

February 2025

IPSOS UPDATE

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



Ipsos Update February 2025

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

Welcome to Donald Trump's second presidency. Unlike 2016, he won in the popular vote stakes and now has only his love of the US stock market, and his interest in a Nobel Peace Prize, to constrain him. The first might limit how many illegal workers he deports and tariffs he raises – as both are likely to add to inflation. The second may mean he repeats the Gaza ceasefire in Ukraine. We will see.

Our US research shows decades-long dissatisfaction with the American political set-up, accompanied by erosion in trust in politicians. This 'broken system sentiment' is now in evidence pretty much everywhere, as witnessed by the punishments handed out to incumbents

last year by angry voters around the world.

We've been looking at the implications for [brands navigating this polarised environment](#). One standout statistic: 56% of Democrats say EVs are better for the environment than internal combustion engine cars, a view shared by just 27% of Republicans.

The new President has popular support for many of his policies, although Americans are not too sure on whether he will help with the cost of living. As our new [What Worries the World](#) survey shows, cost-of-living concerns remain fundamental, and not just in the US. It's the number one worry for people in many other countries too.

Linked to this, concerns about housing affordability are rarely far away. Our first ever [Housing Monitor](#) finds an average of 71% (across 30 countries) saying that, even if today's young people work hard and get good jobs, they will have a hard time getting the right kind of housing. This 'loss of the future' feeling is a recurrent theme in our [Ipsos Global Trends](#) analysis and one we'll continue to track over the course of this year – along with how far 'nouveau nihilism' will go in response.

Today's demographic reality is another topic business cannot ignore. Most people are now living in countries where the fertility rate is less than the 2.1 required to keep numbers stable. South

Korea is one nation already facing the challenges of being a super-ageing society. Take a look at our team's new State of the Nation [Ipsos Flair](#) report which shows how businesses in the country are responding, including some more explicit targeting of the over 50s market.

As ever do get in touch. We're looking forward to discussing all of this and more with you.



Ben Page
Ipsos CEO

Poll Digest

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

Canada:

43% of Canadians aged 18-34 would vote to be American if citizenship and conversion of assets to USD was guaranteed.

USA:

29% feel the US should take control of the Panama Canal.

Peru:

92% disapprove of President Boluarte's management of the country.

Chile:

41% say they feel guilty for spending money on indulgences.



Great Britain:

85% say it is important to discuss the Holocaust in the present day.

France:

67% have a bad opinion of Donald Trump.

Czechia:

37% perceive the education system as good (vs. 23% who say bad).

Lebanon:

87% think the ceasefire with Israel was the right decision.

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Ipsos Flair South Korea 2025

Shifts and Explorations: Decoding Emerging Trends and Opportunities

South Korea has developed a unique consumer market in a rapidly changing economic, social and technological environment. These changes present new opportunities for businesses and brands.

In our new edition of Ipsos Flair South Korea, our local experts explore the current and future state of the Korean market and decipher the key trends to help businesses navigate this dynamic landscape, with the key words in 2025 identified as 'shifts' and 'explorations'.

Key topics covered include:

- **Generations:** In the marketplace, teens and people in their 50s are important target generations, each with unique consumption patterns.
- **Subscription economy:** The subscription economy is establishing itself as a consumption trend that values experiences over ownership, and Korean consumers are actively embracing this model.
- **ESG:** Korean companies are strengthening ESG management to meet consumer

expectations, with ESG now a core element of a company's sustainable growth strategy, rather than just a marketing tool.

- **K-Food:** As an important part of the globally popular K-culture, K-Food has gained competitiveness in the global market.

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Demographic changes due to low birth rates, diversification of household composition and technological advances are profoundly influencing the consumer market in South Korea.

Demystifying Mystery Shopping

The importance of Mystery Shopping and its role in CX Measurement

In this paper, we delve into the unique advantages of Mystery Shopping in assessing employee behaviours and internal processes, and how it complements Voice of the Customer (VoC) research as part of a comprehensive Customer Experience Measurement strategy.

Mystery Shopping provides objective, detailed feedback on employee performance and channel effectiveness during typical customer interactions, while VoC focuses on the customer's perceptions and feelings about their experience.

