

June 2025

IPSOS UPDATE

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

Ipsos Update June 2025

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

The first 100 days are supposed to set the tone for a presidency. After a whirlwind of announcements and lots of noise and fury, President Trump's approval ratings remain low but broadly stable, with his core voters seemingly unfazed by rapid shifts on tariffs and their impact on the stock market.

Of course, the impact of these measures are just beginning to bite. When we ask Americans how they would react to a 10% price hike due to tariffs, spending on restaurants, clothing and large electronics are in the firing line, with over 40% of consumers saying they'd cut back on these items. On foreign policy, another area of

frantic activity, the public have clear reservations, with a majority believing the US is on the wrong track, although views are more balanced on immigration. Our latest [Know the New America & Beyond](#) illustrates how the country is a complex and often contradictory beast. Subscribe to our [newsletter](#).

Across the Atlantic, our new Ipsos [Europulse](#) report finds Europeans in questioning mode when it comes to how they feel about the European Union. Seven in ten of them fall into the "it depends" category, being neither strongly in favour of how everything is going, nor strongly opposed. A

reminder that polarisation of political opinion is not universal at all.

Our India team's [Boxes, Labels and Beyond](#) study also illustrates another "it depends" area: consumers welcome sustainability options but remain reluctant to pay for them. Our research consistently finds that top-performing communications are ones that highlight personal "me" benefits such as "never using pesticides" rather than more scientific or technical claims.

Finally, we have launched our latest annual [Ipsos Generations Report](#), where we unpick the lazy myths from the reality and explore how better analysis can support marketers and

policy-makers. To all the Generation Xers out there, it seems amazing that Gen Z gets four times as much media coverage as our generation, bearing in mind that we are wealthier, more powerful and, in some places - Europe for example - actually outnumber them! Take a look and let us know what you think.



Ben Page
Ipsos CEO

Poll Digest

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

Canada:

54% of workers or their spouse contend with mental or physical health conditions.

USA:

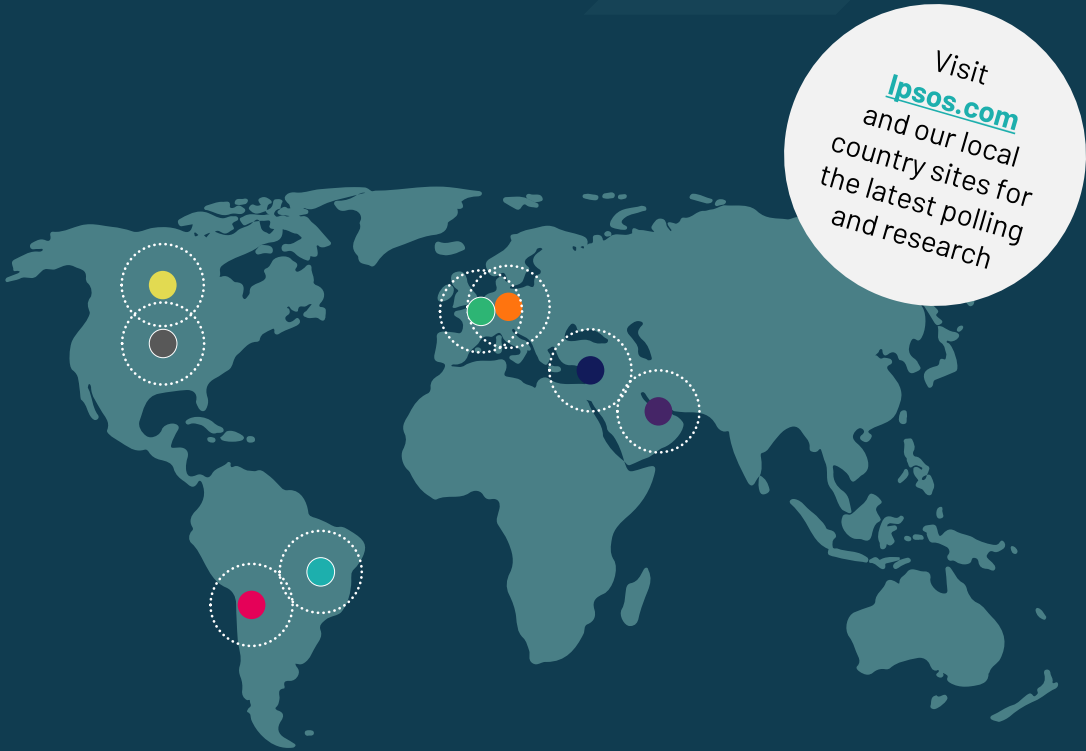
50% want retailers to label the cost of tariffs on items like they do with sales tax.

