

THE CHANGING EUROPEAN CONSUMER: FROM UNCERTAINTY TO OPPORTUNITY

A Shoptalk Presentation by
**Ted Utoft, Ipsos Head of
Behavioural Strategy**

THE BIG PICTURE

What does the consumer landscape look like 2026 – 2030?

25%

of the way through the
21st century ...



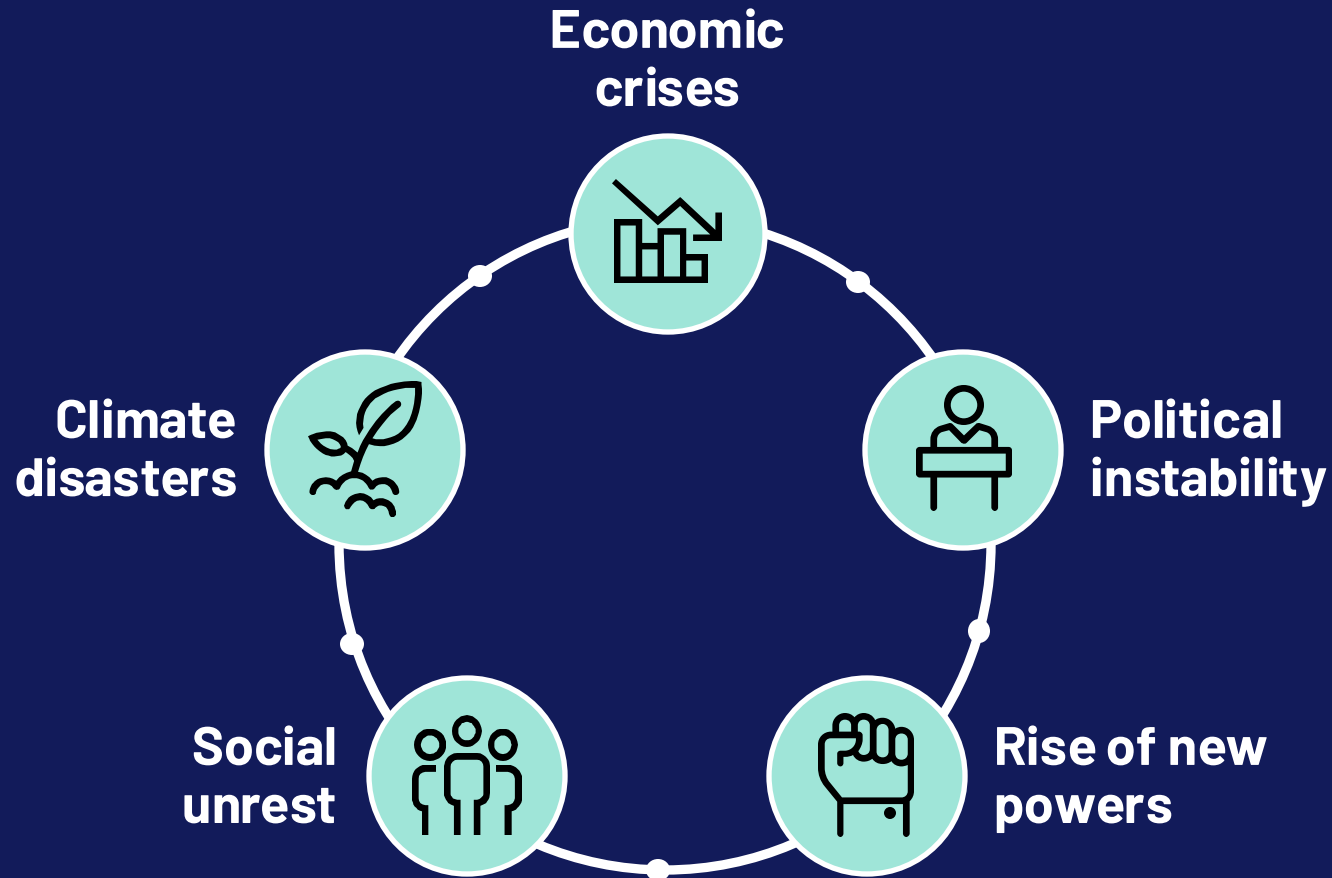
LOADING ...

