May 2026

IPSOS UPDATE

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

Ipsos Update May 2026

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

As the Iran conflict enters its third month, the Covid-era comparisons are instructive, both in terms of the similarities and the differences. People can already see the impact on their daily lives, even if they are still able to move around freely. Again, we don't know how long the situation will last, but the effects may be different and even longer lasting. Governments are once more expected to act, but their ability to control economic levers in an interconnected and international economy are constrained.

With the war unpopular everywhere, the reputation of the United States is taking a fall. Today, people in Canada, Italy and France are more likely to see China than the United States as a force for good in the world. That's also the case in Brazil, Türkiye, Australia and a whole range of other countries. Is this a moment in time, or a tipping point?

To help us understand today's American dynamic as the country's 250th anniversary approaches, our new state of the nation report finds concepts of freedom, justice and equality continuing to resonate widely. Despite the country's real and intense divisions, there is broad agreement around the core principles the nation should stand for.

Around the world, we also see broad agreement that action must be taken on climate change. Three of the last four years have been the hottest on record. But the sense of urgency is not what it was. All countries surveyed in our *People and Climate Change* report in both 2021 and 2026 have seen falls in the proportion who agree that individuals would be failing future generations by not acting against climate change.

This edition also features a celebration of the most successful advertising in France, alongside our regular tour of the latest polling numbers from around the world. We also share new guidance for those involved in consumer satisfaction research.

Meanwhile, the sixteenth edition of our *Ipsos Flair Italy* report encourages us to "Step Out" and navigate the labyrinth of uncertainties facing not just Italians but many others around the world.

On that note, we hope the resources here will support you in your work – your Ipsos representative is on hand to continue the conversation!

Simon Atkinson
Chief Knowledge Officer

Poll Digest

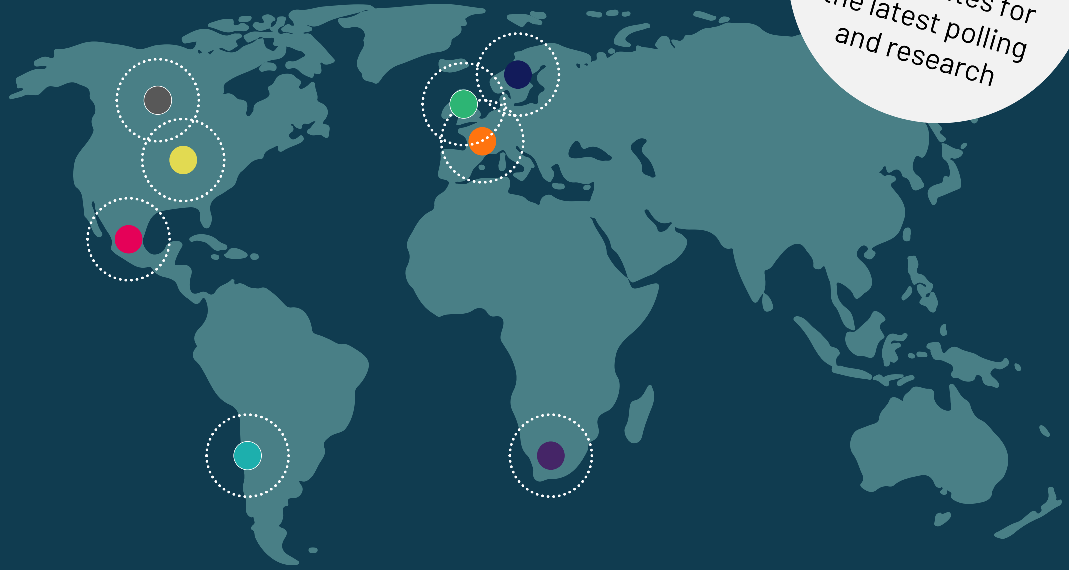
Some of this month’s findings from Ipsos polling around the world

USA:
51% say military action in Iran has not been worth the cost.

Canada:
68% of Gen Z entrepreneurs view Canada as globally competitive for starting and growing businesses.

Mexico:
79% state they will support the Mexican National Team during the soccer World Cup.

