

April 2025

IPSOS UPDATE

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

Ipsos Update April 2025

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

What's now happening in the US is driving markets and politics around the world. In this edition, we feature our latest research on how the public and economy are reacting in both America and internationally. Our [special feature](#) focuses on Canada, as voters prepare to go to the polls later this month. Ipsos' 'Trump, Tariffs and Turmoil' research uncovers Canadian attitudes about the tariff threat, analyses the growing levels of "Buy Canadian" sentiment and assesses its impact on consumer behaviour.

So far, President Trump is [maintaining his approval rating](#) among Americans, dropping only slightly since his

inauguration in January, from 47% to 44% today. That's better than he performed during his first term, but his numbers are weaker at this stage than for most other presidents in the last 50 years, reflecting the polarisation that is so prevalent in the country today.

What's more, on THE most important issue to Americans – inflation and rising prices – his approval is now lower: [our Reuters survey](#) finds only 32% of Americans approve of what Trump is doing on the cost of living. Meanwhile, 57% of Americans say the President's moves to shake up the economy are too erratic.

On tariffs, the picture is mixed, with

only 31% agreeing that American workers come out ahead when the US charges tariffs on imported goods, while 48% disagree. Americans are more split on [US involvement and foreign aid](#) to other countries. Most (53%) support cutting US aid to foreign countries, while half (50%) support continuing to provide weapons and financial aid to Ukraine (46% are opposed).

Over in Ukraine, [our new poll](#) finds 74% of Ukrainians in favour of continuing fighting even without American support, against a backdrop of strong levels of support for President Zelenskyy. Across Europe, our latest

[What Worries the World](#) monitor finds concern about military conflict between nations is on the rise, even if cost of living remains the top worry overall.

As ever, a big thank you to our readers – your Ipsos representatives are on hand to help you navigate today's uncertain environment.



Ben Page
Ipsos CEO

Poll Digest

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

Canada:

15% say relations with other countries is a top issue facing their country, up 11pp from February.

USA:

26% say they have reduced or stopped purchasing from a company due to politics or current events.

Peru:

60% say security has worsened in the country since the appointment of the new Minister of the Interior.

France:

89% are angry about the lack of resources allocated to public hospitals.



Belgium:

75% feel Europe should rearm to face Russia.

Romania:

89% of GPs agree telemedicine and digitalisation will play a crucial role in healthcare.

Jordan:

48% want public investment in healthcare infrastructure.

India:

Defence forces are the most trusted institution (56%) among urban Indians.

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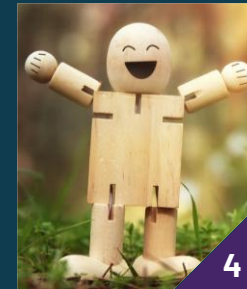
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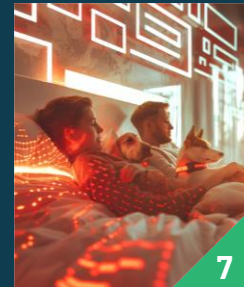
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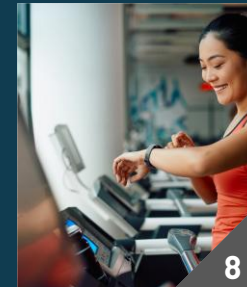
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IPSOS

Canada Special

The world's political and social landscape since the inauguration of Donald Trump in January has shifted dramatically. This has been acutely felt for America's neighbour and long-term friend, Canada, who not only have to reconcile with new tariffs and threats of becoming the 51st state, but are also heading into a federal election on the 28th of April.

In [March's edition](#) of Ipsos Update we examined key findings from the ongoing events in the US, with analysis from our team there and experts around the world. This month we will take a look at what our team in Canada has been finding.

