 29 countries chose inflation as a top worry in their country. Since then, worry has been steadily falling with 35% now picking it as an issue in April 2024.

This is not to diminish the fact that it remains a major concern for many markets. Ten countries still pick inflation as their number one worry and in four countries – Argentina, Türkiye, Canada and Singapore – more than one in two say it is a concern.

Argentina remains the most concerned country about inflation, with 65% saying it is a top issue. Argentinians have been the most worried across 29 countries since November 2022.

Higher income households are more likely to be concerned about rising prices; 37% of high-income families are concerned about inflation compared to 34% on a low income. However, concern among those on a higher income has been falling over the last 18 months, while worry among people on a low income has stayed consistent over the same period.

Inequality, crime (both 30%), unemployment (27%) and corruption (26%) round out the remaining top five most worrying topics globally. In five countries, a majority say they are concerned about crime. Three of these are from LATAM – Peru (62%), Chile (61%) and Mexico (53%).



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THE 2024 RAMADAN HANDBOOK

How to engage with consumers during Ramadan

The 2024 Ramadan Handbook provides insights into consumer behaviour and attitudes in the MENA region during the holy month of Ramadan. The report finds people love the spirituality (30%), fasting (15%), and family gatherings (15%) associated with Ramadan.

Most view Ramadan as a time for increased religious devotion (86%), charity (84%), and spirituality (82%). Sleep, activity levels, and productivity at work vary between individuals. 90% spend more time with family than friends, as Ramadan evokes nostalgia for cherished family times. However, 57% feel the Ramadan spirit isn't as strong as in the past.

Home-cooked meals are favoured over eating out (84% vs 16%). People usually break their fast with dates (86%), have appetisers (74%), and eat a variety of main dishes. 84% have suhoor on most nights and snacks after iftar, with 69% choosing healthy snacks.

Ramadan shoppers tend to plan purchases (65%), shop in-store (69%), seek deals (62%), and stick to familiar brands (59%). Half (50%) look forward to Ramadan promotions and two-fifths (40%) delay big purchases to benefit from offers. Overall, 59% spend more during Ramadan.

Online (53%) and offline (47%) sources are almost equally used for brand information, with social media being the top source (28%). And while 76% think there are too many ads during Ramadan, 49% say they have purchased products based on Ramadan ads.

The report provides valuable consumer insights to help brands effectively engage with their audiences during Ramadan. Five Ramadan personas are identified: Content Explorer (26%), Passionate Shopper (24%), Social Connector (19%), Festive Spirit (18%), and Self Nurturer (15%), each with unique behaviours.

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MORE THAN ONE IN TWO (57%)
FEEL THAT THE RAMADAN SPIRIT
ISN'T AS STRONG AS IT
USED TO BE IN THE PAST. ”



FLAIR ITALY 2024

A Divergent Country



Italy's current society is marked by social fractures, restless passions, and frustration. Oscillating between dynamism and setbacks, radicalism and defensiveness, solidarity-driven impulses and egoistic cravings.

This edition provides a broad overview of a range of sociological and marketing perspectives in Italy today. The report is comprised of five parts.

Section I: A Holistic Look at Gen Z

Here we analyse the personality traits, attitudes, values, and behaviours of Gen Z, identifying eight distinct 'swarm' communities: the exuberant carefree, the daring to emerge, the desirous of admiration, the genuine concrete, the calm reflective, the poetic-passionate, the introverted taciturn, and the dark isolated.

Section II: Brands & New Generations

We explore the relationship between brands and younger generations, finding that Gen Z are attracted to products that reflect their personal values. Brands that engage them effectively by understanding their media use, leveraging co-creation, and expressing authenticity.

Section III: Obstacles to Having Children

There are several drivers to Italy's population decline. Economic instability and the fear of job loss, especially among women, are significant barriers to starting a family in Italy. This paper reviews how social and economic reforms could address these issues and subsequently boost birth rates.

Section IV: Authenticity in Italian Food

We outline five different interpretations of authenticity within Italian food culture, including the celebration of tradition, handmade foods, embracing imperfection, transparency, and the artistry of food. Brands can leverage these trends to resonate with consumers.

Section V: Behaviour and Neuromarketing

Using Esselunga supermarket as a case study, we look at neuromarketing techniques and customer feedback, demonstrating the effectiveness of combining traditional marketing strategies with advanced consumer neuroscience techniques.

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SHORTCUTS

What's Next in UX Podcast

Jacqueline Hull, Senior VP, UX USA, and Guilia Stefani, Client Service Director, UX Switzerland, are joined by Brooke Bosley, Ph.D., Design Researcher at Microsoft Education and Alyssa Sheehan, Research and Innovation Director, Ipsos UX. Brooke's research draws from Black feminism and Afrofuturism and offers an approach to help Human-Computer Interaction (HCI) researchers and designers create more reflective products and experiences.

The guests also talk about how to apply social justice to UX research and how brands and companies can implement inclusive and equitable designs.

One of the key takeaways of this episode for brands and researchers is that inclusive UX doesn't just benefit a specific group of people, but rather benefits all users.

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The Treatment of Ethnic Minorities

On average across 30 countries, one in five people (21%) say that ethnic minorities experience unequal or unfair treatment in their country.

This finding comes from the second edition of our annual *Ipsos Equalities Index*, examining how people around the world understand fairness and discrimination.

Countries with a higher degree of ethnic diversity (such as Indonesia), and those where discrimination on ethnic grounds was legal in relatively recent history (such as the United States and South Africa) are more likely to report unequal or unfair treatment of ethnic minorities.

Conversely, countries that are more ethnically homogenous like China, Japan and South Korea are less likely to agree that ethnic minority groups suffer from unfair discrimination.

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Four Years of Coronavirus

Four years after the WHO first declared a global health emergency, we look at how views on everything from inflation to mental health have changed since 2020.

The ultimate toll of living through this once-in-a-century event has yet to be truly tallied. But, as the world marks the fourth anniversary of the start of the pandemic, we dive deeper into what Ipsos Global Advisor polling tells us about where we've been and where the data suggests we're going.

One of the big impacts of Covid-19 was on global economies. Back in April 2020, only 9% across 28 countries considered inflation a concern. Two years later and worry had risen to 32%, becoming in the biggest issue in our *What Worries the World* survey.

We also look at the effects on people's mental health and other problems.

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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.

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