Halfway through 'The Uneasy Decade'

POLITICAL INSTABILITY



More events, more frequently



A roundup of the latest on the conflict

Four in ten (39%) Dutch consider the attacks a bad thing, compared with 21% who view them positively.

Over 8 in 10 Britons concerned about impact of Iran conflict on fuel/energy prices as belief in the special relationship falls.

79% of French express a fear that the conflict will spread beyond the Middle East.

72% of Spaniards describe the military campaign as unjustified, with only 12% saying the actions of the US and Israel are justified.

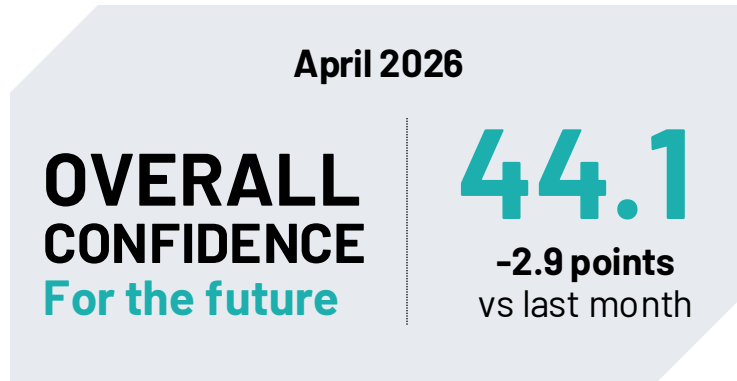
72% of Europeans believe the US will have a negative impact on world affairs in the next decade.



Source: [The Iran Conflict | Ipsos](#)

© Ipsos | The Changing European Consumer | June 2026 | Version 1 | Client Use Only

Consumer sentiment is at a historic low across markets



Country	Feb '26	Mar '26	Apr '26	MoM Change (Mar→Apr)
France	41.1	42.0	38.1	▼ -3.9
Spain	50.0	51.2	47.2	▼ -4.1
Great Britain	49.0	46.0	43.3	▼ -2.7
EU & GB Average	47.1	47.0	44.1	▼ -2.9

The April Ipsos Global Consumer Confidence Index recorded its second biggest decline ever, behind only April 2020 at the start of the COVID-19 pandemic, with the global index falling 2.7 points to 46.7 amid the ongoing U.S.

By April 2026, France had fallen below the 40-point mark, joining Japan and Turkey as the only countries in the survey with a National Index below 40.

Base: n.1,022 adults aged 16+ interviewed via Ipsos B&A's Acumen Online Barometer Ireland. Fieldwork on the latest wave was conducted from the 5th to the 20th of February.

Source: [Home - Ipsos B&A](#)

© Ipsos | The Changing European Consumer | June 2026 | Version 1 | Client Use Only



52%

of employees globally cite job security is the second most important factor when considering a role – only #2 to salary

91%

of French consumers consider the economy to be in a bad situation – the highest disapproval globally

