

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

KEYS – A WEBINAR SERIES BY IPSOS

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GAME CHANGERS Ipsos

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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

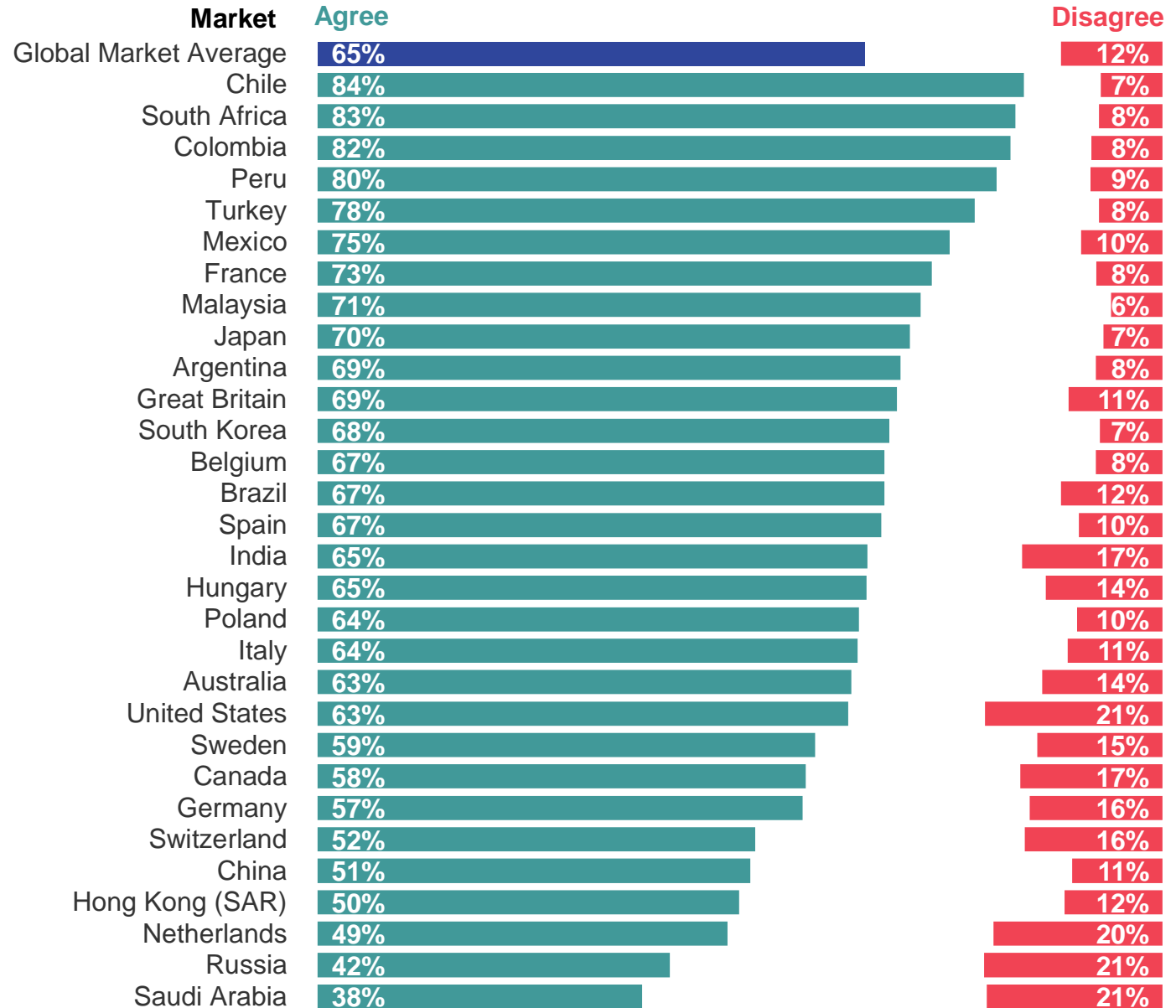
STARTING POINT: ACTION NEEDED BY GOVERNMENTS



