

March 2025

IPSOS UPDATE

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



Ipsos Update March 2025

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

Just weeks into the second Trump presidency, politicians, businesses and citizens around the world are scrambling to make sense of it all. As we go to press, Donald Trump has just shared a video with Gaza rebuilt as a development of beach front hotels, with a large golden statue of himself featuring prominently.

Our polling for the [Washington Post](#) finds mixed-to-negative reactions to his avalanche of executive orders. He is currently recording some of the lowest post-inauguration approval ratings seen in 70 years. I wouldn't expect to see much improvement until Americans feel the economy improving. Having won by a very effective campaign focussing in part on the cost of living, his challenge, amid so much performative politics, is to now make

Americans – not just billionaires – better off.

In contrast to the US, Asia is far more positive – I write these notes having spent much of February with our teams and clients right across the region. People in Malaysia, Singapore and India have a generally positive outlook, with seven in ten or more saying their country's economy is in "good shape". Back in Europe, optimism is much more muted, although it does vary from country to country. Compared with this time last year, [consumer confidence](#) is on the rise in Italy and Spain, while Britain and Germany have become more pessimistic.

The new Trump administration presents many questions for businesses, and not

just those operating in the US. As our [What Trump Means for Brands](#) review pointed out, this is not necessarily a matter of companies throwing out their current strategies in line with changes of government and the evolving political climate. But we are reminded of the need to be vigilant in ensuring our messaging truly resonates among target audiences, acknowledging the diversity of their experiences and beliefs.

Great advertising can serve as a motor for bringing people together. Take a look at [our feature](#) on the ad campaigns that really cut through at two very different cultural events: the Super Bowl in the US and the Mala Kumbh Mela in India. This analysis, alongside that in our [What the Future: Influence](#) report, highlights the importance

of remaining authentic and being ever-alert to the dynamics of today's fragmented media environments.

Our latest [What Worries the World](#) report once again finds cost of living concerns are most certainly not going away. We explore how this translates to [life on the ground in Sydney](#). Stay tuned for a new report on Asia's top cities, which we'll be featuring next time.

As ever, we are on hand to discuss any of the topics covered here.



Ben Page
Ipsos CEO

Poll Digest

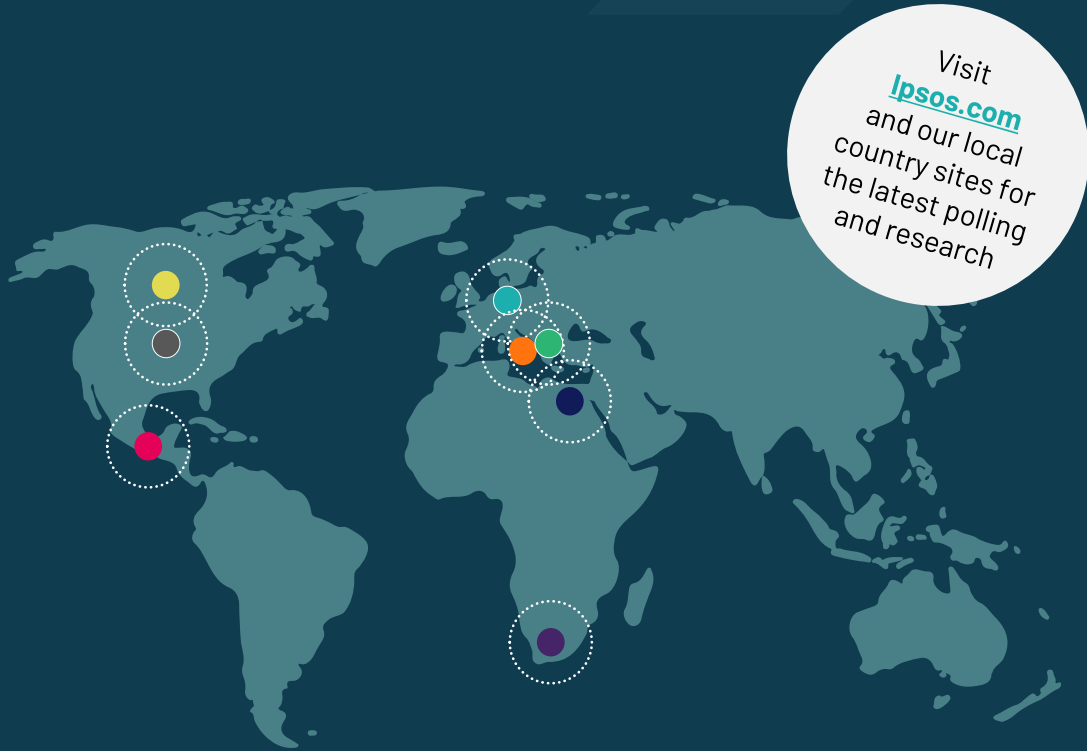
Some of this month’s findings from Ipsos polling around the world

Canada:
68% think less of America as a country because of Trump’s threats.