CLIMATE CHANGE

75%

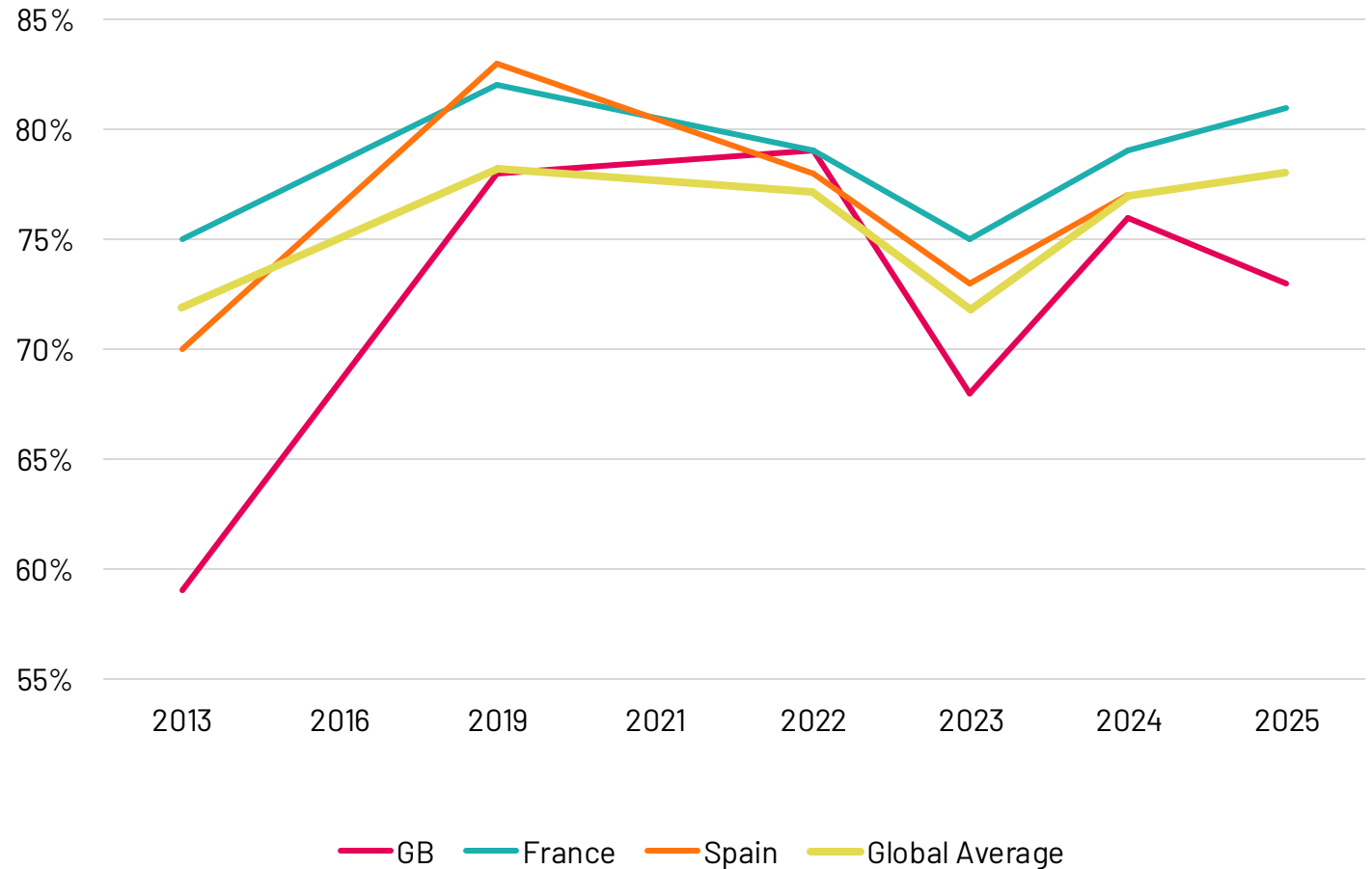
of Europeans agree we are heading for environmental disaster unless we change our habits quickly – rising to 81% in France

63%

of Britons, on the other hand, feel they are already doing all they can – the lowest in comparison to their European neighbours

The urgency that we are heading towards environmental disaster remains among key priorities

Q. 'We are heading for environmental disaster unless we change our habits quickly'
%Agree



Base: n.33,083 adults surveyed in the markets shown between 23 May and 6 June 2025. For full methodology see [ipsosglobaltrends.com](https://www.ipsosglobaltrends.com).

