

DYNAMIC PLANET

KEYS – A WEBINAR SERIES BY IPSOS

22nd April 2021



Watch the recording [here](#)

GAME CHANGERS



AGENDA

INTRODUCTION

Jennifer Hubber

Head of Ipsos Global Client Organisation

GREEN PLANET

Simon Atkinson

Chief Knowledge Officer, Ipsos

EMPTY PLANET

Darrell Bricker

Global Service Line Leader, Public Affairs, Ipsos

MOBILE PLANET

Peter Otto

Chief Client Director, Ipsos

SPOTLIGHT ON LATIN AMERICA

Ana Maria Leyva

Chief Client Officer, LATAM, Ipsos

DYNAMIC PLANET

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GAME CHANGERS Ipsos

Follow [this link](#) to access all the webinars from our KEYS series

GREEN PLANET?



KEYS – A WEBINAR SERIES BY IPSOS

Simon Atkinson
Chief Knowledge Officer

GAME CHANGERS



EARTH DAY 2021

Public opinion on climate change action

IPSOS GLOBAL ADVISOR

30 countries

GAME CHANGERS



STARTING POINT: HEADING FOR DISASTER?



80% globally say we are heading for environmental disaster unless we change our habits quickly

STARTING POINT: CLIMATE CHANGE IS ALREADY HERE



Just **1 in 25** of us know that **all of the last six years** were among the hottest on record

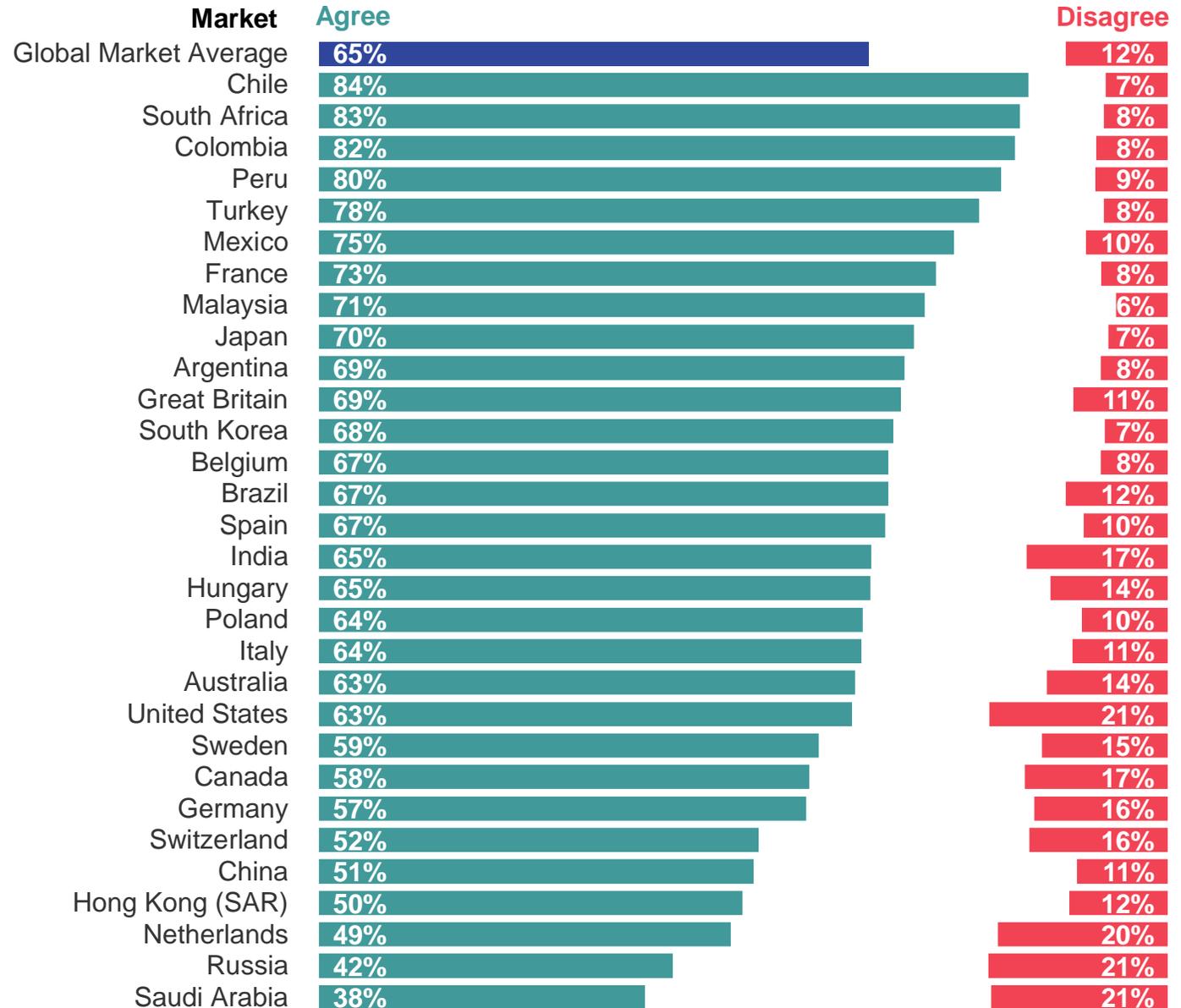
STARTING POINT: ACTION NEEDED BY GOVERNMENTS



31% agree their government has a **clear plan in place** for how government, businesses and people are going to work together to tackle climate change

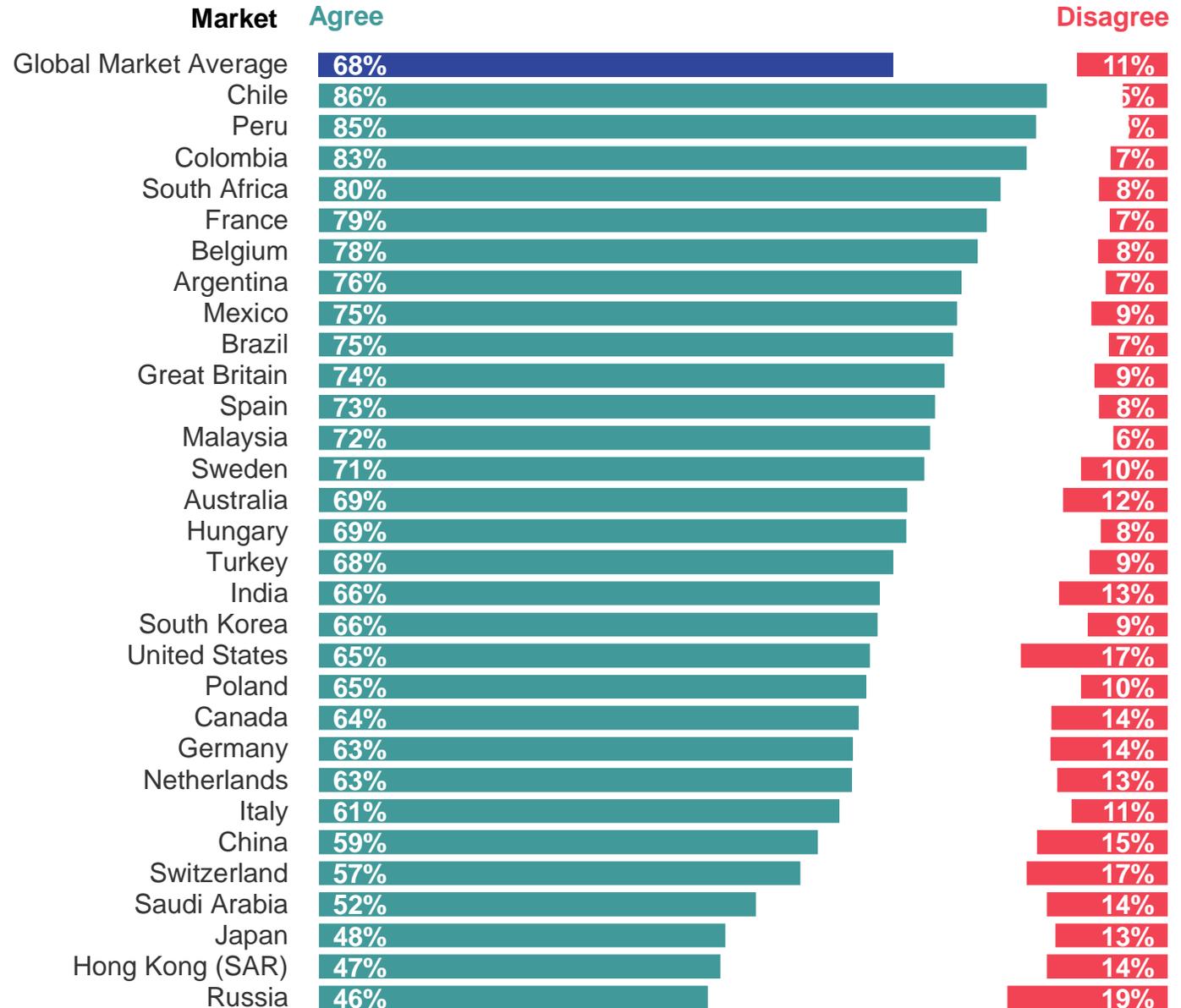
65% agree

“Governments will be failing citizens if they don’t act now on climate change”



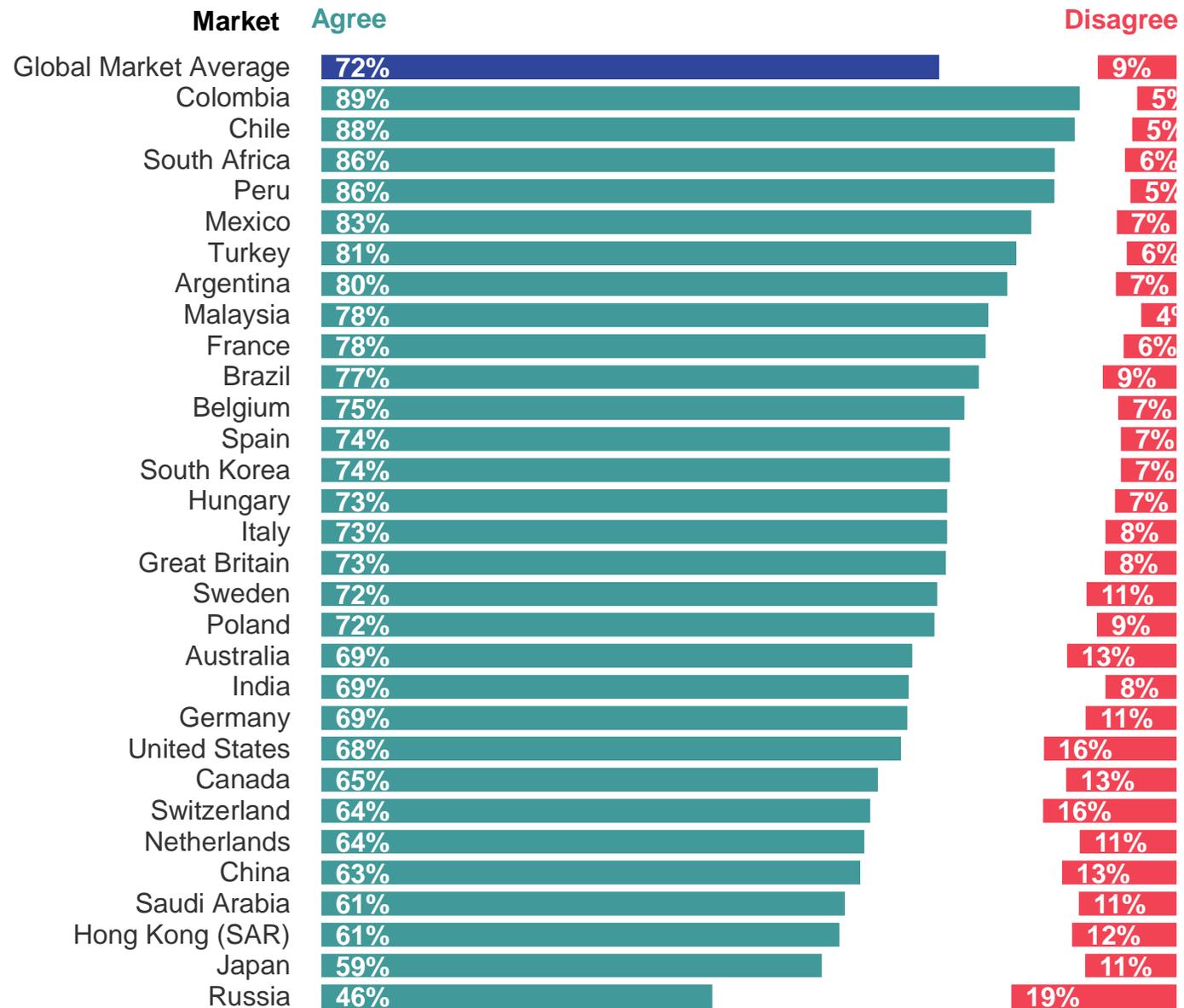
68% agree

“Businesses will be failing their employees and customers if they don’t act now on climate change”



72% agree

“If individuals like me do not act now to combat climate change, we will be failing future generations”



WHERE WE ARE TODAY: THE ENVIRONMENT IN CONTEXT



Q: *Which 2 or 3 topics do you find most worrying in your country?*



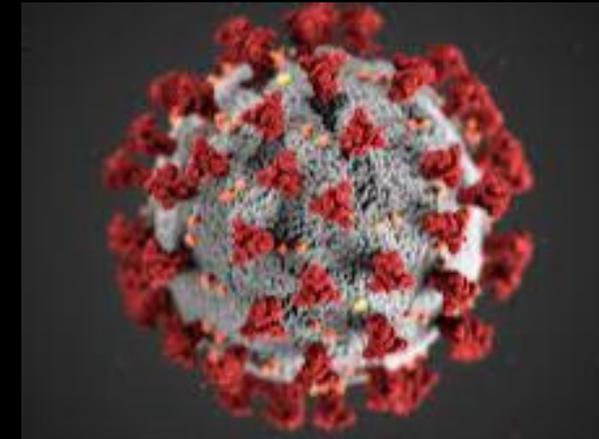
Climate Change #9

Threats against environment #13

CORONAVIRUS CRISIS DOMINATES THE SCENE



Q: *Which 2 or 3 topics do you find most worrying in your country?*



#1 issue
since April 2020

AN ECONOMIC CRISIS AS WELL AS A HEALTH CRISIS

CONSUMER & SHOPPER - 20 April 2021

Global consumer confidence reaches new pandemic high



Results for 24 markets [here](#)

“My country’s economy is in bad shape”