Over time, Mystery Shopping has evolved into a highly sophisticated tool that delivers clear commercial benefits, such as improved compliance, product recommendation, and sales conversion.

We outline four main types of Mystery Shopping programmes, each with specific business applications: **Customer Service**, **Compliance**, **Product Recommendation**, and **Sales Conversion**.

The most customer-centric organisations leverage both

Mystery Shopping and VoC in a holistic approach to drive continuous improvement. By understanding the unique roles and advantages of each methodology, businesses can create a powerful, integrated Customer Experience measurement system that delivers actionable insights and measurable business impact.

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The most customer-centric organisations leverage both Mystery Shopping and VoC in a holistic approach to drive continuous improvement.

Ipsos Housing Monitor

Exploring people's perceptions to housing and their aspirations

Over the last few decades much ink has been spilt about runaway house prices and the winners and losers who have been left in its wake. However, in the first Ipsos Housing Monitor, we find few think rising house prices benefits themselves personally or their country.

In 29 of the 30 countries surveyed people are more likely to say house prices are not favourable. On average across 30 countries only one in five (19%) feel rising prices is a good thing for them. Even among homeowners this only rises to 24%.

However, there are big differences between property owners and tenants when it comes to satisfaction with where they live.

Less than one in renters (47%) say they are happy compared to 71% of homeowners.

While in all markets surveyed, homeowners are more likely to be happy with their current housing situation than renters, in countries where there are stronger rights for tenants, such as Germany, Sweden and Netherlands, happiness is higher for renters.

Seventy-one per cent of renters

want to take the step to home ownership, but only 56% think they will ever be able to do so.

When it comes to housing ownership, a majority in all countries believe everyone has a right to their own home.

People also feel it is hard to feel secure in life if you do not own your own home.

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47% of renters say they are happy with their living situation (vs. 71% of homeowners).

Product Testing with Synthetic Data

Part two of our 'Humanizing AI' series

Synthetic data is revolutionizing industries from healthcare to financial services to automotive, by enabling simulations and data augmentation. At Ipsos, we believe [synthetic data](#) opens new possibilities for market research, particularly in product testing. However, many businesses remain uncertain about the quality of synthetic data and how to evaluate it.

In this Ipsos Views paper, our experts provide recommendations for generating and evaluating high-quality synthetic data and explore how synthetic data can be applied specifically to product testing.

To generate synthetic data that effectively mimics real-world data, an artificial intelligence (AI) model must first be trained on relevant, real-world data. As discussed in our first paper in the [Humanizing AI](#) series, AIs are simply algorithms; they have no intelligence of their own, until they are trained. It is through learning from training data that AIs acquire the intelligence we associate with them.

How humans react to products, or life in general, is not captured solely in the brain as factual or semantic knowledge, our bodies and sensory experiences play a

significant role, too.