Source: Ipsos Global Trends 2025

© Ipsos | The Changing European Consumer | June 2026 | Version 1 | Client Use Only

69%

of citizens say they are
already doing all they
can to save the
environment

European Average Score

Base: n.33,083 adults surveyed in the markets shown between 23 May and 6 June 2025. For full methodology see [ipsosglobaltrends.com](https://www.ipsosglobaltrends.com).
Source: Ipsos Global Trends 2025

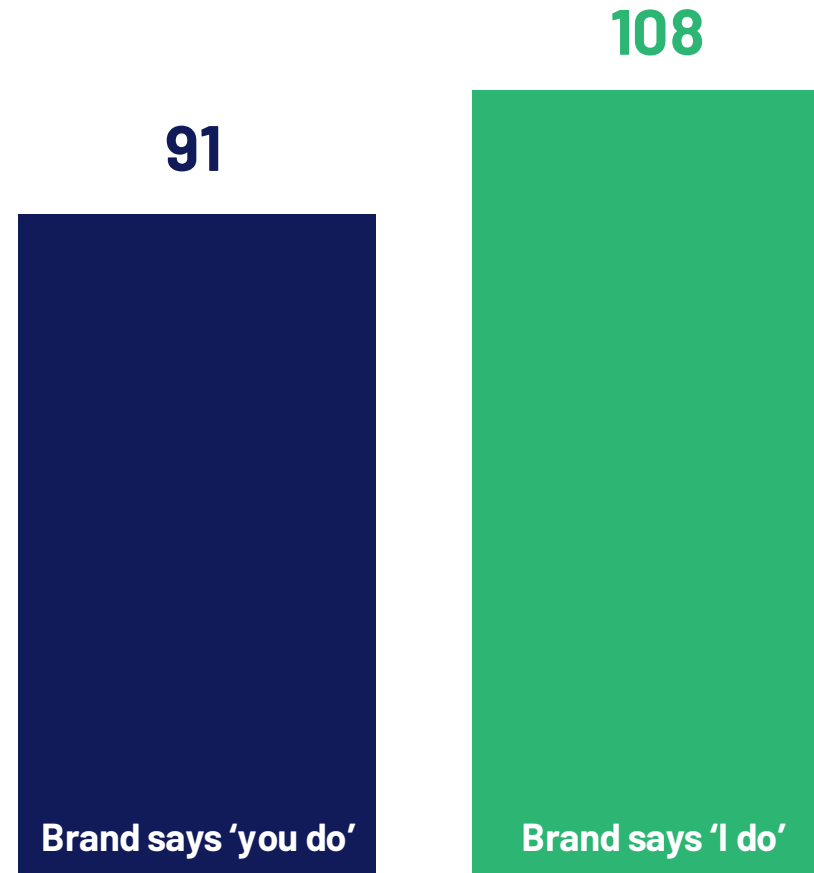
© Ipsos | The Changing European Consumer | June 2026 | Version 1 | Client Use Only



Sustainability advertising that shows brands taking responsibility performs better than when asking consumers to take the burden

Creative Effect Index

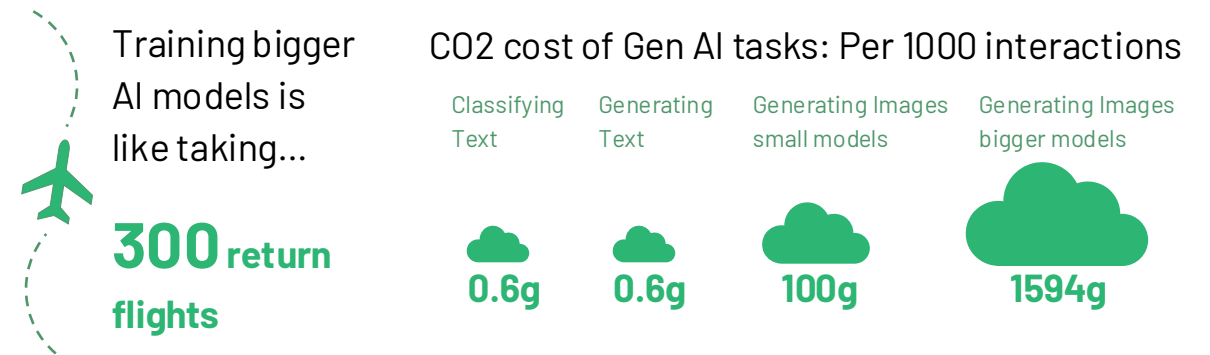
Ipsos' CreativeSpark ad effectiveness measure linked to sales lift in market



Gen AI could be part of the solution, but its environmental footprint is adding to the pressure

AI is vital to the success of sustainability:-

- Demand optimisation
- Improve productivity
- Forecasting and Modelling
- Data Mining to identify trends
- Advanced analytics
- Waste management



TECHNOLOGY & THE 'TECHNOWONDER' OF AI



52%

***Agree "I fear that technical progress is
destroying our lives"***

The Magnificent Seven: boom and/or bubble?

