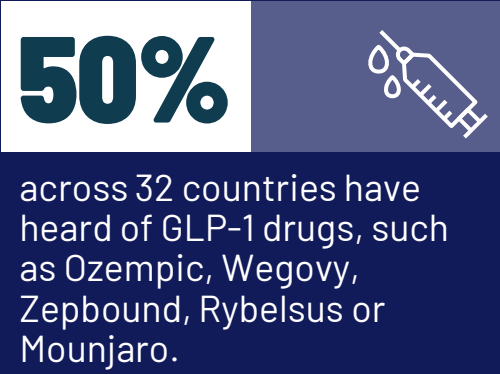
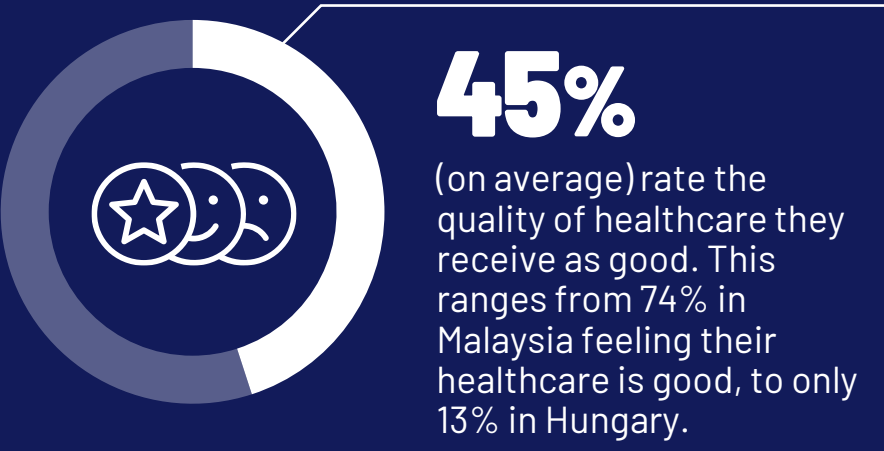
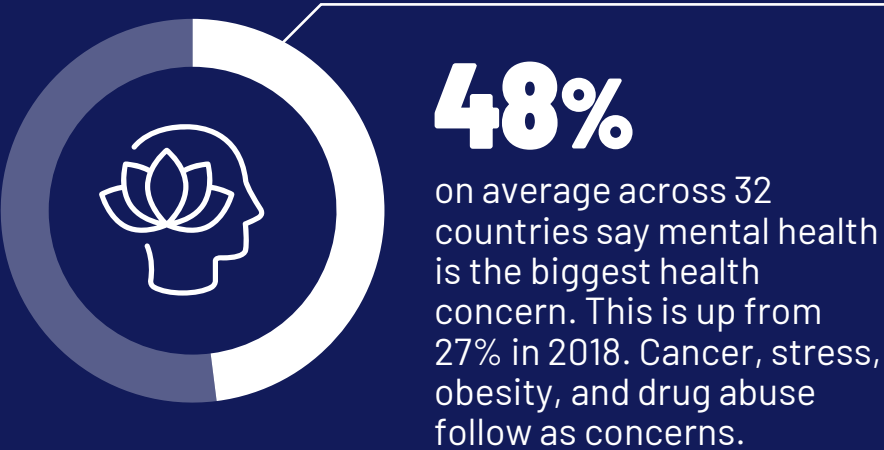


IPSOS HEALTH SERVICE REPORT 2026

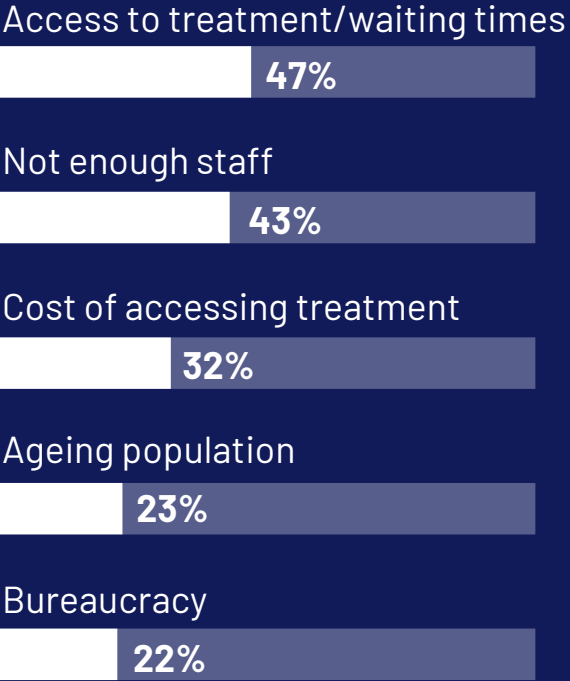
A 32-Country Ipsos
Global Advisor Survey

October 2026

At a glance



Perceived biggest healthcare problems:



CONTENTS

1

Healthcare system
satisfaction

2

The biggest health
conditions

3

Mental Health: A
global priority

4

GLP-1s: Awareness,
changing behaviours
and the future

5

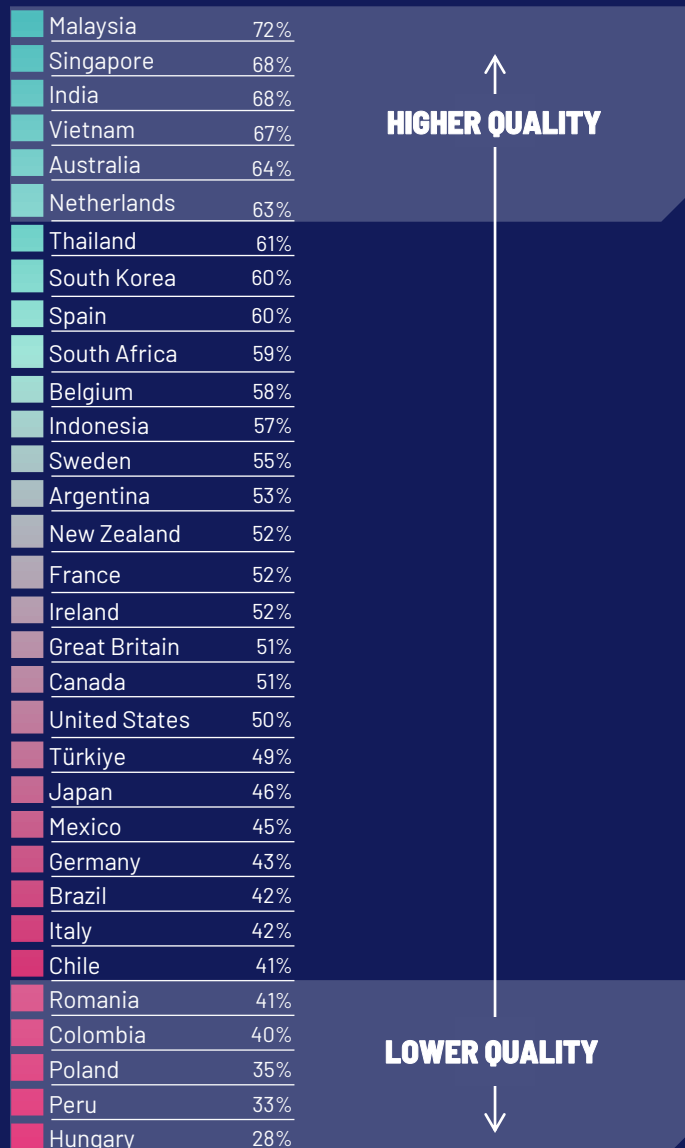
Healthcare systems:
Now and in the
coming years

6

Methodology

Healthcare system satisfaction

QUALITY OF CARE PERCEPTIONS INDEX



Quality of Care Perception Index

To try and understand how perceptions of quality vary across countries, we have produced a quality of care perception index.

This looks at people's satisfaction with their country's healthcare system, trust in the system, ability to access a doctor and a pharmacy, and there is equality in the care received.

Perceived quality in care is highest in Asia-Pacific. The top five countries which have the highest satisfaction scores are all in the region: Malaysia (72%), Singapore, India (both 68%), Vietnam (67%) and Australia (64%).

Hungary ranks bottom of the quality of care perception index with a score of 28%. Only 13% of Hungarians rate the quality of care they receive as good and only 15% think their healthcare system provides the same level of care to everyone.

This fits with what we see in our [What Worries the World](#) study where in September 2026 Hungarians are the most likely to see healthcare as a major problem (64%).

The Ipsos Quality of Care Perceptions Index

The Ipsos Quality of Care Perceptions Index is made up of the % who say agree/good for the following five statements or questions:

How would you **rate the quality** of healthcare that you and your family have access to in your country?