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

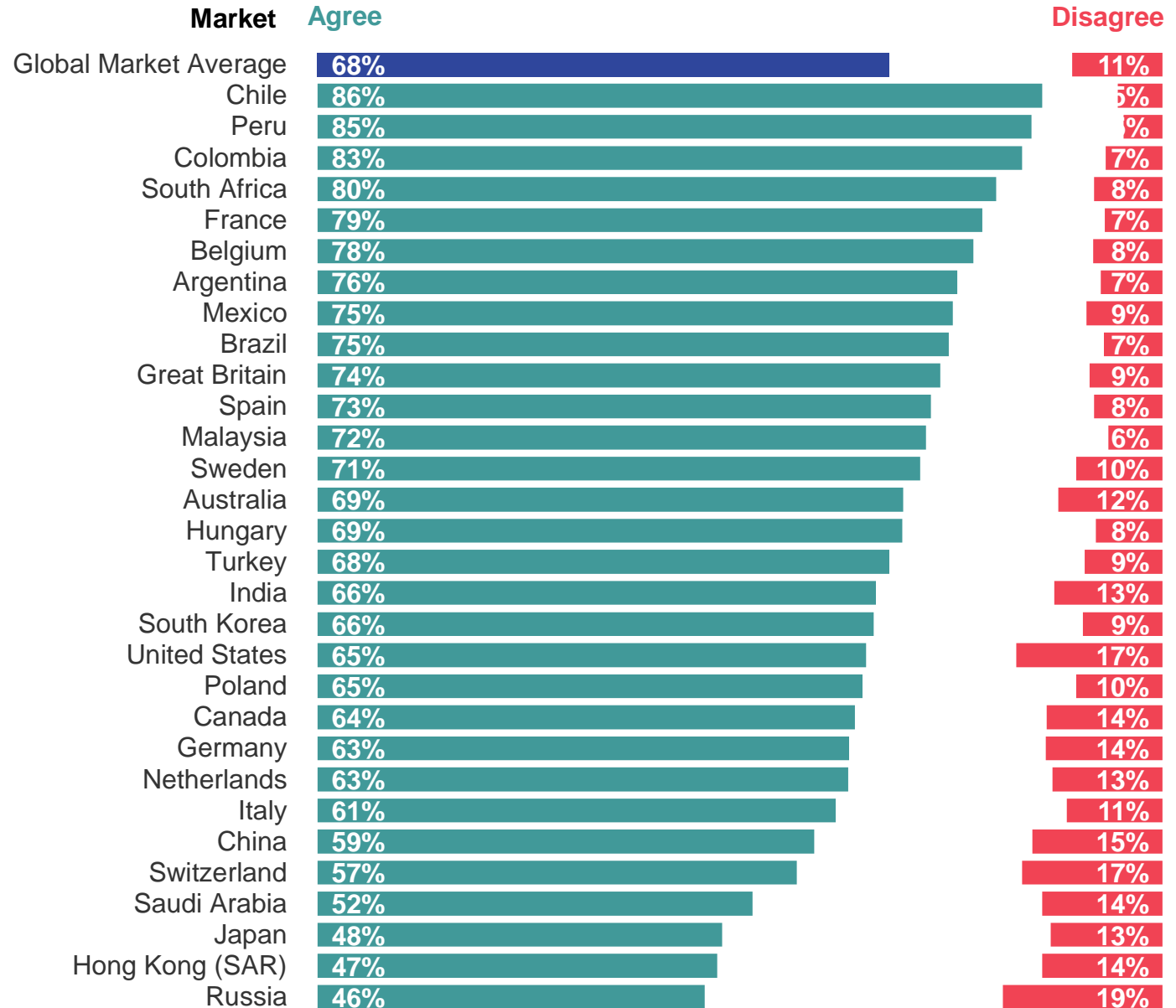
“Governments will be failing citizens if they don’t act now on climate change”



