

December 2024

IPSOS UPDATE

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



Ipsos Update December 2024

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

As we digest the US election results, one clear lesson is that "it's the economy, stupid." Donald Trump maintained a strong lead on cost-of-living concerns, benefiting from the global anti-incumbency effect. His 1.7% popular vote victory highlights America's division. [Our polling predicted the close race and his lead on key issues](#). Looking ahead, Trump's policies on tariffs and immigration may be inflationary and hinder global growth, while his stance on Ukraine could alter European security. However, discussions with senior politicians and CEOs suggest hope that his stock market focus and desire for a Nobel Peace Prize might temper his impulses, keeping him attuned to established voices. Time will tell.

Globally, with six in ten believing their society is broken, populism thrives. Our [Cost of Living Monitor](#) reveals widespread frustration with inflation's lasting effects. Particularly in G7 nations, people feel worse off than pre-pandemic, with financial difficulties disproportionately affecting low and middle-income groups, widening the sentiment gap from higher earners. We are growing more divided.

Meanwhile, the 2024 [Ipsos Global Trustworthiness Index](#) highlights experts – doctors, scientists, and teachers – as the most trusted professions. Contrary to popular belief, trust is rising in many areas, with journalists seeing improvement, albeit from a low base.

Social media influencers debuted this year with poor trust scores, only above politicians. Our [Perils of Perceptions](#) research puts the spotlight on social media as a key reason for public misconceptions about national changes. Despite low trust, advertisers and influencers remain effective communicators.

Looking to the future, our [Halifax Security Forum](#) report examines global public perspectives. Disinformation is seen as a real threat by 76% across 30 countries. Canada and Germany are viewed as positive international influences, while Iran ranks lowest. However, there are signs of hope: concerns about a world war have

decreased globally. Most people in all surveyed countries affirm democracy, human rights, and the rule of law as universal values to which all nations can aspire.

As always, please feel free to get in touch with any queries. Look forward to hearing from you!



Ben Page
Ipsos CEO

Poll Digest

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

USA:

35% say economic policies were a key motivation to vote in the election.

Canada:

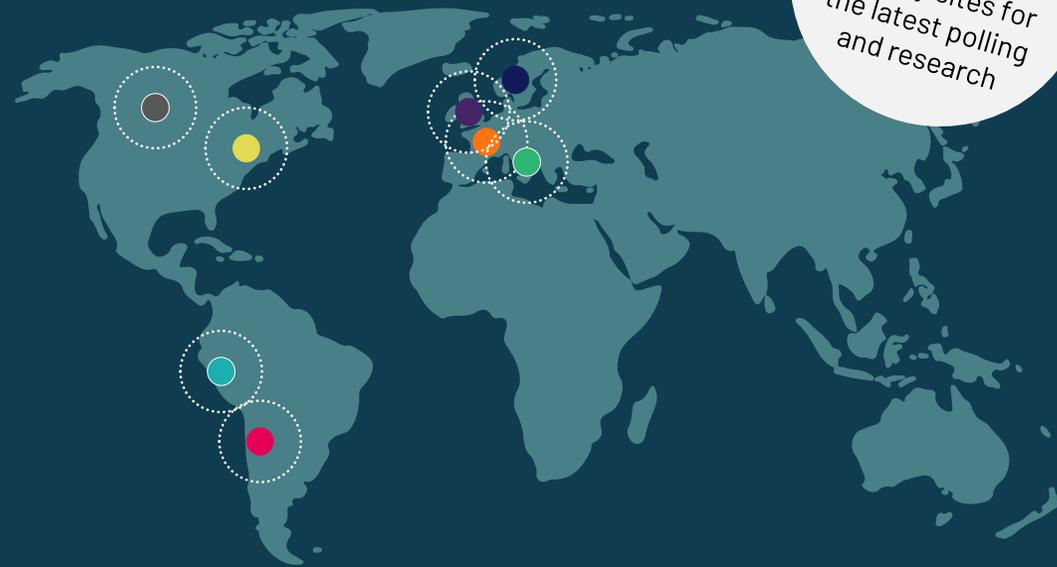
59% of parents admit they don't know what their children are doing on social media.