The total market capitalisation of the Magnificent Seven stock

\$21.2 trillion as of Feb. 9, 2026

The top eight shareholdings of Nest's default "2040 retirement date fund":

Apple; Microsoft; Nvidia; Amazon; Alphabet; Meta; Berkshire Hathaway; Tesla.

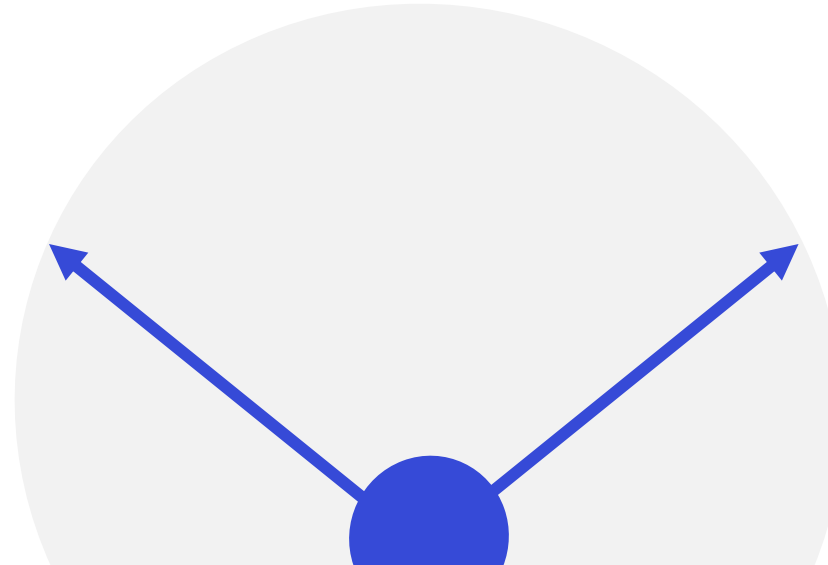


Citizens believe AI will change their lives in the near future

42%

of European citizens say
**AI has changed their
lives in the past 3-5
years.**

Global 53%



60%

of European citizens say
**AI will change their
lives in the next 3-5
years.**

Global 67%

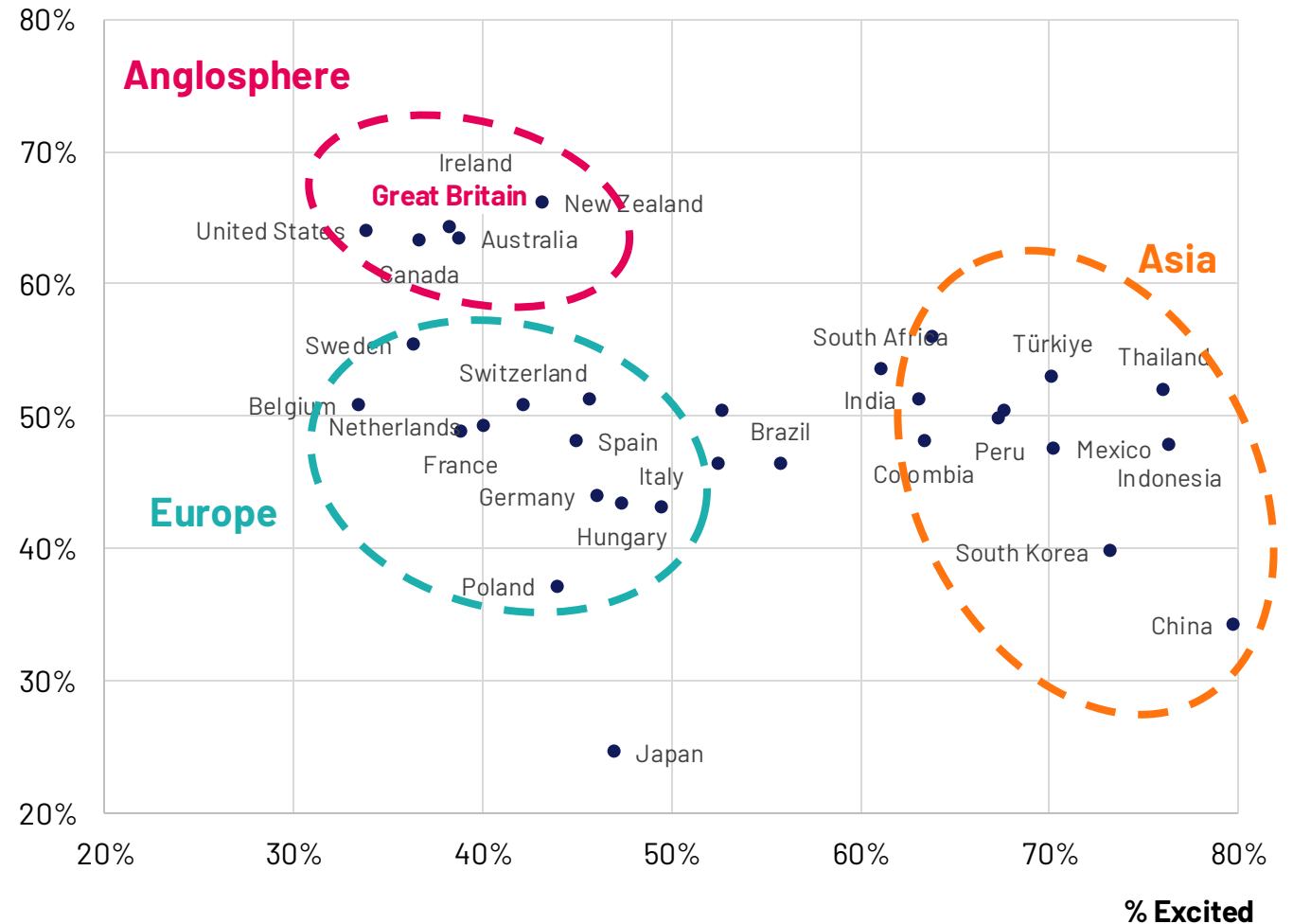
We're reacting against 'too much' tech....

How much do you agree or disagree with the following?

- Products and services using artificial intelligence make me nervous
