October 2025

IPSOS UPDATE

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

Ipsos Update October 2025

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

We're now halfway through the 2020s and it's five years since the pandemic began. How best to describe today's times? *The Uneasy Decade*, our new Ipsos Global Trends report, brings with it the gloomy news that optimism about what's next for our families and communities is harder to find than it was even a year ago.

This 'loss of the future' sentiment is accompanied by a sense of nostalgia in many countries for the way things used to be. Our analysis reveals increasing expectations for brands – including opportunities for those who get it right. We were also interested to see that optimism about AI is growing, albeit at different rates in different markets.

In the research sector, we're seeing the power of AI opening up new opportunities, with conversations around the beneficial use of synthetic data moving to centre stage. Look at our updated guide to responsible adoption, which sets out the *when*, the *how* and the *when not to* around using these techniques. As our authors note, when using AI to create synthetic data, we need to remember that the technology is not magic – it is maths!

The changes we're seeing in our economies, societies and politics raise new questions for businesses and brands about their messaging. This year's *Ipsos Reputation Council* report charts the rise of 'strategic silence', revealing that only one in five senior communications professionals say they prefer to speak out on potentially divisive issues. For organisations operating at scale, the challenge is acute: a statement that resonates in one market or segment could trigger boycotts in another.

What does it mean to be an American Brand today? Our US team has been gauging opinion in several markets around the world. If a brand is perceived as "American", we find a negative impact on trust and purchase intent outside the States. But within the US, an American brand perception is a net positive.

Elsewhere, the new *State of Digital Marketing in India* release finds digital marketing extending its lead over television, powered by continued growth in internet use. This year's analysis shows how affordable data, Gen Z's digital literacy, and regional language content are shaping marketing strategies.

This edition features short summaries of all of this and more, together with links to the full analysis if you'd like to go deeper. We're looking forward to great conversations about how these resources can help you in your work.

Simon Atkinson
Chief Knowledge Officer

Poll Digest

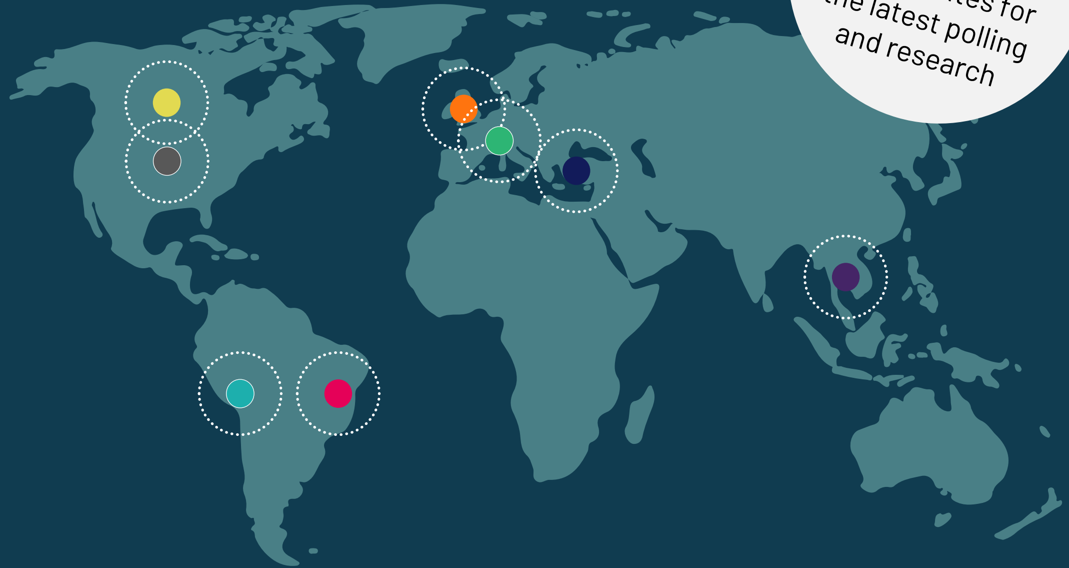
Some of this month's findings from Ipsos polling around the world

Canada:
60% believe they can never trust the Americans the same way again.

USA:
90% say there's an urgent need for greater unity among Americans.

Brazil:
40% say they know very little or nothing about adultification (exposing children to adult behaviours).

Chile:
36% reduced their meat, dairy, and egg consumption for health reasons.



Visit Ipsos.com and our local country sites for the latest polling and research

Great Britain:
59% view AI as a risk to the country's national security.

Switzerland:
66% don't want to spend more to purchase F-35 fighter jets.

