

July 2025

# IPSOS UPDATE

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





# Ipsos Update July 2025

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

President Donald Trump remains centre stage, having led the US to enter the war in Iran, then quickly pushed for a ceasefire. [Most Americans \(84%\) are concerned about the war](#), with three in five (60%) saying US airstrikes don't make their country safer. Despite his hawkish and isolationist supporters publicly sparring with each other, Trump's base is still largely in favour of the bombings in Iran: 69% of Republicans support the US action. Our latest [Know the New America & Beyond](#) article provides a full round-up – confidence among American consumers has been bouncing back after three months of decline – and we've been recording solid levels of comfort around making large purchases.

The actions of the Trump administration continue to reverberate around the world. We find 58% of people (across 29 countries) concerned that US economic policies will have a negative effect on their country's economy. Many are shifting their purchases away from US products: [people across the same 29 countries say they prefer goods made in the European Union, Japan, and China to those made in the United States](#).

With the Israel/Iran hostilities adding to the already long list of conflicts around the world, our [World Refugee Day Report](#), conducted with the UNHCR, provides some stark messages. While support remains steady across countries for the right to seek refuge, we find persistent

concerns that asylum seekers are primarily economic migrants, and a strong sense that wealthier countries need to be doing more.

Meanwhile, the latest wave of our [AI Monitor](#) continues to find people grappling with both the wonder and the worry of the technology. We see most excitement at its potential in Thailand, Indonesia, Malaysia and other Asian markets. But enthusiasm levels in the Anglosphere are rather more muted, and worries about whether governments will be able to effectively regulate AI come out loud and clear. In our own industry, AI is certainly helping us to take some leaps forward – in these pages we feature how it's taking innovation and creative

evaluation research to new levels. But we do need to be ever-mindful of the watch-outs: hallucinations, security concerns and machine-powered biases highlight the need for careful human supervision.

Read on to discover all of this and more!



Ben Page  
Ipsos CEO

# Poll Digest

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

## Canada:

83% of Gen Z are familiar with AI (vs. 38% of Baby Boomers).

## USA:

61% say their employer aligns with their personal political beliefs.

## Brazil:

43% believe President Lula's government is responsible for an increase in social security fraud.

## France:

73% have a risk profile for developing an oral disease.



## Great Britain:

75% say they're concerned about the impact of Israel/Iran conflict on fuel prices.

## Pakistan:

81% feel less comfortable in meeting household expenses than a year ago.

## Australia:

42% are concerned about housing, second to inflation (63%).

## New Zealand:

55% are worried about the cost of living.

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# Ipsos Populism Report 2025

## Profound pessimism settling in


Sixth edition of the *Ipsos Populism Report 2025* highlights a pervasive sense of dissatisfaction with societal structures and a longing for strong leadership.

Over half (56%) of respondents across 31 countries perceive their society as broken, although sentiment has improved in nations like Poland, Mexico, and Italy following significant political changes since 2016. A majority globally (57%) fear national decline, and 47% feel the need for a strong, rule-breaking leader, particularly in Brazil (58%) and South Korea (75%). Conversely,

Germany shows the highest sense of societal malaise (77% feel a sense of national decline) but the lowest support for autocratic leadership (24%).

Economic scepticism persists, as 68% across 31 countries believe the economy is manipulated by the affluent, strongly aligning with calls for strong leadership (64%), especially in emerging Asian economies and South Africa. The concept of "economic cakeism" is prevalent, with 57% resisting tax hikes for enhanced public spending, even as many support improved public services.

Nativism remains significant, with the importance of birthplace emphasised in 25 of 31 countries, while countries like Canada, Australia, and Germany are exceptions, showcasing more lenient views.



**47% across 31 countries want a strong, rule-breaking leader to take back control.**

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# Know The New America & Beyond

## Top insights for global decision makers

With war in the Middle East, US President Donald Trump remains centre stage. Most Americans (84%) are concerned about the war, with three in five (60%) saying US airstrikes don't make their country safer. Republicans have traditionally been supportive of Israel. In a Reuters/Ipsos poll conducted in March, 48% of Republicans agreed with the statement that the US should defend Israel militarily against any threats, regardless of their origin, compared to 28% who disagreed.

Against this backdrop, the threat of tariffs – and their impact on Americans' wallets – is currently shrinking in the US, as courts

threaten to block some of the levies and Trump continues to suspend or delay others. The result is increased confidence among US consumers – bouncing back after three months of decline – and solid levels of comfort making large purchases.