The '[Trump, Tariffs & Turmoil](#)' page

has been created as a one-stop spot for all the latest insights. In there you will find the latest POVs, for instance [From Retaliation to Renewal](#), which discusses Canada's future in the face of tariffs and highlights how Canadians expect their government to reduce reliance on the US. It found nine in ten (89%) want the government to remove barriers to interprovincial trade and work on building trade with other countries. Watch the webinar for this POV [here](#).

Additionally, register for the upcoming webinar on 9th of April, [Canadian Perspectives on Energy & Resources in a Shifting Economic Landscape](#), with our Public Affairs

team as they talk about the proposed tariffs on Canadian resources and the economic implications, all in the context of public opinion.

Ongoing events in the US are also having an effect on Canadian politics. New Prime Minister, Mark Carney, who is taking a firm stance on Trump, has [seen a surge in support](#), with the Liberal (42%) party taking a six-point lead over the Conservatives (36%). If these numbers hold through election day, the Liberals could secure Canada's first majority government since Justin Trudeau's 2015 win.

In recent [Ipsos polling](#), Carney is thought to be the best federal party

leader to help Canada navigate challenges associated with the Trump Presidency. He is the only leader with more approval than disapproval (48% vs. 30%, respectively). He's also seen as the most likely to get the best deal for Canada (48% agree) and is seen as less likely to roll over to Trump compared to the Conservative leader, Pierre Poilievre (22% vs. 43%, respectively).

Find all this and more from our team of experts in Canada.

READ MORE FROM CANADA

READ MORE FROM THE US

Ipsos Flair Italy 2025

Fleeting future

The 15th edition of *Ipsos Flair Italy* explores the complex dynamics shaping Italy in 2025, a year marked by a sense of fleeting hope and a desire for a brighter future amid ongoing challenges.

Here, our local experts highlight the need for a renewed sense of individual responsibility, a revitalised political discourse, and a focus on long-term vision to build a more sustainable and equitable future.

Key themes include:

- **Social fractures:** There are growing social, economic, and existential fractures in Italian society, including rising

inequality and a shrinking middle class.

- **The search for connections:** Despite the rise of individualism and self-focus in contemporary society, there is an increasing desire for deeper, warmer, and more collective relationships.
- **Transformative forces:** The key forces driving change in Italy are the green movement, technological acceleration, and the push for gender equality and rights for gender minorities. These forces are shaping values, behaviours, and aspirations, but also generating

resistance and backlash.


- **The future of democracy:** We explore the impact of social and cultural changes on Italian democracy including the erosion of institutional legitimacy and the rise of soft authoritarianism.

Download the English summary [here](#).

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Italians are increasingly seeking out communities and groups where they can find emotional support, share experiences, and collaborate on common goals.

International Women's Day 2025

Mixed views on gender equality advancements and societal tensions

Ipsos' *International Women's Day* survey, conducted with the [Global Institute for Women's Leadership](#) at [King's College London](#), highlights complex views on gender equality across 30 countries.

While there are positive attitudinal shifts overall, significant gaps persist, especially among younger generations. Notably, optimism for young women's futures is evident, but not equally extended to young men, with 55% thinking young women will have a better future than their parents' generation (vs. 45% for young men).

Although a majority (68%) agree on

the importance of gender equality, less than half (42%) expect significant progress in the next five years, acknowledging that current initiatives might be insufficient.

Societal tensions are recognised both between genders and among different age and economic groups, particularly by the youth, leading to polarised views on equality progress. Additionally, personal experiences – such as having female leaders or caregivers – influence perceptions markedly. The survey emphasises the necessity for ongoing gender equality advancements while considering the concerns of all

demographics, especially young men, to foster a more inclusive and equitable future.

Further exploration of generational differences and societal tensions is key for ongoing progress.

Download the accompanying report [Where Next For DEI?](#)

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55% thinking young women will have a better future than their parents' generation (vs. 45% for young men).

Ipsos Happiness Index 2025

Global attitudes to happiness and quality of life

The *Ipsos Happiness Index* reveals India and the Netherlands as the happiest countries among 30 surveyed, with 88% and 86%, respectively, reporting happiness. In contrast, Hungary ranks the lowest with just 45% describing themselves as happy.