Türkiye:
43% of respondents think more needs to be done for equality.

Thailand:
33% say they would consider buying an electric vehicle.

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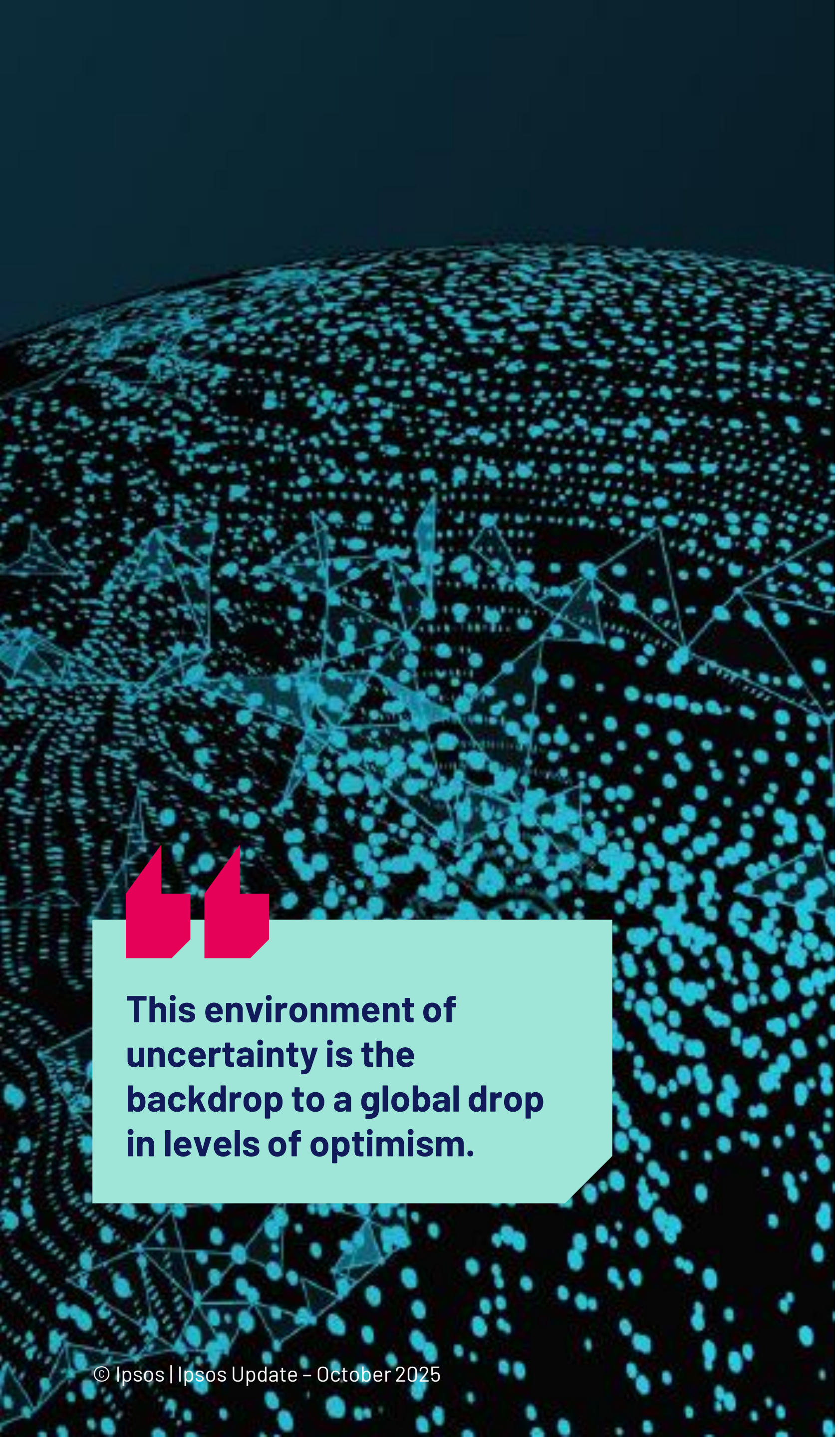

Ipsos Global Trends

The Uneasy Decade: Reshaping society, technology & the global economy

This year, it feels as if the change is intensifying. The 9th edition of the Ipsos Global Trends report reflects a sharp increase in geopolitical tensions, the rapid mainstreaming of AI, and a broad societal reconfiguration.

Today's environment of uncertainty is the backdrop to a global drop in levels of optimism. People are usually more optimistic about what's closer to them - themselves, their family and their community - than they are about things that are farther away, such as their nation or the world.