Pitfalls remain for brands trying to sell to Americans. More than half of people in the US (53%) say that if a company takes a stand on an issue that they do not agree with, they are less likely to buy their products or use their services; nearly one in three Americans say they have followed through and stopped purchasing from a company due to politics.

Globally, an average 58% of people in 29 countries are concerned that US economic policies will negatively affect their country's economy (58%), and 41% believe these policies will hurt their personal financial situation. Many are also shifting their purchases away from US products, saying they prefer goods made in the European Union, Japan and China to those made in the United States.

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**More than half of people in the US (53%) say that if a company takes a stand on an issue they do not agree with, they are less likely to buy their products or use their services.**

# World Refugee Day 2025

## Support holds steady despite global fragility

This year's survey comes at a critical moment. We're seeing more people displaced from their homes than ever before, and at the same time, organisations that help refugees are facing serious budget cuts.

According to the UN Refugee Agency (UNHCR), by the end of April 2025, 122 million individuals globally were forcibly displaced from their homes. This includes 42.7 million refugees, a significant 73% of whom are being hosted in low- and middle-income countries, highlighting the disproportionate pressure faced by these nations.

Despite these challenges, support for the right to seek refuge remains robust, with 67% across 29

countries backing the right to seek asylum for those escaping conflict and persecution. Strong support is evident in nations like Sweden, Argentina, and the Netherlands.

However, there are persistent concerns about the motives of asylum seekers, with 62% on average viewing many as primarily economic migrants. This perception contributes to anxiety about border security and challenges regarding refugee integration into host societies. Additionally, a notable 62% agree that wealthier countries should increase their financial support for refugees, emphasising a desire for greater contributions from international bodies like the UN

and the World Bank, as well as from affluent nations.

While empathy for refugees is still strong, personal involvement in supportive actions has decreased. Active engagement, such as donations and social media advocacy, has declined from 38% in 2024 to 29% this year, likely reflecting shifting priorities and economic concerns.

**62% agree that wealthier countries should increase their financial support for refugees.**

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# Ipsos LGBT+ Pride Report 2025

## Support for LGBT+ rights slip

The 2025 *Ipsos LGBT+ Pride Report* outlines a complex tapestry of support and opposition toward LGBT+ rights across 26 countries.

Despite the emergence of a perceived 'wokelash', general support remains substantial in many areas, although figures indicate a downturn from previous years. For instance, 72% still back non-discrimination against those who identify as lesbian, gay or bisexual, while the figure is slightly lower for transgender individuals at 71%, marking a five-point decrease from 2021.

In terms of marital rights, support for same-sex marriage/legal

recognition has slipped to 69% from 74% in 2021, with Peru experiencing a significant decline from 68% to 48%, contrasting with France's rise from 62% to 67%.

Adoption rights for same-sex couples have also witnessed diminished support, down by five points to 59%.

Younger generations reveal significant gender differences: 58% of Gen Z women support brands that promote LGBT equality, starkly contrasting the 34% of Gen Z men in agreement.

Meanwhile, 51% favour legal measures banning discrimination

based on sexual orientation or gender identity.

We have also seen support for transgender athletes drop considerably. Only 22% are currently in favour of trans athletes competing based on the gender they identify with rather than the sex they were assigned at birth (compared to 32% in 2021).

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**58% of Gen Z women support brands that promote LGBT equality, starkly contrasting the 34% of Gen Z men in agreement**





# Navigating Through Turbulence

## Reputation resilience in uncertain times

We live in turbulent times. That much is clear, but it was true even before the recent trade war escalations. In the last two Ipsos Reputation Council sittings, geopolitics has emerged as the most common issue that keeps Chief Communications Officers (CCOs) up at night.

When asked about the biggest issues facing her organisation this year, one Council Member said: “If it’s my top three, it’s geopolitics, geopolitics, geopolitics”. The prevailing sentiment remains one of uncertainty.

Long before the US announced tariffs, many countries had been

experiencing rising inflation, stagnant economic growth and increasing political polarisation. Whether caused by market volatility, political instability, consumer anxiety, disruption to supply chains, or the lingering effects of the COVID-19 pandemic, economic confidence was already low and a broader global trend of pessimism existed.

Whether or not we officially fall into recession, these uncertain foundations risk becoming further destabilised by economic uncertainty, making the importance of a good reputation more vital than ever.

This edition of *Navigating Through Turbulence* leverages Ipsos’ extensive research and expertise to provide a practical framework for surviving this polycrisis. Its goal is to provide actionable insights and lessons, enabling organisations to emerge from this challenging economic period with their reputations intact.