I **trust the healthcare system** in my country to provide me with the best treatment

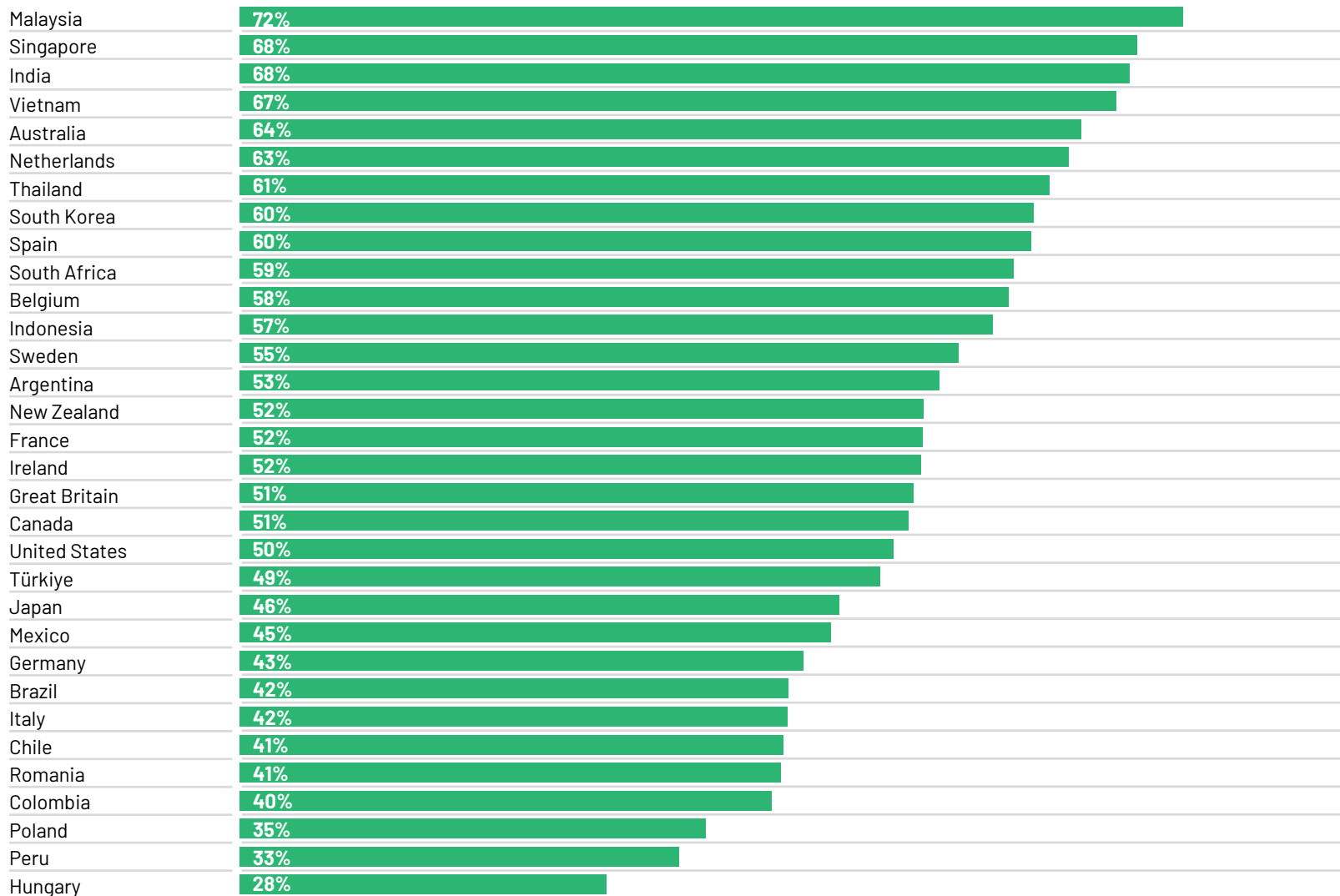
I find it easy to get an **appointment with doctors** in my local area

I find it easy to get **access to a pharmacy** in my local area

The healthcare system in my country provides the same standard of **care to everyone**

Base: 22,528 online adults under the age of 75 across 32 countries, interviewed 13 July – 7 August 2026. .

Country



Access of treatment and not enough staff the biggest problems

Access to treatment/long waiting times (47%) and not enough staff (43%) are seen as the biggest health problems facing healthcare systems.

While they are by some distance the two biggest perceived problems globally, there is considerable variation in what is seen as the top problem at the country level.

Cost of accessing treatment is the third biggest problem across 32 countries but ranks as the top problem in India (42%), Indonesia (59%), the US (57%) and Vietnam (36%), ahead of the 32-country average of 32%.

Meanwhile, ageing population ranks as

the fourth biggest problem across 32 countries (23%), but in the super-ageing societies in Asia it is a much greater concern.

In Japan (51%), Singapore (56%) and South Korea (55%) more than in one in two see it as a problem.

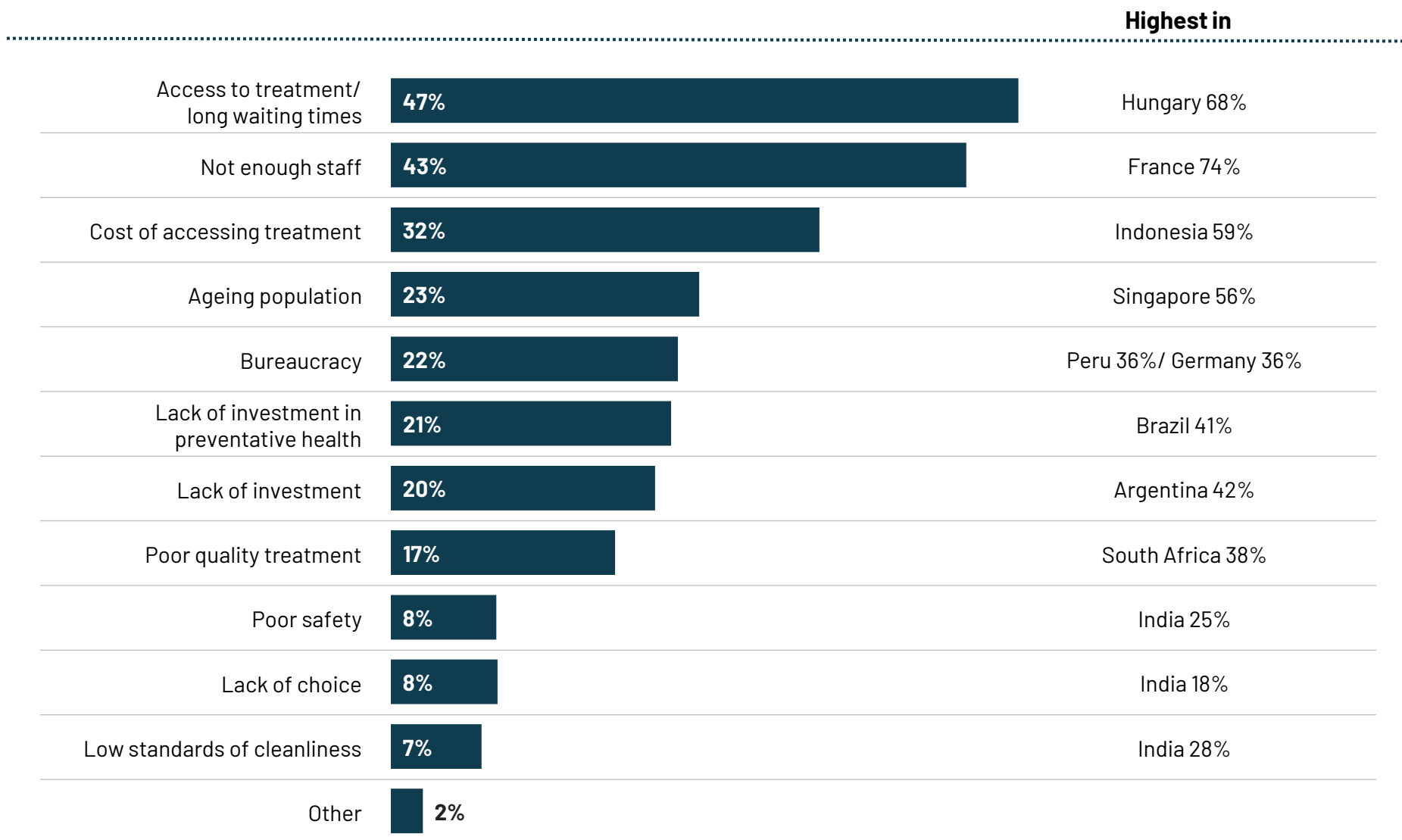
Baby boomers, the oldest generation in our report, are also more likely than other generations to see it as a problem (37%).