But this year there has been a 7-point drop in citizens saying they feel optimistic about themselves and their community. This fall in optimism is striking and has broad implications for corporate and policy leaders alike.

At the macro level, one of the most notable changes we've seen has been an escalation of economic and geopolitical instability.

At the same time, technology continues to leap forward, creating a double-edged sword of innovation and apprehension

First launched in 2014, the Ipsos Global Trends report is the largest and broadest report of its kind. As we reach the midpoint of the decade, *"The Uneasy Decade: reshaping society, technology, and the global economy"* focuses on the changes from last year as well as from the initial report in 2013.

The report is grounded in an expansive global survey, fielded this year in 43 global markets, as well as macro force analysis and signals collection. It builds on the framework of nine trends established in 2024 using a factor analysis of more than 5 million data points.

Listen to our experts talk through the findings of this year's report in our latest KEYS episode.

This environment of uncertainty is the backdrop to a global drop in levels of optimism.

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Ipsos Reputation Council Report 2025

The Eye of the Storm

In an era of unprecedented volatility, the Chief Communications Officer has become a strategic sense-maker, tasked with navigating a polycrisis of fused geopolitical, societal, and technological risks.

We've asked the Ipsos Reputation Council – a cohort of 161 communications leaders across 19 markets - about their greatest challenges, their emerging opportunities, and the strategies they are deploying on the front lines of a world in flux.

Topics covered include:

Silence as strategy: The volatile political landscape has torn up the old playbook for corporate activism, forcing communicators to adopt a new approach: 'Strategic Silence'. How are leaders responding to pervasive distrust and polarisation? And is internal alignment now more important than external communication?

The evolution of ESG: Political pressure and a crisis of credibility are forcing a strategic retreat from public pronouncements on ESG, even as its core principles are embedded more deeply than ever into business operations. As stakeholder expectation, investor demand and societal pressure collide with geopolitical instability, economic uncertainty and political polarisation, how are comms leaders shaping ESG's evolution?

The tightrope act: As the initial hype around Artificial Intelligence recedes, CCOs must walk the tightrope between harnessing its power and mitigating its profound reputational risks. How are communicators confronting the practical challenges of ethical implementation and the need for human oversight?

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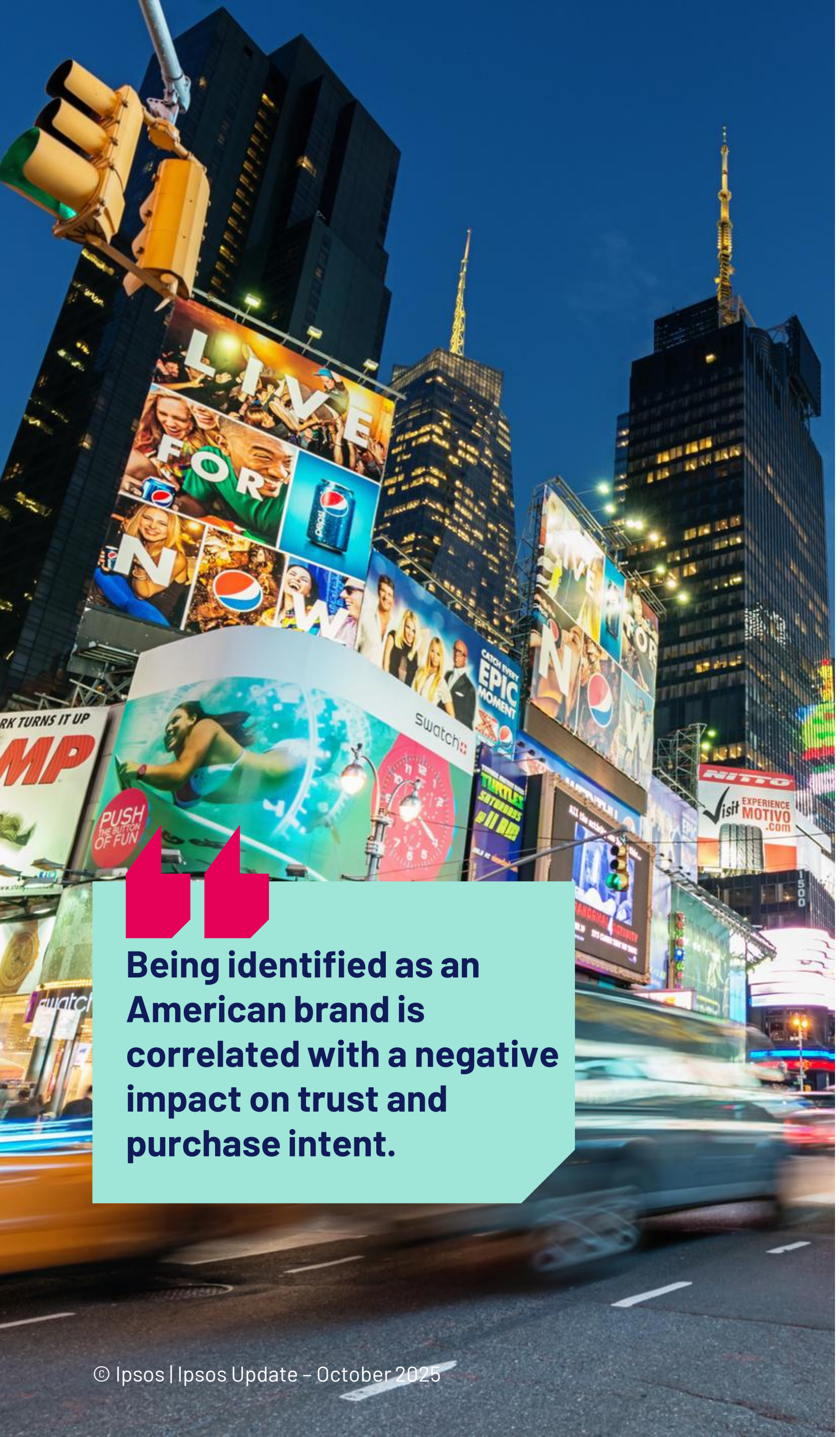
As corporations grapple with complex reputational, social, and regulatory landscapes, what role do CCOs play in influencing organisational direction?



