April 2026

IPSOS UPDATE

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

Ipsos Update April 2026

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

Concern about armed conflict tends to track with geographic proximity. The closer people are to a war, the more worried they tend to be. We've seen this over the last few years in Europe, where the countries closest to Ukraine are consistently the most concerned about what's happening there.

The war in Ukraine also drove a surge in the cost of home heating and electricity as natural gas supplies were disrupted. It hit households directly and forced a rapid adjustment. Energy vulnerability is no longer abstract there.

The Iran conflict already feels like it has even broader ramifications. Disruption to shipping through the Strait of Hormuz is a catalyst for supply chain problems that could ripple through the global economy.

Higher oil prices are feeding directly into cost-of-living pressures that were already top of mind. Some 92% of Americans tell us they've witnessed higher prices at the pumps.

Yet drivers may simply just have to grit their teeth. Our new *Ipsos Mobility Report* illustrates just how dependent people are on the motor car, with the vast majority of the world's passenger fleet still powered by fossil fuels. In 22 out of 31 countries, driving is the preferred form of transport, while two-thirds of Americans and French say they couldn't live without one. We find real reluctance about moving to EVs in US and North America. Perhaps the unfolding events will prompt some to rethink their choices.

This year's *International Women's Day Survey* finds a complex picture of progress and polarisation. Most believe young women today will have better lives than their mothers' generation. But tensions between men and women are widely acknowledged. And in 23 out of 24 countries, we've seen an increase over the last few years in the proportion saying that, when it comes to gender equality "things have gone too far".

In this edition we also feature some new guidance to help us sharpen our analysis. In *Calibrating Synthetic Confidence*, our researchers show how a "naïve" approach to statistical testing can lead to dangerously misleading conclusions.

Wherever we are in the world, our lives are taking place in today's hyper-fragmented landscape, where consuming short-form content, on multiple screens and via fragmented media channels is now the norm. Take a look at our *Battle of Attention* analysis for advice on how to cut through the clutter.

In that vein, we hope that this blend of bite-sized summaries, linked to longer-form reports if you want to go deeper, will support you in your work. As ever, your Ipsos contact is on hand to discuss what it means for your business or organisation.

Simon Atkinson
Chief Knowledge Officer

Poll Digest

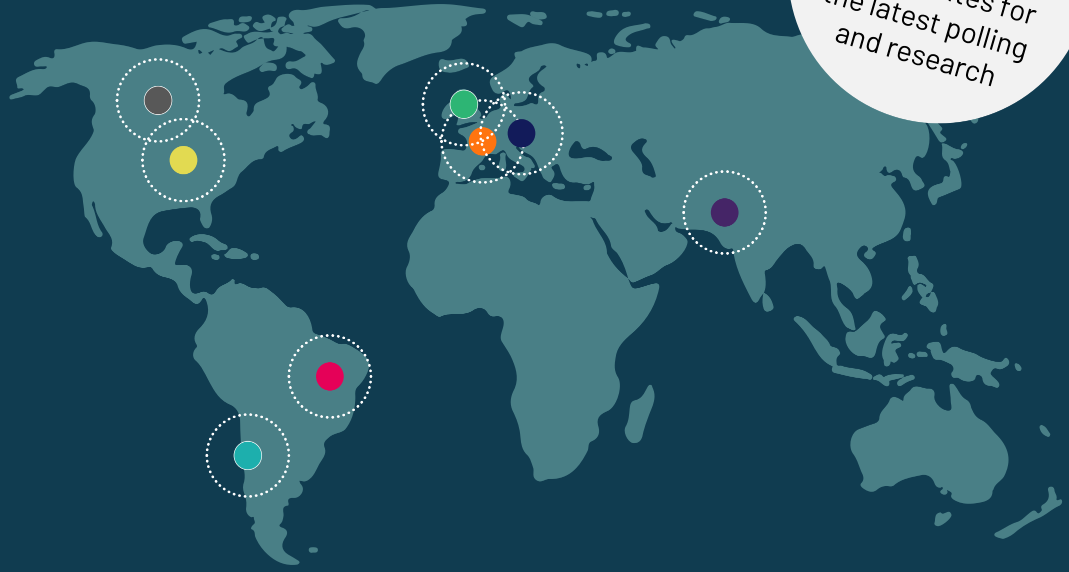
Some of this month's findings from Ipsos polling around the world

USA:
"Not 'real art'", "fake" and "controversial" top the list of words most associated with AI, ahead of more positive terms.