Argentina



Japan



Peru



France

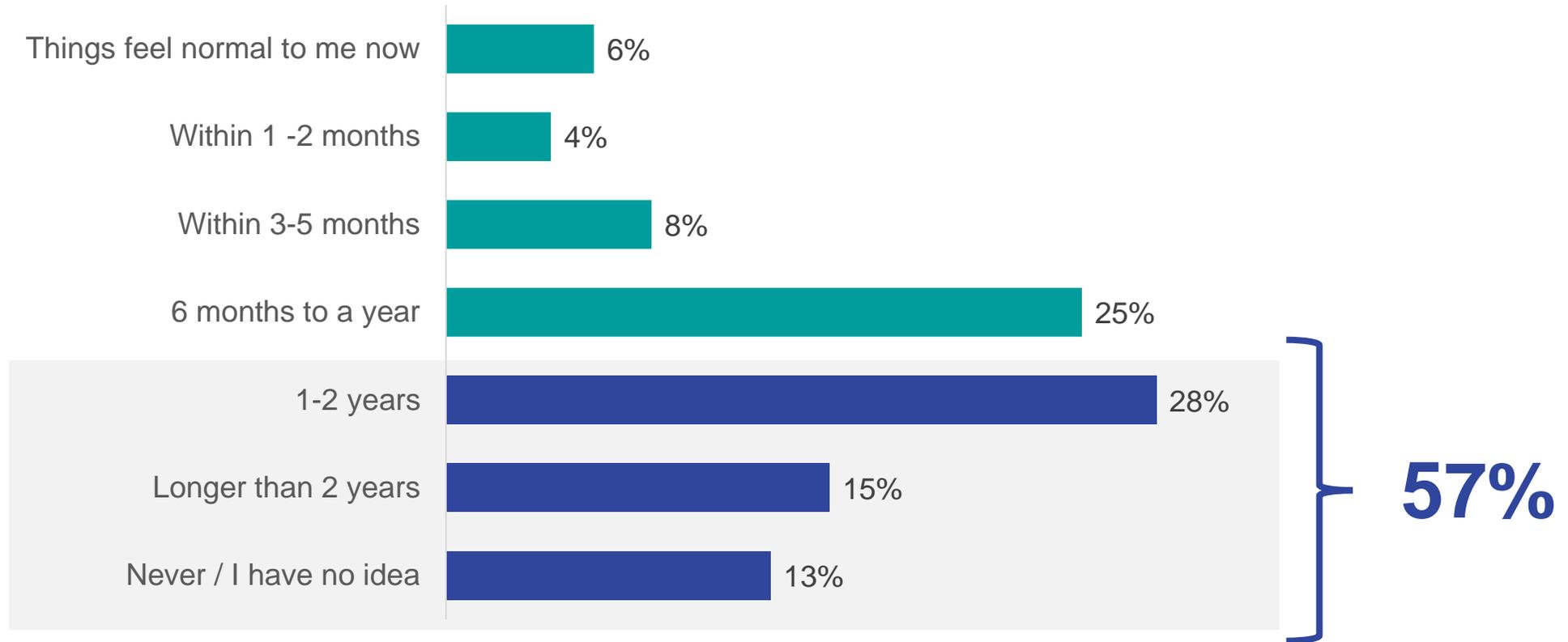


Italy



A PERSONAL CRISIS: WILL THINGS EVER GET BACK TO NORMAL?

Timeline to Normalcy: **April 2021**



Q: How long do you think it will take before things feel like they are getting back to normal?
Base: Global Country Average:14511

CLIMATE CHANGE CONCERN HASN'T GONE AWAY

65%

“It is important government actions prioritise climate change in the recovery from COVID-19”

April 2020

GAME CHANGERS





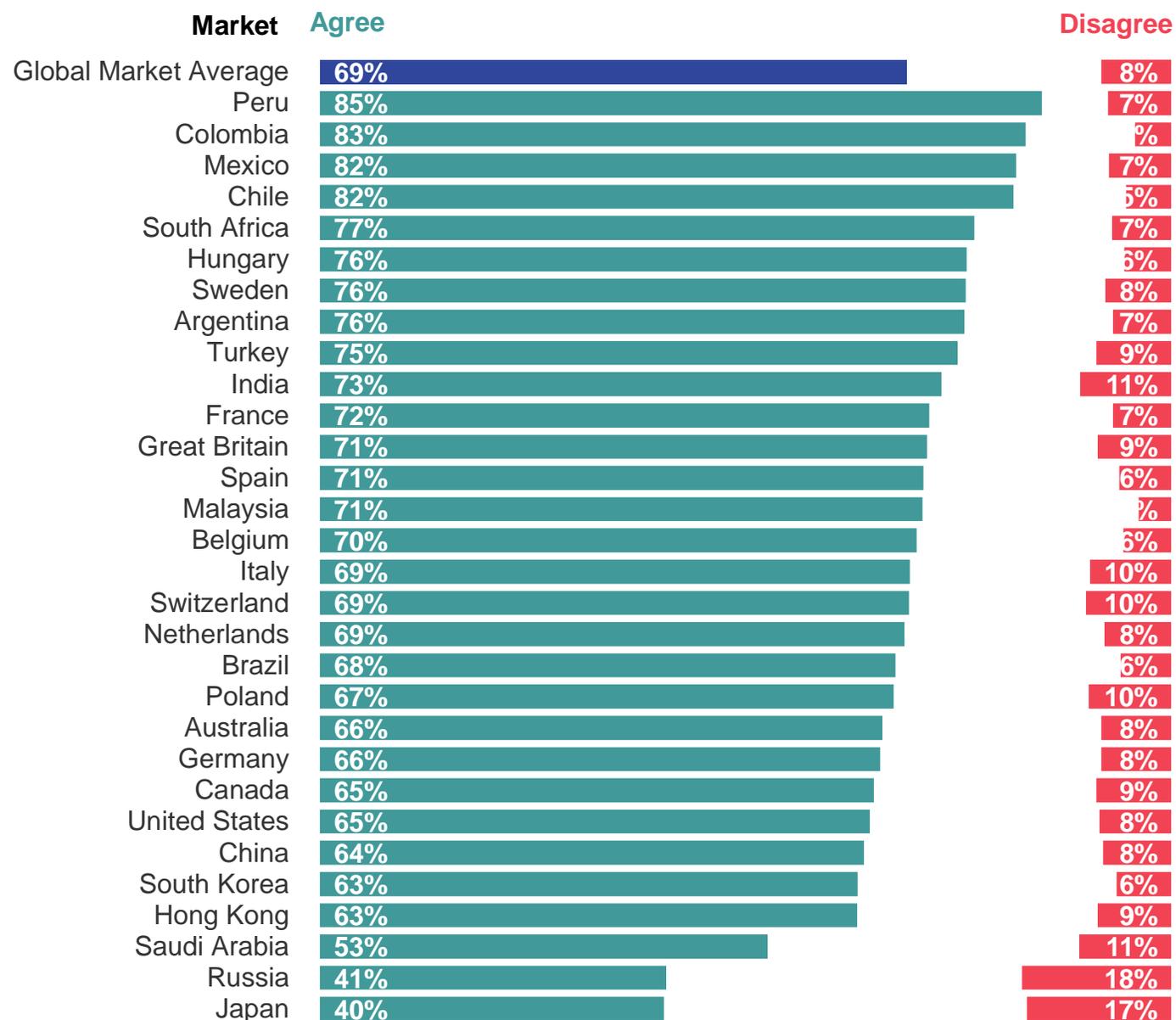
**A Global Market Average
of 7 in 10 agree:**

**“I understand what action
I need to take to play my
part in tackling climate
change.”**

Q.

To what extent do you agree or disagree with the following: *I understand what action I need to take to play my part in tackling climate change*

In almost every market, a majority agree they understand what action they need to take to tackle climate change.



Base: 21,011 online adults aged 16-74 across 30 markets, 19 Feb – 5 Mar 2021



**A Global Market Average
of 7 in 10 agree:**

**“I understand what action
I need to take to play my
part in tackling climate
change.”**

But do we really?

PERILS OF PERCEPTION

**Our understanding
vs
The reality...**

April 2021



GAME CHANGERS



Here is a list of “green” actions

Which three do you think would most reduce the greenhouse gas emissions of an individual living in one of the world’s richer countries?



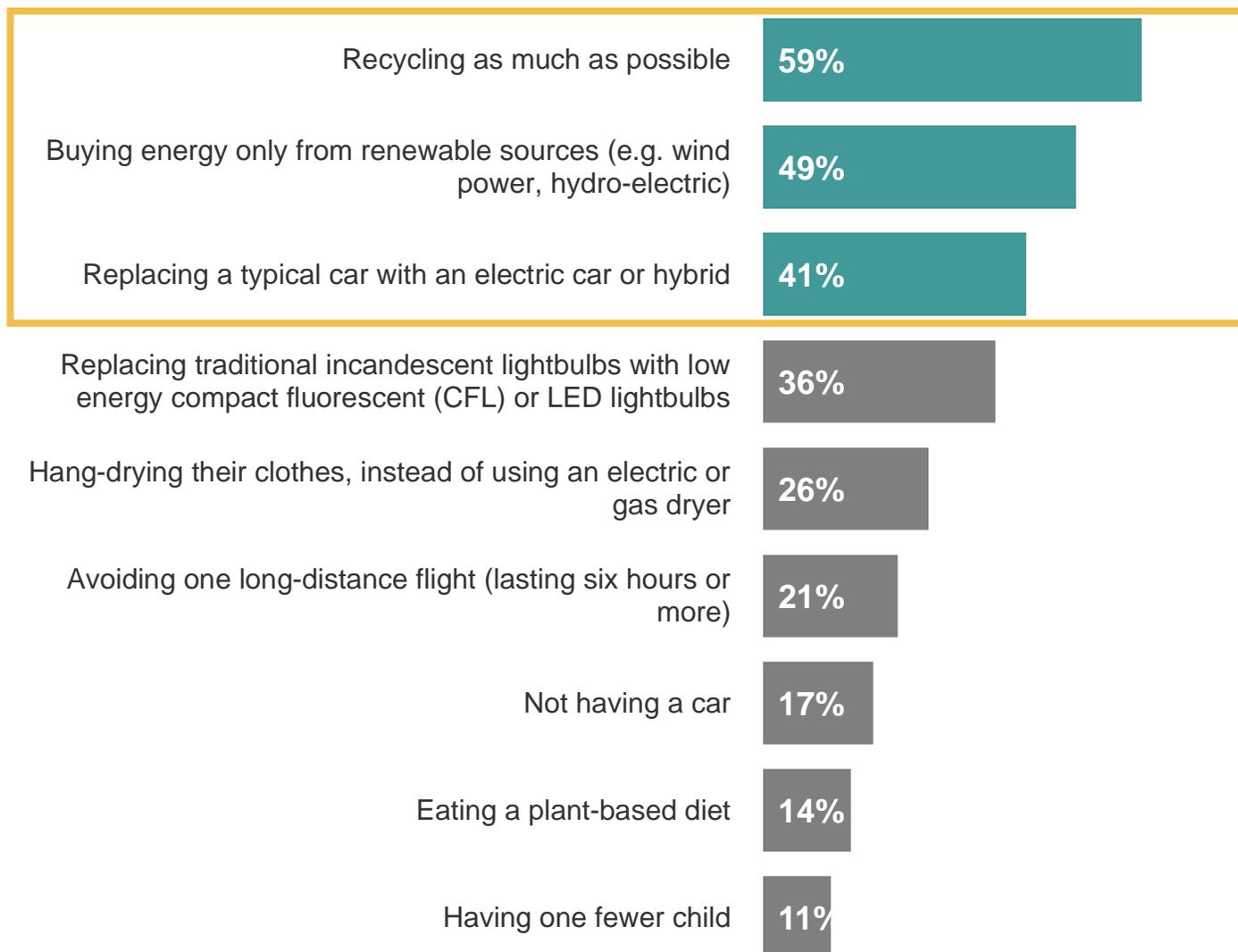
Q.

From this list of options, which three do you think would most reduce the greenhouse gas emissions of an individual living in one of the world's richer countries?

Respondents' choice:

1. Recycling
2. Renewable energy
3. Electric or hybrid car

Global Market Average



Base: 21,011 online adults aged 16-74 across 30 markets, 19 Feb – 5 Mar 2021

*Source: Institute of Physics, 2017. The most effective individual steps to tackle climate change aren't being discussed. Available here: <https://phys.org/news/2017-07-effective-individual-tackle-climate-discussed.html>

NB: Emissions saved from having one fewer child is calculated by quantifying future emissions of descendants based on historical rates, based on heredity