Overall, which of the following, if any, do you see as the biggest problems facing the healthcare system in your country?

32-Country Average

Base: 22,528 online adults under the age of 75 across 32 countries, interviewed 13 July – 7 August 2026.



The biggest health conditions

The biggest health conditions

We asked 22,528 people across 32 countries what they think the biggest health problems are for people in their country.

Mental health comes out top with 48% choosing it as the biggest health problem in their country. Mental health has been the top problem in our global survey of health attitudes since 2023 as we exited the Coronavirus pandemic.

Despite it already being seen as a major concern, 19 of 29 countries that have featured in both this year's and last year's report are more likely to think mental health is a problem in 2026.

In 16 of the countries surveyed this year, a majority see mental health as one of the biggest problems. To

understand more about how people are feeling about their own mental health, we have a dedicated chapter on the topic in this report.

Cancer is seen as the second biggest health problem with 40% on average across 32 countries choosing it.

Cancer is more likely to be chosen as a health problem in Europe (49%) than in Asia-Pacific (36%), LATAM (33%) and North America (39%). In Europe, on average, as many people see cancer as a health problem as they see mental health as one (49%).

Of the eight countries that see cancer as their biggest health problem, six are in Europe: France, Belgium, Italy, Romania, Poland and Hungary.

Obesity is the fourth biggest health problem with 25% seeing it as an issue.

As mental health has become a greater health priority coming out of the pandemic, obesity has gone in the other direction.

Only two of the 23 countries surveyed in 2018 and 2026 are more likely to think obesity is a problem today than before the Covid-19 pandemic (Brazil and Peru).

In 2018 four countries (Chile, Great Britain, Mexico and Malaysia) saw obesity as the biggest health problem, in 2026 no country does the same.

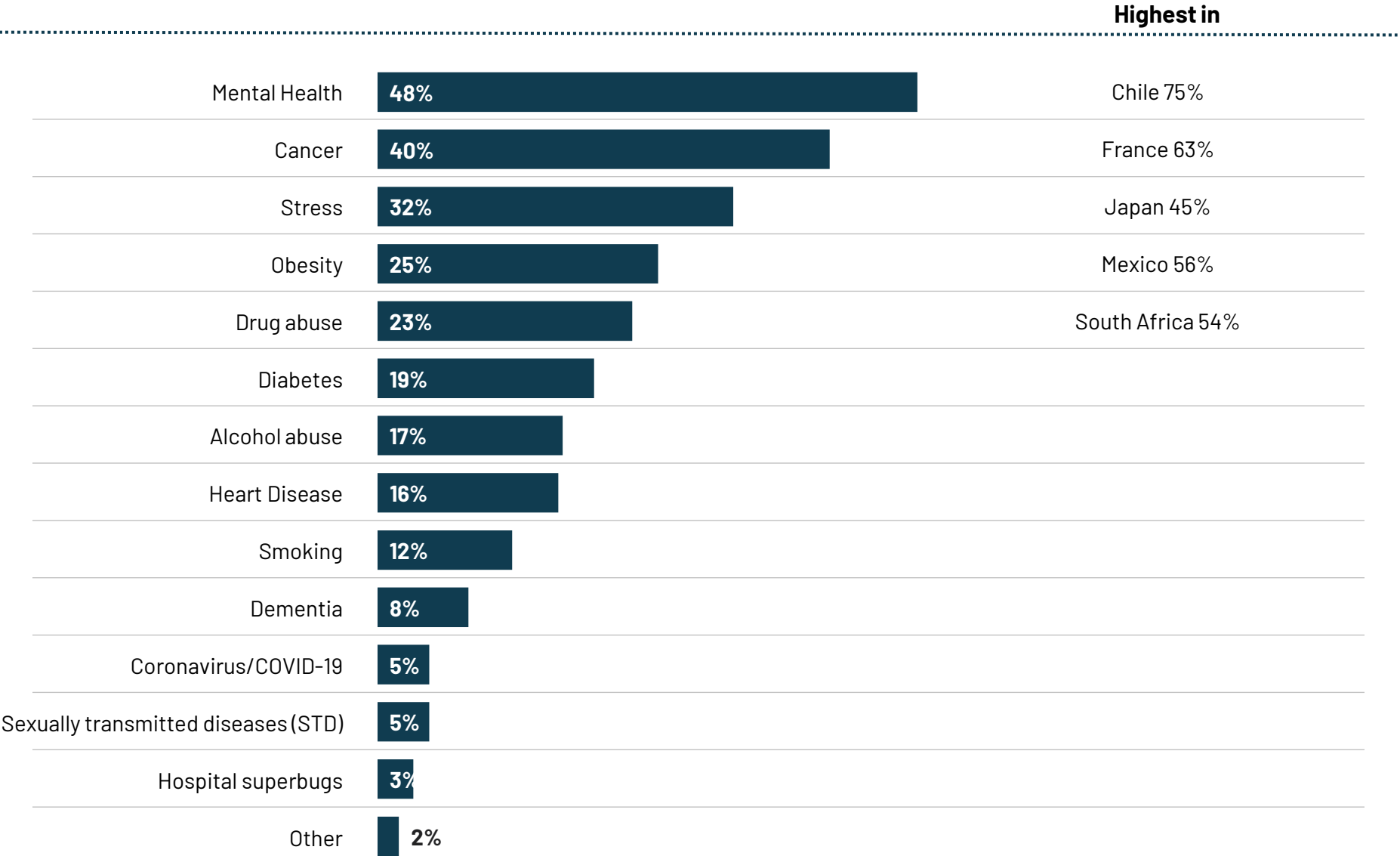
We look at the topic and the impact of GLP-1s in greater detail in a dedicated chapter in this report.

49%

In Europe see cancer as one of the biggest health problem, ahead of Asia-Pacific (36%), LATAM (33%) and North America (39%).

Thinking generally, which of the following, if any, do you see as the biggest health problems facing people in your country today?

Base: 22,528 online adults under the age of 75 across 32 countries, interviewed 13 July – 7 August 2026.



Thinking generally, which of the following, if any, do you see as the biggest health problems facing people in your country today?

Number one healthcare priorities for each country

Base: 22,528 online adults under the age of 75 across 32 countries, interviewed 13 July – 7 August 2026.

*Mental health and Stress are Thailand’s equal biggest problems, according to the Thai public

Mental health

Chile (75%)	United States (57%)
Sweden (70%)	Great Britain (55%)
New Zealand (62%)	Argentina (54%)
Spain (62%)	Singapore (53%)
Canada (60%)	Netherlands (53%)
Australia (59%)	Indonesia (48%)
Ireland (59%)	Peru (46%)
Brazil (58%)	Malaysia (39%)
Colombia (58%)	Thailand (38%)*
Germany (58%)	

Stress

Japan (45%)
South Korea (44%)
Thailand (38%)*

Cancer

France (63%)	Romania (50%)
Belgium (61%)	Poland (45%)
Vietnam (56%)	Türkiye (44%)
Italy (55%)	Hungary (42%)

Diabetes

Mexico (60%)	India (40%)
---------------------	--------------------

Drug abuse

South Africa (54%)