Chile:
78% are preparing strategies to cope with price increases due to the end of the Fuel Price Stabilization Mechanism.



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

France:
43% of people who have taken sick leave have done so, in whole or in part, due to a psychological reason.

Great Britain:
54% think the impact of porn on real-life relationships between men and women is a problem.

Norway:
Only 2% have a lot of trust in news found on social media.

South Africa:
47% say no political party represents their views.

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The Middle East Crisis

As the conflict and rhetoric with Iran continues, so does Ipsos' polling. Our surveys show that public opinion is still largely against the war and, furthermore, America's reputation is taking a hit.

Our latest 31-country study on *Attitudes to the Conflict in Iran* has found that a large majority (81%) think their country should not get involved in the Middle East. In America, 71% feel they should avoid getting militarily involved in the country. Israel is the only country more likely to feel it should be involved than not.

The study also finds little confidence that the war will end soon. Just 10% think the war will be over within the next month, while 26% think it will end within three months. A third (33%) think the war will last until next year or beyond and three in ten (31%) think it will end by the close of the year. Canada is the country most likely to think it will take until the end of the year - or longer - before the war will be over (76%).

In 27 of 29 countries surveyed in both April 2026 and in October last year, there's been a decrease in people thinking the US will have a positive impact on world affairs in the coming decade. This is true even among Americans; only 59% of Americans think the country will have a positive impact on world affairs. Prior to President Trump's second term, this figure had not fallen below 76%. Across all countries (even in the US), a greater proportion think China will have a positive impact on the world than America, with 50% viewing China positively. On average, people in Europe, Asia Pacific and LATAM are all more likely to feel China will do greater good than the US in the next decade.

Elsewhere, nine out of ten (90%) Brazilians believe the impact of the conflict between the United States, Israel and Iran will impact the country's economy. Meanwhile, there is a marked increase in the proportion of French people concerned about the consequences of the war on rising fuel prices and inflation (up 8pp over the month to 53%).

Read on for further public opinion on the war across the world.

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People and Climate Change

Exhaustion and shifting expectations

The *People and Climate Change* report explores perceptions to the risks facing us from the climate crisis, as well as attitudes across 31 countries to the energy transition. Three of the last four years have been the hottest on record. Yet the individual desire to act on climate change has fallen over the same period. That tension sits at the heart of this report.

The past 11 years have been the warmest in the modern era, but people increasingly place less responsibility on needing to act. All countries surveyed in this report in both 2021 and 2026 have seen falls in the proportion who agree that individuals would be failing future generations by not acting against climate change.

What's shifting is where people think responsibility should sit. Governments are failing the leadership test: more people believe their government lacks a clear plan (32%) to tackle climate change than believe one exists (30%). The message from citizens is less "we give up" and more "we're waiting for you to lead."

Cost, security and climate: people want all three, and they know they can't always have them. Seventy-four percent on average across 31 countries are worried about rising energy prices. For half of those surveyed, keeping prices low takes priority even if emissions rise as a result.

What the data tells us is not a story of apathy. People still believe action is needed – in 28 of 31 countries, a majority say individuals must do more. But exhaustion is setting in, and expectations are shifting.

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> 80% describe the US as a nation of immigrants, and 63% say diversity strengthens society.

America 250

Enduring values, evolving identity

To mark the United States' 250th anniversary, Ipsos explored how Americans reflect on their nation's past, present, and future.

Equality and belief in freedom and justice top the list of what Americans consider central to the American national identity. However, only half (50%) say being American is an important part of how they see themselves – with Baby Boomers far more likely to feel this (65%) than Gen Z and Millennials (both 39%).

Americans broadly embrace the country's diversity: 80% describe the US as a nation of immigrants, and 63% say diversity strengthens society. Views on immigration's role in the country's future, however, divide sharply along partisan lines.

Equal proportions (58%) believe both historical successes and failures deserve a place in the national conversation, and two-thirds feel the country still has much more to do to live up to its founding ideals.

On happiness and the American Dream, family relationships and financial security matter most to Americans' sense of success. While 73% feel the American Dream is either achieved or within reach, only 19% believe the country is doing well at providing opportunity – a 52-point gap with the 71% who say doing so is important.

