

January 2025

# IPSOS UPDATE

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



# Ipsos Update January 2025

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

Happy New Year! The media are full of massive economic shifts, environmental emergencies and geopolitical tensions. Disinformation abounds. Populations are declining in many countries. Low productivity growth is widespread outside the US and shows little sign of improving – leading to the “loss of the future” for millions of people – especially young men, who were noticeable in Ipsos research 2024 for their divergent views from young women.

But, as we have seen so often in history, most recently during the pandemic and its aftermath, human beings remain deeply resilient – and

perennially optimistic. When I was young in the early 1970s, there were constant media and pundit predictions that mass famine and mineral exhaustion would happen by the turn of the century. It didn’t happen. We need to be cautious in making firm assumptions about the future – even our demographic predictions of [declining populations](#) need watching carefully. In our work across 33 countries, 71% are expecting 2025 to be a better year, while 52% say the coming period will see people in their country start to feel more optimistic about their long-term future. Our annual [Predictions Survey](#) explores a range of topics, from whether the public think

smartphones will be banned from schools to the likelihood of a rogue AI program causing havoc globally.

We also include a series of briefing documents to help us all prepare for the year ahead. The latest [Ipsos State of Democracy](#) survey finds strong global support for democratic principles, despite a desire for radical systemic change. A case in point is France, which currently faces a post-election political stalemate. Take a look at our [French Fractures](#) report for an in-depth look at the dynamics of a country where 82% say things are going in the wrong direction and only 6% are content.

Finally, 2025 marks the 50th

anniversary of Ipsos. As the year unfolds, we’ll be reflecting on how societies, markets and people have changed over five decades. We look forward to discussing the dynamics of our times with you, and to accompanying you on your own journey over the next 12 months as we navigate the future together.



Ben Page  
**Ipsos CEO**

# Poll Digest

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

### Canada:

84% are comfortable expressing their cultural identity while still feeling Canadian.

### Brazil:

64% believe companies mislead consumers on Black Friday, with many calling the event 'Black Fraud'.

### France:

75% of employers think that the job market today is favourable to young people.

### Czechia:

43% donated money to a charity or good cause over the last year.



### Norway:

31% of those aged 19-29 use X (formerly Twitter) on a weekly basis.

### Türkiye:

67% believe violence against women goes unpunished.

### Pakistan:

19% think smog is caused by the wrath of Allah.

### Malaysia:

46% have bought something on an e-commerce platform in the last six months.

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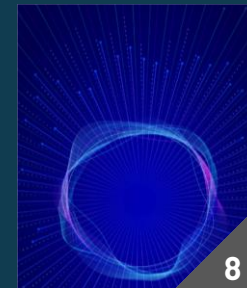
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# IPSOS Almanac 2025

**Welcome to the Ipsos Almanac 2025 – our annual review of how the events, trends and surprises of the last 12 months will shape what happens next.**

Inside this year's edition:

- **The Events of 2024** – Explore the most interesting findings of the year through the news stories that characterised each month, covering climate, technology, geopolitics and more.

- **The Generative AI Revolution** – Generative AI isn't just a fleeting trend, it's a fundamental shift that's changing the way we work, create and connect with the world. Find out how to unlock its full potential.
- **The Gen Z Gender Gap** – Gen Z men and women are drifting apart from each other on a number of key social issues. Find out why.

- **Is ESG Dead?** – Are we still making progress on ESG and sustainability? What role will legislation play in the year to come?
- **Populism** – The connective thread running through each electoral event of 2024.
- **Cracking Brand Success** – Four key contexts which provide a roadmap for Brand Success in today's dynamic landscape.

Plus find out what 2024 meant to six major economies, as described by our local experts in Brazil, China, France, India, the UK and the US.

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# Global Predictions for 2025

## Pessimism at its lowest level since the pandemic

Amidst a complex global landscape, public sentiment reflects a cautious hope for the future. While 65% across 33 countries considered 2024 a bad year for their country, this is a 5pp drop from 2023, returning us to pre-pandemic mood levels.

People are generally more upbeat about their personal lives than the state of their nation; we also saw a rise in individual positivity with almost half of respondents (49%) reporting a good year for themselves and their families.

Global optimism for 2025 is showing positive trends across


several key areas. A majority of people surveyed (71%) believe that 2025 will be a better year than 2024, a slight increase from the previous year's outlook.

Economic optimism has also seen a modest rise. 51% of respondents anticipate a stronger global economy in 2025.