USA:
Half (49%) of Americans would recommend military service to young people they know.

Mexico:
60% say they will boycott American companies if Trump’s policies regarding Mexico are implemented.

Germany:
67% fear people with disabilities are viewed as unimportant by politicians.



Italy:
47% of teenagers say they consult websites to find out about sexual practices.

Croatia:
60% of parents are concerned about the impact of tech on children’s development.

Egypt:
91% see Ramadan as a time of deep spiritual reflection and increased religious devotion.

South Africa:
92% agree they need to do more to look after themselves physically.

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IPSOS US Politics Special

Since the re-election of Donald Trump in January, our team in the US has been monitoring the latest public sentiments in the US, as well as how other nations view US politics.

One month on from the inauguration, here are some of the [key findings](#) so far:

- **Trump divides opinion.** 45% currently approve of his handling as President; likewise, 45% approve of his handling of the economy. Meanwhile, 50% approve of his immigration control measures.
- **Uneasiness about DOGE.** 63% are worried about Musk's team

getting access to some federal government databases that have Americans' personal Social Security, Medicare, and tax information.

- **Pardoning Capitol rioters is deeply unpopular.** Only 14% support his pardoning of people convicted of violent crimes on January 6.
- **Mixed support on tariffs.** Half (50%) support a 10% increase on Chinese goods but most (69%) think imposing tariffs on Mexico, Canada, and China would increase prices.
- **Most feel Trump has gone beyond his authority.** 57% think

he has, while 40% feel he's acted within his authority. A third (33%) believe the Republicans in Congress will try to stop Trump if he goes beyond his remit.

Elsewhere in the world, Trump's presidency has prompted a mixture of emotions. In Canada, Trump's tariff threats have ignited a sense of nationalism, with 52% desiring reduced reliance on US trade, and [68% of Canadians now having a negative perception of the US](#). There are also potential behavioural shifts to come, like 65% intending to avoid US travel and 67% avoiding American goods.

Similarly, 60% of Mexicans say they will [boycott American companies](#) if

Trump's tariff and deportation policies are implemented.

In Europe, [the French have similar concerns](#), with a strong negative sentiment (67%) towards Trump's leadership. Likewise, [52% of Italians express disapproval of Trump](#). Both countries share concerns around the potential global instability and harmful economic impacts.

In Great Britain, only a [quarter \(25%\) view Trump favourably](#). The British also consider the EU a more important trading partner compared to the US (47% vs. 21%).

READ MORE FROM THE US

READ MORE FROM CANADA

Ipsos Love Life Satisfaction

Attitudes to love, romance, and relationships

The *Ipsos Love Life Satisfaction* survey brings together how satisfied people are with the love in their life, their sex lives and their relationship with their partner.

Countries in LATAM and Asia are most satisfied with their 'love lives'. Mexico, Chile (both 86%) and Colombia (85%) are the countries where people are most likely to say they feel loved. And Colombians (74%) and Mexicans (72%) are also the most likely to be satisfied with their romantic and sex lives. In nine of the 11 European countries covered in this survey, people are less happy with their romantic and

sex life compared to 12 months ago.


Money does appear to help when it comes to love life happiness, with those on a higher income more likely to feel loved and be happier with their romantic/sex lives.

83% of high-income earners across 30 countries say they are satisfied with the love in their life compared to 76% of those on a middle income and 69% on a low income.

The same is true when it comes to their romantic/sex life; 67% of people with a high income are

satisfied with their sex life compared to only 51% of low-income earners.

Generationally, Millennials (those aged in their 30s and early 40s) are a little happier with their romantic and sex lives than other generations; 63% of Millennials are satisfied with this part of their lives compared to 58% of Gen and Gen X and 55% of Baby Boomers.

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Millennials, those aged in their 30s and early 40s, are happier with their romantic and sex lives than other generations.

Avoiding the Activist Trap in ESG Marketing

Insights from Ipsos' ESG segmentation continuum

When it comes to ESG, governments, citizens and businesses must navigate an enormous volume of information, often supported by various statistics and lengthy research reports.