Interestingly, happiness trends over the long term appear to be declining, with 15 of the 20 countries initially surveyed in 2011 now less happy – Türkiye experiencing the most significant drop from 2011 to 2025 (-40pp).

Conversely, Spain has witnessed the most notable increase in happiness (up 11pp from 2021 to 72% in 2025).

Financial strain has increasingly emerged as a principal contributor to unhappiness, particularly in Canada and the United States. Rising inflation and cost of living since the COVID-19 pandemic have contributed to decreased happiness levels. In 2025, 65% of North Americans cite financial concerns as a source of unhappiness.

Across all demographics, happiness tends to follow a U-shaped curve, with the happiest individuals typically found in their 60s and 70s, while those in their 50s are the least content.

Common contributors to happiness include family and feeling appreciated, though these factors

vary across age groups. Notably, older generations value familial connections, while younger people seek appreciation. Financial concerns dominate as a cause of unhappiness for 58% of dissatisfied individuals, underscoring the universal financial pressures impacting global happiness.

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Financial concerns dominate as a cause of unhappiness for 58% of dissatisfied individuals.

Generational Marketing

Breaking free from stereotypes

In the realm of marketing, generational labels such as Gen Z, Millennials, Gen X, and Baby Boomers are oft-mentioned for targeting. However, we argue these labels, while a useful starting point, often oversimplify the reality.

Generational stereotypes can blur consumer insights, overlooking the diversity within groups. An individual's life stages and needs frequently have a stronger sway over attitudes and consumption than generational placement alone. Particularly as inflation rises and purchasing power stagnates, consumers increasingly prioritise price and affordability in brand choices.

This paper underscores a universal truth: consumers seek authentic


connections. They desire to feel acknowledged and appreciated by brands. It provides marketers with four strategies to transcend generational stereotypes and foster robust brand connections.

Key takeaways include recognising the limitations of generational segmentation; the importance of tailoring messages to life stages and needs over generational categories; and the significance of empathy in connecting with diverse demographics.

Brands that empathise with the distinct challenges and dreams of varied demographics can foster deeper consumer connections. Despite gathering insights into generational preferences, the core

driver across all is price and perceived value. Brands must consistently deliver on these to maintain competitiveness.

Leveraging AI-driven data tools can also assist marketers in transcending stereotypes, enabling nuanced targeting based on comprehensive understandings of audience psychographics and behaviours. This approach facilitates more relevant and impactful brand engagements that resonate with today's consumers.

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Generational stereotypes can blur consumer insights, overlooking the diversity within groups.

Accessible Online Banking

Closing the compliance gap and winning new customers


The shift towards online banking, while beneficial for businesses, has often overlooked the needs of people with disabilities. Many banking websites and apps lack compatibility with assistive technologies, creating barriers for a significant portion of the population.

Banks need to understand the accessibility gaps in their online banking experiences so improvements can be made to help people with disabilities access services and products. In this paper we examine the increasing importance of accessible online banking, particularly with the European Accessibility Act (EAA)

