

August 2026

IPSOS UPDATE

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

Ipsos Update August 2026

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

With the Iran crisis now approaching the six-month mark, it's clear the global economy has adapted better than initially feared. But consumers remain cautious. Confidence is neither collapsing nor convincingly recovering. The uncertainty caused by the conflict has added to an unease that was already present. The cost of living remains the number one concern in the US, Canada, Ireland, Türkiye, Singapore, Australia and Japan. And the latest What Worries the World release finds sentiment particularly subdued across the G7.

Here, the work of our Canadian team on the Endurance Economy is instructive. They describe a prolonged period of adjustment in which households,

businesses and institutions are adapting to conditions that appear structural rather than temporary. Their mid-year analysis outlines challenges that have clear parallels across many markets.

One country that has certainly been out of sorts recently is the UK. It now has a new Prime Minister, the seventh since 2016. Andy Burnham takes office with just 19% of Britons saying the country is heading in the right direction, 14 points lower than a year ago. Sometimes it's important to take a longer-term view, and our new We British report does just that. It charts how Britain has changed since the 1980s. In 1988, 72% were satisfied with their standard of living. Today, real GDP

per head is much higher, yet only 52% say the same. This nostalgia for the past, and impatience with the present, is a theme we'll revisit in next month's Ipsos Global Trends release.

Two new 30-country reports highlight the challenges governments face in balancing competing priorities. Our Global Infrastructure Index finds people questioning their country's ability to deliver major projects. They are open to private investment in infrastructure, provided it delivers results. Meanwhile, the Energy Transition Barometer highlights concerns about dependence on foreign energy sources. Two in three support investment in renewables, particularly solar. Yet most also want governments to prioritise low energy

prices, even if emissions rise.

AI is another area where people hold mixed views. Our new Shopping with AI paper finds consumers embracing AI for research and product comparisons, but remaining wary of letting it complete purchases, particularly higher-value ones. For now, shoppers want AI to enhance their journey, not replace it.

As ever, we look forward to great conversations with you all!



Simon Atkinson
**Chief Knowledge
Officer**

Poll Digest

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

USA:

63% of Democrats and 66% of Republicans want to better understand people from different political backgrounds.

Canada:

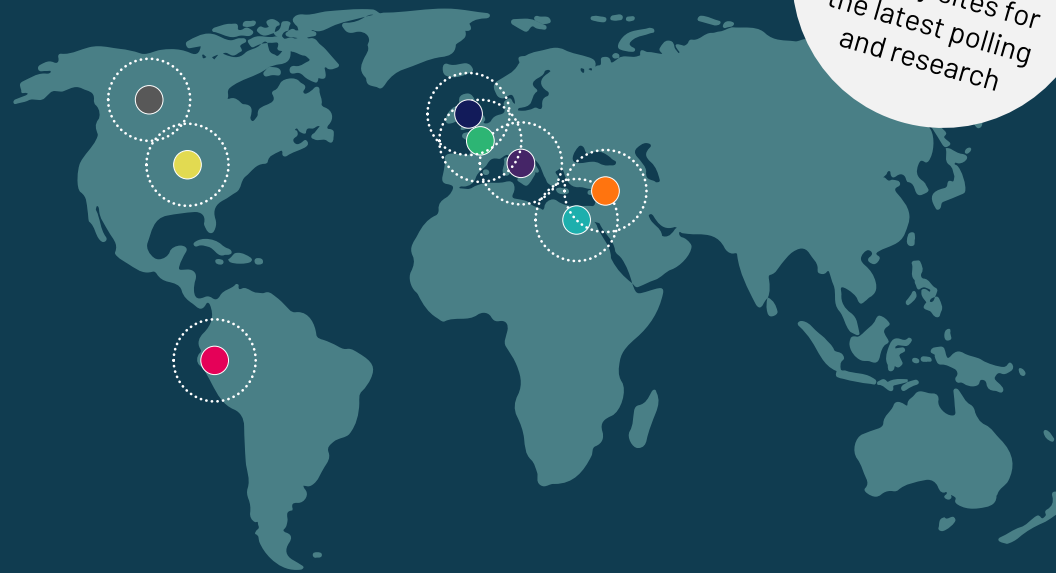
32% admit they have exaggerated their AI skills to colleagues.