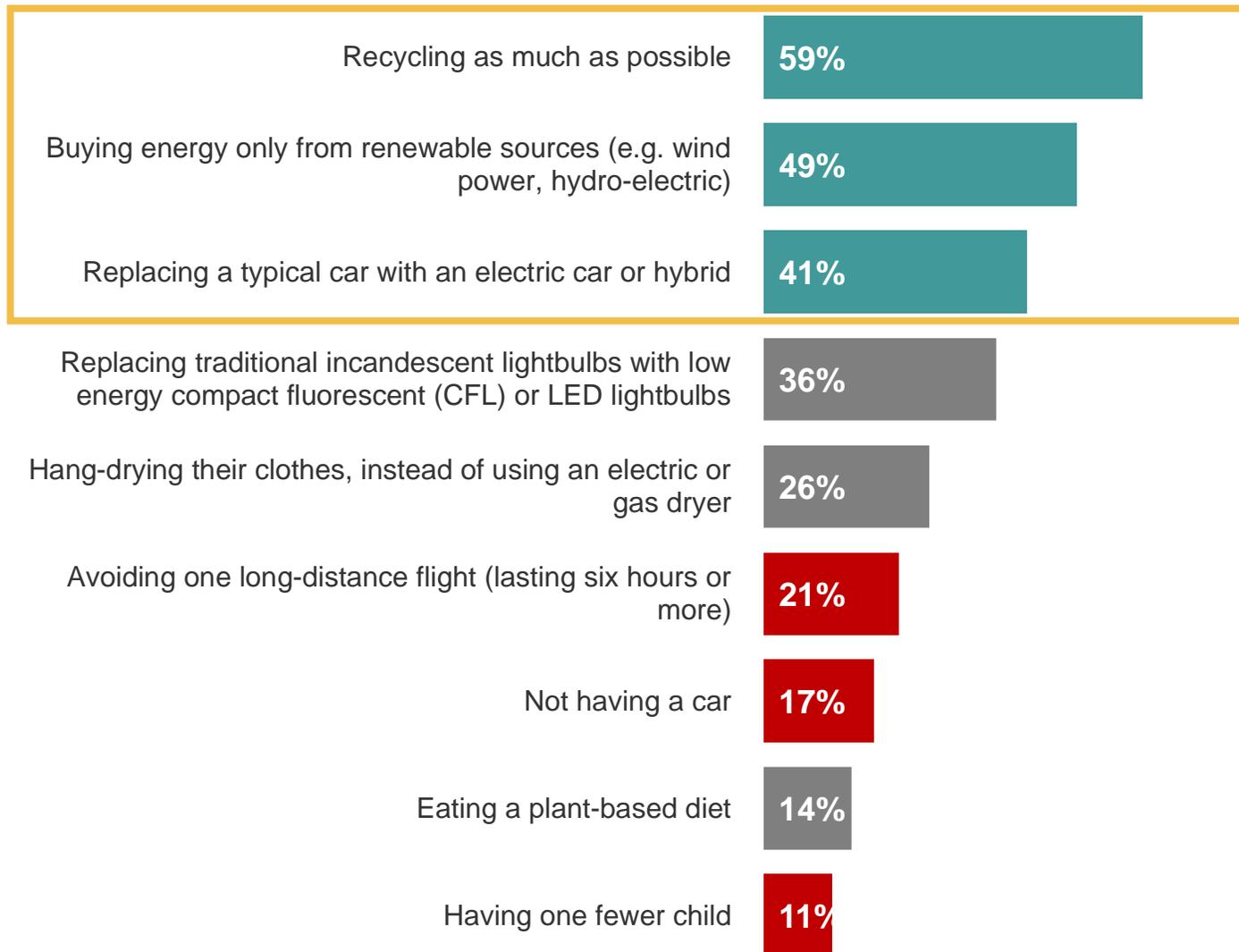
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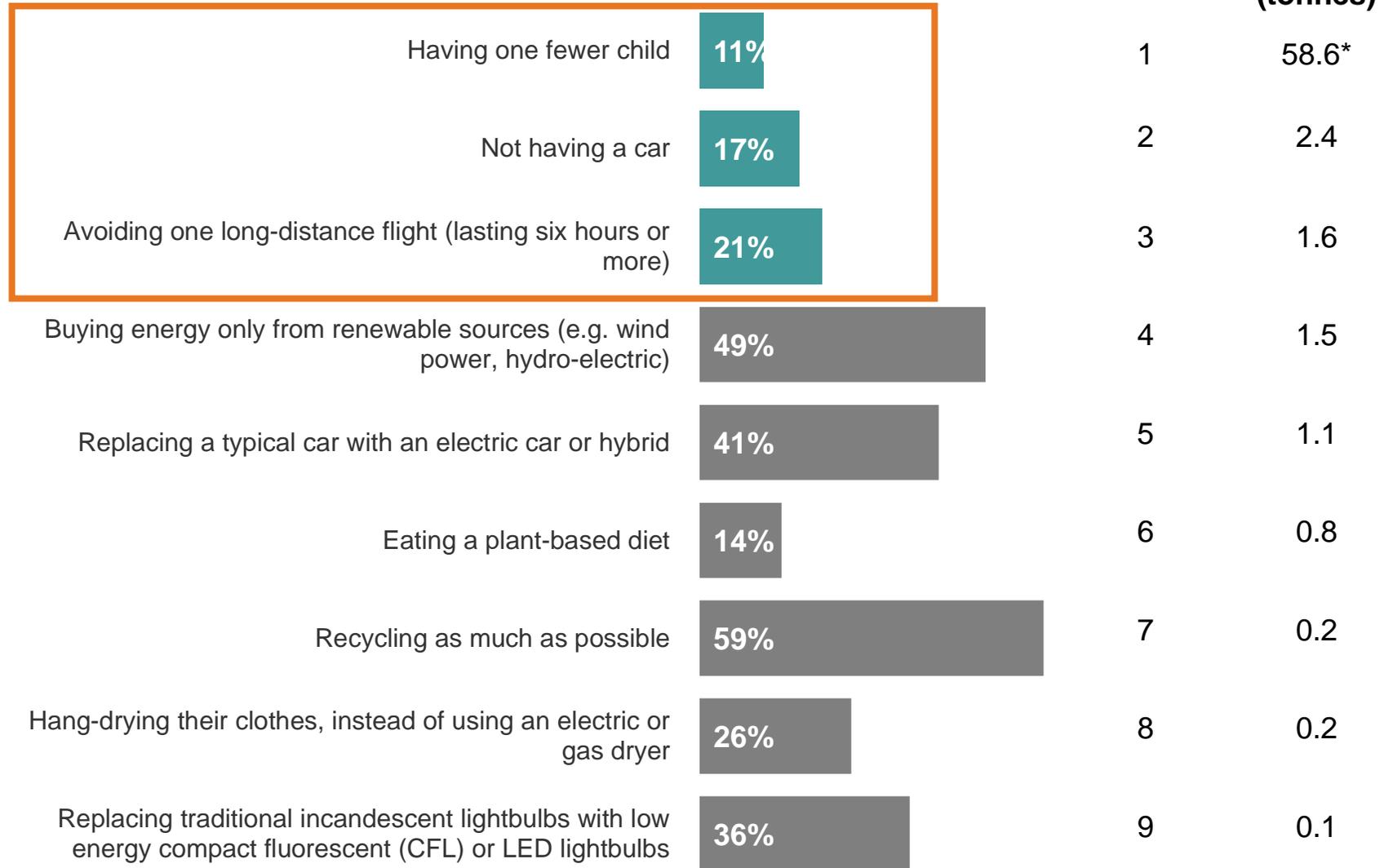
Q.

From this list of options, which three do you think would most reduce the greenhouse gas emissions of an individual living in one of the world's richer countries?

Reality:

1. (Even) fewer children
2. No car at all
3. Avoiding long haul flights

Global Market Average



Base: 21,011 online adults aged 16-74 across 30 markets, 19 Feb – 5 Mar 2021

*Source: Institute of Physics, 2017. The most effective individual steps to tackle climate change aren't being discussed. Available here: <https://phys.org/news/2017-07-effective-individual-tackle-climate-discussed.html>

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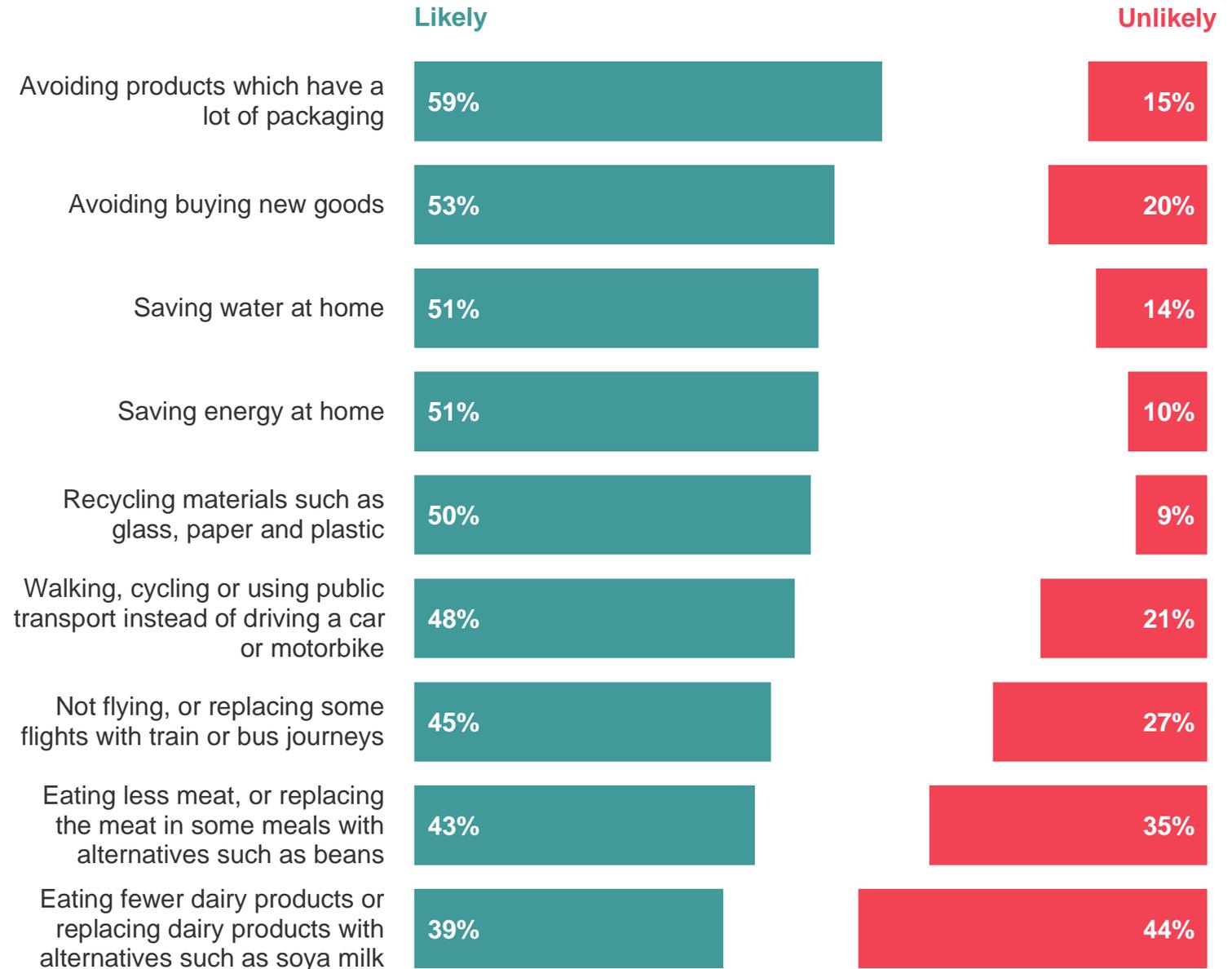
A cyclist wearing a helmet and a dark jacket is riding a bicycle on a city street. The cyclist is positioned in the center of the frame, moving from left to right. In the background, there are several parked cars, including a silver hatchback and a white SUV. The scene is set outdoors with trees and foliage visible in the distance. The overall tone is somewhat muted, with a focus on the cyclist and the urban environment.

Limiting our own contribution to climate change

What are we are “most likely to do” in 2021 to limit our contribution to climate change?

Many feel they are likely to take action in 2021

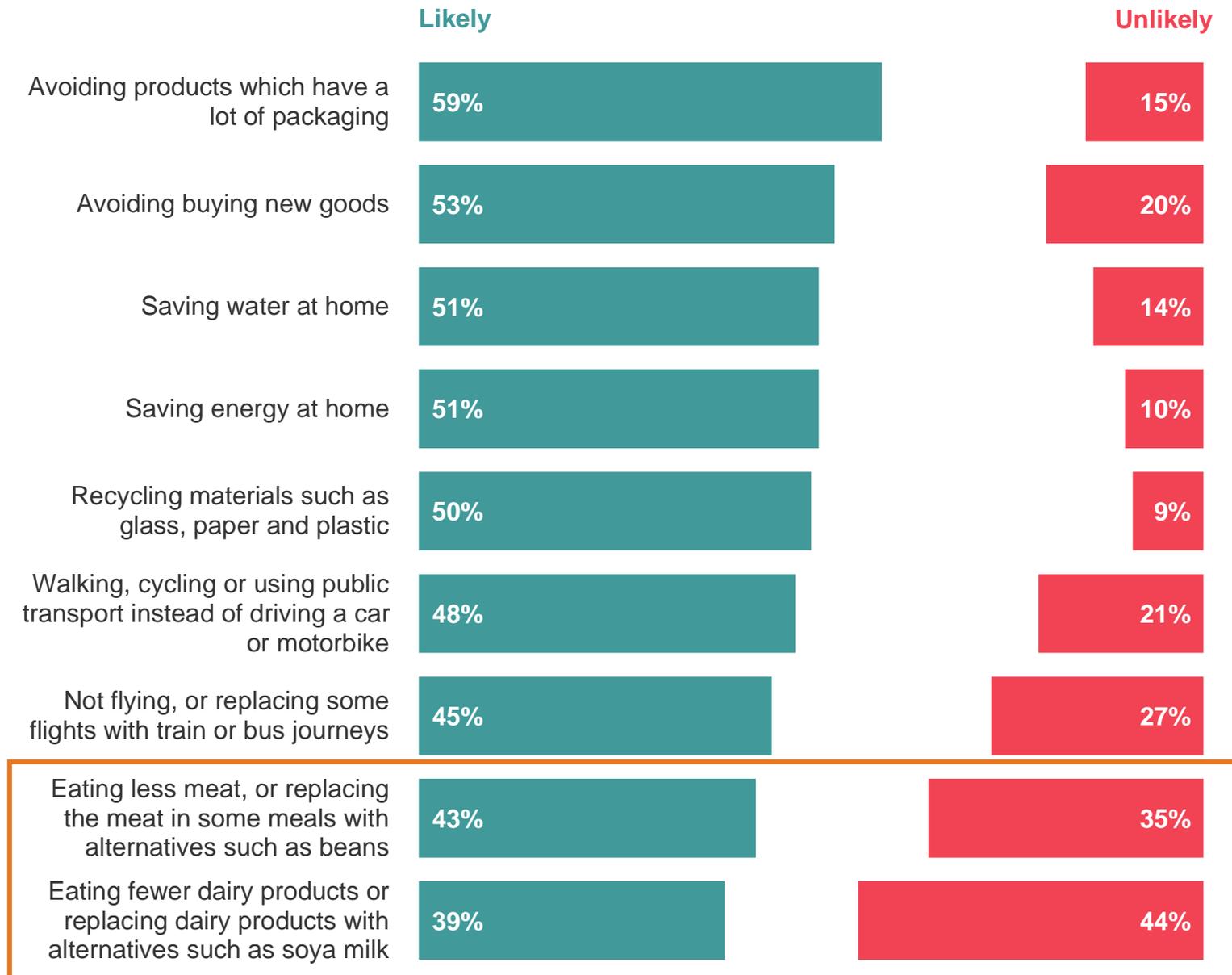
Q. Thinking about things you might do in order to limit your own contribution to climate change, how likely or unlikely would you be to make the following changes within the next year?



Base: 21,011 online adults aged 16-74 across 30 markets, 19 Feb – 5 Mar 2021

Many feel they are likely to take action in 2021, though “lower impact actions” are more popular than higher impact actions

Q. Thinking about things you might do in order to limit your own contribution to climate change, how likely or unlikely would you be to make the following changes within the next year?



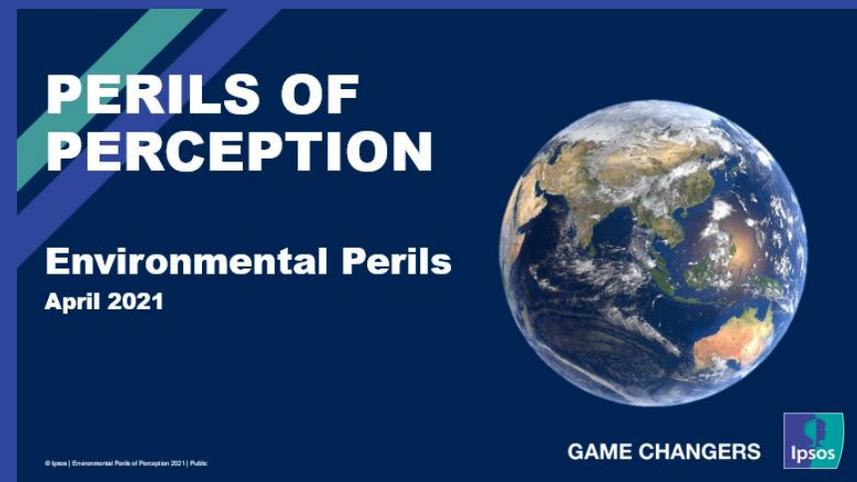
Base: 21,011 online adults aged 16-74 across 30 markets, 19 Feb – 5 Mar 2021

EARTH DAY 2021: WHERE ARE WE?