Canada:
Eight in ten Canadians agree that Canada needs more trees because they help clean the air Canadians breathe.

Brazil:
44% of women feel they bear the brunt of domestic labour in the home, a sentiment shared by 32% of men.

Chile:
31% of people believe that President Boric's outgoing administration helped to strengthen Chile's image abroad.



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

France:
61% of French people see nuclear power as a strategic asset for the country.

Great Britain:
65% of Britons support the assisted dying bill being passed into law.

Czech Republic:
73% of Generation Alpha actively participate in family shopping.

Pakistan:
65% of people are cutting back on Ramadan shopping due to inflation.

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The Middle East Crisis

Ipsos' latest polling on the Iran conflict indicates a clear and consistent pattern across Western countries: **public opinion is largely opposed to military action and strongly concerned about escalation**.

In the United States, a Reuters/Ipsos poll shows that only 27% approve of military strikes against Iran, while 43% disapprove and 29% are unsure. Opinion is also highly polarised along political lines, with 74% of Democrats opposing the strikes compared to 55% of Republicans supporting them. Despite this division, there is broad agreement on avoiding prolonged involvement or escalation.

In the United Kingdom, opposition is similarly pronounced. Over half (56%) of the public oppose US military action. Ipsos polling further shows that 72% of Britons oppose sending British troops, with only 7% in favour. Economic concerns are also a major factor, with 82% saying they are concerned about rising fuel and energy prices linked to the conflict shaping public attitudes.

Across continental Europe, similar trends are evident. In France, our polling highlights widespread concern about the conflict and its potential consequences, with over eight in 10 fearing an increase in inflation (88%) and fuel prices (86%).

Public opinion in the Netherlands tends to be critical of the US and Israeli strikes on Iran. Four in ten (39%) consider the attacks a bad thing, compared with 21% who view them positively. Political preferences play a clear role: support for the attacks is higher among voters of right-wing conservative parties (especially SGP, JA21 and PVV), while voters of left-leaning and progressive parties (GL-PvdA, PvdD, SP, D66) are more likely to oppose the attacks.

Overall, the data suggests that public opinion across these countries is consistently anti-intervention and focused on risk avoidance. People are less concerned with the strategic objectives of the conflict itself and more focused on the dangers of escalation, economic disruption, and the possibility of a wider war.

Stay up-to-date with the latest public opinion on the conflict from across world in the coming weeks and months, by bookmarking our new page dedicated to the Iran conflict.

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International Women’s Day 2026

Deepening gender divides

The Ipsos *International Women's Day 2026* report highlights a growing sentiment that gender equality efforts have reached their peak, with 52% of respondents, on average, across 29 countries believing that when it comes to giving women equal rights with men, things have gone far enough in their country.

The report, developed in collaboration with the [Global Institute for Women’s Leadership]() at [King’s College London](), also identifies significant gender divides in perceptions. More than half of male respondents (54%) feel they are contributing excessively to equality efforts, contrasting with 38% of women sharing that view. Additionally, 52% of men feel that promoting women’s equality inadvertently discriminates against men, a sentiment only 36% of women agree with. Simultaneously, optimism persists regarding female leadership potential, with 60% suggesting a shift towards women in power could enhance governance and business operations.

This view is more popular among women (68%) than men (53%). The forecast for future generations reflects a positive outlook for young women compared to young men, with 55% believing that young women today will surpass the achievements of previous generations. In contrast, only 40% see the same future for young men. Similarly, perceptions about self-expression and career opportunities reveal women have more freedom in personal choices, whereas men are perceived to have more career options.

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52% believe that when it comes to giving women equal rights, things have gone far enough.

Lower-income groups are less likely to report happiness compared to higher-incomes.

Ipsos Happiness Report 2026

Happiness on the rise

The *Ipsos Happiness Report 2026* reveals that global happiness has risen since last year, with an average of 74% across 29 countries saying they're happy.