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

68% agree

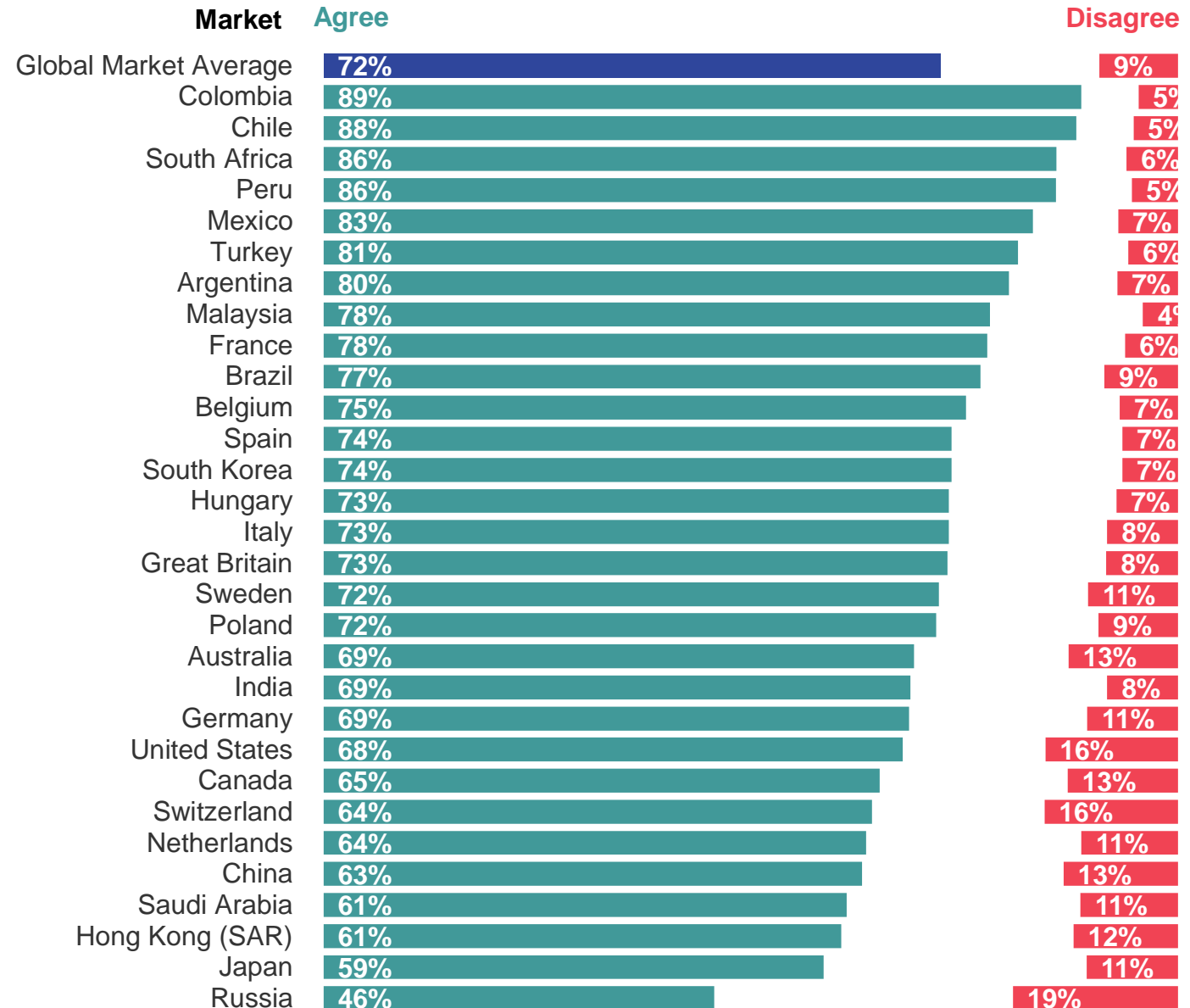
“Businesses will be failing their employees and customers if they don’t act now on climate change”