Peru:

Peruvians are most likely to recommend going to Machu Picchu (58%), the Historic Center of Cusco (28%) and the Inca Baths (26%).

Egypt:

42% worry about not being able to financially cover daily expenses.



Lebanon:

55% feel emotionally drained either every day or several times a week.

France:

59% say Bastille Day is a crucial national holiday that should be celebrated with pride.

Great Britain:

39% cite immigration as an important issue, followed by the economy (37%).

Italy:

50% of Italians consider the mafia to be one of the country's most pressing problems, a sharp decline from the 62% recorded in 2022.

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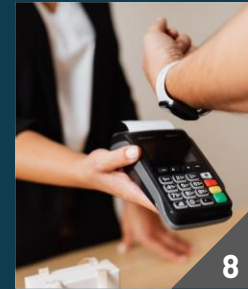
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Shopping With AI

How artificial intelligence is reshaping the purchase journey

Artificial intelligence (AI) is reshaping the shopper experience – but not in the ways many predicted. Drawing on data from across 15 markets, this Ipsos Views paper reveals that while AI is transforming how consumers discover products, shoppers are holding firmly onto final purchasing decisions.

Among consumers aware of AI tools, 27% are already using these to research products before buying, with another 43% open to doing so.

But shoppers are drawing firm boundaries around giving AI permission to make the final

purchase. While openness to AI-assisted research is high, only 9% of consumers currently allow AI to make autonomous purchases, and only 24% would even consider it.

Instead of replacing the shopping eco-system, AI is becoming a powerful enhancement layer.

With 71% of people believing AI should be approached with caution, trust – not technology – is the primary driver of adoption. This trust varies dramatically across age and geography.

For brands and retailers, the pressure is real. How do you justify AI investment when ROI is unclear?

How do you allocate budgets between digital innovation and store experience? Which touchpoints can you safely automate without losing customers? Which are worth maintaining or investing more in to balance the influence of AI?

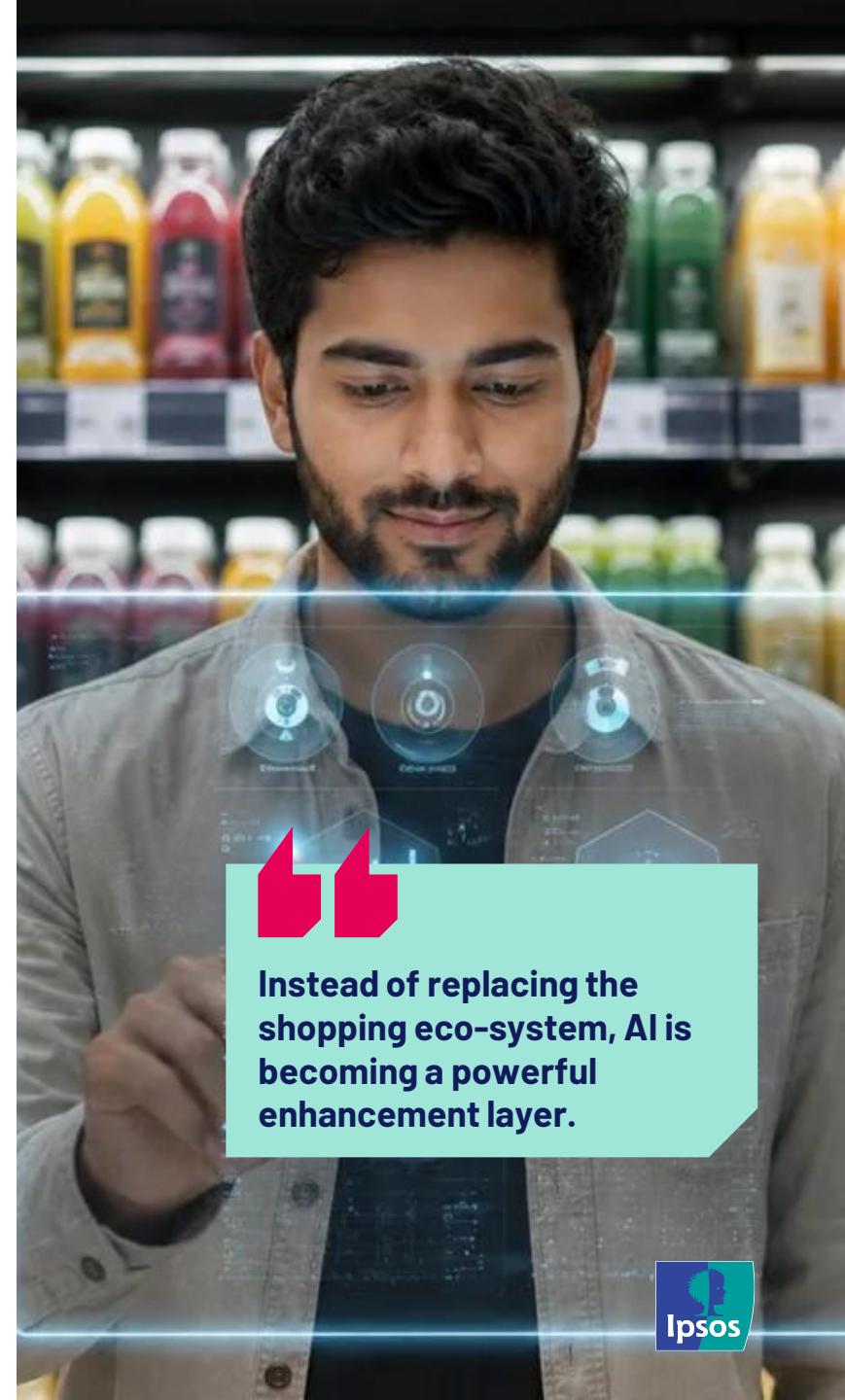
The answer isn't choosing sides – it's understanding exactly where AI adds value in your category's purchase journey.

