

January 2026

# IPSOS UPDATE

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

# Ipsos Update January 2026

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

New Year, new optimism? We start 2026 with 71% expecting this year to be a better year than last, as our annual [predictions survey](#) finds many of us busy making plans to exercise more, improve our wellbeing and spend more quality time with family and friends.

Yet the broader backdrop provides vivid reminders of the need to remain cautious and take a measured view. Optimism levels are still lower than they were before the pandemic. Across 30 countries, 66% describe 2025 as “a bad year” for their country. And 59% expect to see protests in their country during 2026 about the way it is being run.

Our special report on Brazil, the [Echo of the Times](#), illustrates the challenges

facing so many countries. Our team notes the “affective polarisation” that now exists between different political camps, the widespread dissatisfaction with how democracy is working and a resurgence of conservative values, particularly among young men. Although declining trust in government creates an opportunity for brands to build stronger relationships with consumers, many struggle to take advantage of it.

In this vein, our new [Context Advantage](#) report provides fresh thinking on how brands can capitalise on the opportunities. It encourages us to think beyond the constraints of traditional category-based thinking and go in search of those occasions and

moments that really matter. Meanwhile, new research by our team in India illustrates how the rules of customer experience can be re-written by providing memorable, relevant and emotionally resonant interactions.

Our [Year in Review](#) sets out some of the questions organisations around the world will be asking themselves in 2026. Should we speak out on important topics, or is it better to adopt a strategy of “strategic silence”? Where will products powered by AI become part of our “new normal”, and how can we minimise the risks of a backlash? And, as the potential impact of GLP-1s become clearer, can our healthcare systems actually afford them?

We'll be staying close to all of this and more as the year unfolds – and we look forward to supporting you in the work that you are doing. As ever, do get in touch if you'd like to discuss anything here.

With best wishes for 2026.



Simon Atkinson  
**Chief Knowledge  
Officer**

# Poll Digest

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

### USA:

Many Americans say they're cutting their spending, with 65% intending to set a budget for 2026.

### Peru:

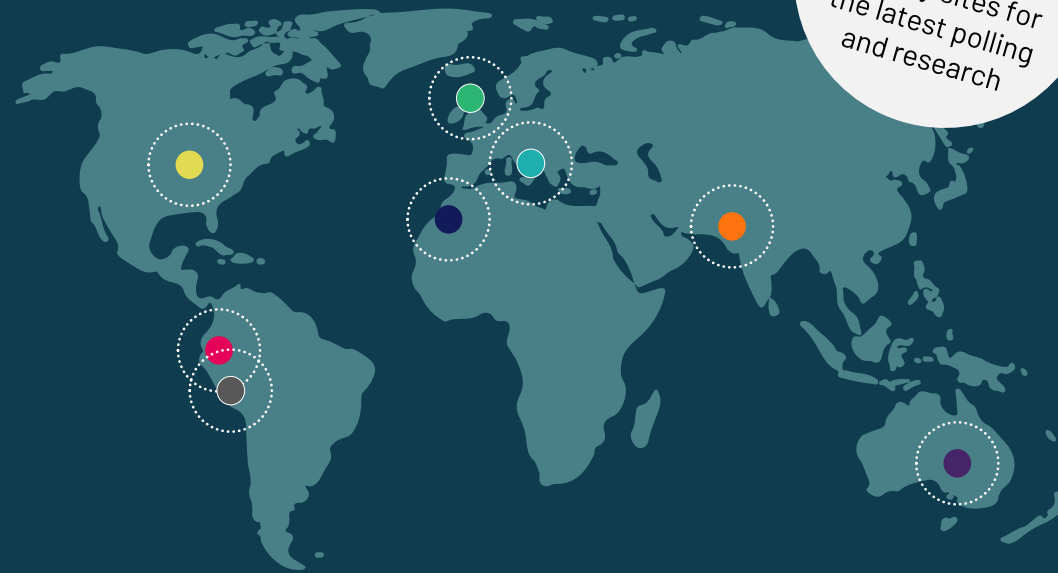
88% of Peruvians believe that corruption has increased in the last five years.

### Argentina:

57% of Argentinians report having difficulty making ends meets, vs 43% of all Latin Americans.

### Italy:

As Italy prepares to host the 2026 Winter Olympics, we find awareness of the event among Italians at 69%.