Global anxieties surrounding climate change persist, with 80% expecting temperatures to rise. This unease is reflected in the 42% who believe parts of their country will become uninhabitable due to extreme weather.

Meanwhile, just under a fifth (18%) expect aliens to visit Earth next year, with over half (53%) in India saying this is likely.

The Ipsos Predictions 2025 report also examines public expectations around issues like immigration, technology, AI and war.

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**35% believe a rogue AI program that can't be shut down will cause significant havoc globally.**

# The Employee Customer Ripple Effect

Doing the right thing by employees is doing the right thing by customers

Successful organisations invest in Customer Experience (CX) and Employee Experience (EX) because they recognise their individual impact on business success.

Research shows that employee attitudes and behaviours impact customer outcomes such as retention, share of spend and advocacy, which in turn impact [Return on CX Investment \(ROCXI\)](#) and business performance. Despite this evidence, EX and CX measurement and management too often operate in silos.

In this new *Ipsos Views* paper, we outline why it is crucial for organisations to think about EX and CX together, to drive better business performance. We also outline the key steps that organisations can take to better align their EX and CX strategies.

The paper proposes a three-step process for linking EX and CX:

1. Lay the foundation through integrated reporting and analysis;
2. Understand experience gaps through journey mapping and mirror analysis;

3. Improve the experience by designing and implementing solutions based on service blueprints.

By recognising the fundamental link between EX and CX, organisations can unlock significant potential, create a more people-centric culture, and drive sustainable growth.

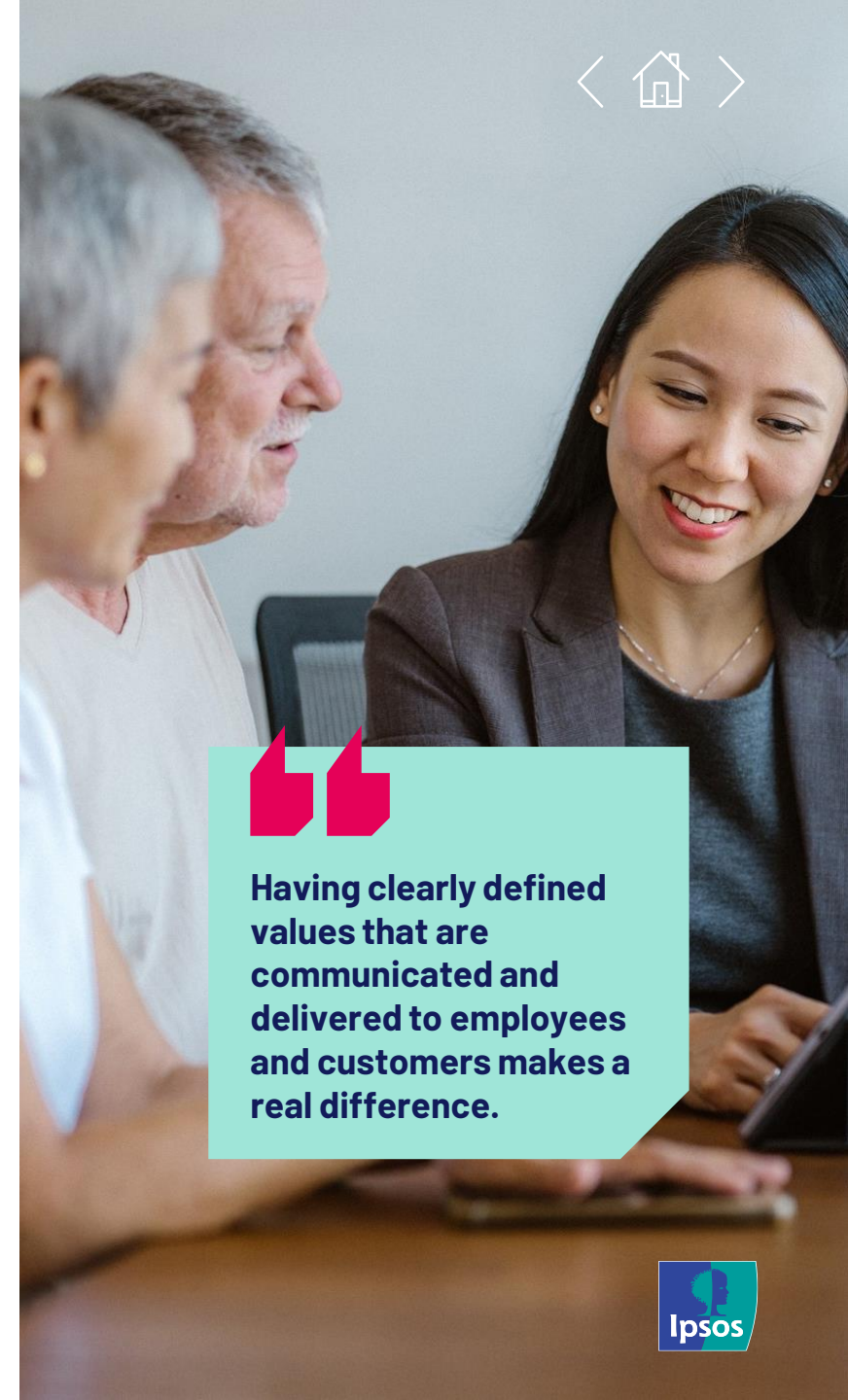
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**Having clearly defined values that are communicated and delivered to employees and customers makes a real difference.**