- Products and services using artificial intelligence make me excited

Base: 23,685 online adults under age 75 across 32 countries, interviewed April 19 – May 3, 2024

% Nervous



And only

35%

**Of European citizens trust
companies using their data with AI**

Compared to 48% of citizens globally

Base: n.3460
Source: Ipsos AI Monitor

© Ipsos | The Changing European Consumer | June 2026 | Version 1 | Client Use Only



54%

of French consumers would use AI for researching products – but only 17% are open to autonomous purchasing

AI isn't enough. The right balance between digital and human interaction is key to creating customer satisfaction.

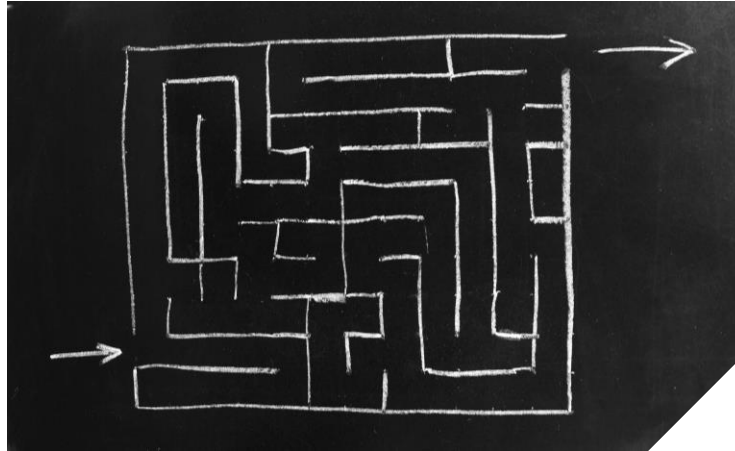
It isn't digitisation or
disruption you should
fear; it's **mediocrity** that
will drive away your
customers.