Consensus that we need to take action on climate change

Expectation for governments, businesses and individuals to act together

Underestimation of the most impactful climate actions we as individuals can take



Earth Day results [here](#)
Perils of Perception analysis [here](#)

EARTH DAY 2021: CHALLENGING OUR PRECONCEPTIONS



PERILS OF PERCEPTION

HOME SLIDES DATA ARCHIVE CONTACT [TAKE THE QUIZ](#)

THE QUIZ

How much do you think you know about what individuals can do to tackle climate change? Test yourself in our quiz and share your result using #IpsosPerils.

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© Ipsos | Perils of Perception 2021 | April 2021 | PUBLIC

Ipsos

The image shows a promotional graphic for a quiz. On the left, a screenshot of the website 'Perils of Perception' is displayed. The website has a navigation bar with links for 'HOME', 'SLIDES', 'DATA ARCHIVE', 'CONTACT', and a prominent 'TAKE THE QUIZ' button. Below the navigation is a section titled 'THE QUIZ' with a background image of hands holding a pen over a document. The text below the title asks how much the user knows about individual actions to tackle climate change and encourages sharing results with the hashtag #IpsosPerils. To the right of the website screenshot is a large, realistic image of the Earth from space. At the bottom right of the graphic, the text 'GAME CHANGERS' is written in white, and the Ipsos logo is visible in the bottom right corner. The entire graphic is set against a dark blue background with diagonal teal stripes.

Take the Quiz!

EMPTY PLANET



EMPTY PLANET

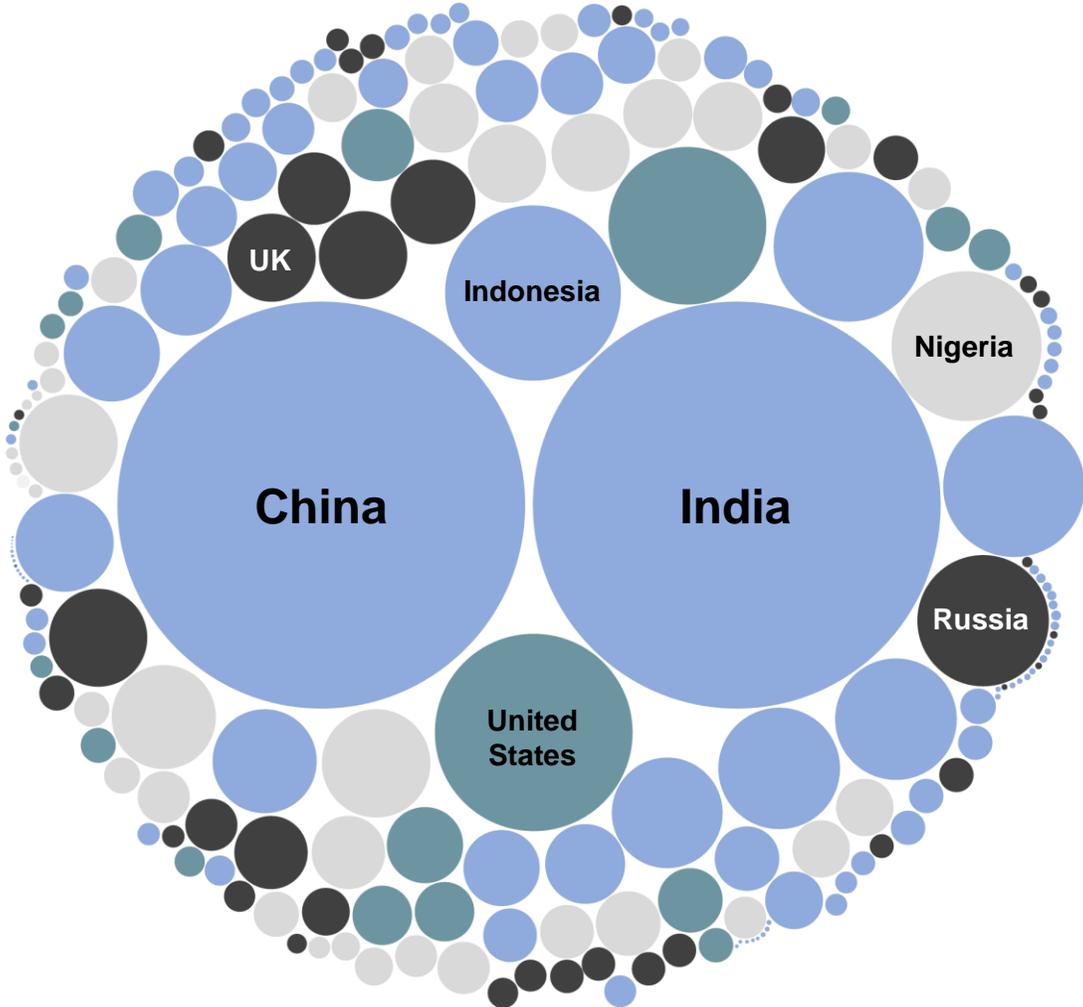
KEYS – A WEBINAR SERIES BY IPSOS

Darrell Bricker

Global Service Line Leader, Public Affairs

THE POPULATION BUST

COUNTRIES BY POPULATION SIZE



- Africa
- Americas
- Asia
- Europe
- Oceania

TOP 10 COUNTRIES BY POPULATION

2017

China	1.40B
India	1.38B
U.S.	325M
Indonesia	258M
Pakistan	214M
Brazil	212M
Nigeria	206M
Bangladesh	157M
Russia	146M
Japan	128M

2100

India	1.09B	↓	290M
Nigeria	791M	↑	585M
China	732M	↓	668M
USA	336M	↑	11M
Pakistan	248M	↑	34M
DR Congo	246M	↑	165M
Indonesia	229M	↓	29M
Ethiopia	223M	↑	120M
Egypt	119M	↑	103M
Tanzania	186M	↑	132M

KEY DEMOGRAPHIC FORCES



Urbanization



Fertility

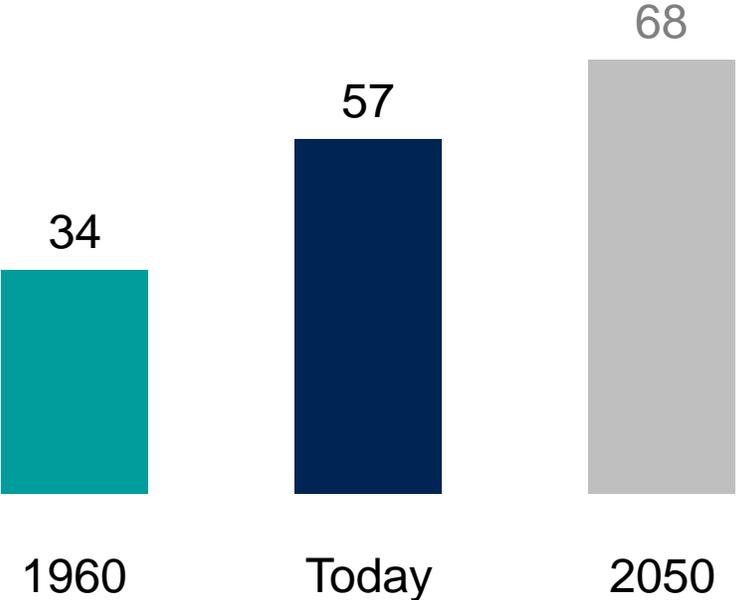


Ageing

URBANIZATION

THE BIGGEST MIGRATION

% of the World's Population Living in Urban Areas



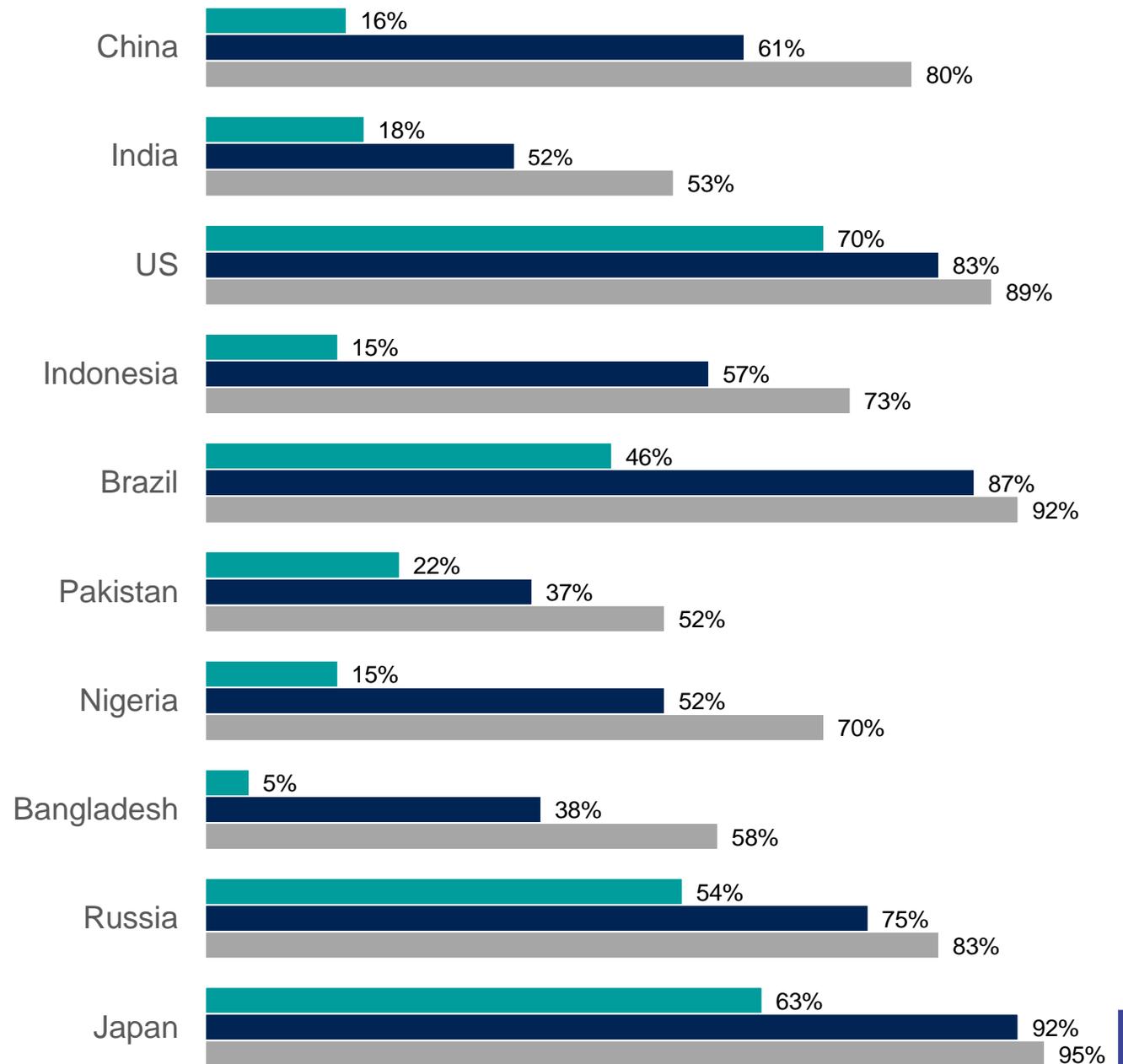
URBANIZATION

10 most populous countries

1960 – 34%

Today – 57%

2050 – 68%



FERTILITY



THE MAGIC NUMBER

2.1

FERTILITY WILL CONTINUE TO DECLINE...

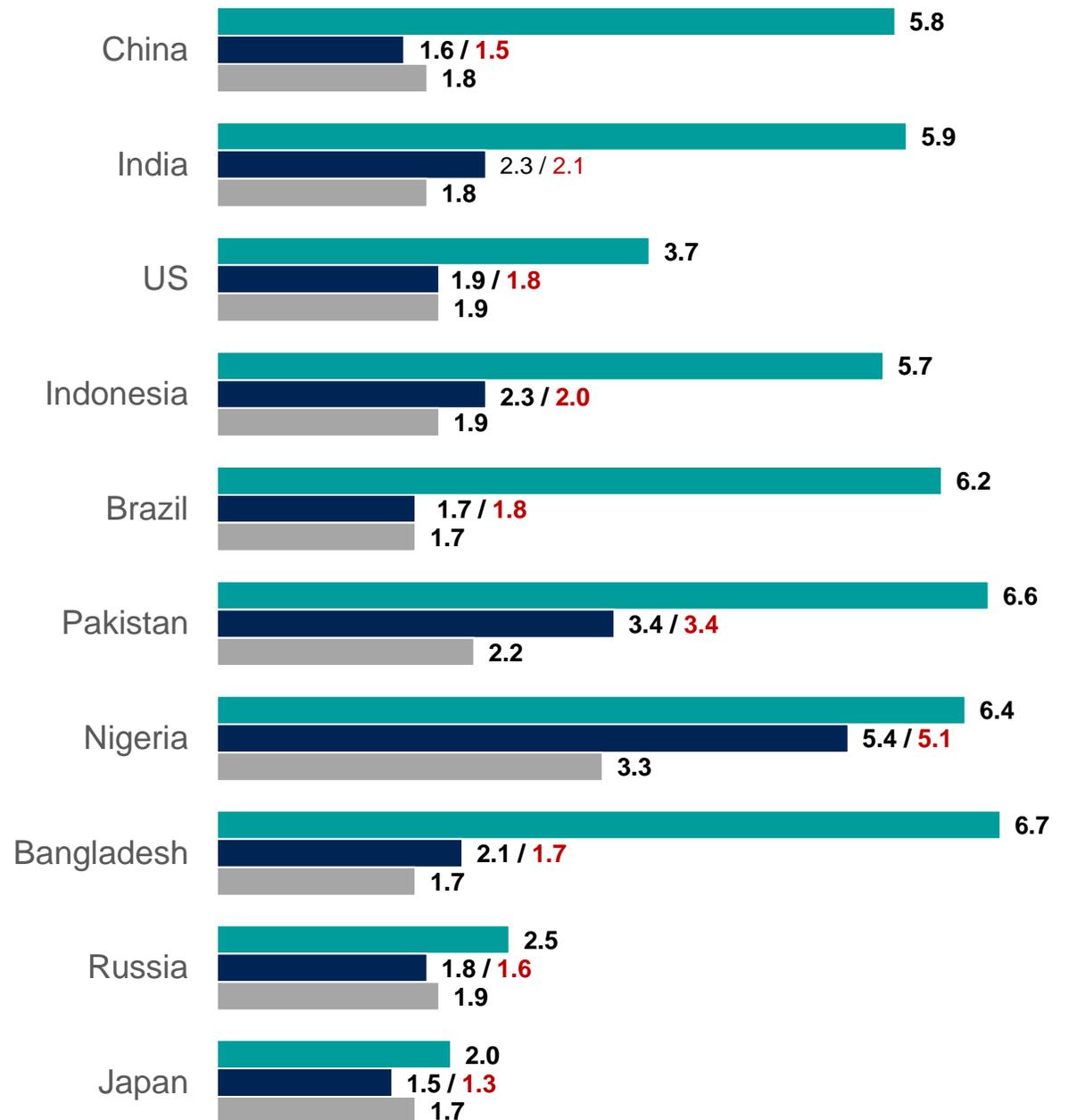
10 most populous countries

5.2 avg. 1960

2.4 avg. Today

2.3*

2.2 avg. 2050



WHY IS FERTILITY DECLINING?