> **Being identified as an American brand is correlated with a negative impact on trust and purchase intent.**

Brand America 2025

Being an American brand now comes with challenges

According to this new 10-country survey, being identified as an American brand is correlated with a negative impact on trust and purchase intent. This is true across all countries except the US, where American brand perception is a net positive for trust and purchase intent.

When averaged across brand and countries, these negative effects amount to approximately a 20-point drop in both purchase intention and trust, with the greatest downside of American associations occurring in the United Kingdom.

Across all 10 countries surveyed, those who perceive a brand as "international" are more likely to trust the brand and to say they would purchase from it.

What are the implication for brand leaders? Well, where your brand stands depends on where you sit.

If you are selling a US-based brand in other markets, the degree to which you are perceived as "American" could potentially be damaging, while the degree to which your competitors are perceived as "American" could present a real growth opportunity.

Brand leaders must monitor the "say-do" gap between shoppers' attitudes and actions in order to strike the right geo-tonal balance without abandoning their core brand identity.

Brands can position themselves for success in this landscape by highlighting their contributions to global causes and communities, collaborating with local businesses and influencers, or focusing on the "American" values which do resonate across different cultures.

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Synthetic Data

From hype to reality: A guide to responsible adoption

Synthetic data, powered by AI, is transforming the market research industry. The question isn't if, but when and how. Recognising the potential – but also the possible pitfalls – of the issue, our clients asked us to provide Ipsos' trusted perspective on the topic.

In this 2025 edition of the paper, updated in line with our latest thinking on the topic, we demystify synthetic data and provide recommendations on when, where, how, and who to trust for responsible, safe, and value-adding implementation. When using AI to create **synthetic data**, remember that this technology is not magic – it is maths. It may appear magical when used correctly, but that's only when it combines the best of human and artificial intelligence: when experienced researchers combine proprietary analytics frameworks, select the right AI/model for the specific task at hand, inject fresh, purposeful consumer data from real people, apply prompt engineering from domain experts, tap into fine-tuned data science algorithms, and leverage norms databases and data assets.

Simply put, the quality and reliability of **synthetic data** is entirely dependent on the real human data used to create and update it, as well as the expertise of the people behind it all.

This point of view is all about making sense of the current landscape and what the future may hold. We hope it will guide you from an objective opinion of synthetic data, demonstrate both its potential and its risks, and refine the questions you need to ask yourself and your partners before you start considering it.