Chile:

75% believe that there is a lot of corruption in the country.

Peru:

85% believe President Boluarte will protect her brother, Nicanor, from facing jail.



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France:

89% believe that nothing can justify an anti-Semitic act or word.

Italy:

62% of women don't report abuse at work for fear of losing their job.

Norway:

12% think Donald Trump will contribute to a safer world.

Great Britain:

43% of Britons think the Royal Family are good value for money for the UK taxpayer.

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Flair Brazil 2025

Movements beneath the surface

Brazil has faced a number of challenges recently, from political and economic instability to the pandemic, health crises, and fluctuating exchange rates. These immediate concerns naturally consume our attention and resources. However, beneath the surface, deeper societal shifts are taking place, like tectonic plates reshaping the landscape. Ignoring these “tectonic shifts” risks leaving us unprepared for major social and economic disruption.

One of the most significant shifts is demographic change, with an ageing population, declining birth rates, and longer life expectancy.

At the same time, emerging behavioural trends – including growing concerns about sustainability, the search for purpose, and a renewed appreciation of nostalgia – are reshaping society.

Brands are faced with the dual challenge of managing current instability while adapting to these changes. The solution lies in developing a long-term vision and cultivating a culture that is sensitive to these shifts.

Companies need to move beyond superficial analysis and quick fixes and focus on putting people at the heart of decisions.

In our latest issue of Brazil Flair, our local experts share their views on the issues and opportunities this presents for brands, focusing on a range of topics, including:

- Concerns of Brazilians
- AI and beauty
- Corporate reputation
- The new Brazilian family.

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Companies that will thrive in this complex and constantly changing scenario will be those that abandon the reactive model and embrace a proactive stance.

Halifax Security Forum 2024

Disinformation and hacking are the biggest concerns

In the latest edition of our annual Ipsos *World Affairs* polling for the Halifax Security Forum, we explore global attitudes towards conflicts and threats to the world. This year, disinformation and hacking are seen as the biggest risks, while fear of World War III starting has dropped.

Worry about a global conflict involving superpowers similar to World Wars I and II over the next 25 years has dropped in 29 out of 30 countries year-over-year. As the full-scale invasion of Ukraine nears the three-year mark and with the Hamas-Israel conflict in its second

year, 63% (down 7pp versus 2023) expect a worldwide conflict between now and 2074.

Over the past decade, on average across 20 countries (change for 20-country average is based on the countries which were in all editions), concern about one issue has grown the most: natural disasters. In 2015, 58% of people saw it as a threat, with that rising to 69% in 2024.

The survey also examines the influence of nations, with Canada seen as being the most positive influence. Globally, 79% say Canada is the

country/organisation most likely to have a positive influence on world affairs over the next decade, once again topping our list. Meanwhile, Iran remains in the bottom spot, with 25% saying it will have a positive influence.

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63% expect a worldwide conflict between now and 2074.

Cost of Living Monitor

Despite inflation rates falling, people are not finding it any easier

In many countries around the world inflation rates have fallen in 2024, but the proportion who say they are finding things financially difficult has changed little this year.

The Ipsos Cost of Living Monitor finds 28% say they are in difficulty (it was 26% in April 2024).

In some of the world's most advanced economies, including Italy, Australia, Japan and the US, the number of people struggling is at its highest level since we began the study in April 2022.

People are also feeling worse off

than they were before the COVID-19 pandemic. 37% across 32 countries say they are worse off than four years ago, with this sentiment particularly felt in the G7 countries.

The expectation is that persistent inflation is not yet behind us. 65% think the rate of inflation in their country will rise in the next 12 months.

This figure is up 7pp since April and this is the highest figure we've recorded since November 2022.

Looking at Europe, the proportion who think their disposable income

will fall in the next 12 months is higher than it was earlier this year (+3pp to 33%).