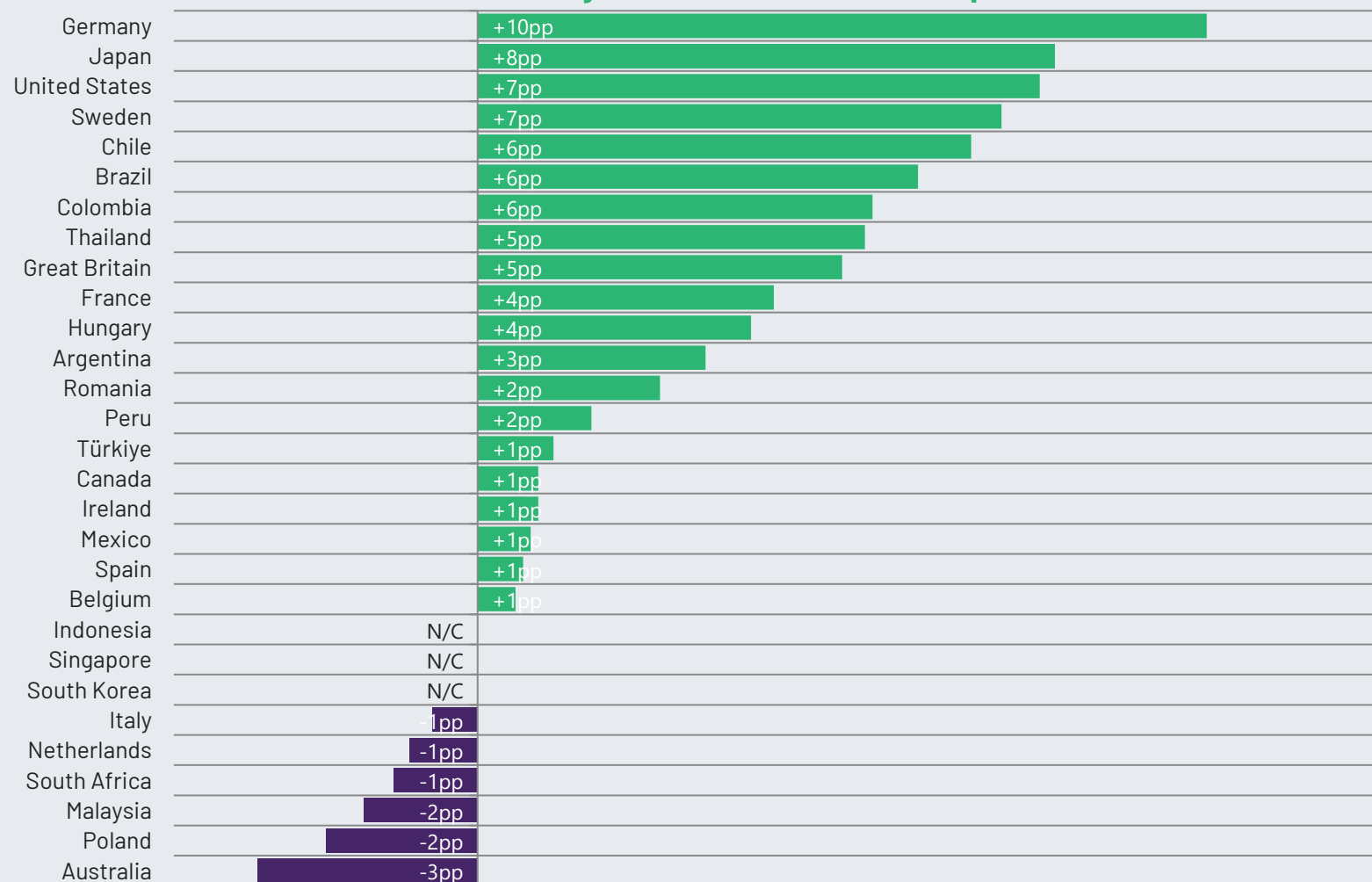
Thinking generally, which of the following, if any, do you see as the biggest health problems facing people in your country today?

Mental health

Net change between 2026 and 2025

Base: 22,528 online adults under the age of 75 across 32 countries, interviewed 13 July – 7 August 2026.

More likely to see mental health as a problem in 2026 than in 2025



Less likely to see mental health as a problem in 2026 than in 2025

Mental health: A global priority



From emerging concern to a global priority

Mental health is seen as the single biggest health problem facing people globally.

Across the 32 countries surveyed, 48% select mental health as a major health concern, putting it ahead of cancer (40%), stress (32%) and obesity (25%).

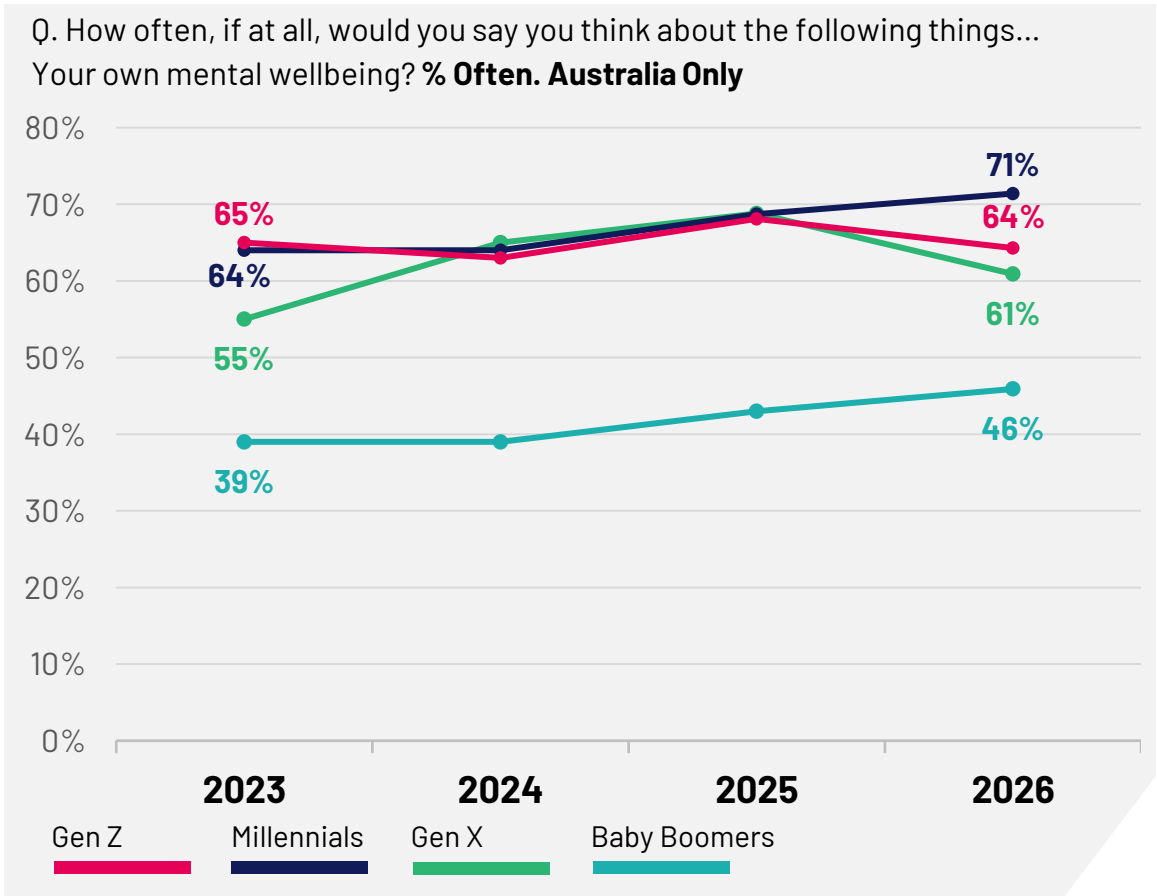
The difference in concern between cancer and mental health is not large, and in Europe the two concerns are level at 49%, but the overall ranking marks a significant change in how people understand the burden of ill health. Mental health is no longer treated as a secondary or separate issue.

It now sits alongside the most prominent physical conditions in the public consciousness.

This shift is also visible in how people value their own health. Almost eight in ten (78%) say mental and physical health are equally important.

A further 13% place greater importance on mental health, compared with only 7% who prioritise physical health.

However, people’s day-to-day behaviour still shows a gap: 75% often think about their physical wellbeing, compared with 63% who often think about their mental wellbeing.



Base: Around 1,000 Australian adults between the ages of 16-74.



From emerging concern to a global priority

Public attitudes may therefore have moved towards parity faster than personal habits and healthcare provision.

Concern about mental health is highest in Chile, where three-quarters (75%) identify it as a major health problem. Sweden follows at 70%.

Spain and New Zealand, both on 62%, form the next tier, followed by Canada (60%). Australia and Ireland, both 59%, and Germany and Brazil, both 58%, also record particularly high concern.

Overall, a majority identify mental health as a leading problem in 16 of the 32 countries surveyed.

The country pattern does not map neatly onto a single region, level of economic development or healthcare model. High concern appears across Latin America, Europe, North America and the Asia-Pacific region.

At the other end of the spectrum, concern is lowest in Romania at 24%, Türkiye and Mexico at 29%, Hungary at 32%, and Vietnam and Japan at 33%.





Worry about mental health has continued beyond the pandemic

In 2018, 27% on average identified mental health as one of their country's biggest health problems. In 2026, the figure is 48%, an increase of 21 percentage points (pp). The pandemic appears to have accelerated the issue's visibility, but the findings suggest that concern has not receded as societies have moved beyond the acute phase of COVID-19. Instead, mental health has become a sustained public priority.

The increase has been particularly pronounced in several countries. Since 2018, concern has risen by 10pp in Germany, 8pp in Japan, 7pp in the United States and Sweden, and 6pp in Chile and Brazil. Great Britain has recorded a 5pp increase. By contrast, change has been limited or negative in a smaller group, including Australia,

Poland, Malaysia and South Africa. The overall direction is nevertheless clear: across countries with comparable data, rising concern is much more common than decline.