### Pakistan:

Confidence in job security has risen to 22%, the highest level recorded since the brief post-conflict surge.

### Scotland:

52% of Scots say they would vote yes in an independence referendum, while 48% say they would vote no.

### Morocco:

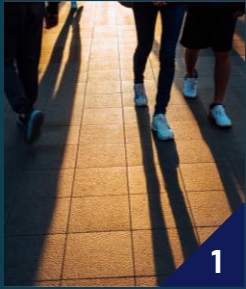
Two in five Moroccans want to start their own business, but many say there is a need for more support.

### Australia:

Cost of living remains the top issue for Australians (59%), followed by Housing (45%).



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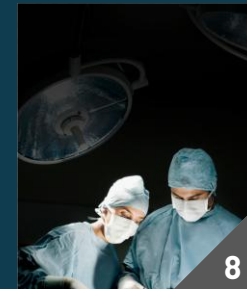
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# Year in Review

2025

**Featuring expert analysis and data-driven insights, our annual Year in Review report looks back at the key events, shifts and challenges of 2025 and reflects on what this tells us about the year to come.**

Inside this year's edition:

- **Events of the Year** – Ipsos research reveals the public pulse behind key moments in the wider narrative of 2025.
- **Ipsos Around the World** – Our interactive world map shares insights from Ipsos experts on the ground, revealing the local findings that illuminate each country's distinct story in 2025.
- **The State of the 2020s** – As global certainties fracture and optimism wanes, leaders must embrace five indispensable rules to reinvent and survive in this uneasy decade.
- **Sustainability's Steady March** – The companies that thrive amidst the political turmoil surrounding 'ESG' will be those that quietly build resilience by weaving sustainable practices into their core strategy.
- **The Agentic Leap** – In 2025, AI transitioned from a creative novelty

to a functional, practical, indispensable tool. Agentic AI – now able to make decisions and initiate actions – will be crucial in enhancing business functionalities as we look ahead.

- **The GLP-1 Revolution** – While GLP-1 medications are visibly transforming individual health, their unseen impact is quietly reshaping industries and challenging the fabric of healthcare economics.
- **Tariffs Took the Wheel** – Trade policy, not consumer demand, became the unexpected architect of the 2025 automotive market. New

tariffs and incentives are compelling manufacturers to localise and driving consumers to rethink every aspect of their vehicle purchase.

Additionally, watch the latest [KEYS webinar](#), where our panel examine what we can learn from 2025.

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# Predictions 2026 Report

## Expectations for the coming 12 months

Across 30 countries, people are more likely to think 2025 was a bad year for their country (66%) than it was for them and their family (50%).

Argentinians are the most likely to say it was personally a bad year for them (67%). Meanwhile, 90% of people in France say it was a bad year for their country – the highest across 30 countries.

Despite this, people are feeling much better about things than they were in 2020 when 90% (on average globally) said it was a bad year for their country and 70% said it was a bad year for them personally.

Close to three-quarters (71%) are optimistic that 2026 will be better than 2025.

Europeans reveal themselves to be particularly pessimistic. Despite being the least likely region to say that 2025 was a bad year for them, they are also the least likely to think 2026 will be a better year (62% in Europe vs 68% in North America, 73% in Asia, and 84% in Latin America).

Despite expecting a better 2026, six in ten people (59%) and majorities in all but four countries expect large-scale public unrest to protest against the way the country is being run. This rises to

80% in Peru, 76% in South Africa and 74% in Great Britain.

Elsewhere apprehension is mixed with hope. When it comes to AI, 67% think it's likely that AI will lead to job losses – but 43% think it will create many new jobs. On the environment, 69% expect more extreme weather events in their country in 2026 – but 48% expect their government to introduce more demanding targets to reduce carbon emissions.

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**People are feeling much better about things than they were in 2020.**



**With support, AI moderators can move beyond scripted exchanges to provide empathetic and context-aware responses.**

# Mind or Machines

## Exploring AI moderation and when to use it

In the rapidly evolving world of market research, AI moderators offer revolutionary scalability and efficiency. AI-powered moderators can conduct thousands of interviews 24/7, offering unparalleled scalability, whether working at home, on-site or on the go.