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Instead of replacing the shopping eco-system, AI is becoming a powerful enhancement layer.





Support for the principle of offering refuge comes with scepticism about how this is working in practice.

World Refugee Day 2026

Attitudes remain stable, while questions about implementation persist

Against a backdrop of historically high levels of displacement, economic pressure and continued debate about immigration, Ipsos' annual World Refugee Day survey finds that public support for offering refuge remains strong – but support exists alongside doubts about how refuge systems work in practice.

Across 29 countries, two-thirds of people agree that people fleeing war or persecution should be able to take refuge in other countries (66%).

Strength of support varies by country, with 78% in both Sweden and the Netherlands in favour of

offering refuge, contrasting 44% and 47% in South Korea and Singapore, respectively.

But views can shift significantly over time, as demonstrated by Japan (from 23% in 2019 to 64% in 2026) and France (from 43% to 68%).

Support for the principle of offering refuge comes with scepticism about how this is working in practice. Six in ten, across 29 countries, express doubts about whether many people claiming to be refugees are in need of protection (61%).

Public opinion is most divided around restrictive policies. One in two (49%) agree that we must “close our borders to refugees entirely – we can’t accept any at this time”, while four in ten (41%) disagree.

Differences between countries are substantial, reinforcing that attitudes are shaped by national context rather than a shared global position.

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Differential Diagnosis

Considerations for synthetic data in healthcare market research

In an era when technology and data are shaping every aspect of industry, synthetic data will play a key role in the future of healthcare market research.

In this Ipsos Views paper, our Healthcare team offer expert insights into the application of synthetic data methodologies in the life sciences. They explore the current practical applications of synthetic approaches, the areas where they remain experimental, and the reasons why the healthcare domain imposes stricter validity demands than consumer research. They also provide valuable guidance on

harnessing these technologies while preparing the landscape for future innovation.

Key insights reveal:

- Where synthetic data is delivering value now – boosting rare disease samples, activating segmentations through AI-powered personas, and imputing missing variables.
- Why healthcare requires purpose-built approaches – clinical reasoning, expert respondents, and regulatory requirements create unique validation challenges.
- How to evaluate synthetic data quality – Ipsos' SURE Framework provides a structured approach across statistical similarity, utility, rarity, and expert validation.
- When to combine AI speed with human validation – the organisations seeing real results are augmenting, not replacing, primary research.