A greater number of people in France, Great Britain, Netherlands, Germany and Poland feel this way in November compared with April.

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65% think the rate of inflation in their country will rise in the next 12 months. This figure is up 7pp since April.



Women's Forum Barometer 2024 Edition

Stereotypes continue to permeate society

For the 19th edition of its Global Meeting, the Women's Forum reveals the results of its annual barometer on gender inequalities, developed in partnership with Ipsos, among a sample of 3,500 people residing within the countries of the G7.

Awareness of gender inequality is growing: 71% of respondents think that gender inequalities are widespread today in the world, an increase of six points since 2022. This is largely driven by growing awareness among men, who are eight points higher than in 2022, compared to an increase of three points for women. This awareness

is more pronounced among 25-34-year-olds, with 53% of Gen Z and 54% of Millennials saying they are feminists (compared to 41% on average).

However, gender stereotypes continue to grow stronger for all respondents but especially for Gen Z. Some 41% of those surveyed believe that "the male brain is different to the female brain, which explains why men tend to have more aptitudes in scientific subjects and women tend to have more aptitudes in literary subjects". This figure reaches 50% for those aged 25 -34.

Meanwhile, 38% believe that women are naturally bigger spenders than men. Again, for 25-34-year-olds, this figure reaches nearly half (47%).

The Barometer examines this and more including: inequalities at work, health, and the environment.

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50% of those aged 25-34 believe that the female and male brains are different.

Perils of Perception 2024

Public misperceptions prove to be persistent

For the last decade Ipsos has been exploring the [gap between people's perception and reality](#) on a range of issues.

Public misperceptions prove to be persistent, spanning most countries and covering a wide range of topics including society's demographic makeup, the prevalence of obesity, the leading causes of death, the cost of raising a family, the risk of terrorism, the impact of climate change and many more.

People tend to overestimate the scale of issues they worry about, whether that's the murder rate in their country, how much

household wealth the richest 1% own, or the share of immigrants in their country.

But these misperceptions sit in a broader climate of mistrust, impacting how we view experts and elites in our societies. Even trust in democracy is not immune to this – a 30-country average of one in four (24%) don't think elections in their country ensure reliable results.

Belief that misperceptions are primarily due to politicians misleading people has fallen six percentage points since 2018. Social media now receives the most blame for our

misperceptions, with 45% on average across 30 countries citing it as the biggest reason why people are wrong about key social realities.

This may not be completely unfounded: people who report getting their news primarily via messaging apps, social media or from friends and family are less likely to trust scientists, elites and the reliability of elections.

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The more time people spend on social media daily, the more likely they are to regard these topics with suspicion.



Growing Your Brand Through Societal Impact

Why socially conscious branding matters

Traditionally, brand value has mainly been viewed through the dual lens of functional and emotional benefits. However, as consumers become more socially and environmentally conscious, societal benefits are emerging as a critical third dimension.

Our research shows that societal benefits – such as environmental impact and social justice – are increasingly important to consumers. People feel good about themselves when they are using products that have a positive impact on our planet and society.

Aligning initiatives with consumer values offers a real opportunity for

brands to grow, build stronger relationships with their customers, and tap into the rising demand for societal impact. But how can brands integrate societal impact in an effective way?

In our latest *Ipsos Views* paper, we draw on our research to highlight the impact societal benefits can have in driving brand growth. We also outline three ways to grow your brand with the infusion of societal benefits:

- **Connect societal expectations with category motivations:** Understand what societal impacts fit with existing brand propositions.

- **Position societal benefits as co-benefits:** Seamlessly add societal benefits to existing value propositions.
- **Leverage the halo effect:** A brand's commitment to one societal issue can create positive associations in other areas.

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Societal benefits – such as environmental impact and social justice – are increasingly important to consumers.

