November 2025

IPSOS UPDATE

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

Ipsos Update November 2025

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

Halfway through the decade, and a quarter of the way through the 21st century, what do people really make of the times we're living in? The prevailing mood is one of nostalgia. Our *Ipsos Global Trends* report finds six in ten people (across 43 markets) saying "I would like my country to be the way it used to be".

There are many reasons why the mood today is subdued. Concerns about military conflict are on the rise in Europe, worries about the rise of extremism are on the increase pretty much everywhere, while crime is again out in front as the world's top concern – our *What Worries the World* study has all the details for your country.

It's not all bad news, however. People acknowledge the amazing progress made in healthcare over the last 50 years, and this year's *Ipsos Health Service Report* shows that people generally trust their health system to provide great care when they need it.

With the COP30 conference taking place this month, we've been reviewing the opinion data on climate change. It remains a 'second-order issue' when we ask people about their worries right now, set alongside all the other pressures impacting their daily lives. But ask people about the future and it's a different story: climate change is again identified as the number one risk by both the public and risk experts. The new AXA/Ipsos *Future Risks Report* finds 83% of those risk experts believing the world today to be "more vulnerable" than it was in 2020.

One theme not so high up the agenda five years ago is the growth of AI. Every day, millions of people are asking LLMs like ChatGPT questions like "what's the best car for a family of four" or "which skincare brand is most accessible". As we adjust to scenarios where a brand can be defined by AI chatbots, our new report explores how to control your narrative where it matters most.

Meanwhile, in search of those elusive new growth opportunities, our team has been spending time at "the EDGE" – where lead users exchange ideas, hacks and prototype solutions. This new analysis explores how to spot which of today's niche behaviours have the potential to be the mainstream innovations of tomorrow.

Still looking ahead, the latest *What the Future* report invites us to think about indulgence in all its forms. Consumers are now balancing their love of special occasions with their broader wellness agendas.

We're looking forward to some great conversations about what the themes covered here mean for your business.

Simon Atkinson
Chief Knowledge Officer

Poll Digest

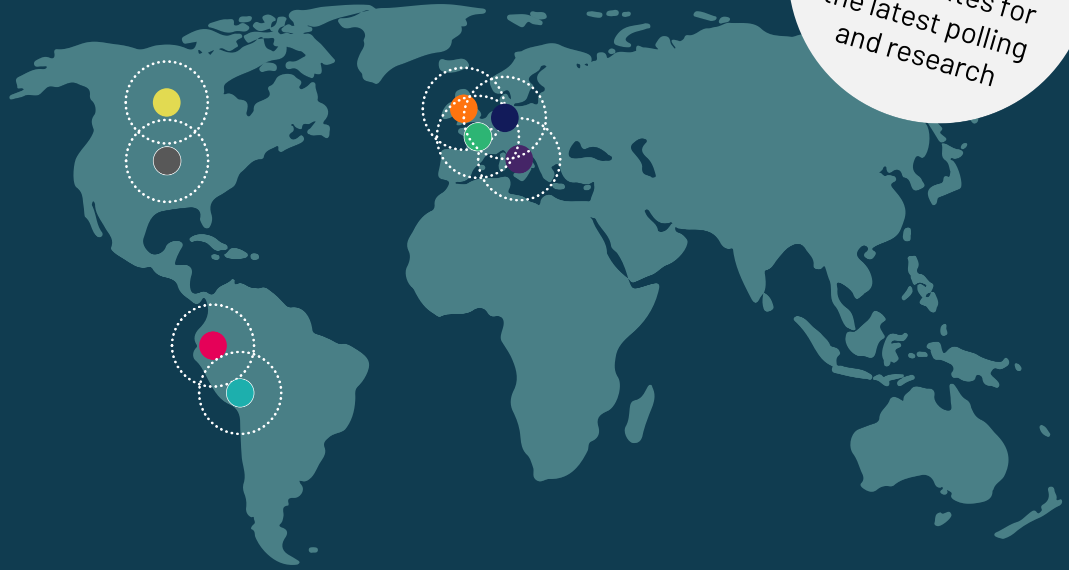
Some of this month's findings from Ipsos polling around the world

Canada:
83% support the government bringing in a "Buy Canadian" rule that requires most of its advertising spend to go to Canadian-owned companies.