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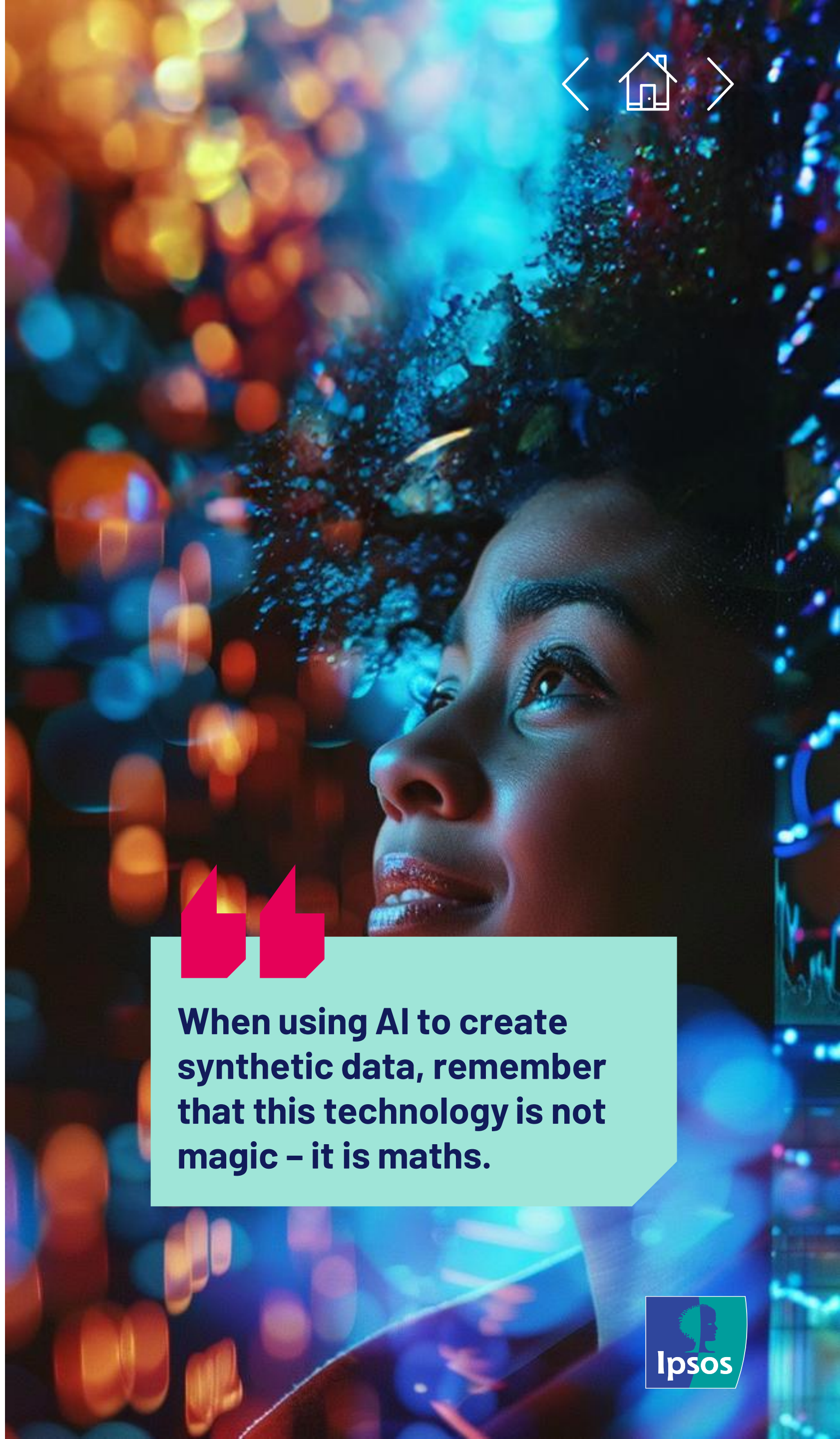