The perceived promise of America seems to be shaky. 62% feel hopeful about the future, yet 77% harbour serious doubts. A striking 88% agree there is an urgent need for greater national unity, and 84% believe there is no limit to what Americans can achieve when united.

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Europe’s Best Cities

London retains first place

Ipsos and Resonance Consultancy have released their annual ranking of over 180 European cities with populations above 500,000 across 34 subcategories spanning Liveability, Lovability and Prosperity, combining performance metrics with perspectives from residents and visitors.

London claims the top spot for the fourth consecutive year, leading on overall Prosperity and Lovability, and ranking first for nightlife, educational attainment and airports. The city's appeal is underpinned by record-breaking international visitor spending and surging American interest in its property market.

Paris holds second place, topping the Liveability index as well as the rankings for health and restaurants, propelled by sweeping urban transformation including expanded cycling infrastructure and the ongoing Grand Paris Express metro expansion.

Berlin rises to third, driven by a thriving start-up ecosystem of over 4,800 companies and 27 unicorns, UNESCO-recognised techno culture, and major regeneration projects including the transformation of the former Tegel Airport into a climate-positive urban district. Rome (4th) capitalises on its Jubilee year windfall, ranking first for Sights & Landmarks, while Barcelona (5th) balances record tourism with deliberate moves to curb overtourism and prioritise residents.

Further down the rankings, cities such as Dublin, Copenhagen and Stockholm stand out for Liveability and sustainability credentials, while emerging destinations like Warsaw, Budapest and Kraków reflect Central Europe's growing economic clout. Istanbul leads for social media presence and shopping, highlighting the diversity of strengths across the continent.

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London claims the top spot for the 4th consecutive year, leading on overall Prosperity and Lovability.

> **40% of users report finding movies or TV shows they would not have otherwise discovered through TikTok.**

Beyond Discovery

Entertainment consumption and conversion

Commissioned by TikTok and conducted by Ipsos across seven markets (US, UK, Germany, France, Japan, South Korea, and Brazil), this study examines how social and video platforms drive real-world entertainment consumption. TikTok has evolved from a discovery tool into a full-funnel conversion engine for the entertainment industry.

TikTok's personalised algorithm proves particularly powerful. The platform outperforms competitors by eight percentage points on personalised content delivery, and 40% of users report finding movies or TV shows they would not have otherwise discovered. Gen Z users are 1.5 times more likely than the general population to choose TikTok as their primary entertainment platform.

35% of users watch content on TikTok specifically to evaluate whether they will enjoy a title before committing – a behaviour especially pronounced among Gen Z (44%) and Millennials (38%). This 'preview utility' moves viewers from passive scrolling to high-intent engagement.

The downstream impact is measurable. 46% of TikTok viewers went on to watch a title on a streaming service or television after encountering it on the platform. Additionally, 31% visited a cinema, 25% subscribed to a new streaming service, and 25% purchased related merchandise.

A blended content strategy – combining official brand content with authentic fan-generated material – seems to be the most effective approach, with official content driving subscriptions and ticket sales, and fan content building the community conviction that ultimately closes the gap between awareness and action.

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From Overwhelm to Opportunity

Scaling social creative without sacrificing quality

Social media is now the world's largest advertising channel, and the pressure it places on creative teams has never been greater. As platforms multiply and targeting grows more precise, brands are producing assets at a scale that would have seemed unthinkable a decade ago – with some global advertisers increasing output tenfold. The question is no longer whether to scale, but how to do so without losing what makes creative work in the first place.

A new joint paper from Ipsos and Smartly argues that the answer lies in combining human intelligence with AI-powered production and measurement systems. Drawing on Ipsos' global creative meta-analyses and Smartly's platform data, the paper sets out a five-step blueprint for marketers seeking to maximise both volume and impact.

The findings are striking. Ads seen as both highly creative and empathetic drive 30% greater effectiveness than those that are creative but lack empathy – yet an analysis of nearly 5,000 ads found that only 10% actually achieve that combination. Ideas that connect with "people like me" are 79% more likely to drive brand choice, underscoring the importance of grounding even AI-assisted production in genuine human insight.