USA:
37% agree that most of the stuff coming out of Hollywood is too liberal for their taste.

Peru:
65% support the construction of a funicular railway to access Machu Pichu.

Chile:
58% trust the electoral process, down from 70% a year ago.



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

Great Britain:
82% of Britons feel unfavourable towards Prince Andrew.

France:
69% would support measures to curb the development of Chinese clothing giants in France and Europe.

Germany:
27% of voters believe war with Russia is likely.

Italy:
49% of workers experience high levels of work-related stress.

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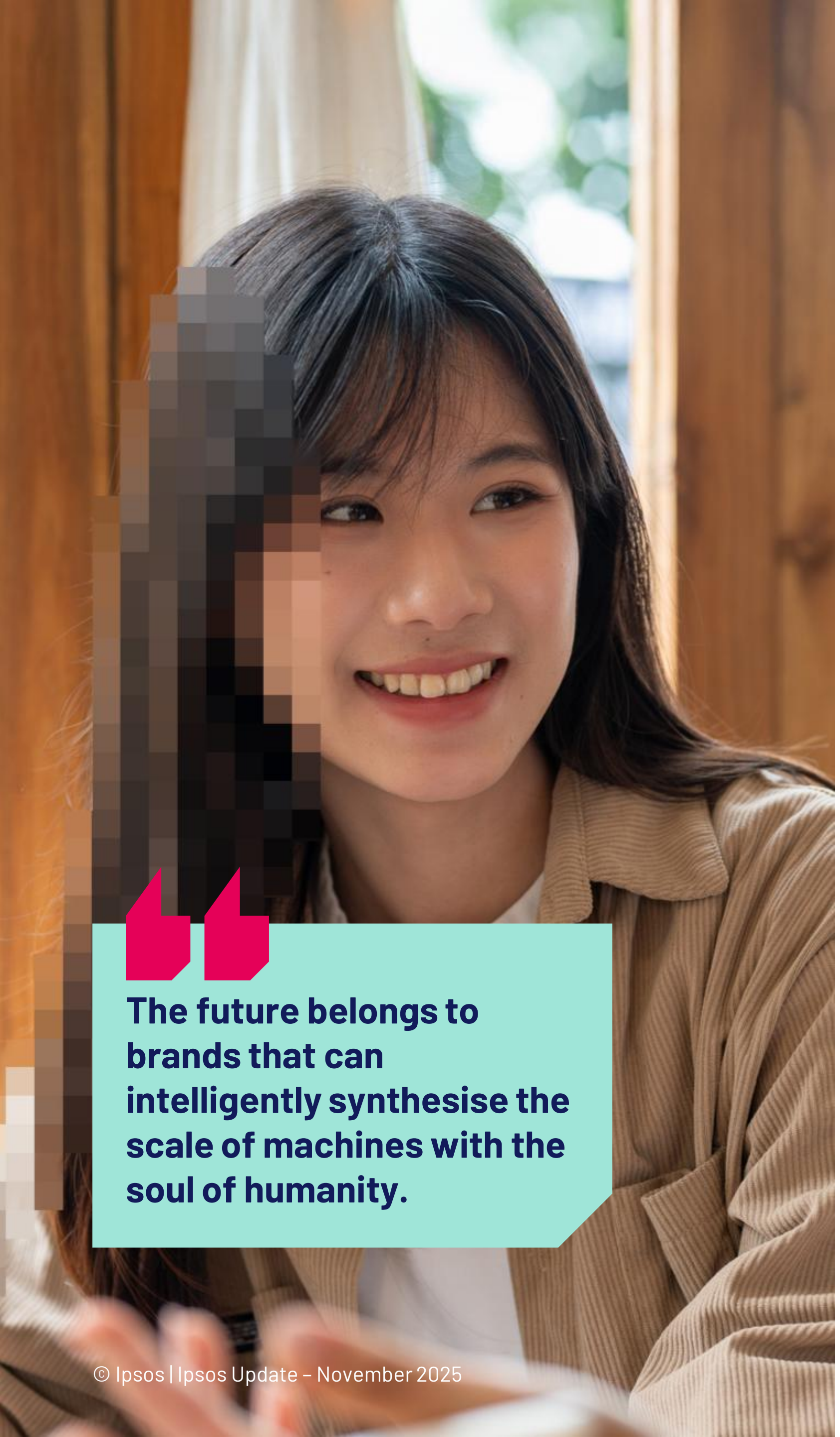