But can a machine truly replicate the nuances, empathy and insights of a human moderator? In this *Ipsos Views* paper, we present the findings from a series of rigorous, multi-country pilot studies, where our experts compared the performance of standard AI bots, enhanced AI systems and expert human moderators.

Initial research confirmed what many had suspected: while standard AI moderators excel in terms of engagement and scale, they perform poorly in certain key areas. However, enhancing a standard AI bot with human-like expertise produced clear results: each additional layer of human-centric knowledge significantly improved the AI moderator's performance, resulting in higher-quality data and a dramatic increase in the identification of emotional themes. Nevertheless, human moderators still had the edge when it came to uncovering deep, unexpected insights by following "emotional breadcrumbs"

and demonstrating true empathy.

The future of qualitative research lies in powerful collaboration between humans and AI, rather than choosing between the two. The "best of both worlds" approach involves human experts designing, guiding, and concluding the research journey, while leveraging AI to ensure scale, depth, and quality.

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# Flair Brazil 2026

## 'Echo of the times' is the theme of this year's report

In the latest instalment of Brazil Flair, we explore the complex landscape of Brazil as it approaches 2026, a pivotal year in which significant electoral decisions will determine the country's future political, social and economic trajectory.

Our local experts explore the collision of nostalgic yearnings and pressing contemporary challenges, such as deep emotional divides and growing distrust of political institutions.

### Contents include:

- **The Brazilian crossroads:** The current government is facing immense challenges due to a

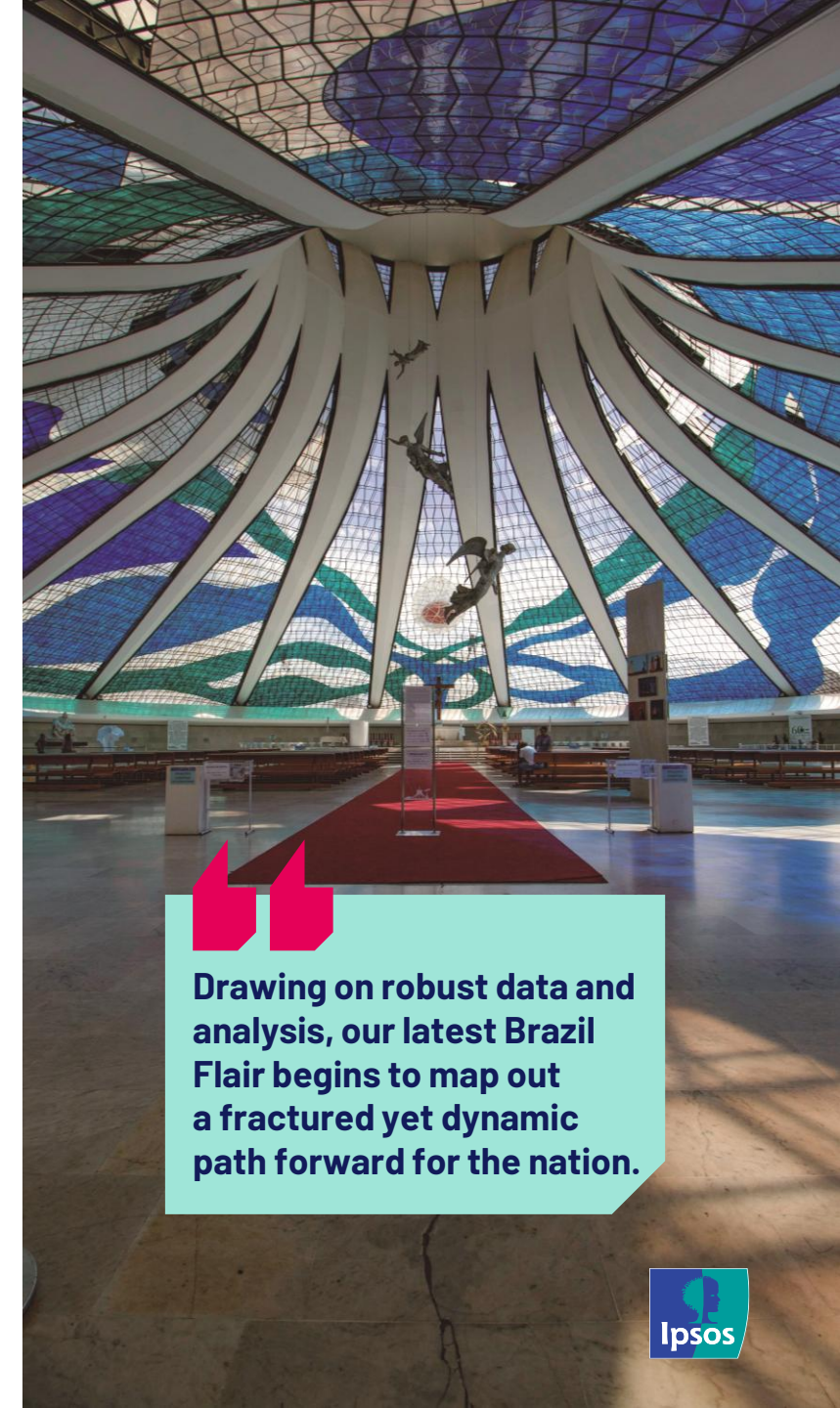
powerful and oppositional Congress. We examine Brazil's profound "affective polarisation" between the Lula and Bolsonaro political camps, while highlighting the significant decline in public trust in institutions, as well as the widespread dissatisfaction with the functioning of democracy.