- **Urbanization**
- **Empowerment** of women
- **Changing culture**
- **Success** of Government/ NGO programs
- Gender and age **structure** of population

AGEING



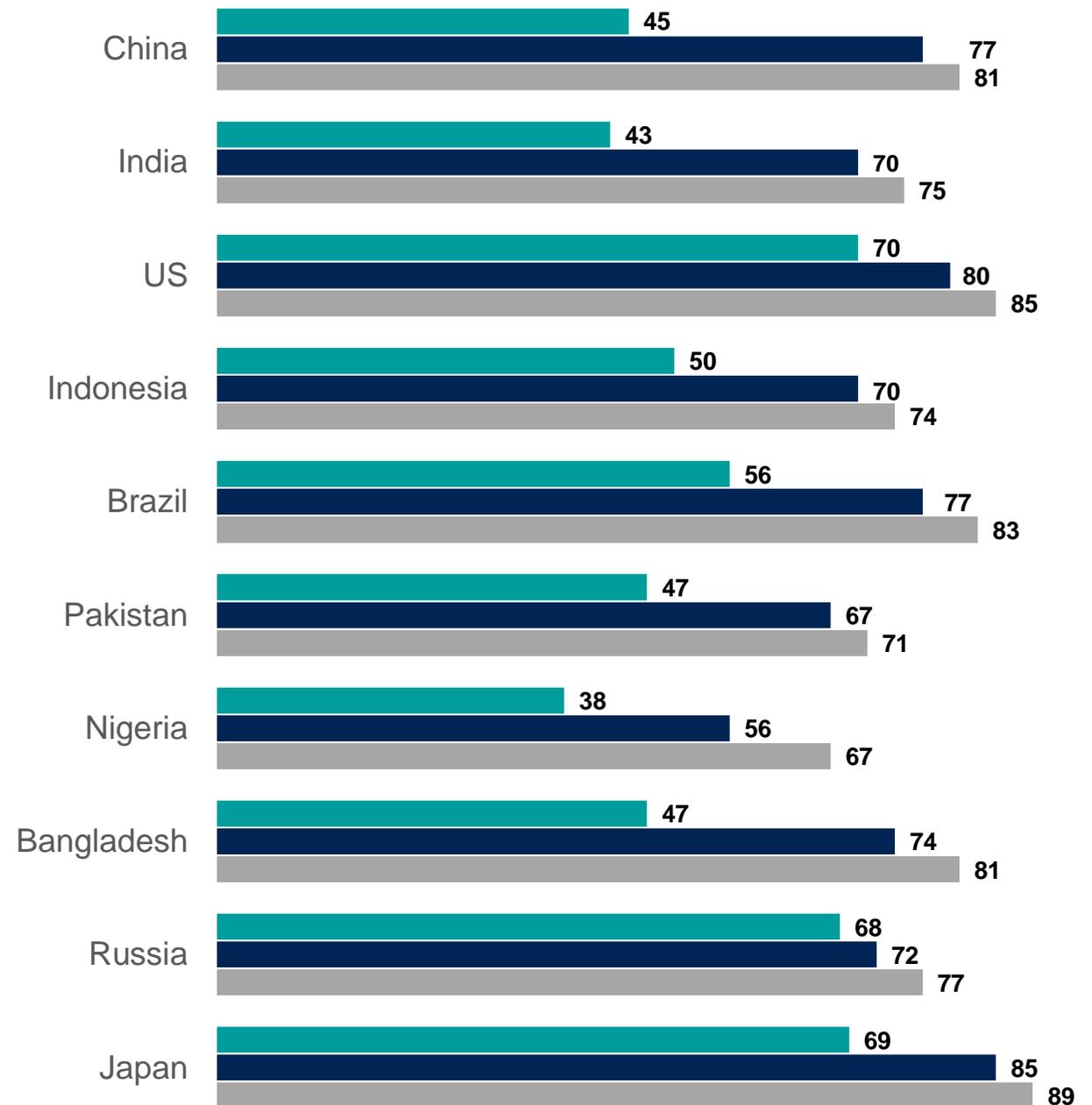
LIFE EXPECTANCY

10 most populous countries

51 avg. 1960

73 avg. Today

77 avg. 2050





www.proguidescreen.com

WORLD WILL GROW **FEWER**

Which Means...

- Global **Population Bust**.
 - Reach 8-9 billion by 2050-60, then start to decline.
 - End of century, population size like 2020's.
- Not good, not bad, but **important**.
- Reduces **denominators**.
- Growth more from **ageing** and **immigration** than fertility.
- Dramatic shift in population **structure**.
 - Older with diminishing fertility.
 - Smaller families.
 - **Geographic** shift.



COVID-19

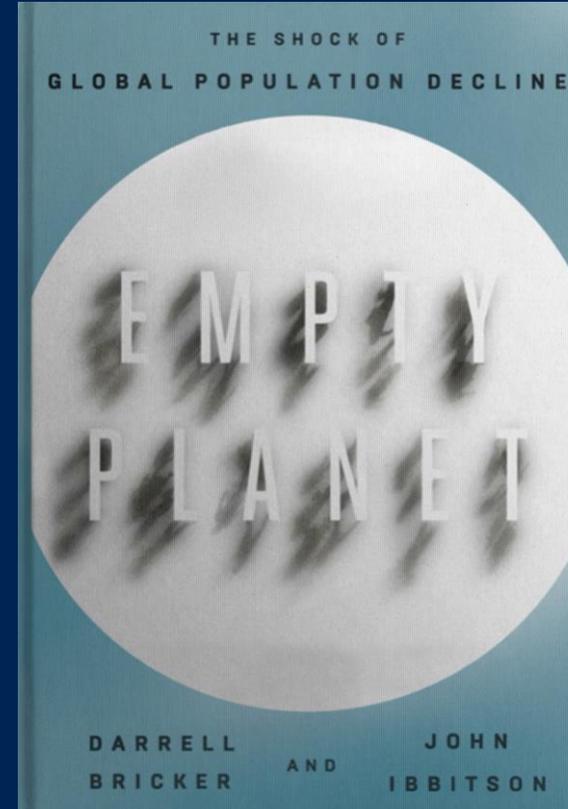
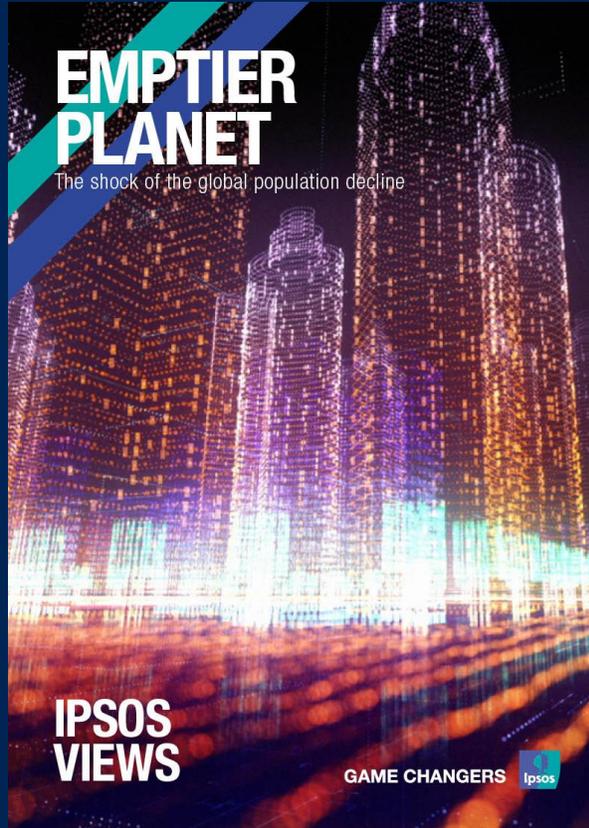
Impact on key demographics

- Depressed fertility rates
- Disrupted immigration
- Excessive death among elderly
- Outmigration from major cities
(temporary?)



THANK YOU

Contact: Darrell.Bricker@Ipsos.com



MOBILE PLANET

KEYS – A WEBINAR SERIES BY IPSOS

Peter Otto
Chief Client Officer

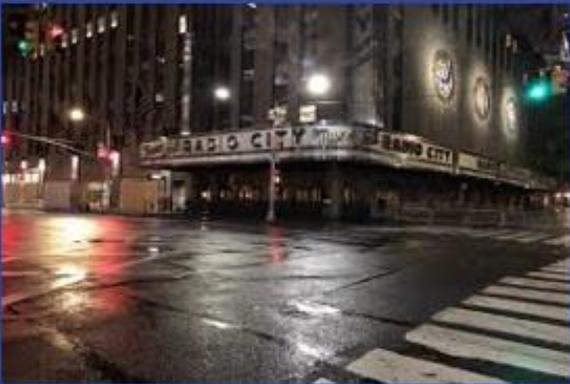
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FUTURE OF MOBILITY

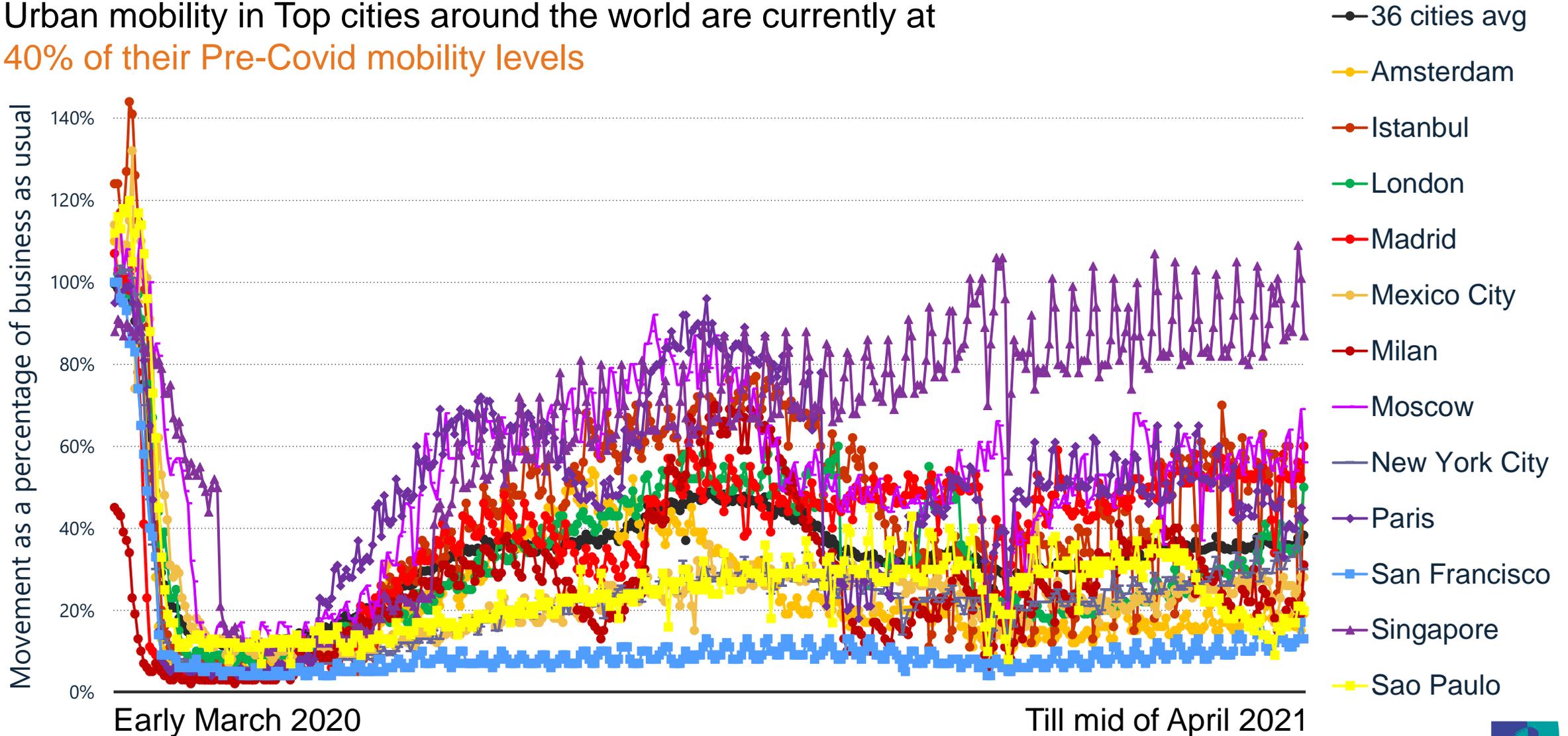


CURRENT STATE OF MOBILITY, IS A STATE OF **IMMOBILITY**



THE CURRENT STATUS OF IMMOBILITY

Urban mobility in Top cities around the world are currently at **40% of their Pre-Covid mobility levels**



Source: Citymapper

ALSO MY PERSONAL MOBILITY HAS CHANGED



Grand Cayman	09:15	✿	AC 972	On-Time
Havana	16:20	✿	AC 1748	On-Time
Hong Kong	09:55	✿	AC 015	On-Time
Lima	16:30	✿	AC 080	On-Time
London/LHR	23:00	✿	AC 858	On-Time
London/LHR	08:35	✿	AC 868	On-Time
Mexico City	08:35	✿	AC 993	On-Time
Montego Bay	09:00	✿	AC 1804	On-Time
Munich	22:20	✿	AC 846	Delayed