The burden reaches well beyond diagnosed mental illness.

The most widespread experience captured by the survey is stress. Six in ten people, 61%, say that during the past year they have felt so stressed that they could not cope at least once, including 33% who experienced this several times.

Stress is also affecting how people live. Nearly two-thirds, 64%, say it has affected their daily life at least once in the past year, including 36% who say this happened several times.

Meanwhile, 54% report having felt sad or hopeless almost every day for at least a couple of weeks, with 29% experiencing this several times.

The impact extends into work, education, relationships and family life. 20% say stress has prevented them from going to work for a period of time several times in the past year. Sixteen per cent have taken time off work or school to deal with their own mental health, while 10% have done so to support a family member or close friend.

Mental health is therefore not solely an individual clinical issue. Its effects spread through households, workplaces and wider support networks.

68%

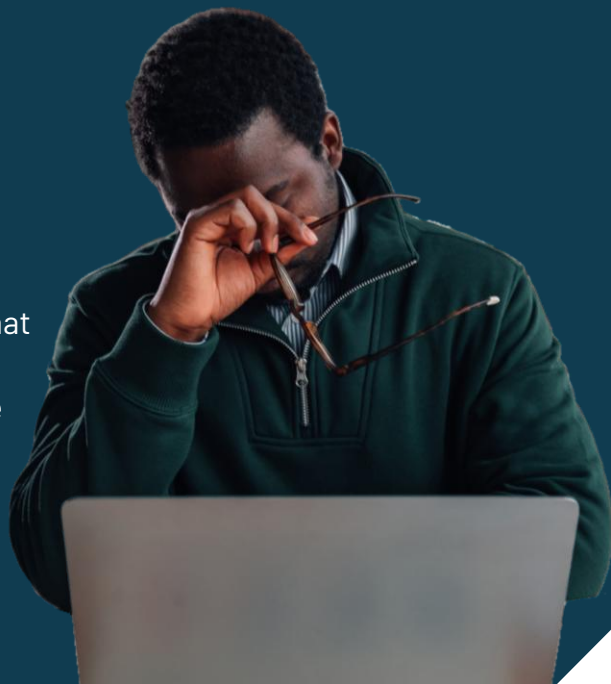
of women across 32 countries say stress has disrupted their daily life (vs. 60% of men).

75%

of under-35s across 32 countries say stress has affected their daily life at least once in the past year.

38%

of Gen Z across 32 countries felt depressed to the point that they felt sad or hopeless almost every day for a couple of weeks or more (vs. 15% of Baby Boomers).



Younger adults appear most affected

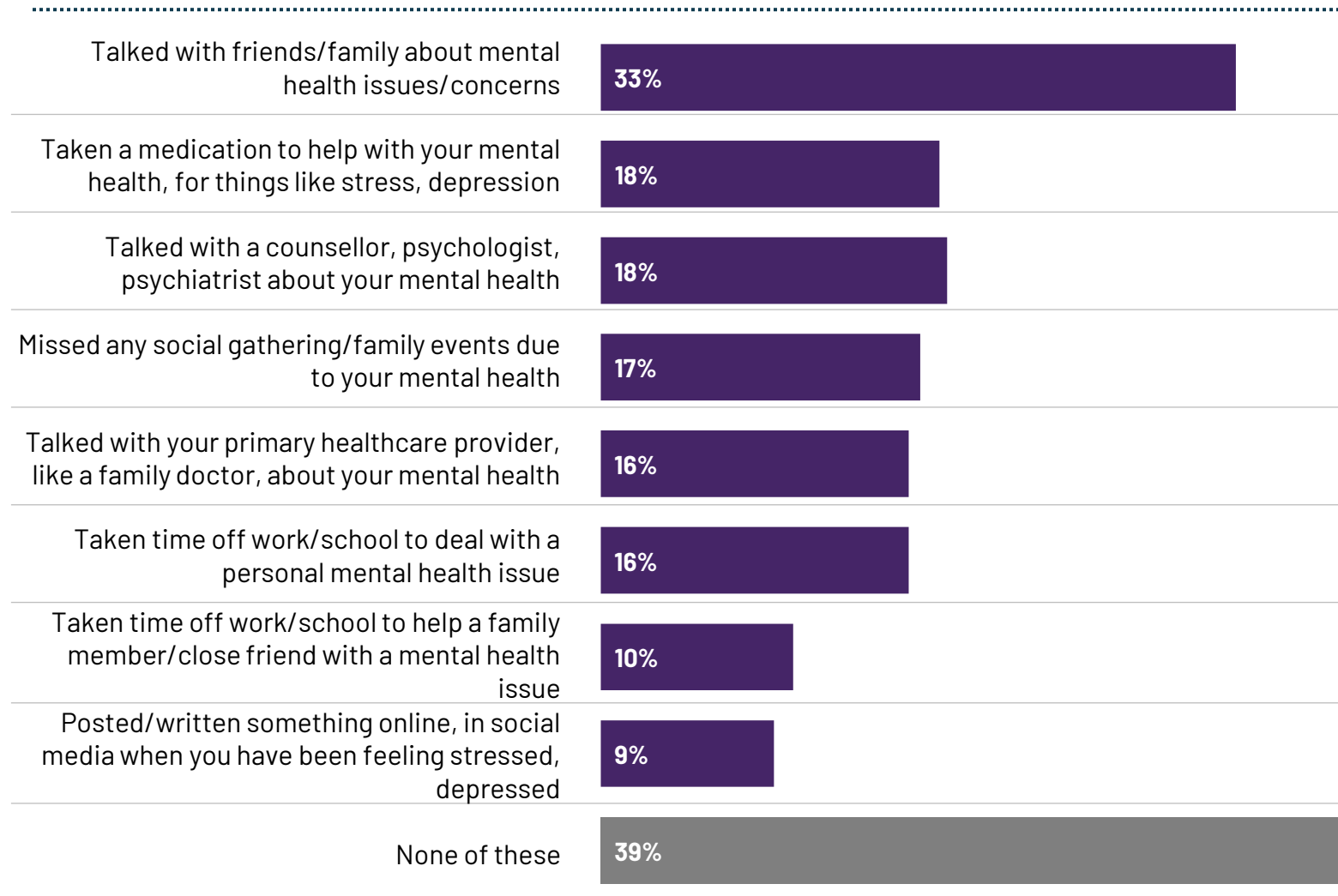
Younger adults appear most affected by mental health difficulties, with a particularly pronounced gap between under-35s and older people.

Three-quarters (75%) of under-35s say stress has affected their daily life at least once in the past year, compared with around half of those aged 50–74. A similarly wide age gap appears in experiences of being unable to cope and in sustained feelings of sadness or hopelessness. Gen Z generally reports the greatest impact, while Baby Boomers report the least.

Women are also consistently more affected than men: 68% say stress has disrupted their daily life, compared with 60% of men, while 66% have felt unable

to cope, compared with 56%. Lower-income and unmarried respondents report somewhat greater difficulties too, suggesting that mental health vulnerability may be intensified by financial strain and weaker access to support. The overall picture is therefore one of unequal exposure, with younger people and women carrying a disproportionate share of the burden.

Please indicate whether you have done any of the following in the past year?



Base: 22,528 online adults under the age of 75 across 32 countries, interviewed 13 July – 7 August 2026.

GLP-1s: Awareness, changing behaviours and the future

Rising awareness about GLP-1s

Across 32 countries, one in four (25%) see obesity as one of the biggest health problems in their country.

No country sees it as their top health issue and in this year's report Mexico is the only country where more than one in two see it as a major concern (56%).

In recent years the landscape around obesity and weight loss has changed considerably. Obesity is seen as less of an issue now than it was before the Coronavirus pandemic.

Of the 23 countries included in both the 2018 and 2026 reports, 19 are less likely to see obesity as a problem in 2026.

While not the only reason for the decline, GLP-1 drugs, such as Ozempic

or Wegovy, have been revolutionary for weight loss. We can see that awareness is growing globally.

Across 32 countries, one in two (50%) say they have heard of GLP-1s. This figure is higher in some of the world's most advanced economies like Great Britain (86%), Canada (83%), or the US (82%).

While awareness is lower in LATAM, all 29 countries surveyed in 2025 and this year are more likely to be aware of GLP-1s in 2026.

South Korea has seen the biggest rise in awareness (+23pp), followed by Great Britain, Mexico and Japan, all up 22pp.

50%

across 32 countries say they have heard of GLP-1s.

86%

in Great Britain have. The highest out of 32 countries.

83%

in Canada, the second-highest level of awareness of GLP-1s.