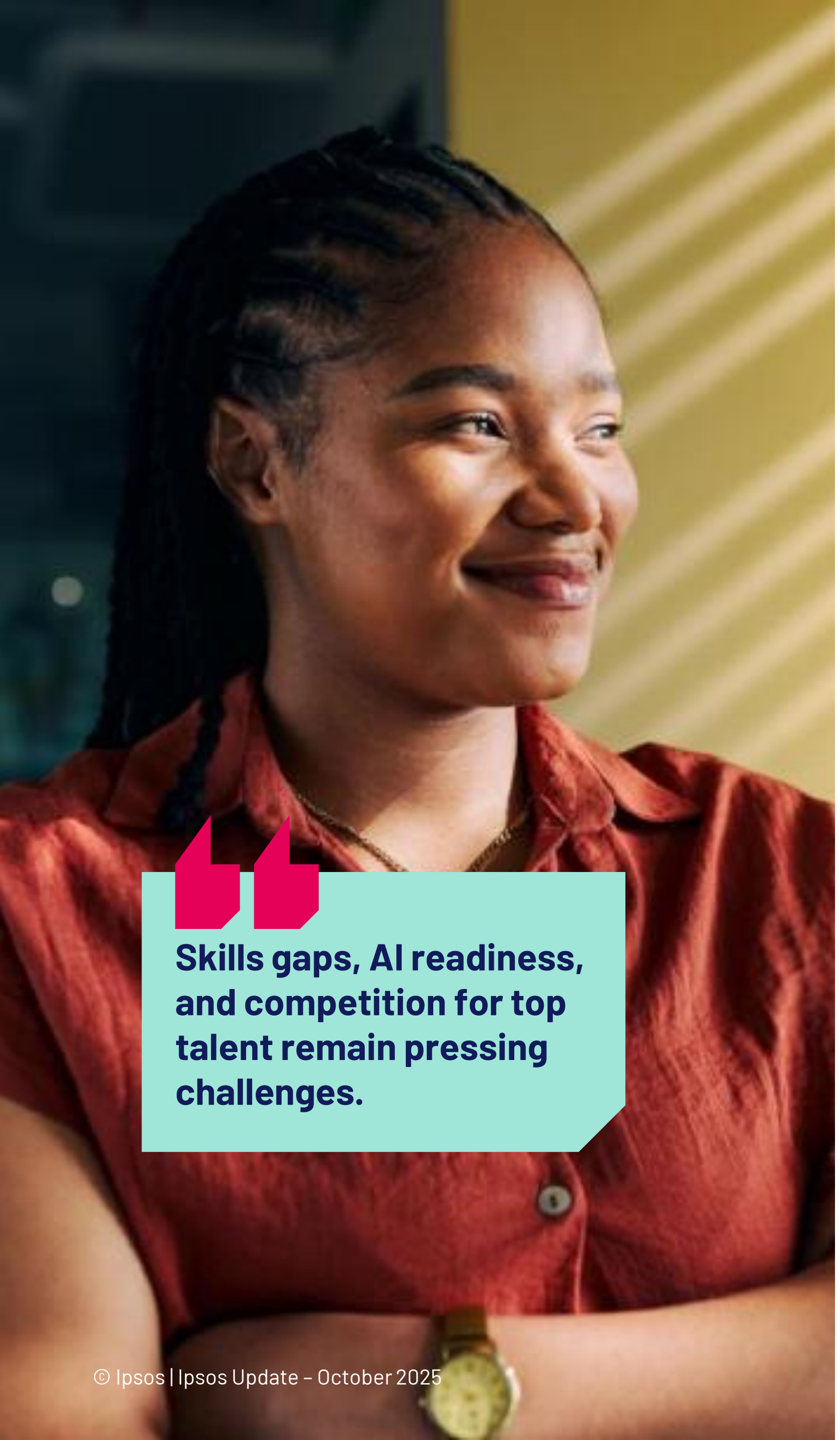

Empowering People Teams

Navigating 2025 and beyond

Your employees are your most valuable asset. In a time of rapid workplace change, the role of the People Team has never been more critical.

To better understand how the profession is evolving, we surveyed 1,500 HR and People professionals across the Asia-Pacific region from a diverse range of industries, sectors, and organisational sizes.

Empowering People Teams provides HR and People professionals with a clear, evidence-based view of where the profession stands, and where it's headed next.

Key takeaways include:

- **The People Team's strategic influence is growing**. Nearly half of respondents report increased involvement in decision-making: priorities shifting from tactical delivery to shaping strategy around wellbeing, talent & engagement.
- **The talent market is stabilising, but quality gaps persist**. Recruitment and retention momentum is holding steady or improving for most, yet skills gaps, AI readiness, and competition for top talent remain pressing challenges.
- **Employee Experience (EX) is on the agenda, but maturity varies**. Most organisations recognise EX as a strategic driver and have leadership buy-in, but only half have formal listening programmes and lifecycle measurement is inconsistent.

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Advocacy Ripple Effect

What if you could turn your happiest customers into effective marketers?

Our new research reveals a powerful dynamic: customers acquired through recommendations are more valuable, exhibiting higher retention and advocacy rates.

The advocacy ripple effect is an organic and self-perpetuating cycle of acquisition. This new research from Ipsos' Global Customer Experience (CX) Insights study is designed to support the activation of CX KPIs, such as the Net Promoter Score (NPS), and provides organisations with the ability to calculate future acquisition potential from existing CX efforts.