- **A new conservative wave?**

We are witnessing a significant resurgence of conservative values, particularly among Gen Z men. We explore the opportunities and risks this presents for brands, who must

navigate this cultural shift in order to connect with this demographic.

- **Towards more conscious health:** The cultural and medical phenomenon of GLP-1 drugs is undeniable. We examine the tension between their aesthetic use for weight loss and their significant medical potential for treating various health conditions.

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**Drawing on robust data and analysis, our latest Brazil Flair begins to map out a fractured yet dynamic path forward for the nation.**





**Traditional family demographics are changing, and businesses must adapt to new consumer behaviours in order to succeed.**

# What The Future: Family

## Navigating the new norms and markets for tomorrow's families

The concept of family is changing as younger generations are choosing not to enter into traditional partnerships and are redefining family bonds as something that goes beyond blood or legal ties. At the same time, the ageing population is set to outnumber the young, creating a daunting care gap. These dynamics are reshaping spending habits and technology usage, particularly as Gen Alpha and Gen Beta come of age. These issues demand fresh strategies from policymakers and brands to better connect with and support all types of households.

In *What the Future: Family*, we

explore how leaders can move beyond outdated norms to capture new opportunities. We analyse generational impacts on consumer behaviour and show how policymakers and brands can play pivotal roles in modern family life.

One significant change is our transition from a domestic economy to a technology-based one. For parents of young children, technology-related issues such as screen time, privacy and safety cause the most tension within the household. Beyond these issues, the rise of streaming and algorithm-driven entertainment means that it is harder to find entertainment that the whole

family can enjoy together.

For businesses, the stakes are high. Failure to adapt means missing key opportunities to engage families while companies that innovate around these evolving concepts of family and belonging can tap into new markets and drive growth in a diverse society.

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# Ipsos Canada: 2025 Review & 2026 Outlook

## From elbows up to elbow grease

Donald Trump has been a key figure in 2025, but the more influential driver of Canadian public opinion has been the decade-long decline in economic sentiment.

2025 unfolded in two acts. The first dominated by Trump's annexation threats and the second focused on Prime Minister Carney's calm pivot to economic growth initiatives. They have gone from "elbows up" in a defensive stance against Trump to an "elbow grease" approach focused on strengthening Canada's economy.

For 2026, expect continued economic challenges with personal financial concerns

persisting for many Canadians. While there are stark differences between generations, income and regions, all Canadians want a return to affordability and a path to economic opportunity.

Last year Ipsos noted that public sentiment was anything but aspirational. This year the mood is shifting. A confluence of factors - support for policy changes, a new Prime Minister, calmer conversations with our neighbours to the south and a closer alignment between public opinion and our leaders' actions, has created a more hopeful - but not yet positive - public environment.

Yet 2026 will likely still be a

volatile, disruptive, and quick-to-change public opinion environment. The World Series Ronald Reagan ads showed just how quickly things can move from calm to chaos.

In the 2025 Review & 2026 Outlook report, Ipsos in Canada dives into the issues poised to impact Canadians, governments, and business in 2026 and beyond, ranked by their potential to disrupt the public opinion environment.