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Synthetic data tools have the power to enhance healthcare research meaningfully.

Energy Transition Barometer 2026

Affordability, security, and climate change

The global energy transition is entering a new phase, shaped as much by affordability and security concerns as by climate change. Ipsos' 2026 Energy Transition Barometer finds rising energy anxiety across 31 countries, with people increasingly focused on the cost, reliability and resilience of energy systems.

Affordability remains the dominant concern. Three in four people (76%) worry about rising energy costs, while 52% say it has become more difficult to pay energy bills and almost half (49%) have cut spending elsewhere to cover those costs. The greatest pressure is

being felt in emerging economies and countries heavily exposed to energy price shocks.

Energy security has risen sharply up the public agenda following geopolitical tensions. Seven in ten (70%) believe their country relies too much on foreign energy sources, while 60% support prioritising energy independence even if it leads to higher costs. At the same time, 53% want governments to prioritise low energy prices, even if emissions increase, highlighting a growing tension between climate ambitions and economic realities.

Concerns about reliability add

another layer of uncertainty. Less than half (46%) are confident their region can meet future electricity demand, and only 35% believe grids are prepared for the energy needs of AI data centres.

Despite these pressures, support for the energy transition remains strong. Two-thirds (67%) support investment in renewable energy and storage, while solar power enjoys overwhelming public backing.

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52%, across 31 countries, say it has become more difficult to pay energy bills.

Global Infrastructure Index 2026

Continued appetite for investment in infrastructure

The latest Global Infrastructure Index from Ipsos and the Global Infrastructure Investor Association (GIIA) finds strong competition for citizens' top infrastructure investment priorities.

The 2026 survey – carried out by Ipsos in 29 countries during April and May – finds citizens prioritise water supply and sewerage more than anything else (chosen as a priority by 42%), with new housing supply in second place (37%). They are closely followed on 36% by three sectors; rail infrastructure, solar energy infrastructure and pavements, footpaths and pedestrian areas.

The findings reveal considerable variation in priorities among the 29 countries. At its most extreme, water supply and sewerage are chosen as an investment priority by 72% in South Africa and only 19% in South Korea, while new housing supply was chosen by 53% in Netherlands and just 5% in Japan.

Meanwhile, four in ten (38%) say they are satisfied with infrastructure in their country overall, a return to levels recorded in 2023 after a small improvement in 2024 (40%). Three in ten (30%) are dissatisfied. A third say they are neither satisfied or dissatisfied (29%) or don't know (3%).

However, there have been sharp falls in satisfaction between 2024 and 2026 in three G7 countries; Great Britain and Germany (both 11 percentage points) and in the U.S. (8 percentage points). Satisfaction has also fallen in Mexico, Thailand and Indonesia.

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57% think their country is not doing enough to meet its infrastructure needs.



We British

From Walkmans to Wi-Fi to what?

Ipsos' latest *Understanding Society* report examines how Britain has changed over the past four decades, comparing attitudes and behaviours from the 1980s with those of today. Britain has become more liberal, diverse and technologically connected, but also more pessimistic about the country's future and less trusting of its institutions.

Despite most Britons remaining broadly satisfied with their own lives, confidence in how the country is run has deteriorated sharply. Trust in politicians, government, public services and social mobility has declined, while

economic pessimism is at record levels. Many feel the social contract is no longer delivering, contributing to a fragmented political landscape and growing feelings of national decline.

Britain is significantly more accepting of different lifestyles, ethnicities, family structures and sexual identities than it was in the 1980s. Morality is increasingly based on ideas of autonomy, consent and harm rather than traditional religious rules. Yet while social values have liberalised, the public remains divided on economic questions such as taxation, welfare and the balance

between individual responsibility and collective support.

The report also highlights how technology has transformed everyday life. Smartphones, the internet and social media are now essential parts of modern living, creating new opportunities alongside concerns about children's wellbeing, social cohesion and the impact of AI on jobs.