Until now, the focus of CX returns has been on retention and spending. This new research sets out a framework that incorporates acquisition budgets and resources into the mix for CX professionals. Acquiring customers through recommendation is a more cost-effective use of marketing spend than above-the-line marketing spend.

Findings show:

- On average, customers actively recommend brands to friends and family 2-3 times per year.
- This organic word-of-mouth has a real impact, with over a third of customers saying that recommendations played a role in their decision to start using a brand.
- The rate of recommendation is 4X higher for customers who feel emotionally attached to a brand, acting as potent brand advocates.

By understanding and activating the hidden power of recommendation, you can transform satisfied customers into a potent marketing force, driving unprecedented organic growth.

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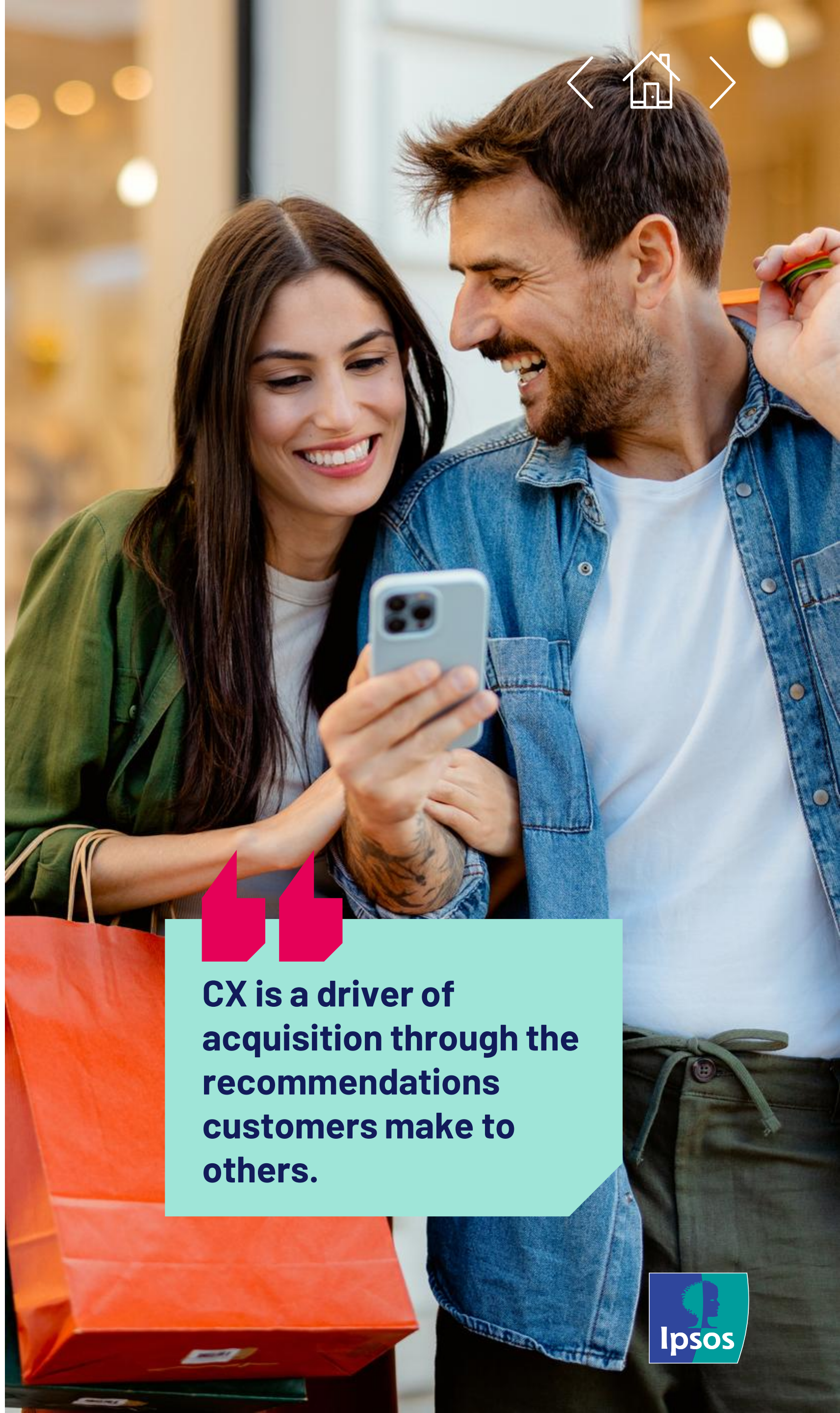

Digital advertising now commands 44% of the market in India, marking 20% year-on-year growth.