The central message is one of optimism: with the right systems, scaling creative need not mean diluting it.

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> **Ads seen as both highly creative and empathetic drive 30% greater effectiveness.**

The dominant social mood seems to be tired, uncertain, but not fully resigned.

Flair Italy 2026

Navigating the labyrinths of uncertainty

For 16 years, Ipsos Flair Italy has been exploring the attitudes and values of Italian consumers with one clear goal: capturing the country's mood and offering real insights into what it means for society, markets, and people.

In our latest edition, we explore a world in which businesses and individuals are confronted with an ever-increasing number of crossroads. The dominant social mood seems to be tired, uncertain, but not fully resigned; 47% of Italians are hopeful and 33% melancholic.

The central challenge now is to dare to 'step out' – to break free from hesitation and move forward to seek new directions and opportunities for growth.

Key takeaways include:

- **Economic Stress:** Italian consumers are under immense strain due to geopolitical and economic challenges, leading to low confidence and emotional distress. We find 85% are concerned about the rising cost of living, and 77% feel a high rate of pessimism.
- **Demand for Justice:** The consumer's search for values is evolving into a clear demand for justice. There's a strong belief that companies and the ultra-wealthy should bear the financial burden of the climate transition, highlighting that sustainability is a test of a brand's fairness and commitment to a more equitable world.
- **Empathy and Economy:** Consumers are becoming more empathically selective, seeking brands that offer value while aligning with their personal stories and ethics. Our report shows 70% of Italian consumers tend to purchase from brands that are in line with their own values. Additionally, people spend up to seven times more on brands they 'love'.

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Gaming the Score

When feedback becomes fiction

Organisations often rely heavily on feedback tools to measure performance and guide improvement efforts. These metrics, when accurate and honestly collected, provide actionable insight into how well a business is meeting customer expectations. However, there's an increasingly prevalent threat that can undermine the integrity of these metrics: survey gaming.

Survey gaming refers to the manipulation or interference in customer feedback collection by employees or internal stakeholders to artificially inflate performance scores. This could include directly asking for high scores (score solicitation), cherry-picking only happy customers for surveys (selective surveying), and offering perks for good ratings (incentivised responses).

Survey gaming is more than a nuisance; it's a systemic risk that erodes the integrity of customer experience programmes. While the motivations for gaming are often understandable – stemming from a desire to meet targets or avoid negative outcomes – the long-term consequences are destructive.

In our article, we reveal how even well-intentioned incentive schemes can backfire, leading to feedback that distorts reality and hinders genuine improvement efforts. We also offer practical guidance and clear advice on how best to tackle this issue and unlock the power of honest customer feedback.