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

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?*



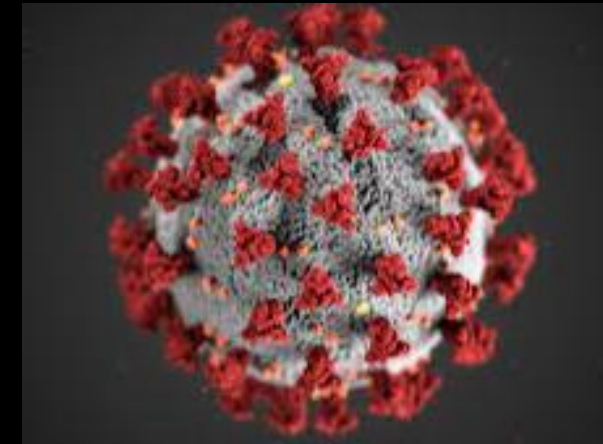
Climate Change #9

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



Peru



Italy



Japan

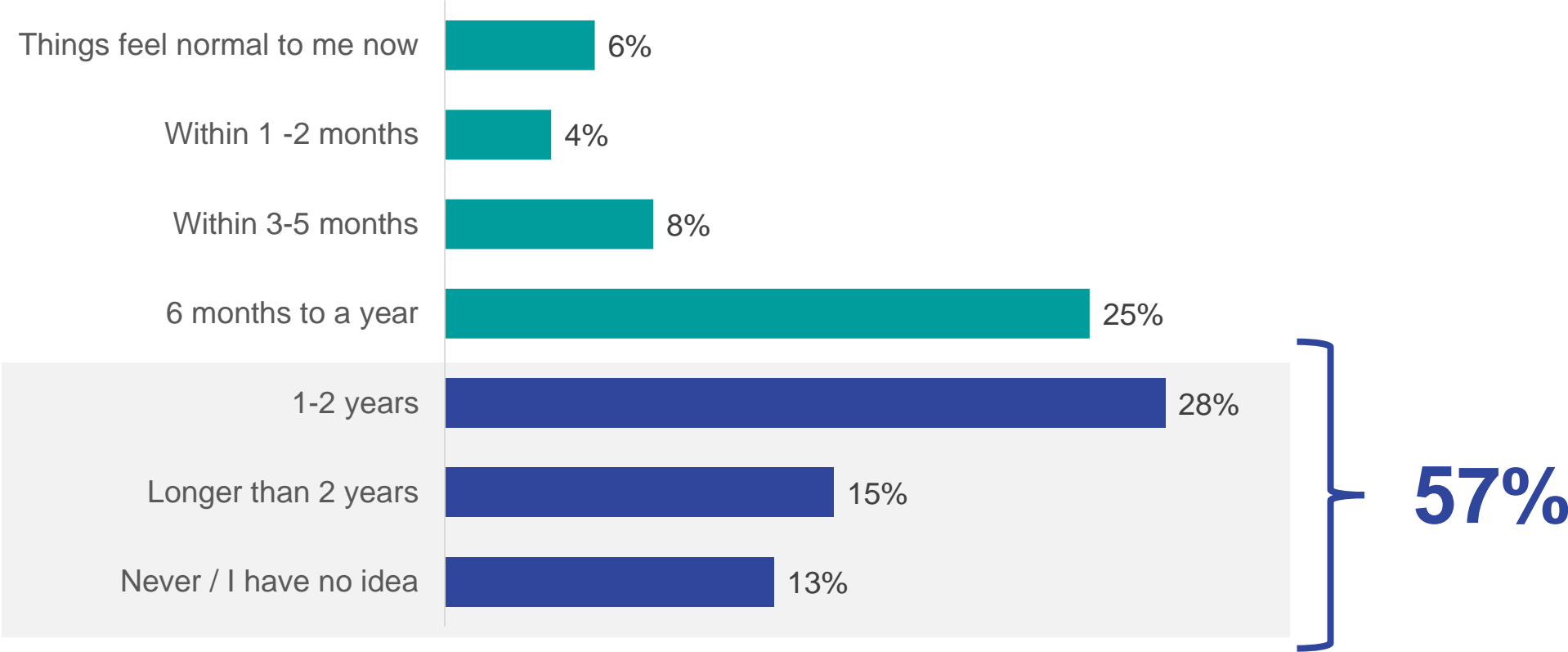


France



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





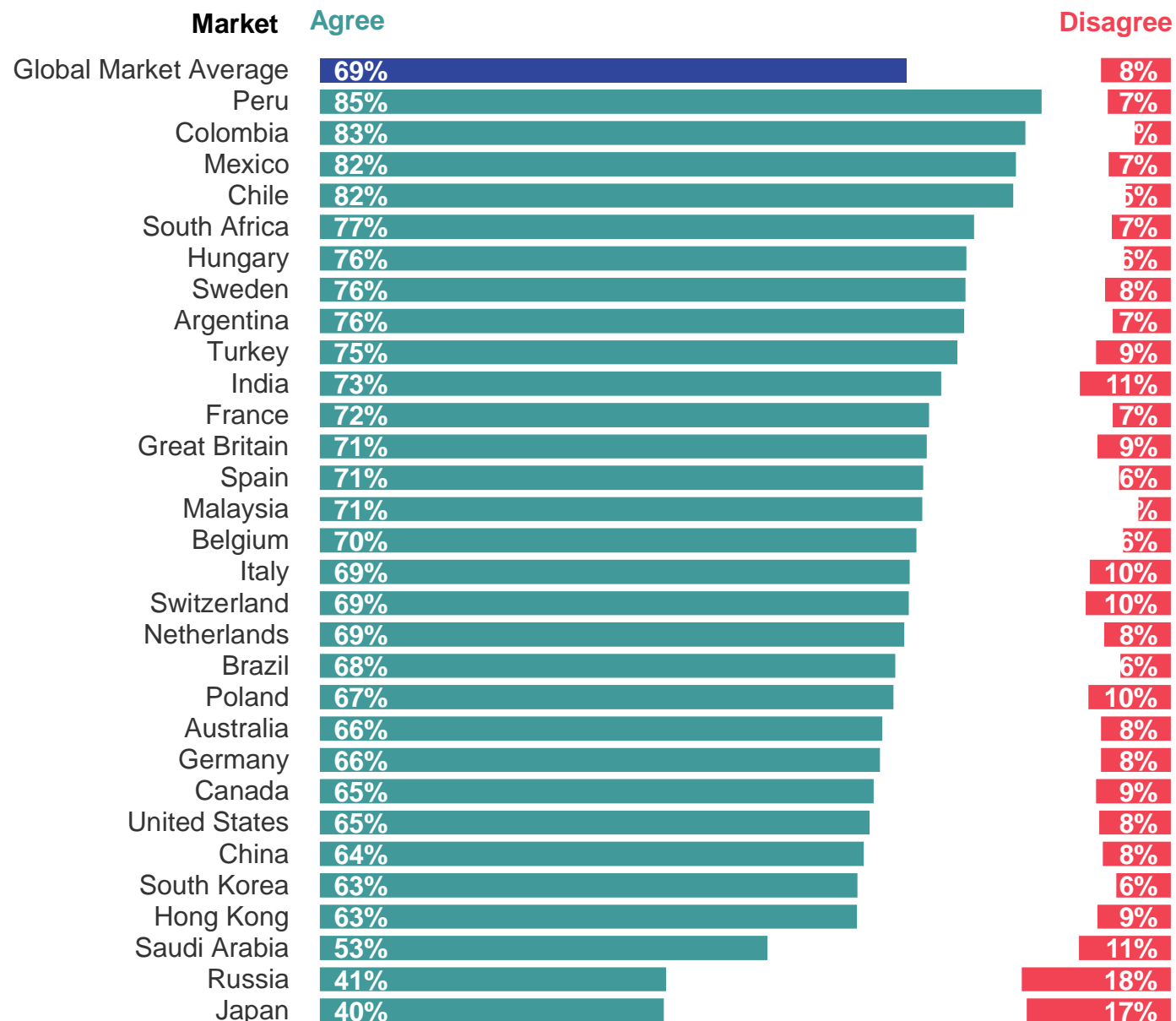
A Global Market Average
of **7 in 10 agree:**