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**Yet 2026 will likely still be a volatile, disruptive, and quick-to-change public opinion environment.**



# The Context Advantage

## How Contextual Brand Equity reveals hidden growth opportunities

Imagine exploring a city with only your travel guide's top ten attractions – you'd capture the highlights but miss the hidden gems and true cultural essence. You'd leave satisfied but somehow unfulfilled, having seen everything yet experienced nothing.

This is how most brands track their performance today.

We are at a critical juncture in brand measurement. When looking only at funnel metrics like awareness and usage, brands see only one part of the landscape. They miss the full context picture that only can reveal unforeseen opportunities.

Ipsos research reveals a startling

truth: context accounts for over 50% of brand choice. The when, where, and why of consumer decisions really matter in a world with so much choice and habitual behaviour.

*Understanding Brand Equity in Context* provides the full landscape and can reveal new opportunities.

Key takeaways for brand leaders:

- **Stop thinking in categories.** Start thinking in occasions and moments to re-evaluate your true competitive set.
- **Look beyond your brand's presumed core occasion** to discover hidden opportunities where consumer desire already

exists.

- **Track social signals** to reveal emerging innovation directions pre-emptively.
- **Stop seeing portfolio overlap as cannibalisation.** Start seeing it as complementary and test by what-if scenarios to quantify the business impact of brands' portfolio optimisation.

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**The when, where, and why of consumer decisions really matter in a world with so much choice and habitual behaviour.**

# The Perioperative Pivot

## The new frontier for immunotherapy in early-stage cancers

Over the past decade, immune checkpoint inhibitors (PD-1/PD-L1 mAbs) have transformed the treatment of advanced cancer, turning terminal conditions into diseases that can now be successfully treated, and sometimes even cured.

The frontier is now moving to an earlier and more complex battleground: the perioperative (neoadjuvant and adjuvant) setting for resectable solid tumours. This 'perioperative pivot' represents a multi-billion-dollar opportunity, but it is also a 'strategic black box' fraught with unique medical, regulatory, competitive and commercial challenges.

To succeed in this new landscape,


it is necessary to move beyond traditional market research and adopt an integrated, strategic approach that can decipher new stakeholder dynamics, navigate complex endpoints, and influence physician behaviour in a curative-intent setting.

In this paper, Ipsos experts decode the new perioperative landscape and offer a practical plan for clinical and commercial impact. Grounded in our therapy area experience and a new Ipsos survey of US based medical oncologists, the paper addresses three pressing questions:

1. How to align on a consistent definition of "high-risk" patients across the

multidisciplinary care team.

2. How to translate event-free and disease-free survival into clear value stories for stakeholders beyond medical oncology.
3. How to fix handoff gaps between diagnosis, surgery, and systemic treatment so eligible patients stay on pathway.

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**The pivot to perioperative settings is a multi-billion-dollar opportunity for maturing brands.**



# Shortcuts



## Veracity Index

The 28th edition of the Ipsos Veracity Index, first launched in 1983, shows continuity and change in public trust towards leading professions in Britain.

The five most trusted professions look similar: nurses are Britain's most trusted profession for another year alongside engineers, followed by doctors, teachers and professors. But some professions have experienced significant declines compared with their 2024 performance.

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## What Worries the World - December

This month we take a moment to reflect on 12 months of data, observing changes on a country average level and by each nation.

Generally, we see that people feel similarly about their nation's direction of travel and the state of their economy (with some exceptions).

There's been a shift in the top concerns, with crime & violence now the most worrying issue.

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## India Rewrites CX Rules

While price sensitivity has traditionally driven purchase decisions, Indian consumers are increasingly valuing the overall experience.

In a country where 71% of customers actively choose brands because they know the experience will be good, India has quietly become one of the world's most experience-conscious markets.

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## Thailand Auto Trends

Chinese automakers are revolutionising the market with cutting-edge technology, innovative style, and strategic insights into the booming EV sector.

Delve into the Thai consumer's mindset, balancing excitement for modern tech against concerns of quality and longevity. Understand the crucial role of hybrids as the market navigates its readiness for an electric future.

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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](mailto:IKC@ipsos.com) with any comments, including ideas for future content.

Cover photo: **Campo de Piedra Pomez, Argentina**. Argentinians are the most likely to say 2025 was personally a bad year for them.

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