State of Digital Marketing in India 2025-26

Key insights to navigate and harness the potential of digital marketing

Digital advertising has not only grown; it has fundamentally transformed how brands connect with consumers across the world's largest democracy. The convergence of artificial intelligence, connected TV, and immersive technologies is creating new frontiers for personalisation at scale.

India's total advertising spends in FY2025 (April 2024 – March 2025) saw 11% growth over FY2024. Digital advertising, which overtook television last year, has further extended its lead, now commanding 44% of the market at ₹49,000 crore, marking 20% year-on-year growth. Looking ahead, digital ad spends are projected to grow 15% in FY2026, expanding its share to 46%.

In terms of categories, FMCG and eCommerce dominate digital spending, accounting for 68% of the total. Mobile platforms continue to dominate, accounting for 78% of total digital advertising expenditure and reaffirming the smartphone's status as the primary screen for commerce, content and engagement.

Several factors continue to drive this growth: affordable data, rising social media adoption, the growing digital influence of Gen Z, regional language content and the surge in CTV (with 40 million users currently and projected to reach 50 million in 2026). These developments are reshaping marketing strategies.

There are still challenges to overcome. As we navigate the complexities of data privacy regulations, increasing customer acquisition costs and fragmented consumer attention, it is crucial that the industry prioritises ethical practices and transparent engagement.

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Opinions on Government Humanitarian Aid

Support outweighs opposition

Across 31 countries, half (50%) are in favour of their government providing financial support to international humanitarian aid organisations. Whereas around one in eight (13%) oppose their government giving financial support to aid groups.

The strongest support is shown in Indonesia which leads with 70%, followed by Italy (58%), China, Saudi Arabia, and Poland (57% each).

At the other end of the table, the highest opposition appears in Great Britain (21%), France (20%), and Türkiye (19%).

While it may seem like there has been a big backlash against national governments helping to fund international humanitarian aid, the reality is that only 6% across 31 countries *strongly* oppose this.

While US President Donald Trump has been an outspoken critic of some international aid efforts, half (50%) of Americans do support their government funding aid groups, in line with the global average. Some 15% oppose this which is also in line with the 13% global country average.

We also see a steady generational consensus, with around half from each generation saying they support government-funded aid (Gen Z, 51%; Millennials, 49%; Gen X, 48%; Baby Boomers, 49%).

The findings reveal a resilient foundation of support for aid, but also regional and demographic divides that define the current landscape. These insights provide an essential evidence base for Ipsos partners and other relevant stakeholders in the humanitarian field as they plan for the future.

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> **Half (50%) are in favour of their government providing financial support to international humanitarian aid organisations.**

Shortcuts

What Worries the World - September

This month, crime & violence remains top with 32% mentioning it across 30 countries, while 30% cite inflation as a worry.

Meanwhile, corruption concern (28%) is on the rise, particularly in APAC but also in Argentina.

French pessimism hits a milestone as the proportion of people saying the country is "heading in the right direction" reaches a ten-year low of just 9%.

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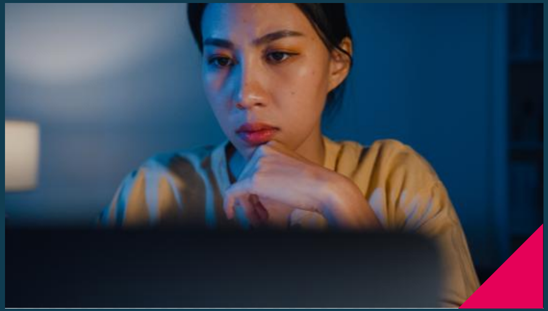

Bridging the Divide

Americans are more sceptical of artificial intelligence than the rest of the world. Here's why – and how to fix it.

This report maintains that human involvement with AI systems is crucial for fostering trust, as people tend to trust humans utilising AI almost as much as humans working independently.

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IC Index: A closer look

Ipsos Karian and Box delve into the data from the Internal Communication Index 2025 to understand how employees feel about communication volume, channels and topics.

Find out which topics have seen most movement, plus dive into extra patterns by demographics such as generation, sector and organisation size that are worth exploring.

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State of the Union

This report examines the latest approval ratings of the EU and Ursula von der Leyen, who delivered her State of the Union speech at the start of September.

In August 2025, only 23% of citizens expressed a positive opinion of the European Commission under her presidency, while 36% were negative, according to the Ipsos EuroPulse Survey.

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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: **Elan Valley Reservoir, GB**. Great Britain are the most likely to be opposed to government funded humanitarian aid.

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