Indonesia leads in happiness levels at 85%, closely followed by the Netherlands at 84%. Whereas Hungary and South Korea find themselves at the lower end of the spectrum, with only 54% and 57% happy respondents, respectively.

In 25 of the 29 countries surveyed, the proportion of people describing themselves as happy has risen from last year. Yet despite this, happiness does not match the levels seen 15 years ago, with many of the same countries reporting lower happiness than in 2011: in 15 of the 20 countries surveyed in both 2011 and 2026, a smaller proportion of people say they feel happy.

Lower-income groups are less likely to report happiness, at 67% compared to their higher-income counterparts. Family relationships and a sense of appreciation are seen as the biggest contributors to happiness, cited by 36% and 37% of those happy, while financial struggles are the primary concern driving unhappiness for 57% of respondents across 28 out of 29 countries surveyed.

An improvement in how many national economies are perceived may partly explain the increase in happiness. The interplay between personal relationships and financial security continues to shape the dynamics of global happiness. Although strides have been made since 2025, the contrast with past decades suggests ongoing challenges in achieving a consistently higher state of global well-being.

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Calibrating Synthetic Confidence

From statistical facade to statistical fidelity

Generative AI and synthetic data are transforming market research, promising faster, more cost-effective insights and the ability to explore scenarios like never before. The potential to augment small samples, test new concepts, and fill data gaps is immense. But with this great power comes a critical, often-overlooked risk: the illusion of certainty. What if the "significant" findings from your synthetic data are nothing more than a statistical mirage?

In this Ipsos Views paper, we tackle this crucial challenge head-on, revealing how a "naive" approach to statistical testing on synthetic data – treating it as if it were real – can lead to dangerously misleading conclusions and an inflated risk of false positives.

We provide a clear path forward, showing why synthetic data requires a rigorous approach to measuring confidence, and introduce a framework for recalibrating our statistical methods.

Read the paper to discover:

- **The "Uncertainty Gap":** Why standard confidence formulas fail for synthetic data.
- **The hidden risks:** How naive data boosting leads to poor business decisions.
- **The path to fidelity:** Ipsos' rigorous approach to providing a calibrated level of confidence.
- **Five key imperatives:** Actionable principles for anchoring AI insights to real-world data.

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Strengthening marketing capability requires action at both the individual and organisational level.

Marketing Anchors

The case for capability in an era of transformation

Marketing is operating in an environment defined by transformation and speed. Teams face more signals, more pressure and greater scrutiny on their decisions.

In this report, we ask whether creativity and on-the-job learning are enough to ensure the success of the modern marketer. To help answer that question, we surveyed 1,226 marketing practitioners from the UK, US, Canada and Australia.

The study comprised a ten-question marketing anchors capability assessment, developed in collaboration with Professor Mark Ritson. Findings show a significant knowledge gap exists among marketers, with only 35% meeting a basic benchmark of foundational marketing knowledge. This emphasises the importance of formal marketing training, with trained marketers four times more likely to meet the benchmark. Trained marketers also report higher confidence, clearer career progression, and stronger budget advocacy. Findings show high-performing teams learn continuously by bringing the outside in and seeking independent challenge, with access to agency training and consultation a key differentiator of capability.

Ways to leverage this report:

- Change the narrative and put the myth of the untrained savant to bed. Raising the bar on core marketing capability benefits the individual, the professional and the industry.
- As a rallying call to bridge the knowledge gap. Change in the business context demands broader marketing knowledge.
- Be inspired to engage with the industry and agency partners.
- Advocate for training and external support. Use the evidence to make your case.

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Beyond Compliance

Building resilient supply chains through human-centric assessments

Corporate sustainability efforts face new fires in 2026. But our research shows that – despite regulatory quagmires and political de-prioritisation – continuing to embed sustainability into supply chains and sourcing practices remains a good long-term strategy and investment.

While supply chain sustainability certification schemes play an important role, the value of many doesn't extend much beyond meeting baseline expectations and supporting regulatory box-ticking.

How can companies get to the root of whether their sustainability programmes are actually generating value, what communities need most, and what would make the most impact?

In this Ipsos Views paper, we demonstrate the importance of evaluating and learning from international programmes so initiatives may improve, introducing qualitative-forward methods that bring an unparalleled depth of understanding to direct and retool investments accordingly.