The future belongs to brands that can intelligently synthesise the scale of machines with the soul of humanity.

From Pixels to People

Combining human empathy and artificial intelligence for brand growth

We are at a pivotal moment in the history of brand management. The rapid integration of artificial intelligence into the fabric of daily life has created a new, powerful, and often invisible touchpoint for every brand on the planet.

Consumers now turn to Large Language Models (LLMs) not just for information, but for conversation, advice, and inspiration on products and services. This shift is reshaping the path to purchase, yet for most organisations, this new frontier remains a blind spot.

This technological change is met with a complex and divided consumer response: 52% of people are excited for products and services that use AI, while a near-identical 53% say AI makes them nervous.

In this new landscape, brands face a fundamental duality. To succeed, they must master two seemingly opposing forces:

- **Artificial Intelligence (AI)** to understand and connect with consumers on an unprecedented scale.
- **Human Intelligence (HI)** – specifically empathy – to forge the deep, authentic connections that build lasting value.

Flying blind is no longer an option. The future belongs to brands that can intelligently synthesise the scale of machines with the soul of humanity.

In this Ipsos Views paper, we share an HI+AI roadmap for brands, demonstrate the tangible ROI of empathy, and demonstrate the power of synthetic data to enhance brand intelligence and predict consumer behaviour.

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Campaign Effectiveness Ignited

Unlocking cross-media synergy with TV and social media

The world of media and advertising measurement has certainly evolved. The digital boom has created a vibrant, fiercely competitive and fragmented landscape. Although the explosion of platforms offers more opportunities to connect with audiences, it has also made measurement exponentially more complex.

In this Ipsos Views paper, we address two key advertising questions:

1. How can I measure campaign success holistically to understand its impact and effectiveness?
2. Where should I invest my advertising budget to achieve my campaign goals?

Despite global uncertainties, the advertising industry is thriving, not just surviving. Digital's share of advertising expenditure is expected to reach 80% by 2028, thanks to its advantages in terms of precision, proof and price. And social media has become the largest channel for advertising investment globally, and its growth is accelerating. Understanding consumer behaviour in the attention economy is crucial.

Using our cross-media measurement solution, Campaign Effect, we present the findings of our in-depth study of 50 real-world cross-media campaigns in various markets. We intentionally included a diverse mix of campaigns, ranging from large-scale initiatives with broad reach to smaller, tactical campaigns targeting niche audiences. The result is a rich and varied dataset spanning 18 product categories, 15 countries, and capturing the views of over 47,000 consumers.