Chile:

51% of Baby Boomers feel brands are not interested in people their age.

Brazil:

24% of Brazilians say they have suffered at least one instance of cyberbullying.



Germany:

46% want a maximum working day of eight hours (vs. 44% who don't).

Netherlands:

62% are in favour of a monarchy over a republic.

Lebanon:

97% express support for local products and 73% report increased usage, mainly due to the economic crisis.

Qatar:

21% of individuals believe that companies will protect their personal data.

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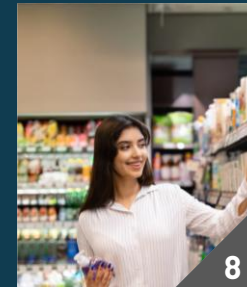
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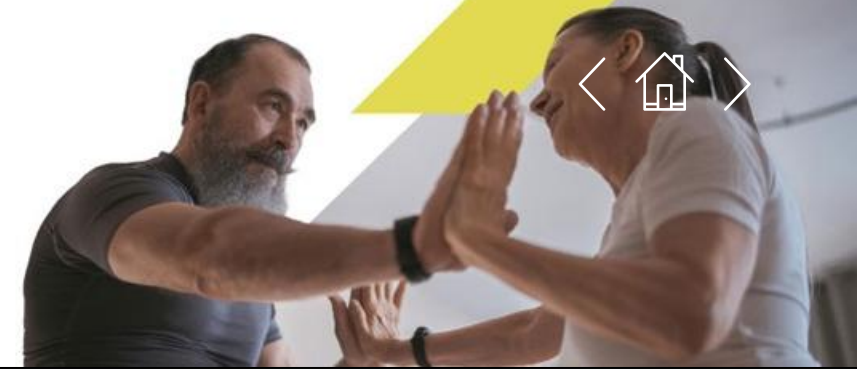


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IPSOS Generations Report



Ipsos has just published the third edition of the Ipsos Generations Report. For this 2025 edition, we've taken a fresh look at the demographic dynamics happening around the world.

One message rings out loud and clear: **fertility rates are falling** even faster than expected. While most countries' populations are still growing, the momentum behind today's demographic realities is irreversible.

This brings with it an **imperative for businesses**. What does the prospect of fewer – and older – consumers, customers or subscribers mean for us? As our [analysis on ageing](#) shows, older people in high to middle income countries are living longer, more

active lives and often have money to spend, even as they grapple with today's economic challenges. Are we truly in touch with who they are and what makes them tick?

We also point our spotlight on a generational group that is not talked about so much these days: Generation X. As our investigation shows, they yield a good degree of power in the family and in the boardroom and are very much the [quietly powerful generation we shouldn't ignore](#).

To round up our analysis this year, we've been [assembling the latest evidence on Gen Z](#), including where young men and women diverge – and converge. We've also been exploring

their online lives: where and how do they spend their time, and what does it tell us about their future lives?

Key findings include:

- **Generational analysis is vulnerable to biases, misperceptions and cultural stereotypes.** Discipline is required to distinguish true generational differences from lifecycle effects that all age cohorts experience, and from period effects that impact all age cohorts at the same time. Local context is also important: 'Western' labels do not always travel well.
- **Gen Z is not one homogenous group.** In certain countries, the gap in attitudes between young men

and women is beginning to be reflected in voting patterns.

- **Don't neglect the quietly powerful Gen X.** While less fashionable than Gen Z, Gen X are economically powerful and poised to dominate even more leadership roles across politics and business – as well as in the family.

Our latest [KEYS webinar](#) dives into these findings in more detail. [Watch the replay here](#).

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ESG Priorities for Multinational Corporations

Meeting citizen-consumers where they are and addressing their needs

In today's environment, understanding consumer perceptions of your Environmental, Social, and Governance (ESG) performance is no longer a 'nice-to-have' – it's a business imperative.

Multinational corporations have the ability and the responsibility to 'do good' in the world. But E, S and G are not held in equal importance by consumers and citizens everywhere.

In order to gain a better understanding of the issues that matter most to people, Ipsos has conducted the fourth ESG-focused


wave of the Ipsos Global Reputation Monitor.

We sought to level-set the understanding of E, S, and G and how those priorities stack up against one another. We defined each of E, S, and G in consumer language and then asked citizens/consumers from across 24 countries to rank them in terms of importance for multinational companies.