“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?**



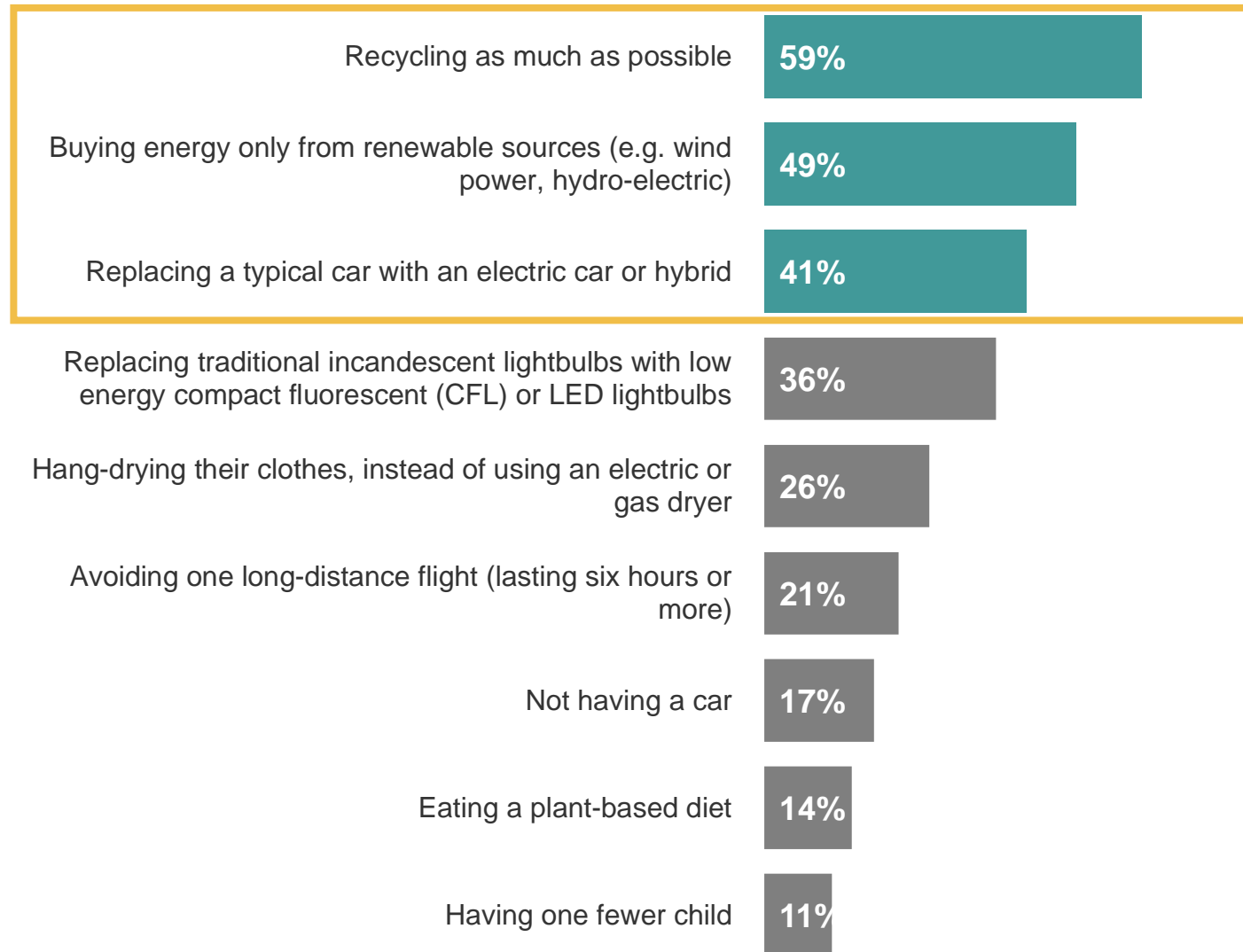
Q.