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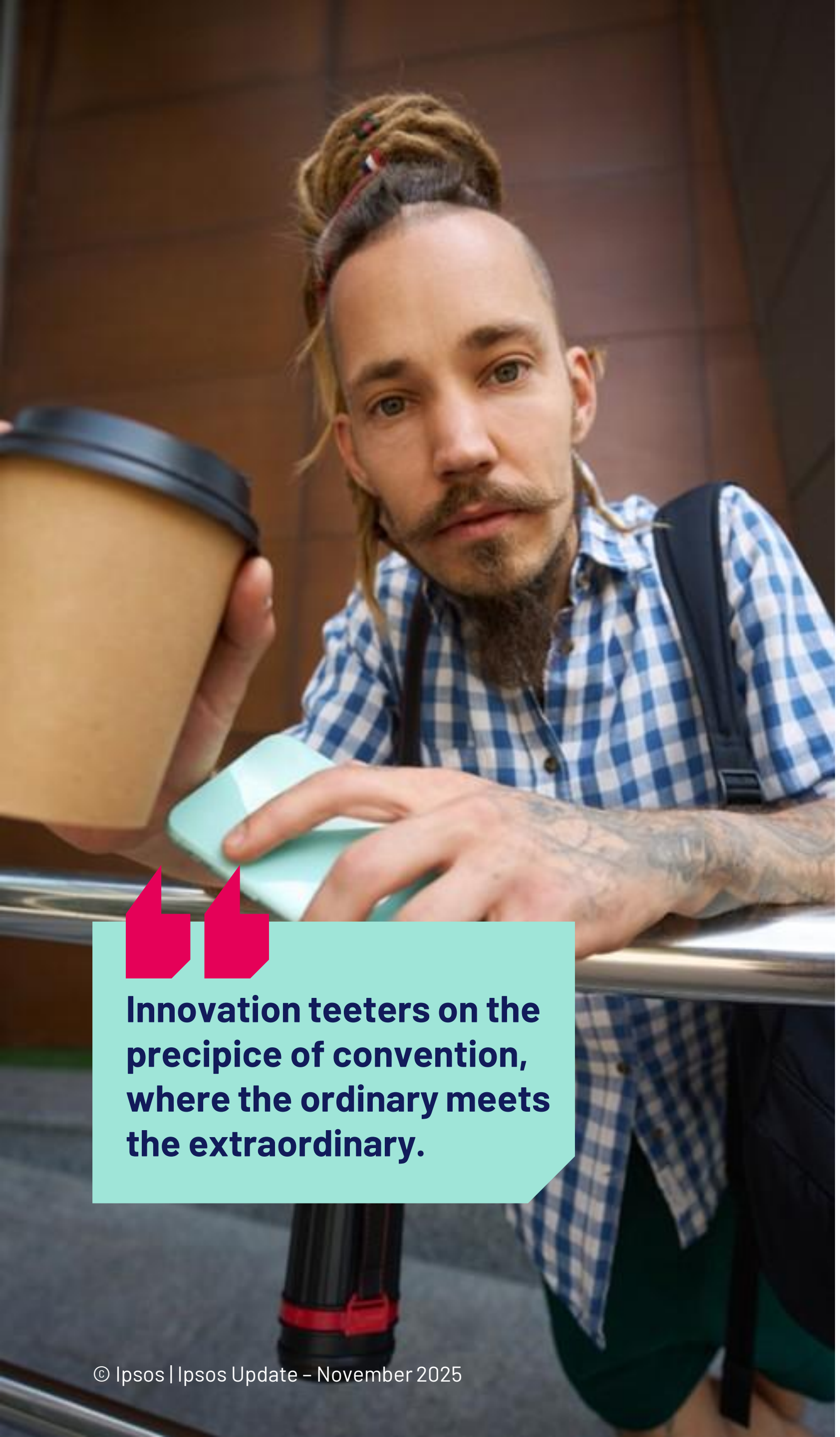

> Innovation teeters on the precipice of convention, where the ordinary meets the extraordinary.

The Next Big Thing

Exploring the EDGE for high growth opportunities

The most significant and disruptive market opportunities are not found in the mainstream but at the fringes of society.

Many multibillion-dollar industries – the $16B doula industry, or the $22B plant-based milk industry – have emerged from niche beginnings, with enthusiastic clusters of pioneers addressing problems the wider world has yet to encounter.

These journeys from fringe to mainstream demonstrate how outlier ideas can overcome obstacles to become trends.

But not all niche ideas result in success. Some fizzle, others are considered an "idea before its time", still more take off years too late. **How can we identify which niche ideas have the best probability of success?**

Introducing the **EDGE:**

- **E**xtreme behaviours,
- **D**ivergences from norms,
- **G**aps and workarounds, and
- **E**ccentric quirks

By investigating the **EDGE**, we can wager on where to focus and how to allocate resources with increased confidence.