In this latest research, we not only seek to understand how ESG priorities vary by industry but have added a layer to understand how some of the world's largest companies perform against these

priorities. These ratings were then used to determine a company rating on ESG.

In this paper, we share an industry-by-industry summary of the global findings. It sets out a bird's eye view of the most pertinent issues for each industry, as well as an overview of the extent of differentiation in effectiveness when it comes to main companies in the industry.

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Citizen-consumers are much more likely to select priorities that they can see, feel, and touch.

Joy Report 2025

Exploring the true power of joy

Together with Cloetta, Ipsos in Sweden has extensively researched the topic of joy. This first edition of the Joy Report takes a closer look at the nature of joy, how it manifests, and which factors are at play.

The focus is on Europe and more specifically the Nordics, where joy has been researched in Sweden, Finland, Denmark and Norway.

The report shows that feelings of joy improve our mood, health and overall wellbeing. And joy, unlike happiness, is achievable for everyone, every day.

Our research shows it's often the simple things that bring most

joy, such as relaxing at home, listening to a favourite song, enjoying a moment in nature, or having a chat with a friend.

Joy is the opposite of sadness, and shorter and more intense than happiness. It can be sparked in many ways, including:

- **Emotional joy:** experienced when we feel pleasure (cooking, relaxing...)
- **Physical joy:** rising through our five senses (dancing, tasting, listening and music)
- **Social joy:** stemming from connecting with loved ones
- **Cognitive joy:** what we feel

when we reflect on reaching a goal or achievement

- **Ideological joy:** being connected with people who share the same ideas or beliefs as us
- **Communal joy:** in situations of collective effervescence (rituals, sports events, concerts)

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**50% of Nordic citizens
associate joy with relaxing
at home.**

What The Future: Fandom

How brands can support fans' passions

"Fandom is where I live" said a teenage *What the Future* reader. That's likely not an exaggeration. Fans binge shows and books and immerse themselves in fan fiction and related Discord channels and livestreams.

This is good news for brands, because younger consumers are notoriously hard to reach and younger fans are more than twice as likely to say they are more likely to buy products or services from sponsors of things they are fans of.

What the Future: Fandom dives into how fans and their communities are evolving as

powerful cultural arteries and the questions they create for businesses. How do you find fandoms that will resonate with your current and potential customers? How can your brand make the fan experience better and not just for your brand? How can you help grow the fan pipeline for the communities your brand takes part in?

Explore our expert interviews and new data on the shifting attitudes and expectations of fans across demographics. From sponsoring emerging sports and athletes to livestreamers to engaging digital fan

communities, the latest edition explores how to support fans' passions and win their loyalty to your brand.

Additionally, watch the recent [webinar](#) with Editor and host, Matt Carmichael, alongside the contributing experts from Twitch, Parity, Coors, Verizon, Pinterest, Swiftie, and the Aspen Institute.

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Younger fans are more than twice as likely to say they are more likely to buy products or services from sponsors of things they are fans of.



CX Global Insights 2025

Opportunities to elevate your Customer Experience

In today's experience economy, great Customer Experience (CX) is paramount to success. It's no longer enough to simply meet customer expectations; businesses and organisations must anticipate and exceed them. CX Global Insights 2025, Ipsos' comprehensive global survey, provides the data-driven insights you need to transform your CX strategy and drive measurable business growth.

Key findings from this year's report include:

- **CX drives brand choice:** 70% of customers choose brands based on the expectations of a good experience.
- **Emotional connection matters:**

building strong emotional bonds with customers fosters loyalty and advocacy. Discover how to move beyond functional satisfaction to create true emotional attachment.

- **The forces of CX:** understand the six key drivers – Certainty, Fairness, Control, Status, Belonging, & Enjoyment – that shape customer relationships and learn how to leverage them for optimal impact.
- **AI's emerging role:** explore the evolving role of AI in CX and how it can be harnessed to strengthen customer interactions and drive efficiency.
- **Sector-specific benchmarks:**

compare CX performance against industry leaders and identify areas for improvement.

Additionally, watch the recent [LinkedIn Live](#) event with our panel of CX experts as they discuss the key findings.

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It's no longer enough to simply meet customer expectations; businesses and organisations must anticipate and exceed them.

What Worries the World?

Inflation and crime & violence are now joint top worries

Across 30 countries, the proportion citing cost of living and crime now sits at 33% for each issue, following a slight increase in concern about crime & violence.

Our latest edition sees Ireland added to our report. This month, their primary issue is health care.