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**When asked about the biggest issues facing her organisation this year, one Council Member said: “If it’s my top three, it’s geopolitics, geopolitics, geopolitics”.**

# The Ipsos AI Monitor 2025

## Conflicting perceptions around AI

The Ipsos AI Monitor's fourth annual survey sheds light on global attitudes towards AI, emphasising its potential impact on public trust and daily life.

Enthusiasm for AI parallels economic expectations, with 52% of individuals across 30 countries expressing excitement about AI-integrated products and services. Notably, Thailand, Indonesia, and Malaysia lead in optimism, linking AI to economic benefits.

People are likely to believe that governments will better regulate AI (54%) over corporate responsibility in data protection

(48%). Opinions are divided on AI's role in advertising, specifically concerning AI-generated content such as images or reviews.

Transparency is key, as 79% agree that companies should disclose any AI usage; 40% of respondents strongly agree with this. Interestingly, AI is perceived as less biased than humans, garnering 54% trust in its impartiality, compared to 45% for human objectivity.

A majority recognise the transformative nature of AI, with 53% saying it has already changed their lives over the past

3-5 years, and a substantial 67% foresee further changes in the coming years.

Overall, in an atmosphere of both worry and wonder surrounding the use of AI, trust issues abound. This report reveals regional differences in the level of excitement about advances in artificial intelligence, confidence in responsible use, and expectations of future impacts.

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**52% of individuals across 30 countries expressing excitement about AI-integrated products and services.**



# Personas in the Age of AI

## Promises and limitations

Personas have long been valuable tools, representing consumer groups through psychological and behavioural profiles, making them relatable and actionable. Over time, personas have evolved into a staple in market research and UX design. They help businesses understand consumer motivations, align teams, make better decisions, limit risks, and inspire creativity and innovation.

Generative AI has revolutionised persona development through AI-powered chatbots – known as persona bots – offering a dynamic and interactive way to understand target audiences. They have quickly become one of the most


popular tools in the Ipsos research portfolio and are now central to our Gen AI innovation efforts.

However, new solutions like these require guardrails to understand the boundaries of how they can be used. As a guiding principle, they should be used as tools for inspiration and idea generation, not as definitive decision-makers.

Whether created by a human or by a machine, the embodiment of a segment of consumers or citizens in psychological and behavioural personas has limitations. Their effectiveness depends on the personal intuition, experience and talent of the researchers, alongside the depth and quality of

the priming material from which they are created.

In this Ipsos Views paper, we explore how AI is changing the way personas are created and used, and the benefits and limitations of AI-powered persona bots.



**To guide commercial decisions effectively, personas should be grounded in real, audience-representative market research data.**

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# Short-Form Social Misfits

## How short-form content changing creative advertising

TikTok's rise to one billion users in 2021 marked a turning point in the world of social media, with short-form video content becoming increasingly popular. Since then, YouTube and Instagram have introduced their own short-form video features, Shorts and Reels. Their success is attributed to powerful algorithms that personalise content based on user preferences, removing the burden of choice.

This combination of optimised recommendations and short-form content enables creators to find an audience quickly. Advertisers are adapting by increasing creator

collaborations, focusing on short-form content.