In this Ipsos Views paper, we demonstrate how the EDGE method tackles three challenges of innovation and why combining Agentic AI with deep human listening is essential for innovation.

We also provide a three-step process to distinguish between long-term disruptive trends and short-term fads alongside practical advice for how to translate EDGE behaviour into actionable concepts that drive category and brand success.

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Ipsos Health Service Report 2025

Low awareness of GLP-1s globally

Despite media discussions around GLP-1s, only around a third (36%) across 30 countries have heard about these drugs, with a lot of discourse taking place via social media.

The seventh edition of the *Ipsos Health Service Report* continues to track people's attitudes and perceptions on their healthcare system and asks what they think are biggest health challenges facing their country.

This edition features new research around GLP-1s, as well as a detailed look at obesity. Additionally, we do a deep dive into mental health to coincide with World Mental Health Day.

Despite much discussion about the effectiveness of GLP-1s, only around one in eight (12%) think there will be fewer obese people in their country in 10 years' time.

Of those who have heard of the drugs, most have been made aware of them online. 45% heard about GLP-1s from social media, while only 19% knew about them from a medical professional.

Once again mental health is seen as the top health problem facing their country, with 45% on average across 30 countries selecting it as a top three issue. It ranks ahead of cancer (41%) and obesity (25%) as the biggest health problems. Perception of mental health as an issue rose rapidly during the pandemic and the proportion that see it as a major health problem has increased by 18 points since 2018.

Turning to views on health services, four in ten (43%) rate the quality of the healthcare they have access to in their country as good. Only 22% rate the care they receive as poor. Britain and Canada have seen particularly marked falls in ratings of their respective health services in recent years.

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45% across 30 countries say mental health is one of the main issues facing their country.

> **76% of Americans consider fine dining a luxury or splurge purchase.**

What the Future: Indulgence

Where luxury meets vice

From $100 non-alcoholic sparkling wines to Chipotle-adjacent cannabis dispensaries, the ways Americans indulge themselves are changing, while the lines between luxury and hedonism are blurring.

That's why six years after *What the Future: Vice* and four years after *What the Future: Wealth*, we're examining the intersection of vice and luxury with What the Future: Indulgence.

In the latest issue of our *What the Future series*, we explore the changing landscape of American indulgence, backed by exclusive data and expert insights. We examine how mainstream acceptance is reshaping vices and luxuries, like how champagne tastes increasingly include non-alcoholic drinks, how prediction markets are disrupting traditional gambling and the precarious state of sex in advertising. We also highlight how experience is the great equaliser in the luxury sector. Our analysis and exclusive Future of Indulgence survey data reveal which sectors are poised for future challenges or growth.

The stakes could not be higher for these combined trillion-dollar markets. Luxury brands that misread these shifts risk becoming irrelevant. Marketers who recognise that today's vices can become tomorrow's wellness trends, and that accessibility beats exclusivity for Generation Z, will capture the premium spending of American consumers navigating new economic and moral realities.

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AXA Future Risks Report 2025

Climate change the top risk for experts and the public

AXA and Ipsos have published the 12th edition of the *Future Risks Report*, based on a global survey of 23,000 citizens and 3,595 risk experts to measure and rank levels of fear and vulnerability to 25 different life risks.

The perception of living in a world facing multiple crises became more pronounced in 2025. Nearly all citizens surveyed believe that the number of crises has increased. Among risk experts, this sentiment is even stronger. Climate change continues to be the most concerning risk, amid strong competition.

The list of the most feared risks for the next five to 10 years illustrates that the idea of climate 'fatigue' or 'habituation' is overstated: both populations and experts rank climate change highest (the top position since 2018, except for 2020 during the pandemic).

Among risk experts, geopolitical instability follows. Indeed, in Europe, geopolitical instability surpasses climate risk. The fear of a world war remains strong in Europe, notably in Great Britain (89%), Ireland (87%), and Italy (85%).