Meanwhile in the US, the level of worry for taxes has reached a new high. While it has not yet become a top five issue, the share of Americans voicing concern about taxes has risen four points to a fifth (20%), which is not only seven points higher than this time last year but the highest it has been in ten years.

On the 28th of April, the Liberal party

won Canada's 2025 federal election. Since last month's edition, the proportion of Canadians believing their country is "heading in the right direction" has increased eight percentage points to 44%. This is the highest score for Canada since May 2022, when it was 45%.

This month, we place a spotlight on South Korea, ahead of its presidential election on 3 June.

South Korea is second from bottom on our list in terms of the proportion of people saying their country "is heading in the right direction", with only 15% stating so. A similar sentiment is also felt about the economy, with just 8% believing the economy is "good".

These attitudes are reflected in the country's top worries this month. Concern about unemployment has jumped seven points to 45%. Also, after martial law was enacted, worry about corruption has remained high with 44% mentioning it. Meanwhile, nearly two-fifths (38%) say inflation is a top priority.

Found out more in-depth analysis in [Flair South Korea 2025](#).

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Across 30 countries, the proportion mentioning inflation and crime & violence sits at a third (33%).

Voices of Europe

A call for change

After celebrating Europe Day on the 9th of May, we turn our attention to the future of the European Union and its impact on the lives of its citizens. As the EU continues to evolve, understanding public sentiment is more important than ever. Recent data from Ipsos' [EuroPulse](#) (powered by [KnowledgePanel](#)) reveals a nuanced picture, offering a valuable opportunity to ensure the Union adapts to meet Europeans' needs and aspirations.

Around one in five Europeans (17%) express full support for the European Union and its current function, while a small minority (7%) are firmly opposed to the EU.

Between these two groups lies the 'moveable middle', the 70% of respondents who are either supportive but dissatisfied (44%) or sceptical yet open to change (26%). This large, persuadable segment represents a crucial opportunity for engagement: they care about the EU but seek meaningful reform.

The results reveal that defending democracy and the rule of law stands as the foremost priority for Europeans, with 28% ranking it as their top concern. This is followed by supporting economic growth and innovation, prioritised by 19%, and environmental protection and food security (14%).

Looking at the EuroPulse results, one thing stands out: most people are not against the EU, but they are not unequivocally supportive either. They are somewhere in the middle, hopeful but frustrated. Both numerically and substantively this group is the most important. They care. They're paying attention. And they're asking for change.

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Europeans are either supportive but dissatisfied (44%) or sceptical yet open to change (26%) when it comes to the EU.

Boxes, Labels and Beyond

Packaging as a messenger of corporate responsibility

Sustainability initiatives are becoming increasingly important for businesses, driven by government regulations and consumer expectations. In India's rapidly expanding FMCG sector, companies are adopting sustainable practices across the board, from supply chains to eco-friendly packaging, in order to comply with this mandate.

Packaging serves as a tangible demonstration of a company's commitment to sustainability, playing a pivotal role in influencing consumer perceptions and actions. However, there is a notable discrepancy between consumers' intentions and their

actual behaviour, as they often prioritise cost and convenience over environmental concerns.