19%

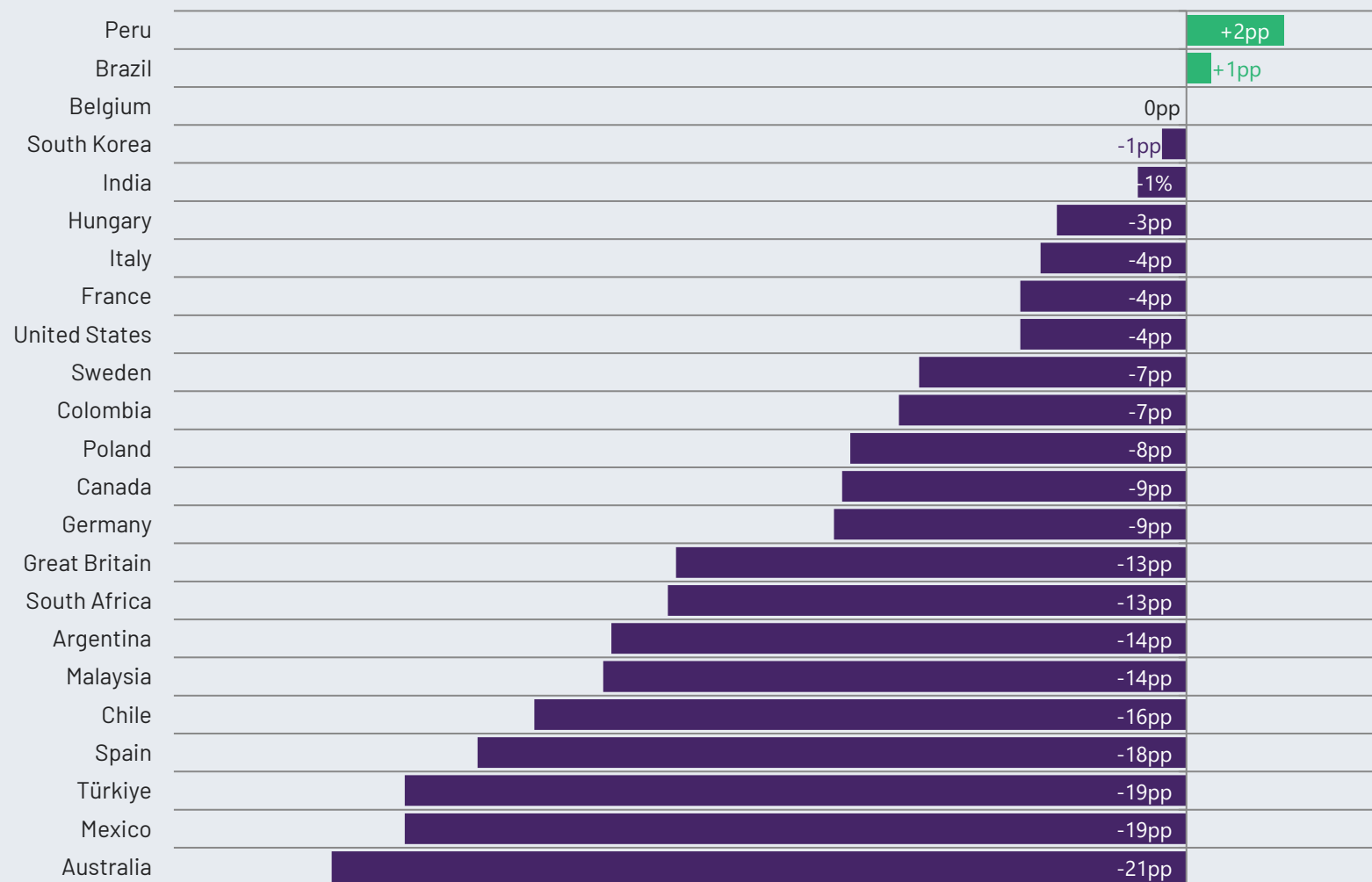
in Peru, the lowest in our survey.

Thinking generally, which of the following, if any, do you see as the biggest health problems facing people in your country today?

Obesity net change between 2018 and 2026

Base: 22,528 online adults under the age of 75 across 32 countries, interviewed 13 July – 7 August 2026.

More likely to see obesity as a problem in 2026 than in 2018

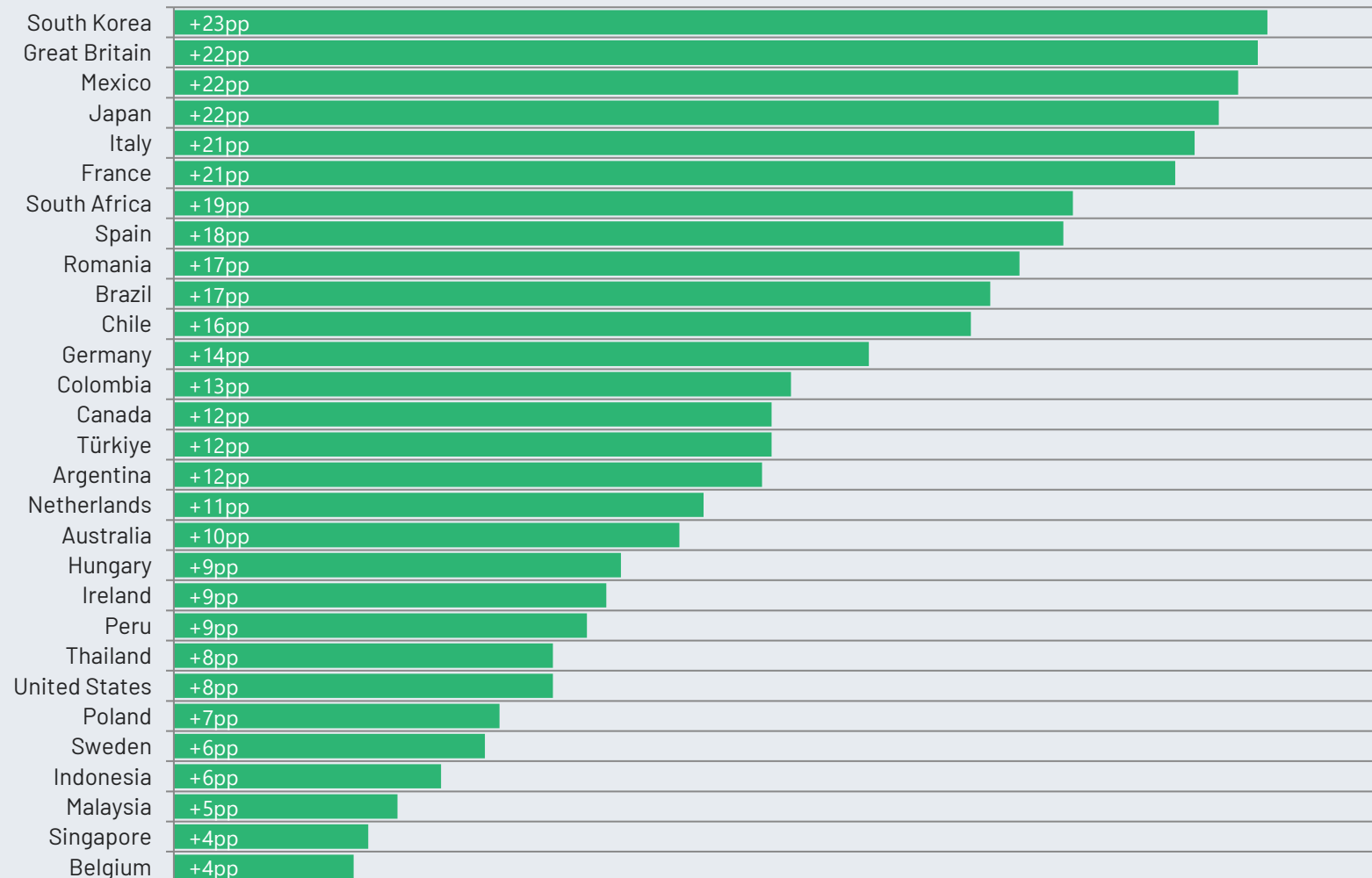


Less likely to see obesity as a problem in 2026 compared to 2018

Have you heard about GLP-1 drugs such as Ozempic, Wegovy, Zepbound, Rybelsus or Mounjaro?