The evidence suggests that companies are still struggling to get it right: being too vocal or not vocal enough, saying things that are important but not with the right tone, or focusing on things citizens feel aren't critical.

ESG issues touch people's lives in different ways. In order to help

organisations connect their ESG initiatives with different groups' realities, Ipsos conducted a global segmentation study, covering c.10,000 people across 15 markets.

The study identified five segments based on attitudes and behaviours across environmental, social and governance domains: **Disengaged Distancers, Passive Compliers, Discerning Realists, Willing Contributors**, and **Activists**.

While attention to Activists is important, inattention to the other ESG segments can lead to missed

opportunities and failed consumer activations.

In this paper, we outline why companies need to look beyond the loudest voices in the room, move their focus beyond the Activists, and focus on engaging the 'overlooked middle ground' in their ESG initiatives.

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While attention to Activists is important, inattention to the other ESG segments can lead to missed opportunities and failed consumer activations.

The Ipsos ESG Council Report

Reset or Retreat?

The global landscape of Environmental, Social, and Governance (ESG) is in constant flux, presenting both unprecedented challenges and exciting opportunities for businesses.


The challenge facing all companies is to adapt to this changing environment whilst balancing the concerns of a variety of stakeholders.

The Ipsos ESG Council was established by Ipsos' Corporate Reputation research team as a forum for senior sustainability leaders from leading global organisations. In the *Ipsos ESG*

Council Report 2025, we provide expert insights into the current and potential impact of ESG, both in the corporate landscape and on wider society, including:

- **Current priorities and challenges:** Explore how companies are recalibrating for long-term impact.
- **ESG strategies in practice:** Move beyond theory and discover how to design and implement ESG strategies that deliver real-world results.
- **ESG and politics:** Learn how to steer your ESG strategy through the turbulent waters of public discourse.

- **ESG in context:** Explore best practices for measuring and communicating the true value of sustainability.
- **The future of ESG:** Discover how technology, innovation, and stakeholder trust will shape sustainable business.



The insights presented in this report are not merely theoretical observations; they are grounded in the real-world experiences of ESG leaders.

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What The Future: Influence

A need to know about influencing across the digital divide

How influence shapes minds, markets and movements in today's splintered society is changing. For brand managers, political strategists and anyone with an agenda, it's crucial to understand the evolving landscape of persuasion.

To start, the tools of influence are transforming. Social media algorithms, AI-generated content and data-driven targeting are revolutionising how messages spread. Trust in traditional institutions is waning, while individual voices can reach millions.

Ipsos' Future of Influence survey shows around four in ten adults think they themselves are influential; it also reveals people tend to trust people they know more than almost any other information source.

What the Future: Influence explores critical questions for this new era of persuasion through the lens of five professionals whose work is to influence others. How can you build trust amid disinformation? What strategies resonate with fragmented audiences? How do you measure influence in a changing digital landscape?

Here we present expert interviews and fresh data on the dynamics of influence across generations and platforms. Whether you're passing legislation, launching products or sparking movements, you can discover how to harness influence to drive change and shape the future.

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89% of Americans are open to changing their opinion or beliefs on which household products or goods to buy.

What Worries the World?

Crime and inflation are now joint number one issues


Across 29 countries, worry for crime & violence rose to 32%, the same level as are concerned about inflation. This is due to inflation staying the same and crime rising slightly from last month.

All six LATAM countries in our study, put crime as their primary issue this month. Notably, the proportion of Argentinians expressing worry has risen 10pp to 49%, its highest level since October 2023 (when it was 50%). Similarly, Peru's has reached a five-year high after the share citing it increased 6pp to 66%. March 2020 (71%) was the last time levels were this high.

Likewise, parts of Europe are experiencing heightened worry. It has now become France's main concern after increasing 6pp to 38%, while Germany (36%) and Great Britain (29%) are up 7pp and Italy (31%) by 5pp.

Meanwhile, after President Trump's inauguration, the proportion of Americans saying their "country is heading in the right direction" is up 8pp (41%) to a near four-year high. For comparison, when President Biden was inaugurated, the right direction score dropped from 44% in January 2021 to 40% in February 2021.

On the other hand, Germany's right direction score is at a ten-year low of 17%, while the proportion saying the economy is "good" hit its fifth consecutive all-time low (25%). Germany is also the most concerned nation when it comes to immigration control, with 44% saying it's an issue. Please note, fieldwork took place before Germany's election.



After President Trump's inauguration, the proportion of Americans saying their "country is heading in the right direction" is up 8pp (41%).