Despite strong feelings of internal division, the commitment to democracy prevails. Nearly three-quarters of the public and risk experts affirm that democracy should be upheld, even if decision-making takes longer (72% and 76%, respectively).

Read on to find out more about sentiments when it comes to other risks like AI and social tensions, alongside the demographic forces, healthcare challenges and those “risks under the radar” that will play their part in shaping tomorrow’s context.

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> **The commitment to democracy prevails, with three-quarters of the public and risk experts affirming it’s necessity.**

Just 8% in France say the country is "heading in the right direction", the lowest proportion in 10 years.

What Worries the World?

Inflation worries fall while concerns about unemployment rise

This month, concern about inflation remains very much in evidence, mentioned by 30% on average across the 30 countries in our study. However, compared to its peak in February 2023, it has fallen 13 percentage points. When compared to 12 months ago, we see that 22 out of 30 countries have seen a decrease in concern.

Worry about unemployment, on the other hand, seems to be creeping up. Since October 2024, the proportion mentioning availability of jobs across all countries has increased a couple of points overall. Some 15 countries have experienced some sort of growth in worry.

Against the backdrop of political upheaval, just 8% in France say things are heading in the right direction, which is the lowest-ever score we've recorded. However, amid national strikes. Please note, fieldwork ended before the resignation of Prime Minister Lecornu.

Likewise, the percentage believing the economy to be "good" stands at similarly low levels, currently just 9%.

Meanwhile, rise of extremism is now the top worry for the Dutch (33%) after increasing 11 points, reaching a six-year high.

After one of the largest far-right demonstrations in London took place, we also see a growth in concern in Great Britain, up nine points to 23% - the highest it has been since 2018.

France (+5pp) and Spain (+3pp) have also experienced a rise in worry, and Australia, South Korea and the US are also showing elevated levels of concern about extremism.

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Modern Masculinity

Media consumption habits of young people

New research from Ipsos in the UK, in partnership with JOE Media, suggests that social media is now the dominant source of information about current events for younger Britons aged 16-34.

The new polling is part of Ipsos and JOE media's Modern Masculinities campaign, which provides an evidence-based picture of modern masculinity and seeks to dispel myths surrounding young British men.

The findings reveal that young men report a higher level of trust in digital platforms, although they do acknowledge significant concerns around misinformation.

56% of young men and 60% of young women aged 16-34 say that they get the majority of their information about current events from social media. This is followed by YouTube (16% young men and 9% young women) and television (14% young men and 15% young women). According to Ipsos iris data, YouTube, Facebook, and Instagram are the social media platforms with the highest reach among those aged 15-34.

A significant discrepancy exists between young men and young women regarding trust in the reliability of media sources. While 72% of young men say that they trust YouTube, only 47% of young women feel the same. Similar trends are evident on social media platforms, (71% trust from young men against 53% from young women), and podcasts (63% trust from young men vs 44% trust from young women).

As Richie Jones, CCO, Ipsos in the UK says: "These findings urge us to consider how we can foster communities that are better informed and resilient against the spread of false information."