AI is reshaping the way customers interact with your brand



Customers are finding and engaging with your brand differently



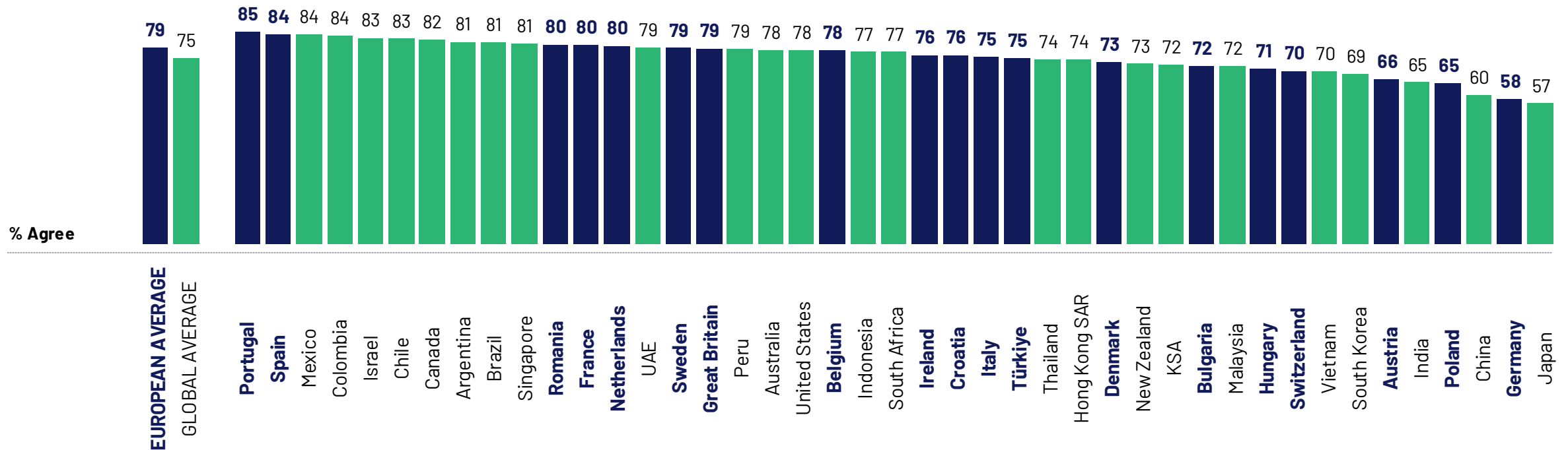
Generative AI is disintermediating your brand



The most influential sources are no longer the traditional paid/ earned/ owned mix

Beware the trap of dehumanisation: getting the right balance of technology and 'humanity' is essential

“Customer service is getting too automated and impersonal” %Agree



Base: n.33,083 adults surveyed in the markets shown between 23 May and 6 June 2025. For full methodology see ipsosglobaltrends.com.

Source: Ipsos Global Trends 2025

© Ipsos | The Changing European Consumer | June 2026 | Version 1 | Client Use Only



Three Key takeaways

Political instability is reducing consumer confidence and can inhibit shopper behaviours. Consider how your brand can bring calm in the storm.

Climate change is a consumer concern. Brands who can demonstrate they are making positive change and helping guide more sustainable consumer choices will win.

Tech & AI are as worrying as they are empowering to many consumers. Don't underestimate the human element in your brand and service delivery, paired with safe and efficient tech.

**DOWNLOAD
PDF HERE:**

QR CODE

THANK YOU



A presentation for
Shoptalk 2026 by

**Ted Utoft, Ipsos Head of
Behavioural Strategy**