These methods provide:

- **Clarity**, allowing organisations to understand what their sustainability investments are achieving in a simple comparable way.
- **Confidence** that programmes are delivering the outcomes they commit to publicly, without doing harm.
- **Value**, ensuring that resources are directed to initiatives that create the most benefit for people, communities, and the business.
- **Consistency,** providing reporting that is reliable and easy to consolidate.

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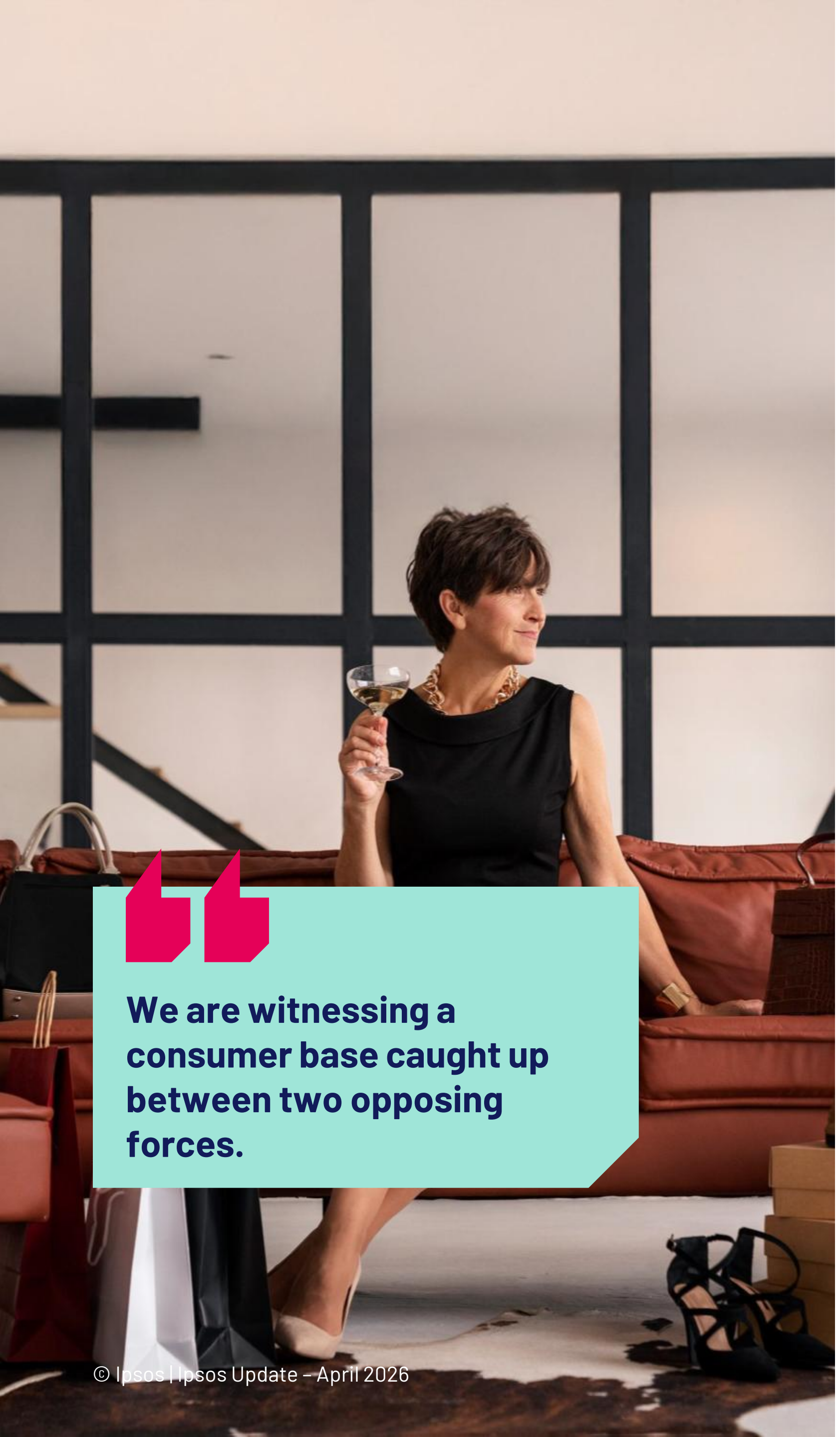
The writing is on the wall: ethical supply chains are good for people and good for business.