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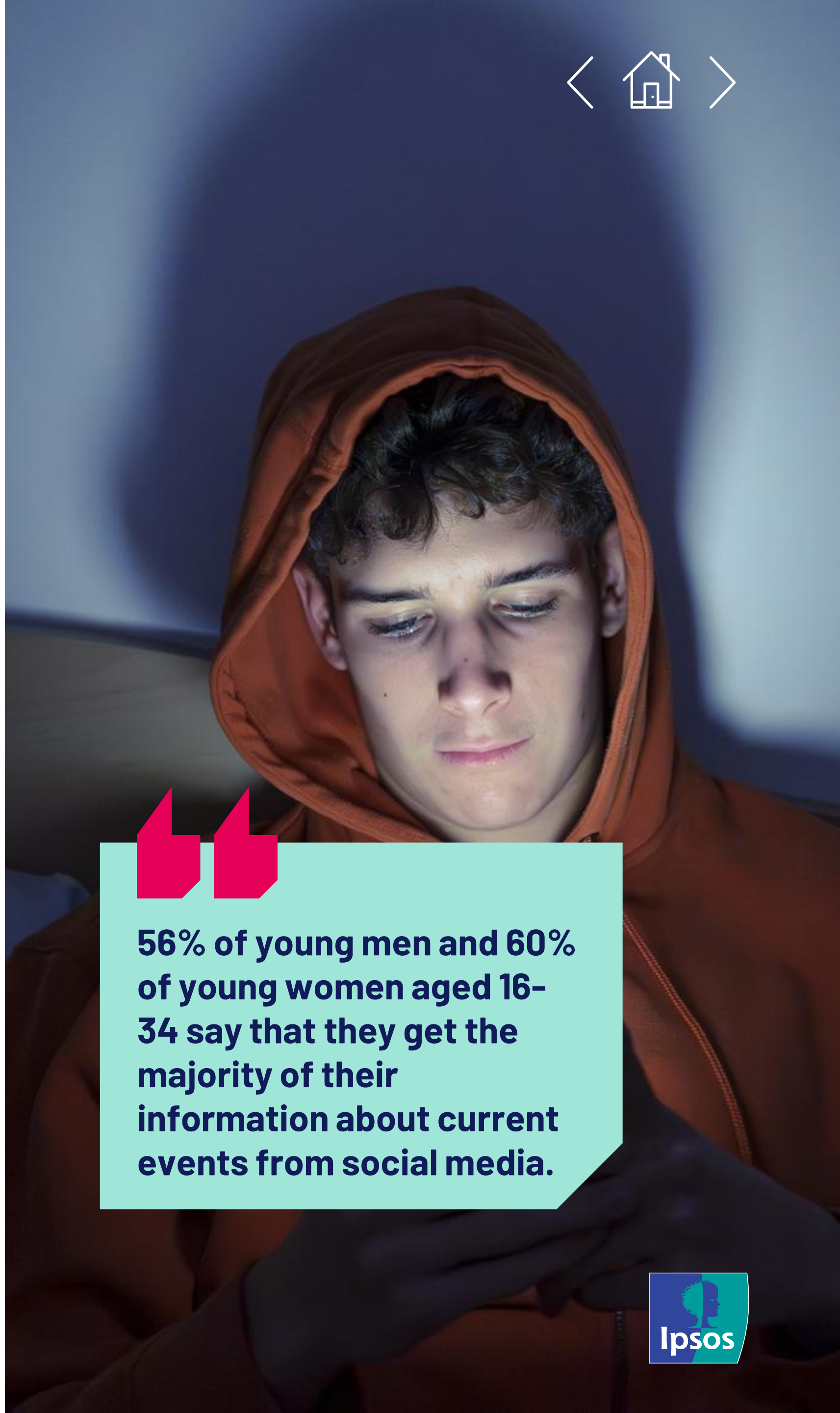

Shortcuts

Strive for More 2.0

Women's economic power is accelerating, yet many industries fail to recognise how female roles and experiences are shifting in relation to brand behaviour, and their advertising often falls short of reflecting this reality.

This research was designed to give marketers a category-by-category playbook to course-correct portrayals and maximise outcomes.

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Food and You 2

Ipsos in the UK has been running the Food Standards Agency's flagship consumer survey since 2020.

This edition reveals the highest level of public confidence in food safety recorded since the start of the project. 94% of respondents said they are confident that the food they buy is safe to eat.

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Empathy

Empathy isn't merely a "soft" skill; it transcends deep understanding. It's about action: delivering tangible solutions, showing genuine care, and supporting daily life.

We show how leveraging empathy-driven marketing can foster genuine connections with consumers and power creative effectiveness and brand success.

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Bullying in Malaysia

New research into perceptions and attitudes towards bullying in Malaysia finds two-thirds (67%) of Malaysians or their family have faced bullying, primarily in schools and workplaces.

Over a third (35%) say it took place online, with two-fifths (39%) also saying they shared their experiences on social media.

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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: **Guanajuato, Mexico**. Mexicans are the most worried about obesity, according the latest Ipsos *Health Service Report*.

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