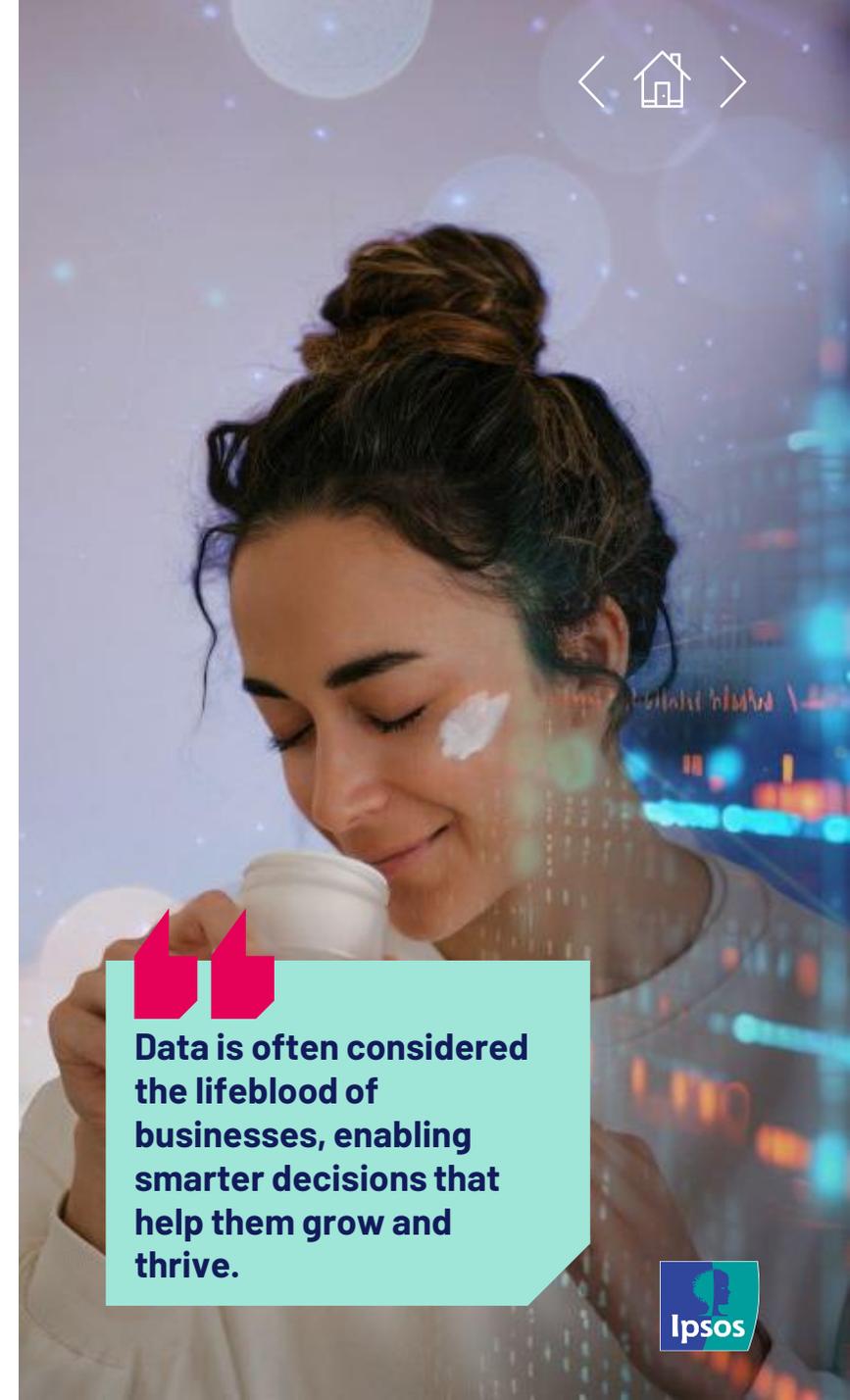
This paper presents our findings and key takeaways from two research streams aimed at establishing the minimum number of human respondents needed to test products alongside synthetic data to ensure viable results.

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Data is often considered the lifeblood of businesses, enabling smarter decisions that help them grow and thrive.



Our Life with AI

From innovation to application

The second study from Google and Ipsos looking at attitudes to AI across the world finds an increase in usage as well as changing attitudes towards the technology.

Across 21 countries, 48% say they have used an AI application over the last 12 months. Embrace of the technology is highest in emerging markets (up 11pp to 58%) and Asia Pacific (up 10pp to 52%).

As we see in other [Ipsos polling on AI](#), Europe and the US lacks behind other regions in adoption. However, both Europe and the US have seen usage rise over the last year, up 8pp and 9pp respectively.

How people use generative AI

varies. While people are asking it to assist with work and learning, entertainment is how people are using it most.

Last year people were split about whether AI was a benefit or a hindrance. Excitement about the potential of AI is now greater than concerns about the risks of AI (57% to 43%).

A belief that fostering advances in science and medicine through AI is more prevalent than protecting impacted industries through regulation (55% to 41%). Even in those countries more sceptical of AI, such as Europe and the US, this is the case.

When it comes to AI's impact on the economy, 49% think the technology will have a positive impact (up from 42% last year).

Countries with the highest excitement about AI's potential are the ones most likely to expect positive economic gains. This includes Nigeria, Mexico and South Africa.



While people are using AI to assist with work and learning, entertainment is how people are using it most.

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How Trump Reshapes the World for Brands

How the new US administration will affect the way you do business

Trump's second presidency is expected to bring significant changes across various sectors, impacting businesses and the public in uncertain ways.

Not since the early days of the pandemic have we seen a landscape so ripe for large shifts in public opinion, laying a virtual minefield for brands.