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Britain has become more liberal, diverse & connected, but also more pessimistic about the future.

Ads at the 2026 World Cup

What it took to break through

The 2026 FIFA World Cup presented brands with a major opportunity to connect with global audiences, but Ipsos' analysis suggests that simply relying on familiar football imagery was not enough to stand out. While many advertisers leaned heavily on traditional World Cup creative cues such as match action, stadiums and sports bars, the most effective campaigns found ways to differentiate themselves.

Ipsos research showed that distinctive brand assets were key. The strongest performing ads used recognisable product iconography and branding to

ensure audiences immediately understood who the advertisers were.

The findings reinforce a long-standing challenge for event sponsorship marketing: major sporting moments naturally attract attention, but they can also make advertising look and feel interchangeable. Brands that relied solely on football-themed settings risked blending into a sea of similar creative executions.

The analysis also highlights the value of balancing emotional engagement with distinctiveness. World Cup advertising works best when it captures the excitement

and cultural significance of the event while maintaining a strong link to the brand. Consumers may remember the football, but advertisers need them to remember who delivered the message.

Winning attention during a high-profile global event is not simply about tapping into the occasion but moving beyond conventions and using distinctive assets.

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Brands that relied solely on football-themed settings risked blending into a sea of similar creative executions.



76% of Canadians cite "rising prices and inflation" as a personal risk.

The Endurance Economy at mid-2026

Consumer mindsets show no sign of anticipated recovery

Six months into 2026, the assumption that easing inflation and stabilising interest rates would mark a swift return to economic normality looks increasingly out of touch with reality. Rather than a typical recovery cycle, Canada is operating in a period of sustained constraint, where long-term adaptation defines consumer behaviour.

While inflation may be normalising, Canadians continue to navigate a prolonged period of financial caution, constrained optimism and structural uncertainty.

Three signals shape the current environment:

- 1. Affordability remains the dominant lens** through which Canadians interpret economic conditions. **76%** of Canadians cite "rising prices and inflation" as a personal risk.
- 2. Adaptation has become more important than recovery.** Rather than waiting for conditions to return to previous norms, Canadians have increasingly adjusted their behaviours under new constraints; **42%** report eating at restaurants less, **29%** are cutting back on social/entertainment spending.

- 3. Canada has become more visibly bifurcated.** Asset-owning households experience the economy differently than income-dependent households and younger Canadians face different realities to older Canadians.

The question for business leaders is: how will prolonged adaptation reshape the market and are current strategies aligned to that reality?

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Shortcuts



KEYS: The Frontiers of Brand Trust

In today's era of rapid technological advancement and shifting geopolitical landscapes, are foundations of brand success being redefined? Brand professionals are operating in a world where AI accelerates the attention economy, making genuine human trust more valuable – and more elusive – than ever before.

Watch as we share new analysis and reflections from the Cannes Lions Festival of Creativity and more.

[WATCH HERE](#)

The Geopolitical Catalyst

For years, we discussed EVs in the future tense. But as the conflict in Iran continues to send ripples through global energy markets, that conversation has moved from the boardroom to the drawing room. For the urban Indian consumer, the geopolitical tension isn't just a headline; it is a direct tax on their daily commute. What we see in 2026 isn't just a "slowdown" in traditional segments but a profound shift.

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UK Political Polling – July 2026

Recent polling reveals widespread public desire for change across key policy areas as Andy Burnham enters Downing Street as Britain's seventh Prime Minister in ten years.

However, our research highlights the challenge of a lack of confidence in the political parties and leaders to deliver change, with a clear majority of the public unconvinced that any political party possesses a credible plan to meet their needs.

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2026 GP Patient Survey

This year's survey shows another positive shift in experience over the last year, building on improvements since 2024.

The survey asks about UK GP practice services, the last contact with the practice, the quality of care at the last appointment, overall experience of the GP practice, experience when the GP practice is closed, pharmacy services and NHS dentistry, as well as current health status.

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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: **Tokyo, Japan.** A majority [support offering refuge](#) to those seeking it.

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