We are witnessing a consumer base caught up between two opposing forces.

Hedonism, Heritage, & Human-Centricity

The new codes of global luxury

As we move deeper into the 2020s, the global luxury sector finds itself at a fascinating, albeit complex, crossroads. Based on the Ipsos Global Trends 2025 and other research conducted by Ipsos, this report outlines a market defined not by linear growth but by deep psychological duality.

Introducing the age of paradox. We are witnessing a consumer base caught up between two opposing forces. On one side, there is a 'Carpe Diem' urgency – a drive for immediate gratification, status and hedonistic 'revenge spending' fuelled by global volatility.

On the other, there is a profound retreat toward safety, where consumers crave the stability of heritage brands, the anchor of established authority, and the reassurance of the past.

This duality is highlighted by seven pivotal trends impacting luxury today. In this report, we distil these seven trends into three overarching macro-themes shaping the luxury sector.

From 'Digital Duality', where Artificial Intelligence is both embraced and feared, to the 'Sustainability Expectation Gap', where consumers demand ethical supply chains without sacrificing convenience or prestige, we explore how these shifts manifest differently across the East and West.

This report is your roadmap to navigating a landscape where brand equity is the ultimate safety net, health is the new wealth, and the human touch is the rarest luxury of all.

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Ipsos Mobility Report

The future of mobility, road safety, and public transport

Welcome to the Ipsos Mobility Report, exploring how mobility choices shape our societies—from access and inclusion to safety, liveability, and climate impact.

Mobility is both deeply personal and profoundly public: it determines who can reach jobs, schools, and care, how our streets feel, and whether we meet environmental goals.

As we see in this report, many people remain car-reliant: on average, 43% say living without a car would be impossible. At the same time, public transport is widely viewed as accessible (62% on average across 31 countries) and safe (also 62%), though affordability and access lag in rural areas. Younger people and urban residents are more open to alternatives, pointing to a future where walking, public transport, and shared options play a larger role.

Safety is a shared priority: 66% support stricter traffic laws, with strong backing for measures that protect pedestrians and cyclists. Technology is reshaping mobility, but acceptance is uneven.

Globally, 47% find driving an electric vehicle appealing, and 53% expect many consumers to adopt EVs by 2030—yet enthusiasm is lower in North America and Europe, and on average drops outside cities and among older people. Views on autonomy are split (36% would feel safe in a self-driving car; 36% would not), reflecting persistent trust and data privacy concerns.

The launch included a special edition of our KEYS webinar, where we discussed the findings from the Ipsos Mobility Report in more detail, including what this all means for car manufacturers and governments. Watch the recording here.

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Shortcuts

From Dashboards to Decisions

Insights leaders and brand practitioners often grapple with brand tracking programs that are perceived as too slow and lacking foresight.

This paper explores how blending Human Intelligence with Artificial Intelligence (HI+AI) transforms stable, slow-moving brand metrics into a dynamic, forward-looking intelligence system that actively informs business decisions.

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What Worries the World - March

Our monthly *What Worries the World* survey explores what the public thinks are the most important social and political issues facing their country.

This month, the proportion across 30 countries mentioning unemployment has risen two percentage points to 29%, putting it joint with inflation and poverty & social inequality. The report also includes a special focus on Chile, in the wake of its recent general election.

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Global Perceptions of Obesity

Ipsos' *Global Perceptions of Obesity* report reveals entrenched misconceptions about obesity, with 66% viewing it as preventable by personal choices despite the WHO's classification as a chronic condition.

The report also highlights the broader impact of obesity on daily life, particularly in areas like self-esteem, emotional wellbeing, and the ability to manage daily responsibilities.

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Gen Z & the Plant-Powered Plate

Gen Z's food choices are shaped by a complex interplay of health aspirations, ethical values, climate awareness, convenience, cost sensitivity, and digital influence.

Released in collaboration with the Plant Based Foods Industry Association (PBFIA), this report talks about the opportunities and tasks for food industry stakeholders looking at targeting Gen Z.

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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: **Navy ship patrolling the Red Sea.** See page five for our round-up of early reactions to the Middle East conflict.

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