# Ipsos Global Trends in Pakistan

## Similarities, differences and questions

[Ipsos Global Trends 2024 report](#), based on 50,000+ interviews across 50 countries (representing 90% of global GDP and approximately three-quarters of the world's population), was rolled out during the first week of November, in Pakistan.

The Pakistan launch highlights the country's similar and distinctive trends compared with the rest of world, emerging markets, MENA region, and Muslim countries.

### What's similar?

- **Disrespect in elites** – Pakistanis

agree that the economy of their country is rigged to advantage the rich and powerful.

- Willingness to pay a premium for a **better customer experience**.
- **Escape to individualism** – Pakistanis are clear that people should take control of their own lives.

### What's different?

- Pakistan remains **traditionalist** on the role of women, religion, and importance of having children.

- Pakistanis remain among the most concerned about **climate change**.
- **Materialism** – Pakistanis measure success by the things they own, achieving a prominent position in their career, and tangible achievements.
- **Technowonder** – Pakistanis are very much in favour of AI and technological adoption.

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**Pakistan remains traditionalist on the role of women, religion, and importance of having children.**



# World's Best Cities 2025

## London takes first place, followed by New York and Paris

London is the world's leading city according to the [2025 World's Best Cities](#) report, a global study published by Resonance and powered by Ipsos that evaluates cities based on their livability, lovability, and prosperity.

With its tenth consecutive win, London has demonstrated its enduring global appeal in the face of economic and political headwinds. The city's rich history, vibrant arts scene, and diverse culinary offerings continue to draw visitors and residents alike. The city ranks 1st on the lovability index, 2nd on the prosperity index, and 3rd for livability, and it is

particularly strong on nightlife and airport connectivity.

This year, New York City overtook Paris for the second-place spot — a win that affirms its status as a global hub for culture and finance. Paris, still ranked 1st for sights and landmarks and 2nd for shopping, fell to third place this year, while Tokyo's world-class shopping, cuisine, and hospitality landed it in fourth place. It was followed by Singapore, which earned top marks on infrastructure and innovation.

This definitive benchmarking of global cities, produced by

Resonance with research by Ipsos, surveyed more than 22,000 people in 30 countries to find the best of the best. It includes perception data from global citizens on the places where they would most like to live, the places they would most like to visit, and the places that they believe would offer the best job opportunities.

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**London is the only city in this year's ranking to capture the top spot in an impressive seven of the 28 subcategories.**



# What The Future: Transportation

## The motor behind the transformation of culture, commerce and cities

The latest edition of *What the Future* explores how the landscape of transportation might look in 2034. It highlights the pivotal role of technological advancements, evolving consumer behaviours, and infrastructural developments. Additionally, it underscores a triad of factors - convenience, climate considerations, and cost - that are shaping future transportation decisions, as well as stressing the importance for brands to spearhead innovation.

With insights from industry leaders, *What The Future* articulates the necessity for a climate-centric infrastructure to bolster economic resilience, as explained by

Evergreen, who highlight policy frameworks with environmental objectives. Penske Logistics also provides a perspective on leveraging the sharing economy to enhance supply chain efficiencies.