Using the framework developed in [Ipsos Global Trends](#) as a starting point, we examined macro forces across several spheres of influence to explore trends and the future. Drivers of change can come from societal shifts, economic headwinds, advances in technology and impacts from the environment.

But often tying all of these together is the political sphere where policy and regulation can cause big shifts in all of the other areas.

This paper shares some broad and sector-specific thoughts on doing business in and with the new administration.

Key takeaways:

- The new Trump administration promises a blitz of change, and the impacts to business and the reactions of the public are deeply uncertain.
- Americans are likely to remain deeply polarised, not just in their opinions but if/how they want brands to react.

- The most important insights will be at the intersection of different trends and are just as likely to come from outside your sector.

You can also find out more by watching the webinar recording: [What the new Trump administration means for business.](#)

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We will likely see a disruption that Americans say they want, but might not actually be ready to live and work through.

What Worries the World?

Inflation top concern, although only by a small margin

Inflation remains the leading concern, with 32% of respondents expressing worry – a figure unchanged since December but four percentage points lower than the same point last year. Notably, inflation is now only one point ahead of crime & violence (31%) as a primary concern.

Meanwhile, after recent political turmoil in South Korea, the proportion of citizens who believe their country is "heading in the right direction" has fallen by three points since last month, to an eight-year low of 14%. Additionally, concerns about corruption have surged, with 50% of respondents now identifying it as a major issue.

Elsewhere, in North America, concerns about health care have risen. The proportion mentioning health care in Canada is up six points since December to 44% (now joint first with inflation). South of the border, in the US, worry for this issue is up eight percentage points, with nearly a third (31%) expressing concern. This is the highest score for the US since May 2020, when it was 32%.

Another story to note in this month's edition is Israel's worry about taxes. Since November 2022, the nation has been primarily worried about terrorism and military conflict. Terrorism is still their primary worry 15 months

later, with 48% citing it, but now taxes are second, ahead of military conflict (31%), after increasing 11 points to 34% saying it's one of the country's main problems.

Be sure to also check out our latest [Global Consumer Confidence Index](#), where sentiments are up in LATAM but down in North America.

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50% in South Korea say corruption is one of the main issues facing their country.

Commerce Redefined

TikTok's role in ushering in a new era

Ipsos, in collaboration with TikTok, explored the new era of commerce to shed light on how platforms like TikTok are fundamentally altering the way consumers interact with brands and make purchasing decisions.

Commerce Redefined offers insights for businesses adapting to the evolving landscape of marketing, e-commerce, and digital, enabling brands small and large to capitalise on new growth opportunities.

In partnership with TikTok, we delved into the rise of authentic, user-generated content and the immense potential it holds for

brands to connect with consumers in meaningful ways.

Entertainment and discovery are now crucial components of a person's shopping experience. Businesses that choose to meet this unique moment can capitalise on the opportunity to drive both engagement and sales. Understanding the impact of these efforts will become increasingly critical in the years to come.

This paper shares new research on:

- How TikTok's unique discovery engine connects brands with new audiences.