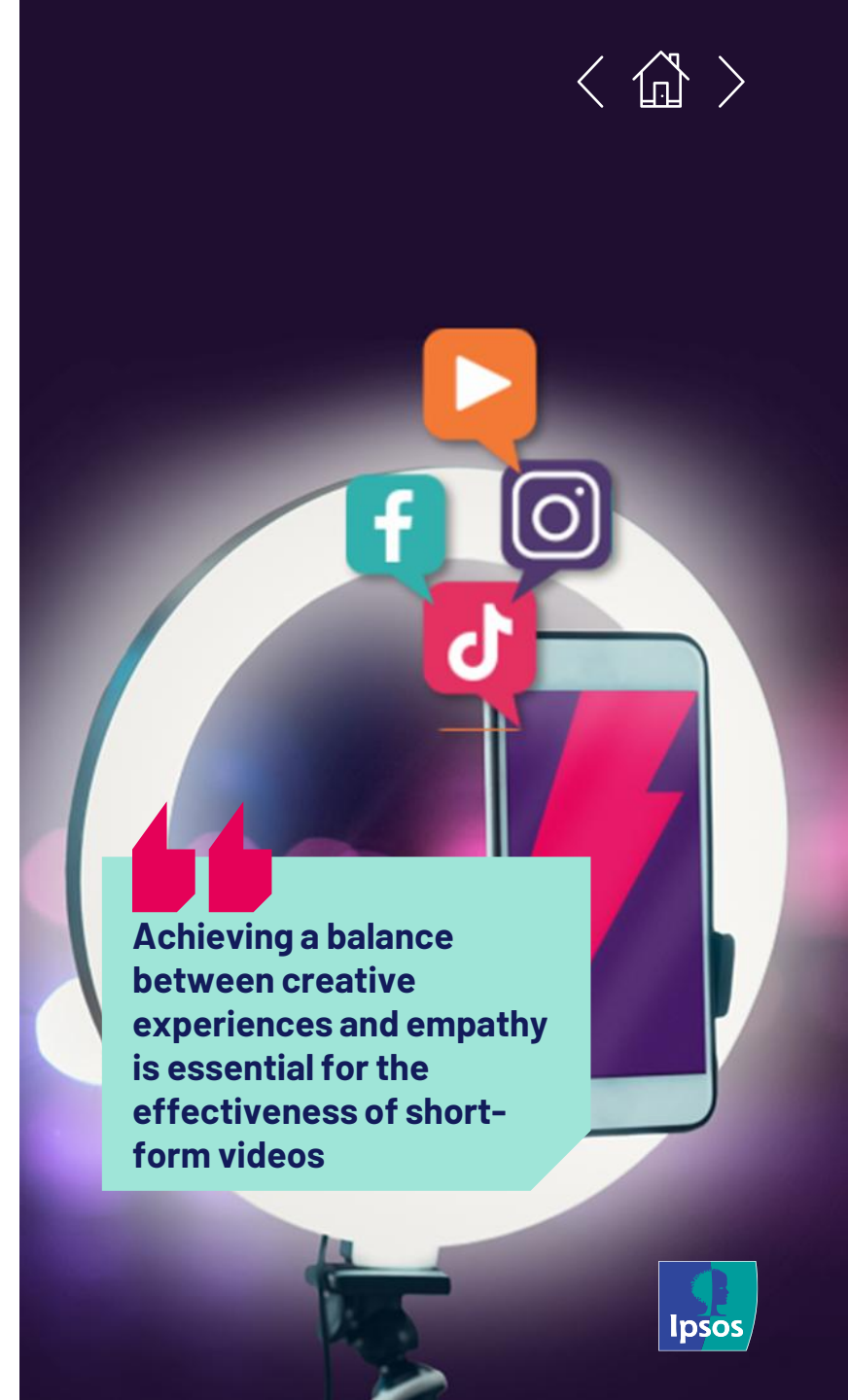
Ipsos' Creative Excellence team measured the effectiveness of short-form video ads by using its [CreativeSpark](#) solution, exposing ads to users in the context of TikTok, YouTube Shorts, and Instagram Reels. They measured the effects of the ads using sales-validated survey metrics: Memory Encoding, Brand Linkage, and Behaviour Change. High and low-performing ads were compared based on creative tactics and user experiences, using both human intelligence (HI) and artificial intelligence (AI) datasets.

The study found that achieving a balance between creative experiences and empathy is essential for the effectiveness of short-form videos. The evidence of effectiveness in these HI and AI datasets points to a bright future for brands investing more in short-form video and creator-led marketing. However, this is only possible if they focus obsessively on one thing: audience-first creativity and value.

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# Shortcuts



## KEYS – Tech-celeration

Today's times are characterised by admiration for the amazing things new technologies bring to the world – alongside real apprehension about what the future may hold.

We took a moment to assess the role technology plays in today's environment. What's changing? And what's staying the same?

[WATCH HERE](#)


## Modern Masculinity & Dating

New research from Ipsos suggests that while young men are more likely to believe women prioritise attractiveness (50%) and financial status (39%) in a romantic partner, their female peers say they consider a sense of humour (60%) and kindness (53%) to be the more important.

The polling is part of the launch of Ipsos in the UK and JOE media's Modern Masculinity campaign.

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## Make America Healthy Again

Many Americans' attitudes align with parts of the "Make America Healthy Again" agenda. As the FDA moves to phase out synthetic food dyes, half of US citizens expect higher prices for food items with natural colour/dyes. But it's not just about personal health: almost half of Americans say they prioritise foods produced sustainably, though enthusiasm varies by demographic.

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## What Worries the World – June 2025

Inflation and crime & violence are still the joint top worries, with a third (32%) worried across 30 countries.

Meanwhile, Great Britain has reached a nine year high for worry about immigration control after increasing five points to 41% mentioning it. This is the highest it has been since July 2016 (one month after the Brexit vote), when concern was also at 41%.

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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](mailto:IKC@ipsos.com) with any comments, including ideas for future content.

Cover photo: **Wrocław, Poland**. Poland are one of the most sceptical countries for asylum seekers, according to our World Refugee Day report on [page 7](#).

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