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2025 Conscious Consumer Report

Closing the say-do gap

If sustainable purchases aligned with consumer intentions, conscious consumerism would account for over 70% of all purchases. Instead, it sits at 38%.

This represents the 'say-do' gap; what people say they value does not always align with their actual behaviours.

This new report from Ipsos/Public Inc, based on interviews with 3,000 Americans and Canadians, explores why this say-do gap exists, the factors driving it, and identifies the strategies for closing it.

The report finds that **confusing claims are the #1 inhibitor of conscious consumerism**; 49% of all

consumers have walked away from products with confusing sustainability claims. This rises to 87% amongst the most conscious consumers. By simplifying language, companies can increase the rate of conscious consumerism.

Overwhelmed consumers also want to know how their purchase makes their life better or easier today, not in an abstract future that is becoming increasingly unimaginable as the world changes at a rapid pace. **Focusing on benefits in the short term instead of the long term also achieves better success.**

The majority of consumers want to make the world a better place. Companies should target 'flip

floppers' and **unlock growth by growing the congregation** instead of preaching to the converted.

Canadian and American consumers are **motivated most by language and claims that meet their personal needs and values in the everyday.**

Claims that appeal to the 'me consumer' are more successful than those appealing to the 'we consumer'.

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49% of all consumers have walked away from products with confusing sustainability claims.



Advertising Special

Ipsos is steeped in advertising research. Our frameworks help evaluate and refine creative potential, ensuring ads are impactful and effective for business. Take our [MISFITS](#) framework, where we offer a shared language for what creativity means in advertising and outline robust evidence.

In the US, the Super Bowl remains a pinnacle of mass audience advertising, with 123 million viewers for Super Bowl LIX, and \$7 million for 30 seconds of airtime. Advertisers, therefore, are driven to deliver innovative and impactful ads, making Super Bowl commercials a spectacle in

themselves.

That's why each year through the Ipsos Super Bowl ad awards, our team in the US celebrates the ads that most effectively meet the brand's business goals and objectives. They go beyond the simplistic ratings and star systems employed by others. And what they've learnt over the years is that **even well-known brands that are Super Bowl veterans can struggle to deliver**. A quarter of the ads tested over the past three years failed to make a significant impact in terms of creative effectiveness or in generating buzz.

[Watch our panel](#) of Creative Excellence experts pick apart the

Super Bowl ads and find out who were the winners and losers this year. Or read up on it all in our [Insights to Activate](#) briefing.

Also read about how [Ipsos helped Pringles](#) take flight with their Super Bowl spot.

In India, [the Maha Kumbh Mela 2025](#) presented a unique opportunity for brands to showcase creativity to millions. Brands like Dettol, Lifebuoy, and Coca-Cola engaged deeply with audiences by **integrating their messages with the event's spiritual and practical context**. These campaigns highlighted the importance of understanding audiences and creating authentic value.

The Maha Kumbh campaigns are perfect examples of the MISFITS framework. How creativity, rooted in a deep understanding of the audience and context, can lead to advertising that is authentic, impactful, and effective. At the end of the day, brands that embrace creativity and empathy in their marketing strategies are going to be the ones that win people's hearts, minds, and wallets.

[READ MORE FROM THE US](#)

[READ MORE FROM INDIA](#)

Shortcuts



KEYS – Brand Talk LIVE

From outstanding creative to enduring brand assets, we uncover how brands can shape people’s expectations and deliver Brand Success.

This special edition of KEYS brings together the hosts of our renowned Brand Talk podcast series alongside some very special guests.

WATCH HERE



Life in Sydney 2025

The annual survey is created in partnership with the Committee for Sydney asking Sydneysiders about the big issues facing Sydney at the start of each year.

This year found that two-thirds (66%) say that cost-of-living concerns are the reason for their dissatisfaction with the city.

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Accessible UX Design in India

Unlock the potential of India's digital future with accessible UX design. As the nation embraces a communications revolution with over 700 million smartphone users, the need for inclusive technology has never been more crucial. Discover how leading companies are pioneering accessibility, ensuring that digital innovation serves everyone, regardless of ability or location.

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Click Into the Future

In this report the Ipsos India Shopper team sets out ten key trends shaping the Indian e-commerce landscape and the implications for marketers. It explores how ‘convenience’ is a bigger driver than ‘discounted price’ for many – how the possibility of shopping ‘anywhere, anytime’ and instant delivery through Q-commerce are changing shopping patterns.

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CONTACT

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: **Cartagena, Colombia**. According to our Love Life Satisfaction Index, Colombians are the most satisfied in their love life. Find out more on [page 8](#).

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