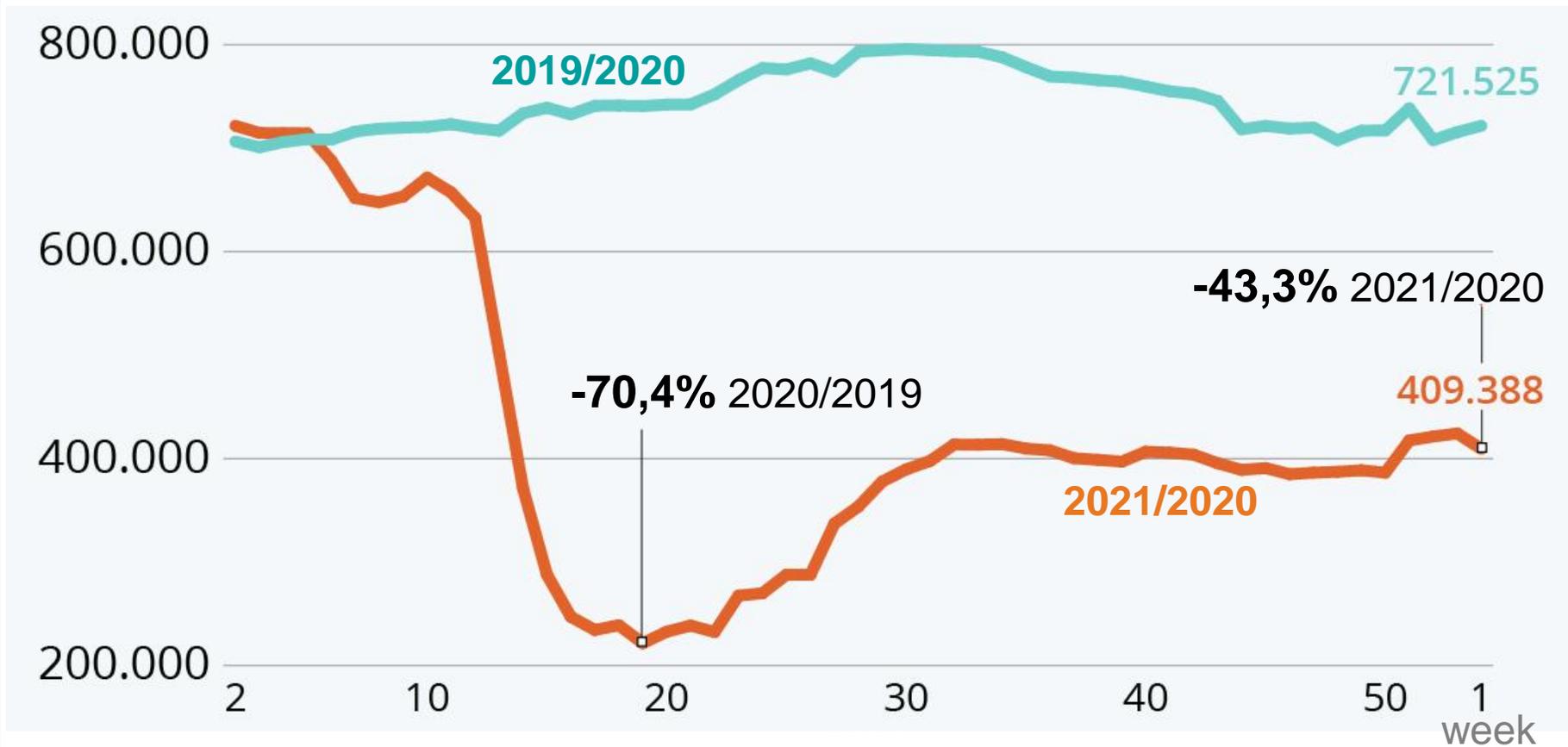


TRENDS

#1 **IMMOBILITY**

GLOBAL AIR TRAFFIC FAR AWAY FROM RECOVERY

Number of planned departures of regular flights



Source: OAG, statista



TRENDS

#1 IMMOBILITY

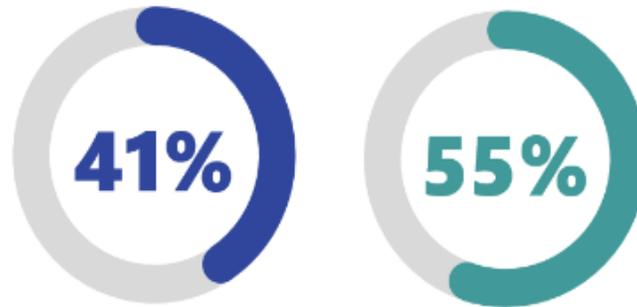
#2 DIGITAL PURCHASE

CAR PURCHASES ARE BECOMING DIGITAL

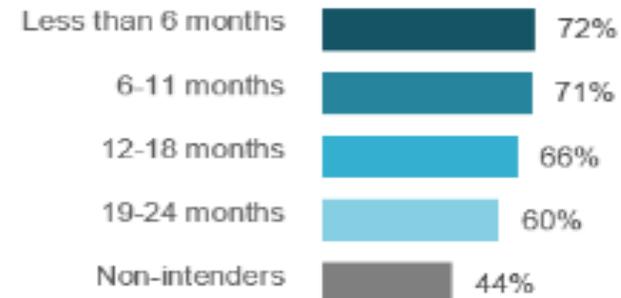
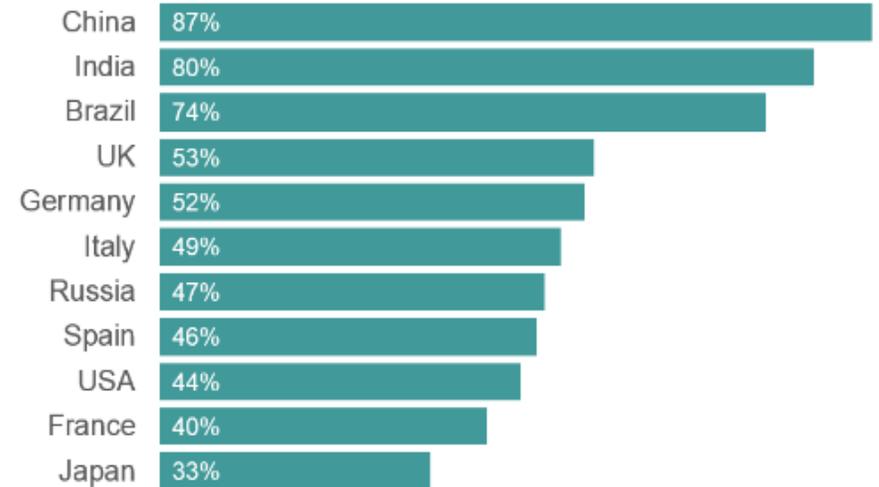
Customers made the switch and Automotive brands now follow

Interest in purchasing / leasing vehicle **entirely online**

May → Sept 2020



Communication via salesperson using a video chat approach



Source: Ipsos Navigator

TRENDS

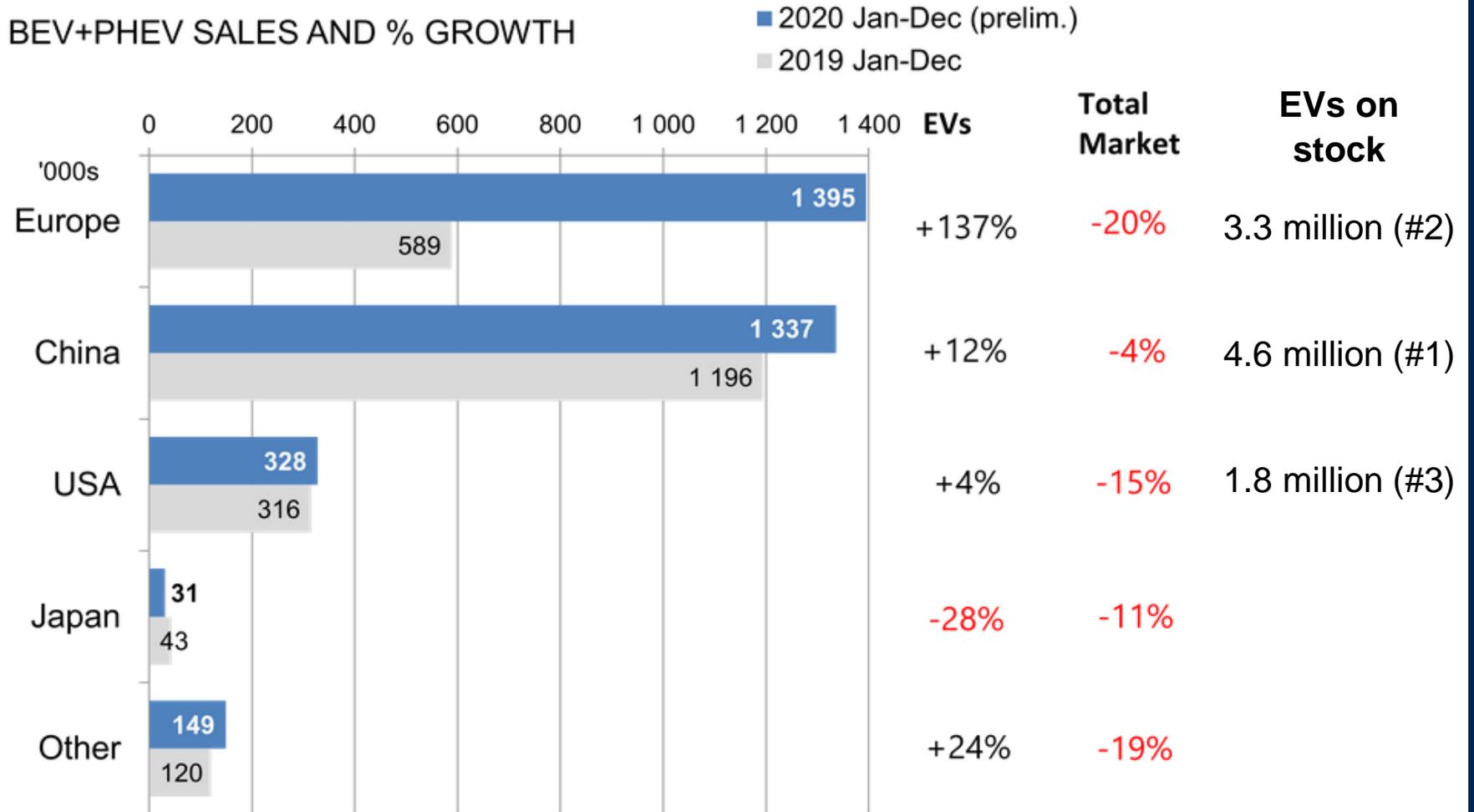
#1 IMMOBILITY

#2 DIGITAL PURCHASE

#3 **ELECTRIFICATION**

CAR SALES WERE DOWN – BUT EVs ARE UP

BEV+PHEV SALES AND % GROWTH



Source: EV VOLUMES



TRENDS

#1 IMMOBILITY

#2 DIGITAL
PURCHASE

#3 ELECTRIFICATION

#4 CONNECTIVITY
before AUTONOMOUS

FROM TRADITIONAL AUTO TOWARDS TECH

Only **1/3** of new car buyers would consider a
FULLY AUTONOMOUS VEHICLE.

Men under the age of 40 years, who live in a **large metropolitan area** as well as **long-term commuters** show the highest interest in self-driving functions.

But **safety** remains the first barrier to adoption.

While today the interest in most **CONNECTIVITY FEATURES** is high.