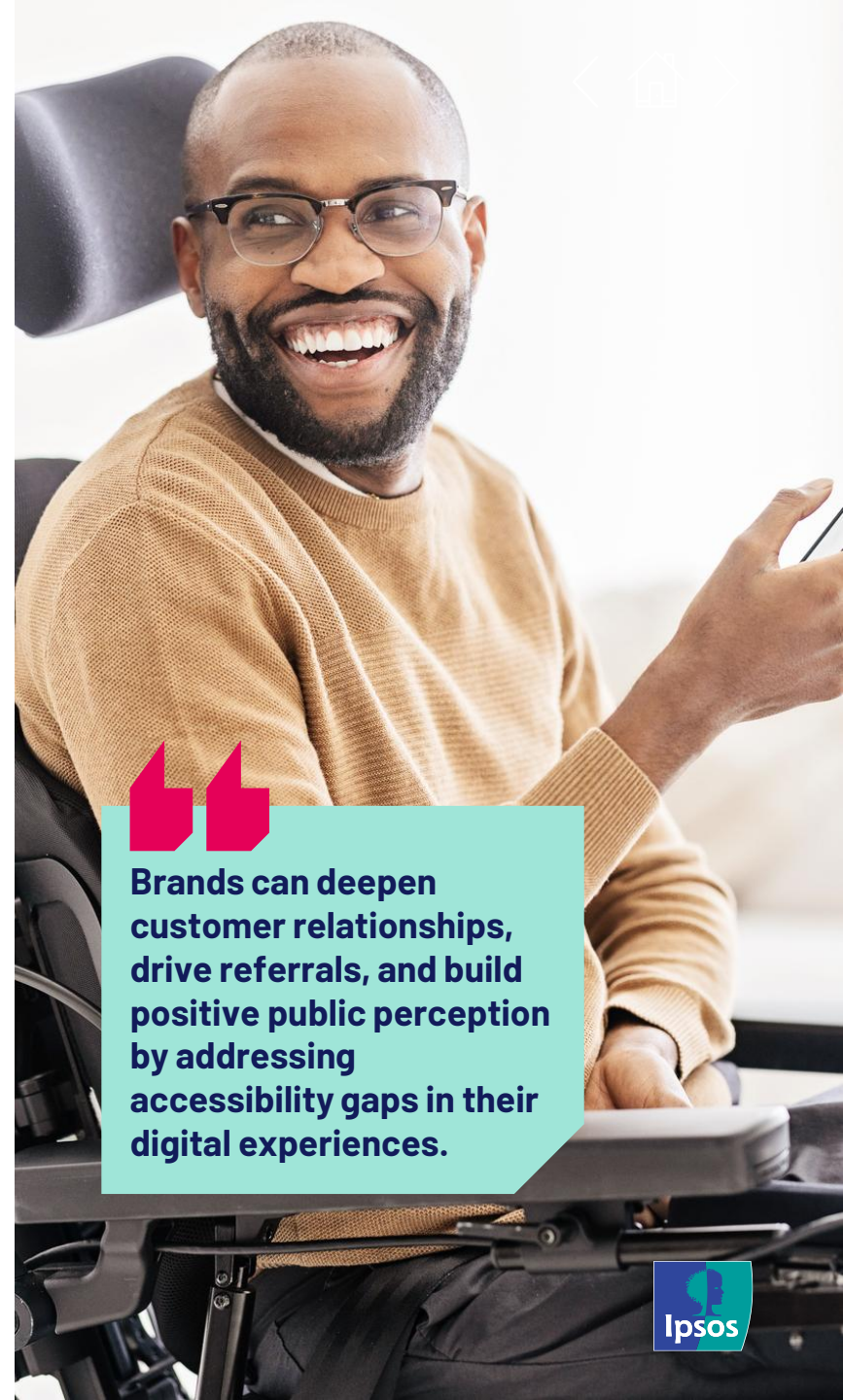
coming into effect in June 2025, driving businesses to deliver on the promise of accessible digital experiences for all. We cover:

- **The importance of accessible online banking for people with disabilities:** A significant portion of the population lives with disabilities, representing a considerable consumer base that often chooses businesses based on accessibility.
- **The risks associated with non-compliance with the EAA:** Non-compliance not only presents legal and financial risks for banks but also damages brand reputation and customer loyalty.

- **Common accessibility issues with online banking:** These include navigation problems, lack of colour contrast, and incomprehensible financial language.
- **Key recommendations for banks to improve the accessibility of their digital platforms:** Including engaging people with disabilities in development and prioritising essential content.

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Brands can deepen customer relationships, drive referrals, and build positive public perception by addressing accessibility gaps in their digital experiences.



What The Future: Pets

How will human-animal bonds reshape business & society?