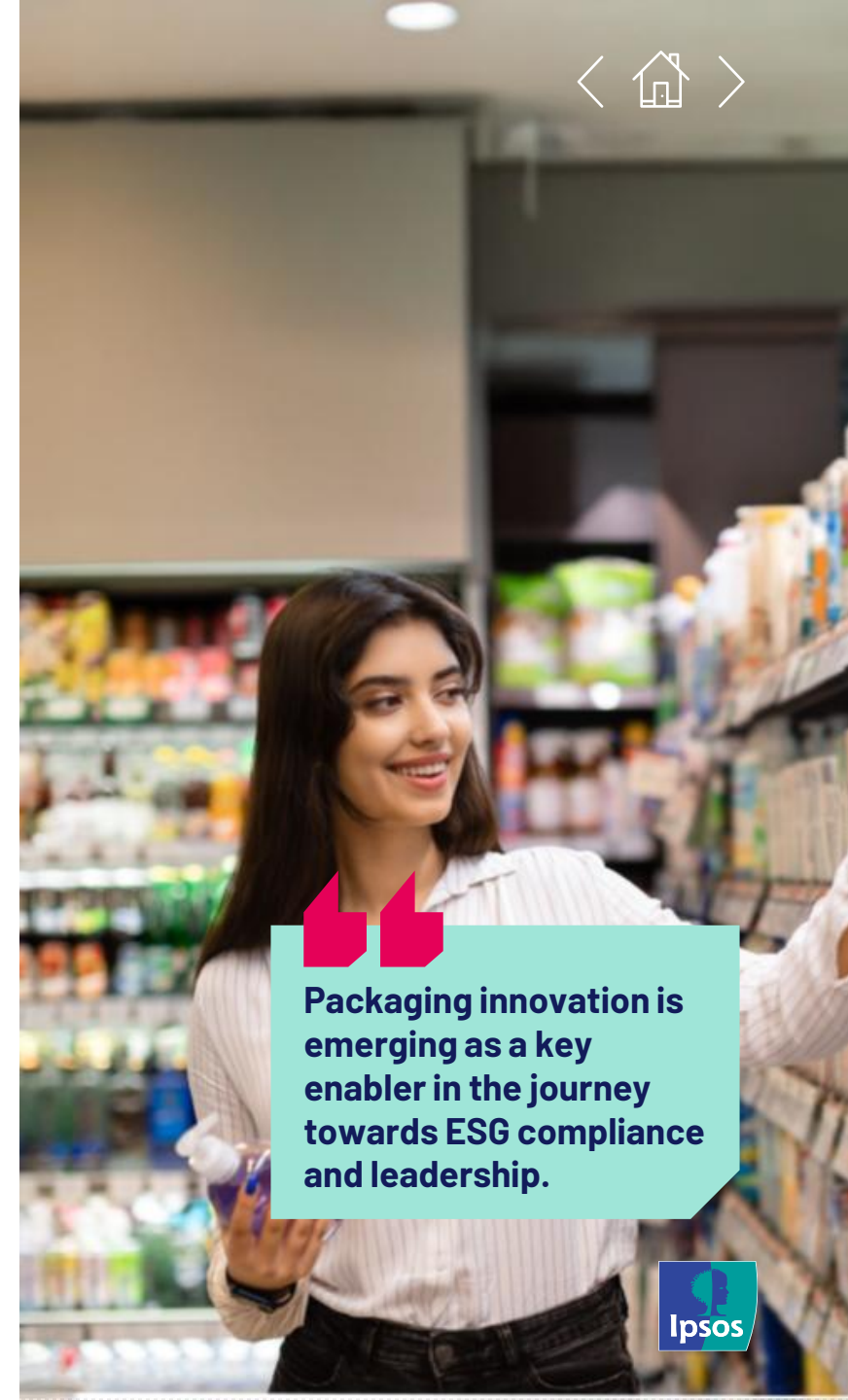
This report highlights the importance of packaging innovation in achieving Environmental, Social and Governance (ESG) goals. Brands must innovate in a way that makes sustainability an easy choice for consumers, using packaging as a core part of their corporate responsibility strategy. At the same time, it is important to maintain distinctive brand elements, such as shape, to ensure continued consumer recognition and prevent existing consumer alienation.

There is a complexity in measuring the impact of packaging changes, and there is a need for a comprehensive assessment that considers both immediate and long-term benefits.

Packaging has the ability to encourage consumers to support the brand in its pursuit of sustainability, fostering a sense of shared responsibility towards a more sustainable future.

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Packaging innovation is emerging as a key enabler in the journey towards ESG compliance and leadership.



Shortcuts



Know the New America & Beyond

The first 100 days are supposed to set the tone for a presidency. After a whirlwind of announcements and lots of noise and fury, President Trump's approval ratings remain low but broadly stable, with his core voters seemingly unfazed by rapid shifts on tariffs and their impact on the stock market.

Find out all the latest polling – and what this means for the wider world – in this monthly newsletter.

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The French View of the Catholic Church

More than seven out of ten French people believe that the Church should allow priests to marry, while nearly half (45%) have a positive view of the Catholic Church.

After the election of Leo XIV, Ipsos asked the French about their opinions on the new Pope and, more broadly, on the Catholic Church and its role.

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Public Hostility Towards Immigration

The UK's Labour government white paper on immigration was a response to growing public concern. But shifting public opinion on such a complex issue isn't easy, especially when the public has so many contradictory voices.

This paper aims to understand these contradictions and offer a nuanced perspective for a challenging subject.

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Ipsos Royals Polling

On the second anniversary of King Charles III's coronation, 44% of Britons want the ceremony for the next monarch to be smaller in scale.

Ipsos in the UK has conducted polling, together with the Daily Mail, which reveals insights into the public's perception of the monarchy, individual royals, and the impact of King Charles III's reign thus far.

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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: **Lofoten Islands, Norway.** Some people in the Nordic countries are experiencing joy; find out why on [page 7](#).

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