Global Trustworthiness Index 2024

Experts are ranked as the most trustworthy

The latest edition of our Global Trustworthiness Index finds doctors are the most trusted profession. Over half say doctors are trustworthy (58% on average across 32 countries), followed by scientists (56%) and teachers (54%). Generally front-line public service workers (including members of the armed forces and the police) tend to be more trusted than not.

43% say they trust members of the armed forces, with New Zealand and France the countries most likely to see the military as trustworthy (59% and 57% respectively). Thailand and Chile are the countries with the highest

proportion saying the army is untrustworthy (41% and 40%).

While at a global level people are more likely to say police are trustworthy than not (38% to 30%), in 11 countries the police are more distrusted than trusted. In South Africa and Peru, a majority say the police are untrustworthy (56% and 53%).

Once again politicians rank bottom, with only 15% saying they trust them. In all but two countries (India and Singapore) more people say their politicians are untrustworthy than feel they can be trusted. In Argentina, only 6% say politicians should be trusted.

Politicians have a rival in the “least trustworthy” stakes; 15% say they trust social media influencers, the same proportion who trust politicians, although influencers have a slightly better net trustworthy score to politicians (-41% to -43%). Trust in influencers differs across generations with younger people more likely to trust social media personalities. 20% of Gen Z trust influencers compared to only 9% of Baby Boomers.

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Only 15% say they trust social media influencers and politicians. Whereas 58% trust doctors.

GLP-1s: A Healthcare Revolution?

Applications stretching beyond treating obesity

One of this century's biggest game-changers will likely be a novel drug class that's showing unprecedented success, or the promise of it, in treating some of the world's most prevalent conditions.

The age of GLP-1s is upon us, with the potential to transform healthcare as we know it. What began as a treatment for Type-2 diabetes has expanded to reinvent obesity management – and the promise of this drug class extends far beyond these two diseases for which it is currently approved.

We know that obesity is linked to many other common health

conditions, including cardiovascular disease, kidney disease, liver disease, and cancer. Therefore, a world where lower obesity rates mean fewer people with hypertension or high cholesterol, fewer patients requiring dialysis, fewer people dying from co-morbid conditions, and a drop in diagnoses of the 13 obesity-associated cancer types (OACs). Taking this a stage further, we would see a huge reduction in the burden of care, far easier access to healthcare, and a dramatic drop in healthcare costs.

In this paper, we highlight the impact of GLP-1s to date, and discuss ongoing research

suggesting their game-changing potential in combating some of the world's most prevalent and devastating conditions – both within and outside the metabolic arena. We also consider the implications for future healthcare delivery and the pharmaceutical industry.

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GLP-1s have the potential to treat conditions beyond diabetes and obesity.

Shortcuts



What Worries the World – December

Across 29 countries, crime & violence and inflation are the joint top issues this month, both with a third (32%) expressing concern.

Meanwhile, after severe flooding in Spain, we have seen a shift in worry towards corruption (now number one), up seven points, as well as climate change, up nine points.

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Aligning Your ESG Strategy

As companies ramp up their ESG efforts, understanding consumer expectations is vital for effective brand positioning and ROI. Research shows that 59% of global consumers are willing to pay more for ethical and sustainable products, and 70% prefer brands that reflect their personal values. Aligning ESG strategies with consumer expectations in specific categories is essential.

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Gender Bias

We explore how deeply rooted cultural and social gender biases act as a barrier to the delivery of person-centric, equitable oncology care in the UK. Inspired by a number of sources, which have drawn attention to the cultural and social gender biases that negatively impact the health care experienced by female patients, we set out to develop a holistic view of the healthcare system.

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2024 State of the CX Nation

The report, in collaboration with Ashton Media, focuses on identifying future trends, best practices and challenges facing CX leaders in Australia, alongside the the evolving nature of customer experience. It highlights the growing responsibility for CX in organisations to deliver unique, differentiated, personalised and privacy compliant experiences for customers.

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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: **Bahia, Brazil**. Brazil has faced a number of challenges recently, both politically and economically, find out why in Flair Brazil 2025 on [page 5](#).

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