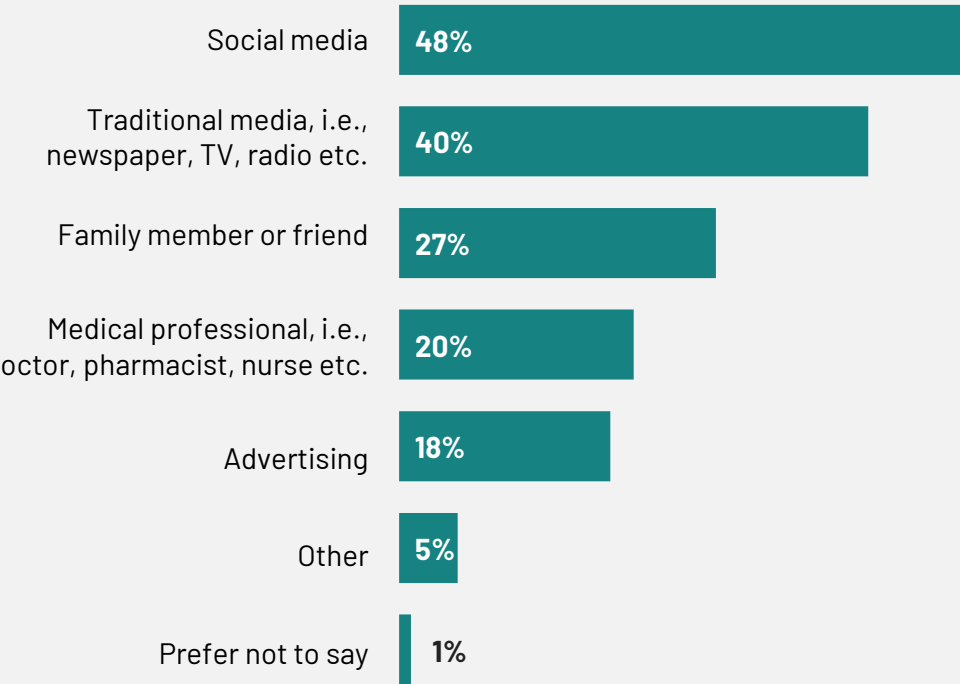
Base: 22,528 online adults under the age of 75 across 32 countries, interviewed 13 July – 7 August 2026.

Percentage point change in awareness compared to 2025



From patient to consumer

Q: How did you hear about GLP-1 drugs?* 32-Country Average



*Asked only to those who said they had heard of GLP-1s

Base: 22,528 online adults under the age of 75 across 32 countries, interviewed 13 July – 7 August 2026.

GLP-1s are changing the traditional doctor-patient relationship. Or perhaps a better way to look at this: they are changing the patient into a consumer.

Globally, people are much more likely to have heard about GLP-1s through social media (48%) or traditional media (40%) than from a medical professional (20%).

In the US, advertising is where people are most likely to have heard about GLP-1s. Forty-six percent of Americans who had heard about GLP-1s said they heard about them from advertising, up 5pp since last year, and greater than 32-country average of 18%.

The proportion who have heard about them from social media is up 4pp and from family or friends is up 5pp.

Even in a market that does not allow prescription drugs to be advertised, like Great Britain, people are much less likely to hear about GLP-1s from a medical professional (just 7%).

People are much more likely to hear about them from traditional media (50%) or social media (39%). As in the US we can see the influence of family and friends in rising awareness. In Great Britain, 32% say they have heard about GLP-1s this way and this figure has risen 4pp since last year.



From patient to consumer

Ayse Levent, Head of Global Syndicated Cardiometabolic/Obesity Research at Ipsos, explains:

“GLP-1s are not only transforming obesity treatment; they are changing how people enter, navigate and remain in care. Patients increasingly expect the same choice, convenience and transparency they experience in other parts of their lives, including the ability to explore options online and access treatment through simpler ordering and delivery models.

This consumerisation is accelerating direct-to-consumer and direct-to-patient (DTC/DTP) models, including cash-pay pathways that can provide an

alternative when insurance coverage is limited. But access alone will not define the next phase. As treatment options expand, success will depend on helping each person find an approach that fits their health needs, budget and daily life, and supports them in staying on treatment.

The US may have led this shift, but DTC and DTP models are now expanding across Europe, MENA and Asia-Pacific. They are likely to become an enduring part of a more personalized, connected obesity-care ecosystem.”



“

The GLP-1 revolution is pioneering an interesting pivot in healthcare, driven by the commoditisation of GLP-1s.

Patients are acting more like consumers, expecting their healthcare experience to mirror how they interact with other goods and services. This includes being able to make a purchase online, alongside convenient ordering and delivery processes.

The DTC/DTP age spearheaded by GLP-1s will become the new norm. While the US took the lead in this new online channel model, we now see this expand into many other countries in Europe, MENA, and Asia-Pacific.

Ayse Levent, Head of Global Syndicated Cardiometabolic/Obesity Research, Ipsos

From patient to consumer to shopper

While the proportion of people using GLP-1s is still relatively small on a global scale, there are consistent trends we are seeing across markets about the impact it is having. Especially when it comes to food shopping.

Part of the success of GLP-1s has been the long-term effect it has had on users' behaviours. We see that current or former GLP-1 users are more likely than those who have never taken the drug to seek out foods that have higher levels of protein or fibre and have greater focus on their shopping list.

GLP-1 users also report eating smaller portions and eating healthier. For example, in Brazil 83% of GLP-1 users in

our GLP-1 Impact Consumer Monitor say they eat smaller portions and 78% are eating healthier. Net changes in consumption show that over half are eating more fresh produce and less desserts and prepared meals.

[Lindsey Sohl](#), Director, Syndicated Healthcare, Ipsos, highlights: "The shifts observed among GLP-1 users toward healthier eating and changing consumption patterns highlight the need for food and beverage companies to evaluate potential implications for category demand, brand positioning and future growth opportunities."



Current or former GLP-1 users are more likely to focus on nutritional value when shopping

Base: 22,528 online adults under the age of 75 across 32 countries, interviewed 13 July – 7 August 2026.

Q: Do you agree or disagree with the following questions, when shopping for food for your household? % **Agree**

■ Those who are or were taking a GLP-1

■ Those who have not taken a GLP-1

When food shopping, I make a conscious effort to seek out nutrient-dense foods, particularly those high in protein and fibre.

60%

54%

I like to read nutritional labels on food products before I buy them

59%

54%

I'm less inclined to be an impulsive shopper

53%

52%

My shopping list is more intentional and focused on nutritional value.

57%

50%

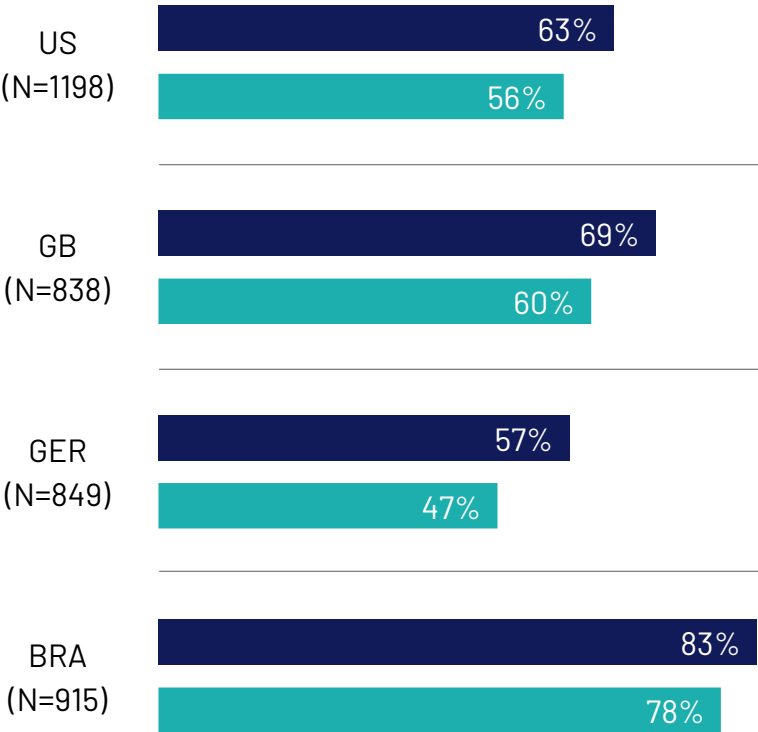
Healthier eating behaviours are driving meaningful changes in food consumption.

Fresh produce is the top net-increased category across all markets, while net-declines are seen for fast food, desserts and other indulgent foods.