Consumer sentiment remains divided; while there is optimism about vehicle technology, there are prevalent concerns regarding costs, privacy, and the politicisation of electric vehicles. A notable reluctance exists towards subscription-based auto features, although safety-related charges are more palatable. Furthermore, the trend of delayed driver's license acquisition among younger generations poses challenges to car

culture and insurance models, prompting companies like Allstate to rethink insurance paradigms.

This latest edition emphasises the criticality of user experience in digital logistics, advocating for real-time tracking to maintain a competitive edge. It also explores future transportation 'Jobs to Be Done', focusing on solutions that adeptly balance convenience, cost-efficiency, and environmental sustainability.

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**Consumer sentiment remains divided; while there is optimism about technology, there are concerns regarding costs, privacy, and politicisation.**



# State of Democracy

## A desire for systemic change

The second *Ipsos State of Democracy* report offers an in-depth analysis of democratic perceptions in eight Western countries, highlighting significant disparities and a strong demand for systemic reform.

While marginal improvements are noted since 2023, many feel democracy has worsened rather than improved. Sweden stands out with high satisfaction (68%), while Croatia registers the lowest (18%).

Most citizens express a desire for radical systemic change, perceiving the current system as favouring elites. Despite this, 70% still support core democratic principles. Trust in political leaders remains low, however, with only 25% believing elected officials fulfil their promises.

This sentiment is particularly prevalent in Croatia and Italy, with 15% and 20% expressing this sentiment, respectively, while Sweden shows slightly more trust at 40%.

The demand for change is evident, with 65% in Croatia, 60% in Poland, and 55% in both France and Italy advocating for radical reform. In contrast, other countries show about 40% support for gradual reform.

While 80% value voting as an effective tool for change, citizens employ various political and social actions, such as petitions and demonstrations, to express their views. Notably, 75% of older generations favour traditional political engagement, whereas 60% of

younger generations prefer actions outside party politics.

The European Union and NATO are perceived as the most effective defenders of democracy, with 70% viewing the EU positively. However, 65% believe the EU needs operational reforms. Few respondents (15%) oppose the EU outright.

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**Trust in political leaders remains low, however, with only 25% believing elected officials fulfil their promises.**



# Navigating Through Turbulence

## Strong leadership and clear communication needed

Ipsos Karian & Box explores the diverse global perspectives on the rise of artificial intelligence (AI) in *Navigating Through Turbulence: The AI edition*.

While some view AI as a positive force, others express concerns about its potential negative impacts.

Optimism levels vary significantly across countries, with higher levels in Nigeria, Indonesia, and India compared to France and Japan. There are conflicted views on AI; while a majority believe AI will have a positive impact, fears about job displacement persist. A trust deficit exists as half of

employees distrust business leaders, which hinders effective communication about AI strategies.

There is also a generational divide, with younger employees more trusting of AI and business leaders than older generations. Data privacy concerns are prevalent, with low trust in companies to protect personal data in the age of AI, especially in the Global North. The Anglosphere exhibits higher levels of nervousness about AI compared to other regions. Although trust in AI-using companies is increasing in the UK, concerns about AI products and services remain high.

The report emphasises the need for equal access to AI and responsible implementation to mitigate negative impacts and build trust. It also highlights the importance of addressing public concerns and ensuring that AI benefits all segments of society.

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**There is a generational divide, with younger employees more trusting of AI and business leaders than older generations.**



# Shortcuts



## Americans' Attitude to Immigration

In 2024, the President-elect Trump won partially off a promise to deport millions of migrants living in the country illegally.

How might Americans react to this? Right now, polling shows that while most Americans support the mass deportation of immigrants, support could change as mass deportations become real.

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## Women's Health in Scandinavia

Many women across Denmark, Norway and Sweden turn to social media to discuss their health experiences and seek advice from peers.

In a self-funded study, Ipsos used social intelligence to explore the trends, challenges and unmet needs related to health discussed online among women in Scandinavia.

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## French Fractures 2024

In its 12<sup>th</sup> edition, the *Fractures françaises* survey measures the opinion of the French on the state of society, their values and their perception of the major political forces.

After a very eventful political year, this new wave finds an ever-increasing distrust towards the political class.

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## Active Lives Children & Young People

The report, conducted by Ipsos UK on behalf of Sport England, covers the overall amount of sport and physical activity young people are engaged in, different activities prevalent in different year groups, and the attitudes of children and young people towards sport and physical activity.

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

Cover photo: **Nanga Parbat Mountain, Pakistan**. Pakistan remains a traditionalist country, find out why on [page 8](#).

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