The pet industry is booming, with \$150 billion in US sales and 80% of younger households owning pets. But shifting demographics, urbanisation and economic pressures are reshaping the landscape of pet ownership and care.

For pet product manufacturers, service providers, and policymakers, understanding the evolving human-animal bond is crucial. The tools and technologies for pet care are advancing rapidly, from AI-assisted health monitoring to premium nutrition tailored for urban living.

What the Future: Pets explores

critical questions for this new era of companionship through the lens of five professionals deeply embedded in the pet industry. How will urbanisation impact pet ownership? What strategies resonate with pet parents seeking premium experiences? How do you balance pet-friendly policies with the needs of non-pet owners? How are pets replacing children in households?

Dive into expert interviews and fresh data on the dynamics of pet ownership across generations and lifestyles. Whether you're developing pet products, creating housing policies or adapting workplaces for pet parents, keep

reading to learn how to navigate the future of the pet industry and shape the evolving role of companion animals in society.

Additionally, join the editor, Matt Carmichael, and guests for [the webinar](#) on the 8th of April as he outlines exclusive data, expert commentary and insights to navigate the shifts in pets' roles in our homes and society.

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Shifting demographics, urbanisation and economic pressures are reshaping the landscape of pet ownership and care.

The Heart Truth

Understanding what we don't know about cardiac health

People seem to overestimate their knowledge of cardiovascular disease (CVD). Despite 84% of people interviewed believing they are well-informed, only 47% actually are.

Drawing insights from a comprehensive survey, Ipsos' latest report, *The Heart Truth*, uncovers significant knowledge gaps that could hinder effective prevention and treatment strategies.


Key findings reveal that over half of the population is unaware of gender-specific differences in symptoms and diagnosis rates; for example, 52% wrongly perceived

symptoms of a heart attack are the same for men and women, while 43% incorrectly indicated a women's cardiovascular risk can NOT accelerate during menopause.

Many also hold misconceptions about risk factors, such as aging, diabetes, and lifestyle choices. Surprisingly, common myths persist, like the belief in the heart health benefits of red wine or the need for life-long exercise abstinence after a heart attack. Addressing these misconceptions is crucial for improving cardiac health outcomes.

These are the results of a study

conducted via Ipsos.Digital's ad-hoc survey solution FastFacts in August 2024 across six countries: France, Germany, Italy, Spain, the United Kingdom and the United States. The survey targeted adults aged 18 to 65, ensuring a representative sample for each country across age and gender demographics.

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Targeted education is needed to close these knowledge gaps and drive greater awareness of the full range of CVD risk factors and symptoms.



Shortcuts



What Worries the World – March 2025

Inflation is the number one concern in worry, again, after a slight increase across 29 countries.

Meanwhile, the proportion of Americans saying “my country is heading in the right direction” is on the rise, with 43% now taking a positive view. But there’s a clear political split, with 76% of Republicans saying this vs. 20% of Democrats.

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Ukrainian Citizen Attitudes Survey

Conducted on behalf of The Economist, Ipsos surveyed the Ukrainian people about their attitudes to the ongoing war and current politics.

President Zelenskyy enjoys high approval, with 72% approving. Additionally, 62% say elections should not be held until the war formally ends and 59% believe they can still win the war.

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Understanding Society

This year’s Understanding Society draws on eight MRP models, to take a granular view of the British public’s satisfaction with public services and shed light on how the UK government can best channel its efforts to deliver meaningful improvements and keep the public’s trust.

Three-quarters (75%) of the UK public feel public services have gotten worse over the past five years.

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Duty of Care

What does it mean to be a man in today’s world?

Ipsos and Effie explore how there is a vacuum in the marketing industry’s duty of care to young men and boys, the benefits of positive and empathetic male role models, and steps brands can take to broaden minds while continuing to serve the bottom line.

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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: **Todi, Umbria, Italy**. Italians are looking for hope among ongoing challenges, find out why on [page 6](#).

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