Source: Ipsos Navigator

TRENDS

#1 IMMOBILITY

#2 DIGITAL
PURCHASE

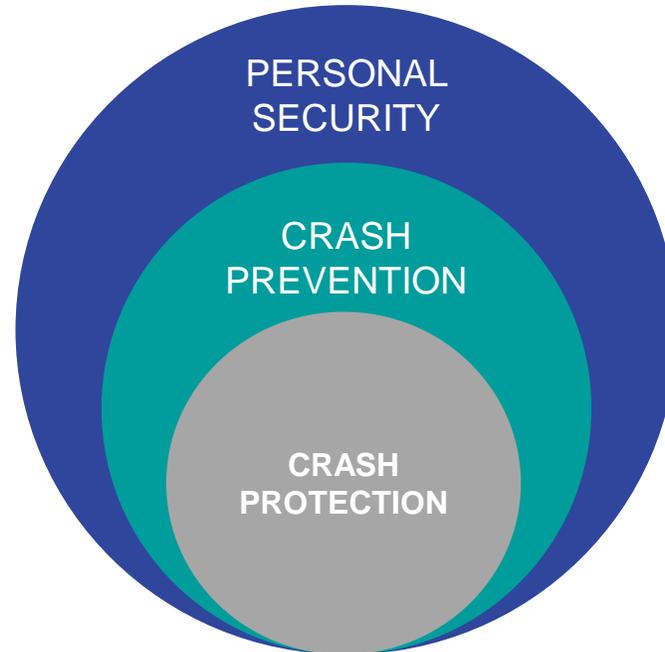
#3 ELECTRIFICATION

#4 CONNECTIVITY
before AUTONOMOUS

#5 REDEFINED
SAFETY

REDEFINING SAFETY

PRE-COVID

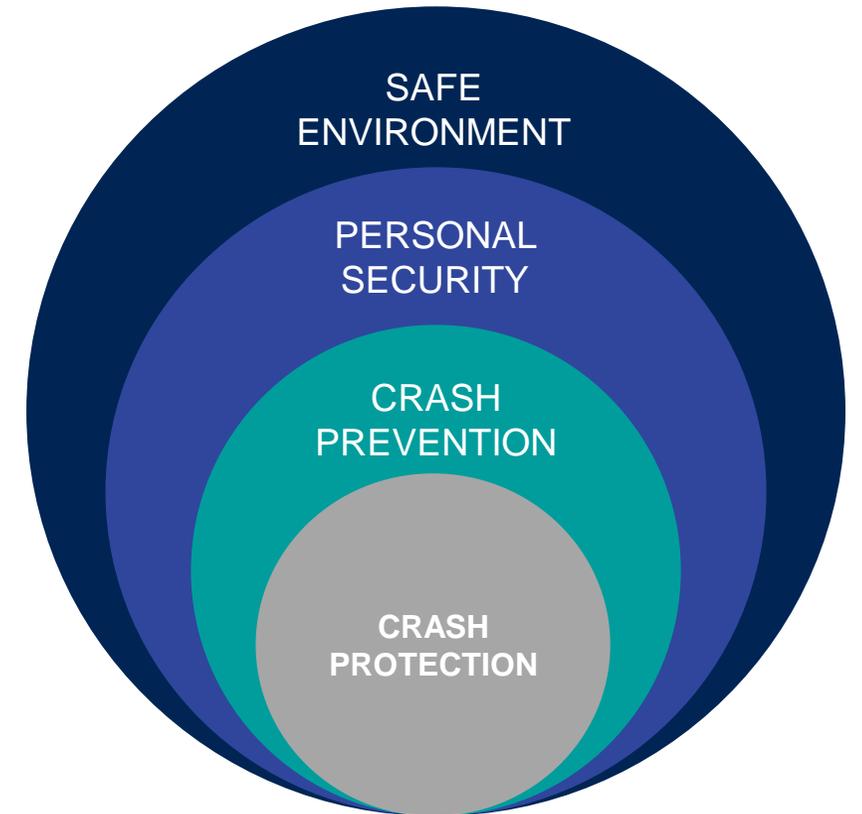


+ as **touchless** as possible

+ incl. **air filtration**

+ creating a “**clean & safe**” feeling in individually owned vehicles

POST-COVID



+ incl. **antibacterial** surfaces

TRENDS

#1 IMMOBILITY

#2 DIGITAL PURCHASE

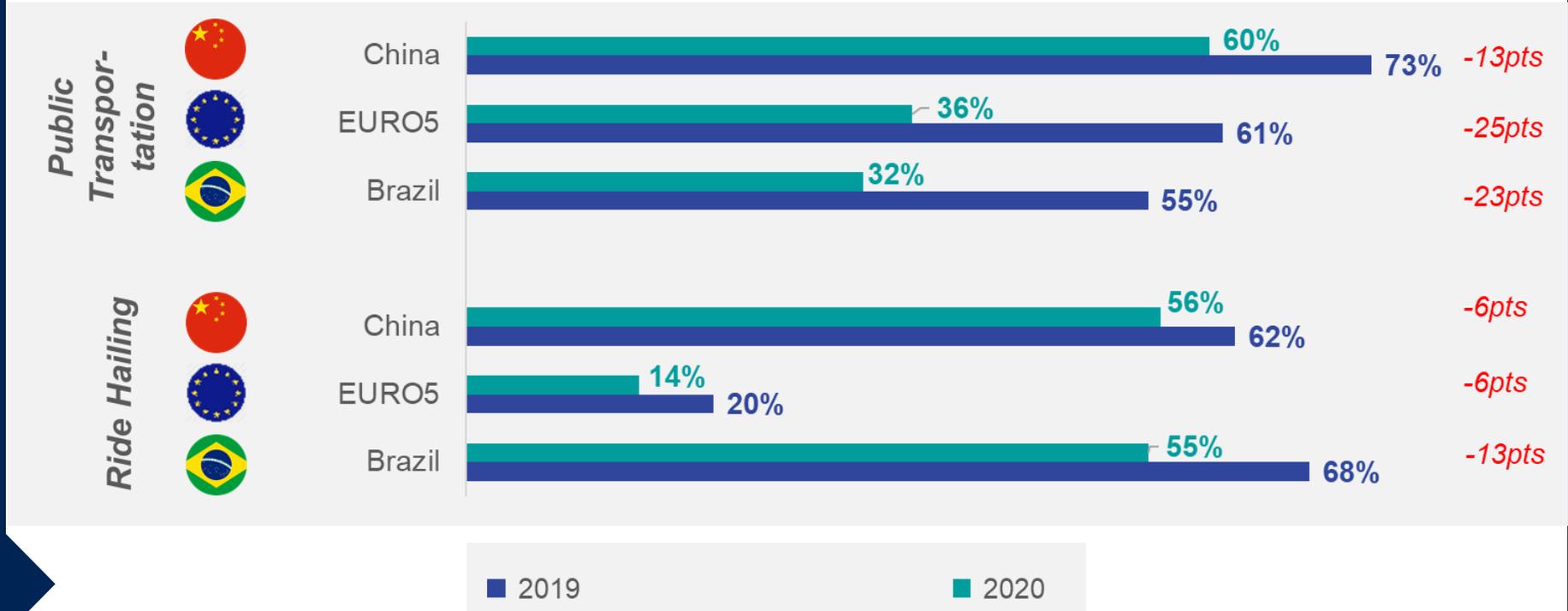
#3 ELECTRIFICATION

#4 CONNECTIVITY *before* AUTONOMOUS

#5 REDEFINED SAFETY

#6 **DECLINE IN COLLECTIVE TRANSPORTATION**

DECLINE IN COLLECTIVE TRANSPORTATION



Source: Ipsos Navigator

TRENDS

#1 IMMOBILITY

#2 DIGITAL
PURCHASE

#3 ELECTRIFICATION

#4 CONNECTIVITY
before AUTONOMOUS

#5 REDEFINED
SAFETY

#6 DECLINE IN
COLLECTIVE
TRANSPORTATION

#7 GLOBAL vs. RISE
OF LOCAL

GLOBAL VS. LOCAL

Development of Future Vehicle Operating Systems will be expensive and therefore global



TRENDS

#1 IMMOBILITY

#2 DIGITAL
PURCHASE

#3 ELECTRIFICATION

#4 CONNECTIVITY
before AUTONOMOUS

#5 REDEFINED
SAFETY

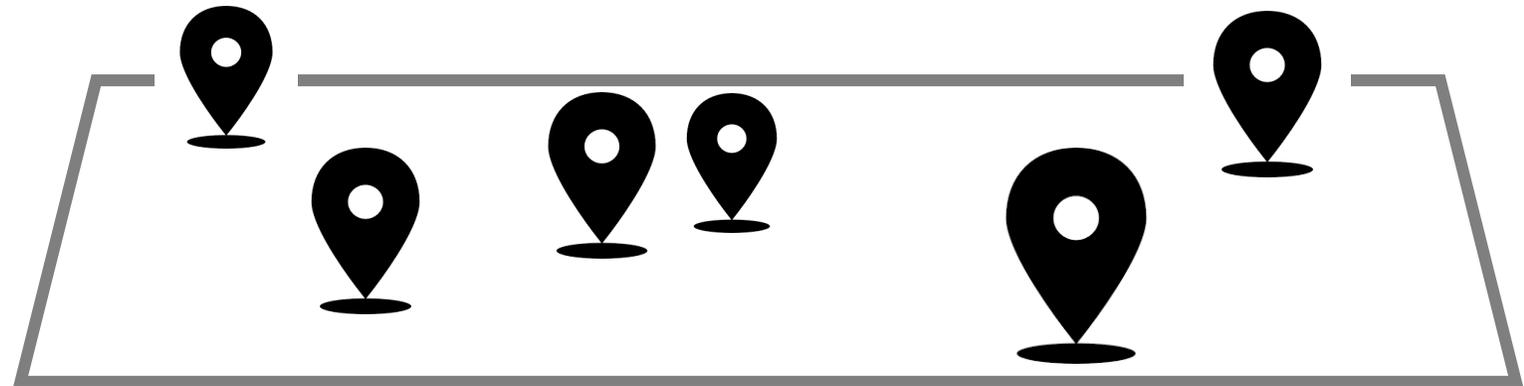
#6 DECLINE IN
COLLECTIVE
TRANSPORTATION

#7 GLOBAL vs. RISE
OF LOCAL

RISE OF LOCAL

Future Mobility Solutions will be local.

- Need to adapt to **local culture, geography, infrastructures** and **environment**.
- Need to understand **local customers** and adapt to **local eco-systems**.
- Public Transportation and Mobility as a Service (MaaS) will integrate **local sustainable micro-mobility services**



TRENDS

#1 IMMOBILITY

#2 DIGITAL
PURCHASE

#3 ELECTRIFICATION

#4 CONNECTIVITY
before AUTONOMOUS

#5 REDEFINED
SAFETY

#6 DECLINE IN
COLLECTIVE
TRANSPORTATION

#7 GLOBAL vs. RISE
OF LOCAL

RELATIONSHIP WITH CUSTOMERS
AND **ABILITY TO BUILT TRUST**
WILL BE CRITICAL SUCCESS FACTORS
IN **FUTURE MOBILITY.**

SPOTLIGHT ON LATIN AMERICA

KEYS — A WEBINAR SERIES BY IPSOS

Ana Maria Leyva
Chief Client Officer, Latin America

GAME CHANGERS



LATAM: A REGION OF CONTRASTS

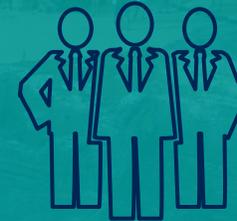


First, some numbers to give us a perspective



20
Countries

GDP:
\$5.3
Trillion US



640
Million people

61% Services

24% Industrial

5% Agro

24%

80% Urban

24% Young population
(0-14 years old)

66% Internet
penetration



Source: [Statista.com](https://www.statista.com) April 2021

A region where each country has unique assets that make it attractive

For its Historic Attractions

Mexico 88%

Peru 78%

Colombia 28%

For its Nature

Brazil 72%

Mexico 43%

Colombia 37%

For its food

Peru 82%

Mexico 70%

Argentina 50%

For its music

Brazil 72%

Argentina 62%

Mexico 62%



Source: 403 Opinion leaders in LATAM 2019



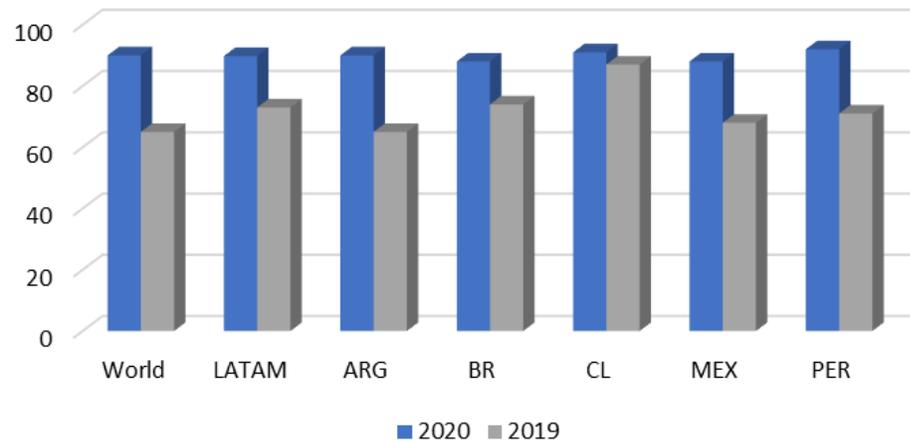
Let's look at Latin-American citizens' feelings and perceptions nowadays



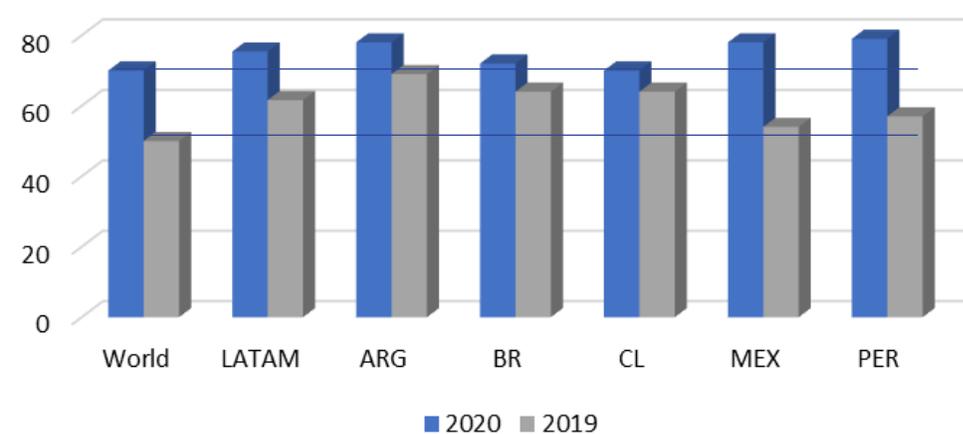
Perceptions 2020

- **2020 was a difficult year for Latin Americans:** 9 in 10 people consider 2020 as a bad year, both at country and personal level
- Latin-Americans more pessimistic than the rest of the world

Was this a bad year for my country?
% of respondents who agreed

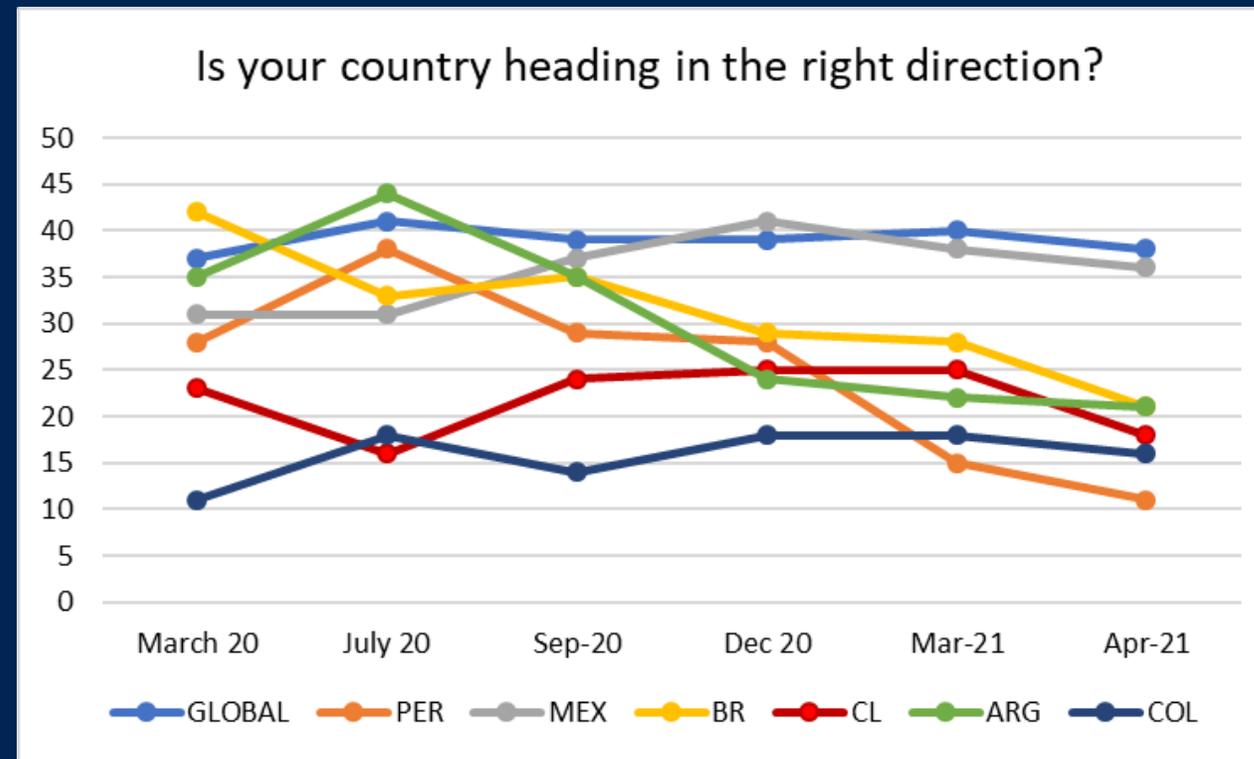


Was this a bad year for me and my family?
% of respondents who agreed



What about today...