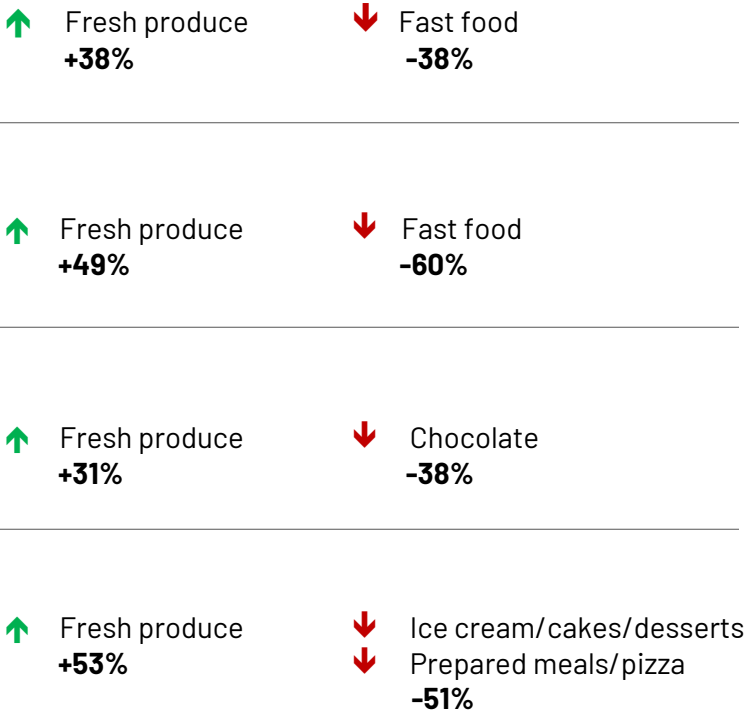
Source: Ipsos Syndicated GLP-1 Impact Consumer Monitor (January-March 2026, online survey gathering consumption perceptions from general population and GLP-1 user consumers. Data shown = Current GLP-1 users. Data © Ipsos 2026, all rights reserved.

Top two impacts of GLP-1 use on daily life % Agree (6,7 on 7-point scale)

- I eat smaller portions
- I am eating healthier



Net impact on consumption: proportion of people reporting change



Healthcare systems: Now and in the coming years

European health services “overstretched”

A lack of capacity in European health systems is a growing worry.

A majority see access to treatment and not enough staff as the biggest problems facing their healthcare systems (52% and 55% respectively). These figures are higher than the global averages (47% and 43%).

They are much more likely (76%) to see their health services as overstretched than the global average (64%).

Out of the 32 countries in this year's report, Great Britain and France rank as the most likely to think their healthcare system is overstretched (88% and 87% respectively).

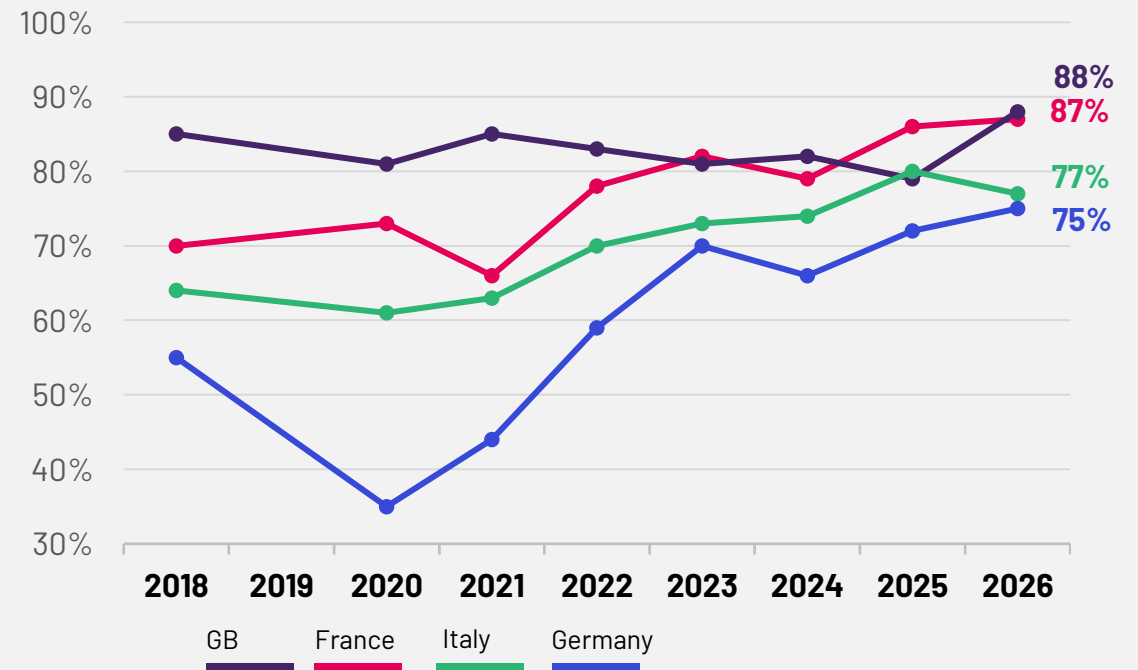
This feeling across Europe has only risen as healthcare systems have faced the Coronavirus pandemic and governments have had to deal with persistent inflationary shocks and sluggish economic growth in recent years.

While the proportion of Brits who think the NHS is overstretched is only three percentage points (pp) higher than in 2018, it is 9pp higher than in 2025 (see right).

In France, the figure has risen by 17pp since 2018. It has increased by 13pp in Italy and by 20pp in Germany. Germany's result is also 40pp higher than in 2020.

Q: To what extent do you agree or disagree with the following statements?

The healthcare system in my country is overstretched



Base: 22,528 online adults under the age of 75 across 32 countries, interviewed 13 July – 7 August 2026.

European health services “overstretched”

While there are concerns about capacity pressures in the system, trust in the system to provide good treatment has stayed strong. In France this has even risen since 2018 (+5pp).

However, in Britain attitudes are beginning to turn somewhat on the NHS. Since 2018 the proportion of Brits who say they receive good quality care has fallen 21pp and those who trust their healthcare system to provide them with the best possible care has fallen 14pp.

Coupled with this, Brits are much more likely to say the care they receive will get worse (35%) than it will get better (12%).

This view is shared across much of Europe where 31% think care will get worse and 16% think things will improve.

Germany is the country most likely to fear things will get worse with 54% expecting care to deteriorate. It's the only country where more than one in two believe things will decline.

31%

across 32 countries think their healthcare system will *improve* in the coming years.

12%

in Great Britain say it will *improve*.

8%

in France think it will *improve*.

5%

in Germany say it will *improve*.

Methodology

Methodology

These are the results of a 32-country survey conducted by Ipsos on its Global Advisor online platform, between Monday, July 13, and Friday, August 7, 2026.

For this survey, Ipsos interviewed a total of 22,528 adults aged 18 years and older in India, 18-74 in Canada, Republic of Ireland, Malaysia, New Zealand, South Africa, Türkiye, the United States, and Vietnam, 20-74 in Thailand, 21-74 in Indonesia and Singapore, and 16-74 in all other countries.

The sample consists of approximately 1,000 individuals each in Australia, Belgium, Brazil, Canada, France, Germany, Great Britain, India, Italy, Japan, New Zealand, Spain, and the U.S., and 500 individuals each in Argentina, Chile, Colombia, Hungary, Indonesia, Ireland, Malaysia, Mexico, the Netherlands, Peru, Poland, Romania, Singapore, South Africa, South Korea, Sweden, Thailand, Türkiye, and Vietnam.

Samples in Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, Italy, Japan,

the Netherlands, New Zealand, Peru, Poland, South Korea, Spain, Sweden, and the U.S. can be considered representative of their general adult populations under the age of 75.

Samples in Brazil, Chile, Colombia, India, Indonesia, Ireland, Malaysia, Mexico, Romania, Singapore, South Africa, Thailand, Türkiye, and Vietnam are more urban, more educated, and/or more affluent than the general population. The survey results for these countries should be viewed as reflecting the views of the more “connected” segment of their population.

The data is weighted so that the composition of each country’s sample best reflects the demographic profile of the adult population according to the most recent census data. In Great Britain, the data was weighted by age, gender, and education. “The Global Country Average” reflects the average result for all the countries and markets in which the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result.

When percentages do not sum up to 100 or the ‘difference’ appears to be +/-1 percentage point more/less than the actual result, this may be due to rounding, multiple responses, or the exclusion of “don’t know” or not stated responses.

The precision of Ipsos online polls is calculated using a credibility interval with a poll where N=1,000 being accurate to +/- 3.5 percentage points and of where N=500 being accurate to +/- 5.0 percentage points. For more information on Ipsos’ use of credibility intervals, please visit the Ipsos website.

For more information

Jamie Stinson

Director, Global Advisor
Ipsos Knowledge Centre

Jamie.Stinson@ipsos.com

Joseph Nadler

Senior Content Executive
Ipsos Knowledge Centre

Joseph.Nadler@ipsos.com