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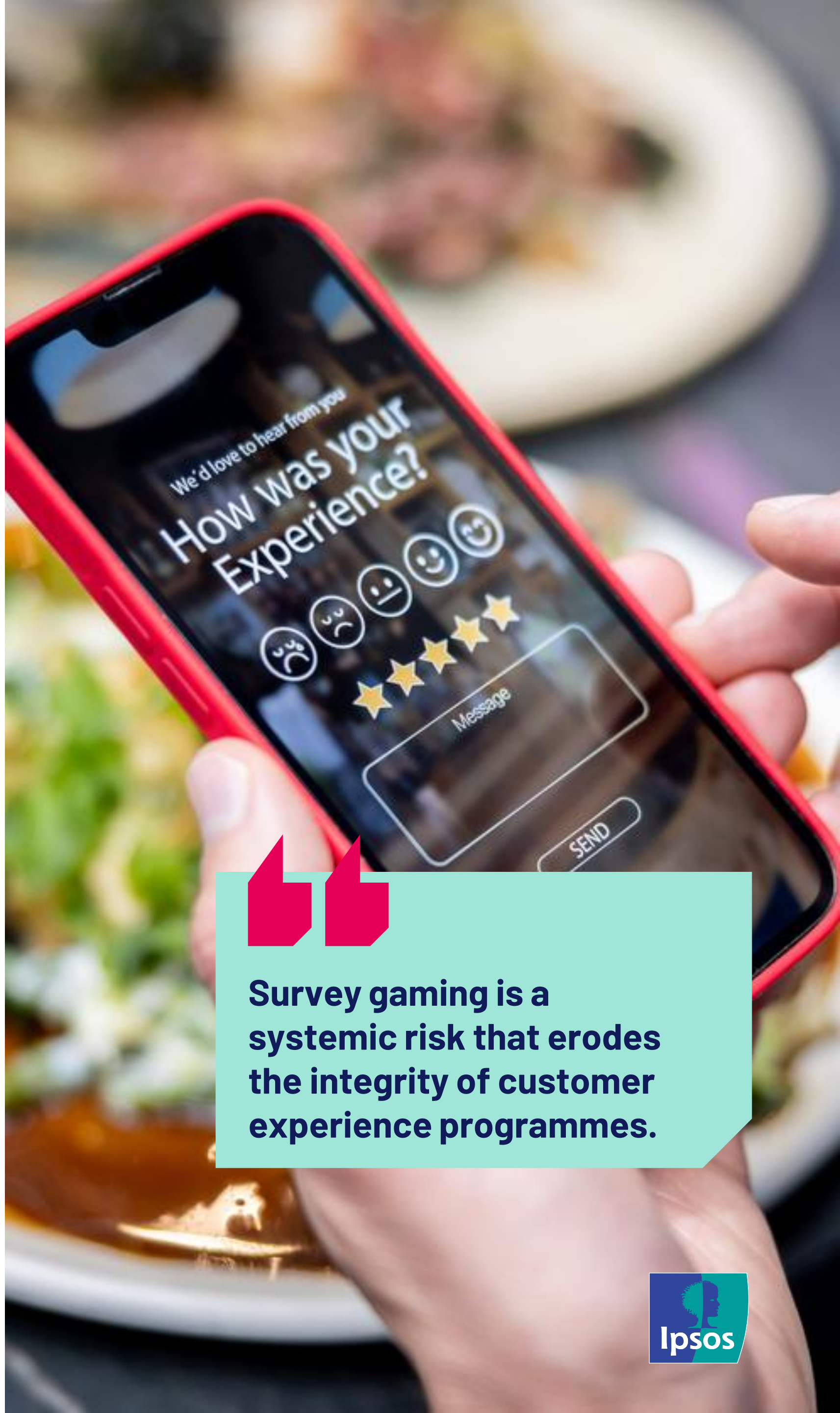

Survey gaming is a systemic risk that erodes the integrity of customer experience programmes.

Shortcuts

The Experience Perspective

The Experience Perspective is aimed at all of you who help your organisation deliver on its Brand Promise to customers, employees and colleagues.

Hosted by Rob Rose, and featuring Andrew Firth, Head of Advisory and Analytics, episode 8 of season 9 delves into the critical elements to consider when designing an effective mystery shopping programme.

LISTEN HERE

Food & You 2

Since 2020, Ipsos in the UK has been running the Food Standards Agency (FSA) flagship consumer survey, Food and You 2, gathering perceptions from households across England, Wales, and Northern Ireland.

The 11th wave of research, newly-published by the FSA, reveals the highest level of public confidence in food safety recorded since the start of the project.

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Ad Rankings 2025

Ipsos in France unveils its "Public Advertising Awards" in partnership with FranceTV Publicité. Since 1986, this unique award has recognised the advertising films and outdoor campaigns that have made a lasting impression and resonated with the French public. It celebrates the best advertisements of 2025, based on 1,000 campaigns.

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Healthcare in Canada

This survey conducted, on behalf of the Montreal Economic Institute, shows the overall satisfaction with provincial healthcare systems among Canadians sits at 56%, a figure unchanged from 2025. However, there are clear regional differences, with satisfaction highest in Ontario at 62% and lowest in Quebec at 49%. Satisfaction is also notably lower among women at 53% and those aged 35-54 at 51%.

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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: **London, UK**. London has been voted the best city in Europe for the 4th year in a row.

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