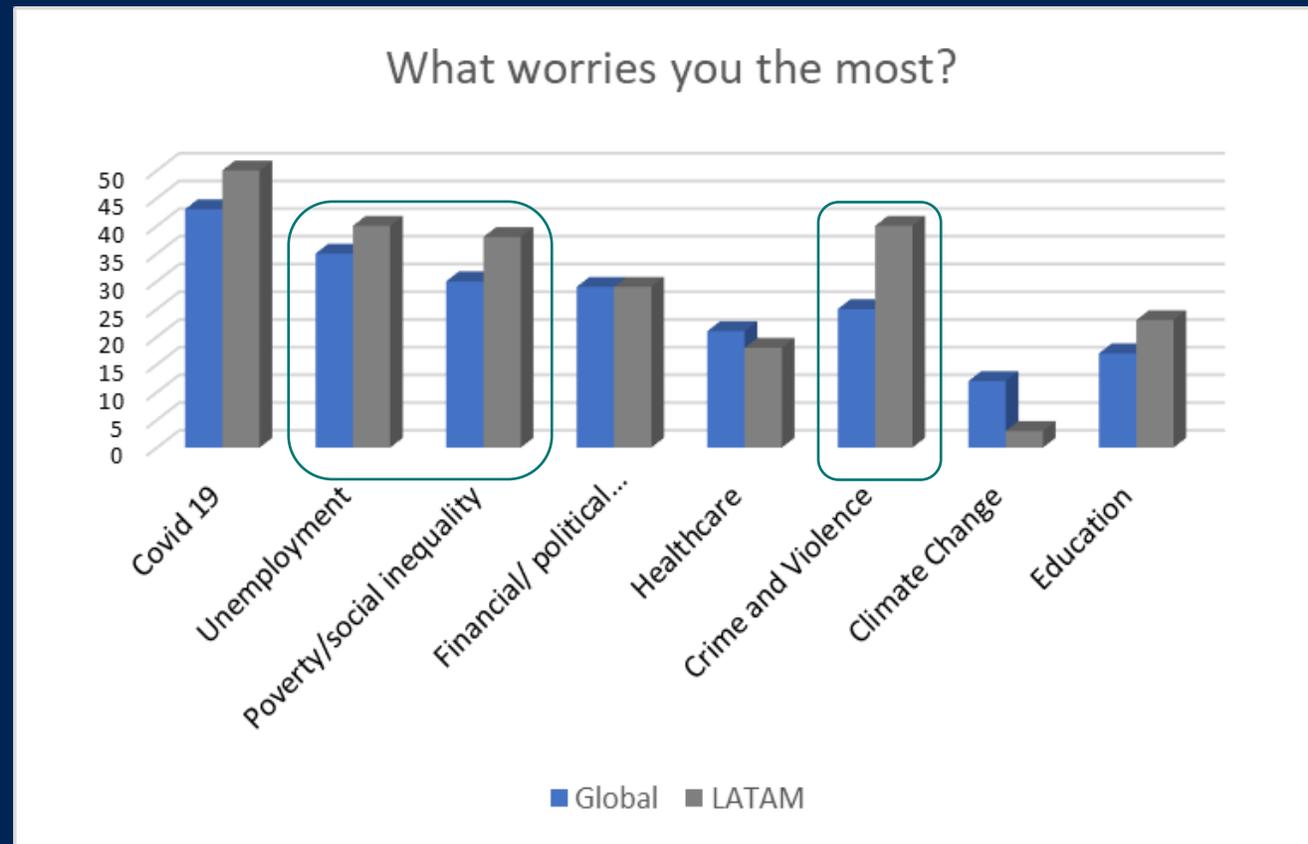
- People still feel pessimistic about the present, 80% perceiving that their respective countries are going in the wrong direction.
- Sentiment that has been deteriorating in the past months



Source: Ipsos Global Advisor – April 2021

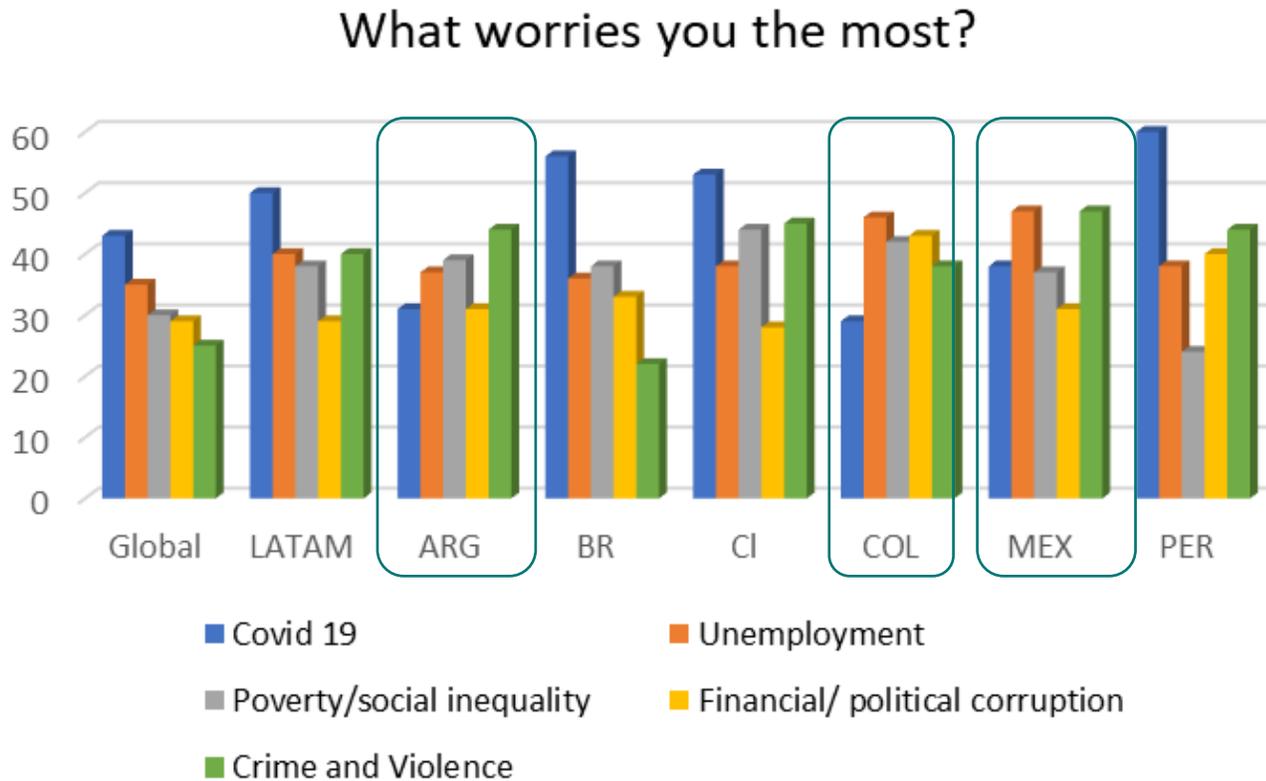
...so, what worries people in LATAM today?

- Besides COVID, **Latin-Americans** are very worried about issues affecting their everyday life
- People are **less worried** about issues impacting in the **long term**



With some specifics by country...

- For some, short-term worries are even greater than COVID



Source: Ipsos Global Advisor- What worries the world – April 2021

But what about tomorrow?

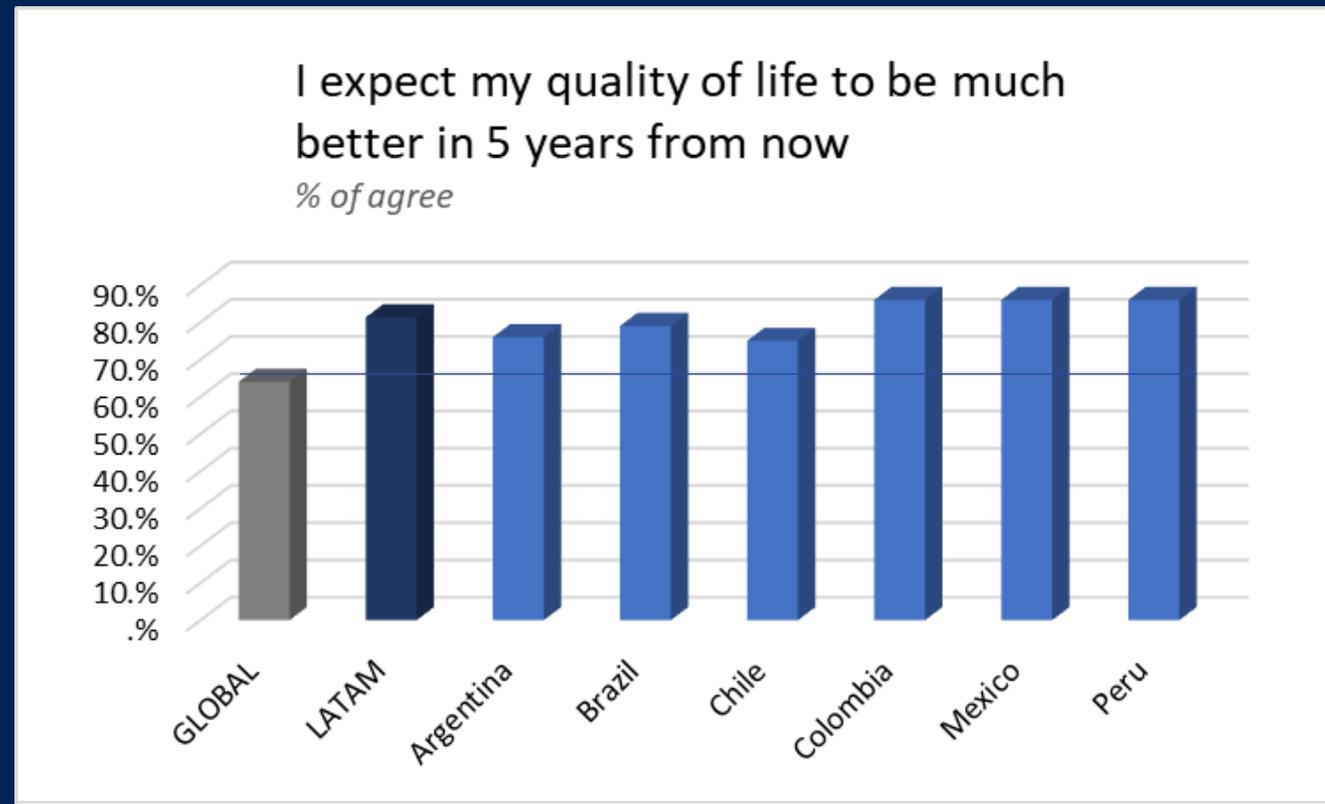
- Latin-Americans are very optimistic when it comes to the future



Source: Ipsos Global Advisor – April 2021

But what about tomorrow?

- Most people expect an important improvement on their quality of life in the long term



Source: Ipsos Global Advisor – April 2021



Let's dive into two key issues: Climate Change and Inequalities that will impact the future of Latin-Americans

How much do we care about the climate?

- Climate emergency is at the top of our values
- We feel strongly about what needs to be done... do we really?

LATAM RANKED VALUES VALUE INTENSITY (%)



I understand what action I need to take to play my part in tackling climate change



Source: Ipsos Global Trends December 2020 & November 2021



Source: Ipsos Global Advisor- Earth Day March 2021

...who else is responsible?

- And we expect both **corporations and governments** to act now

Government will be failing if they do not take a action now in climate change

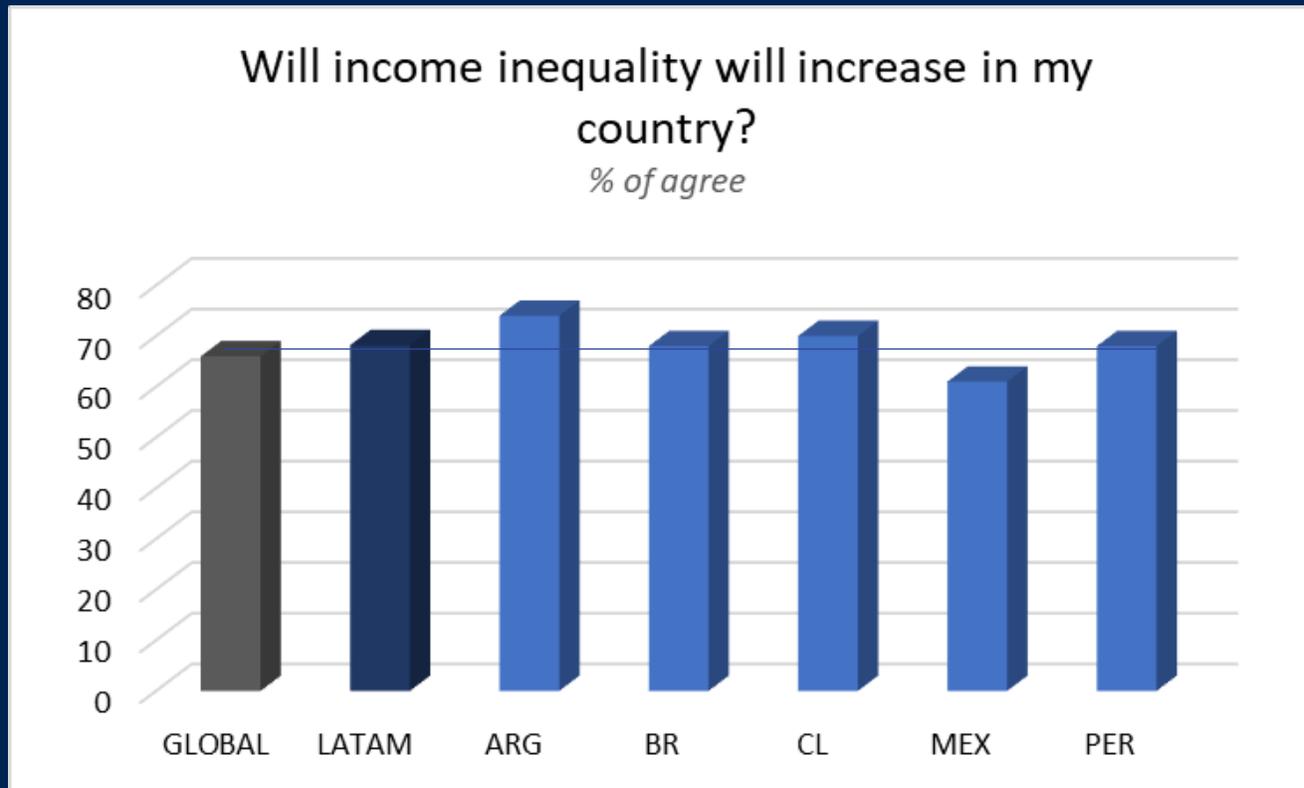


Corporations will be failing employees and consumers if they do not act now on climate change



What about Poverty and Inequality?

- **Income inequality** is expected to continue to be **unaddressed**
- **68% of people in LATAM** expect this to increase



 Source: Ipsos Global Advisor – Predictions 2021 Dec 2020

Key takeaways on LATAM

- Latin-Americans are concerned about past and present situations, being very **conscious of the issues** they face
- Regardless of the problems in the region, they are **optimistic about the future**
- However, many of the **structural inequalities** are expected to remain.

**BE
SURE.
ACT
SMARTER.**