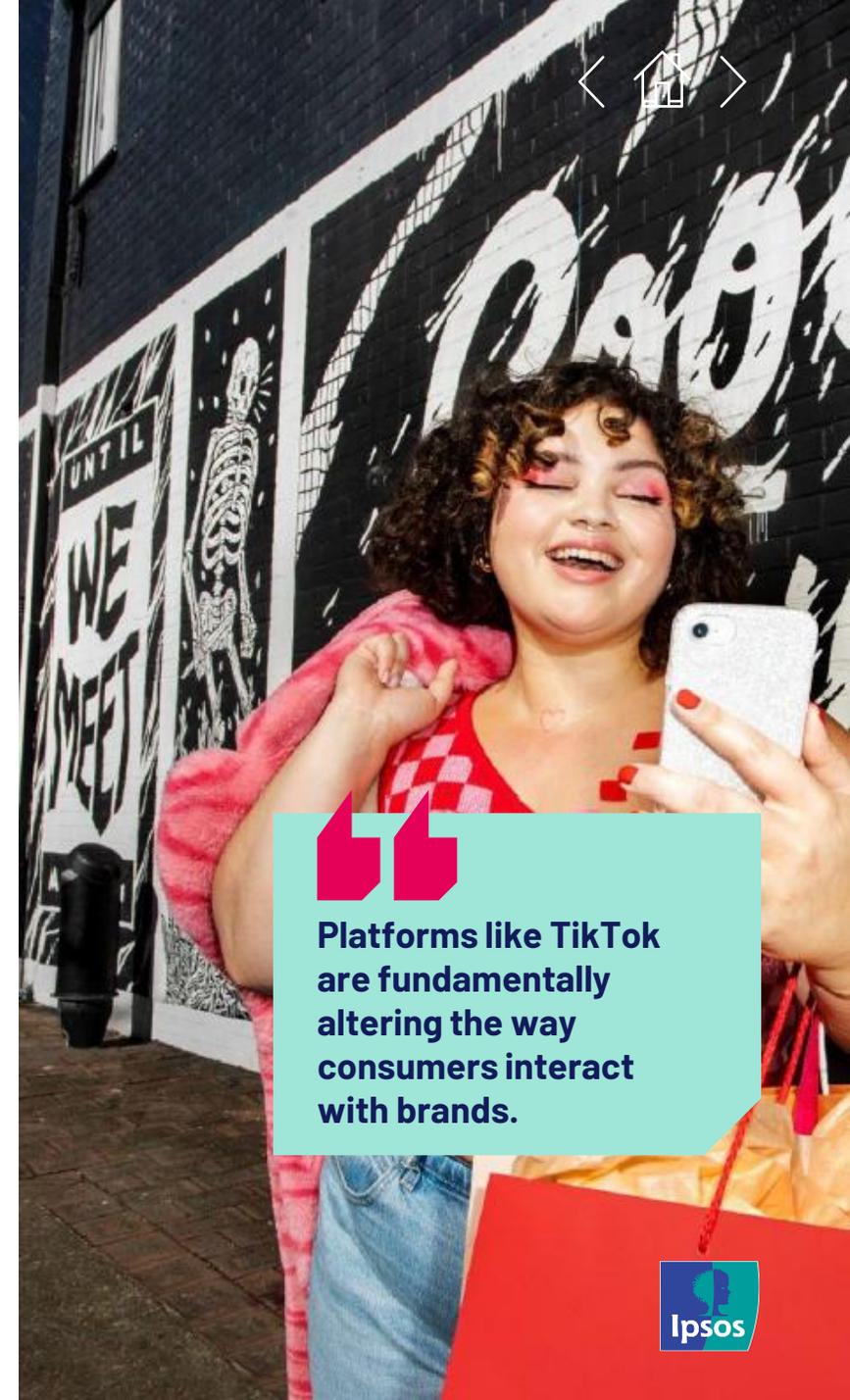
- Why authentic, creator-driven content is the key to building trust and driving sales.
- How TikTok is blending entertainment and shopping to redefine the consumer experience.
- Actionable strategies to supercharge your marketing efforts for maximum impact.

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Platforms like TikTok are fundamentally altering the way consumers interact with brands.



Shortcuts



The Directory

The Ipsos Knowledge Centre brings together Ipsos' latest research and thinking on a wide range of topics in *The Directory*. Content includes white papers, reports, and podcasts to specialist publications – all providing key insights from our different markets across the world.

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Insecurity in B2B Data Security

Discover insights from the Ipsos Business Insights Collective, a panel of business leaders and decision-makers, exploring the perspectives on the evolving challenges of data privacy and security, and outlining the crucial steps organisations must take to fortify their defences in the digital age.

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State of Digital Marketing in India

This third edition provides essential insights into current trends, growth drivers, and key challenges shaping India's digital commerce sector. The report offers a comprehensive overview of digital advertising expenditure, the rise of mobile and internet penetration, and the increasing influence of social media and e-commerce.

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Will Canada Move Beyond Disruption in 2025?

Our clients influence the lives of Canadians every day. We see our job at Ipsos as helping our clients gain the insights they need to make decisions.

In this commentary, our team in Canada analyse 2024 to help businesses understand consumers in an ever-increasing chaotic world.

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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: **Seoul, South Korea.**

Demographic changes are having significant consequences on the country. Read how in the latest Flair on [page 5](#).

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