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

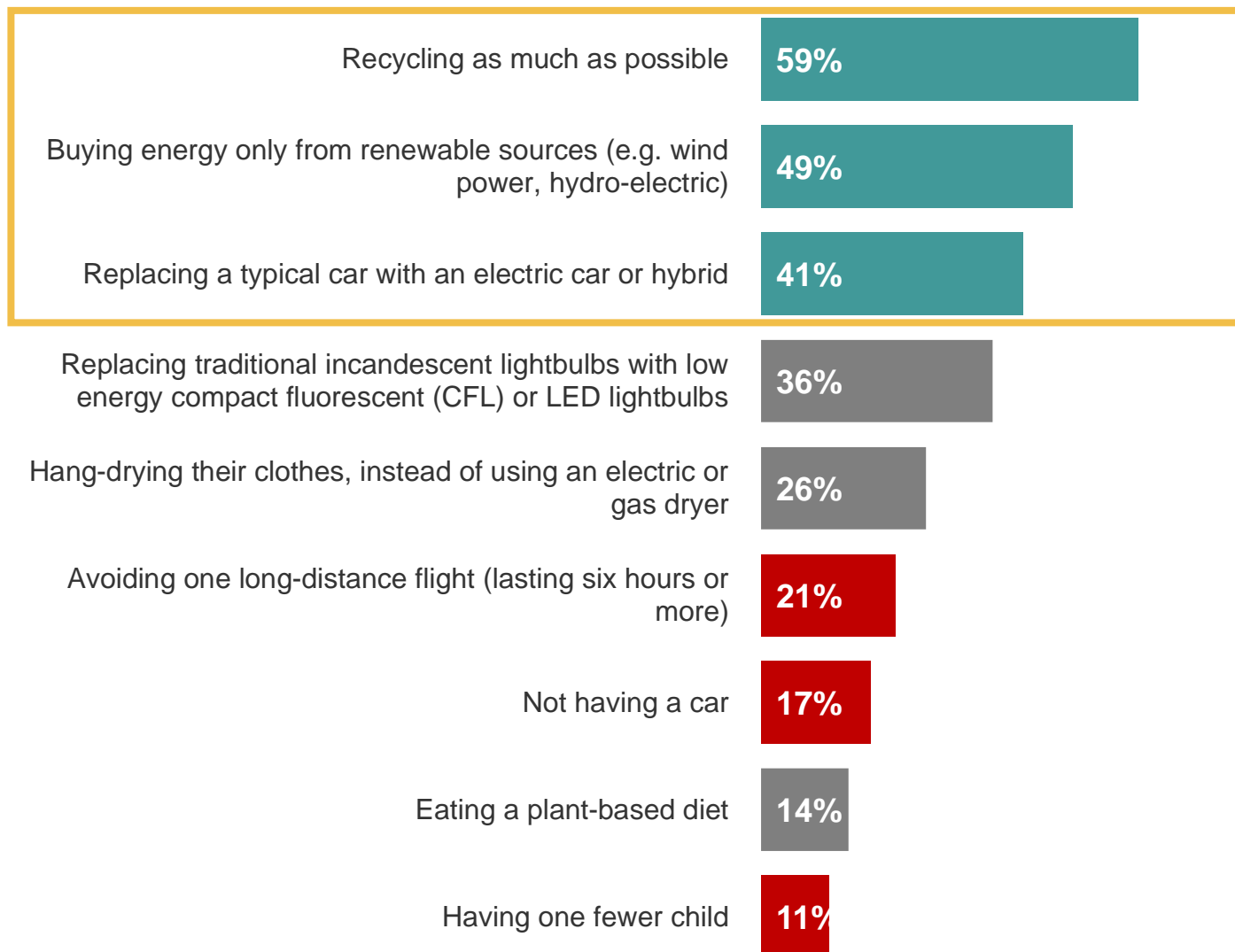
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From this list of options, which three do you think would most reduce the greenhouse gas emissions of an individual living in one of the world's richer countries?

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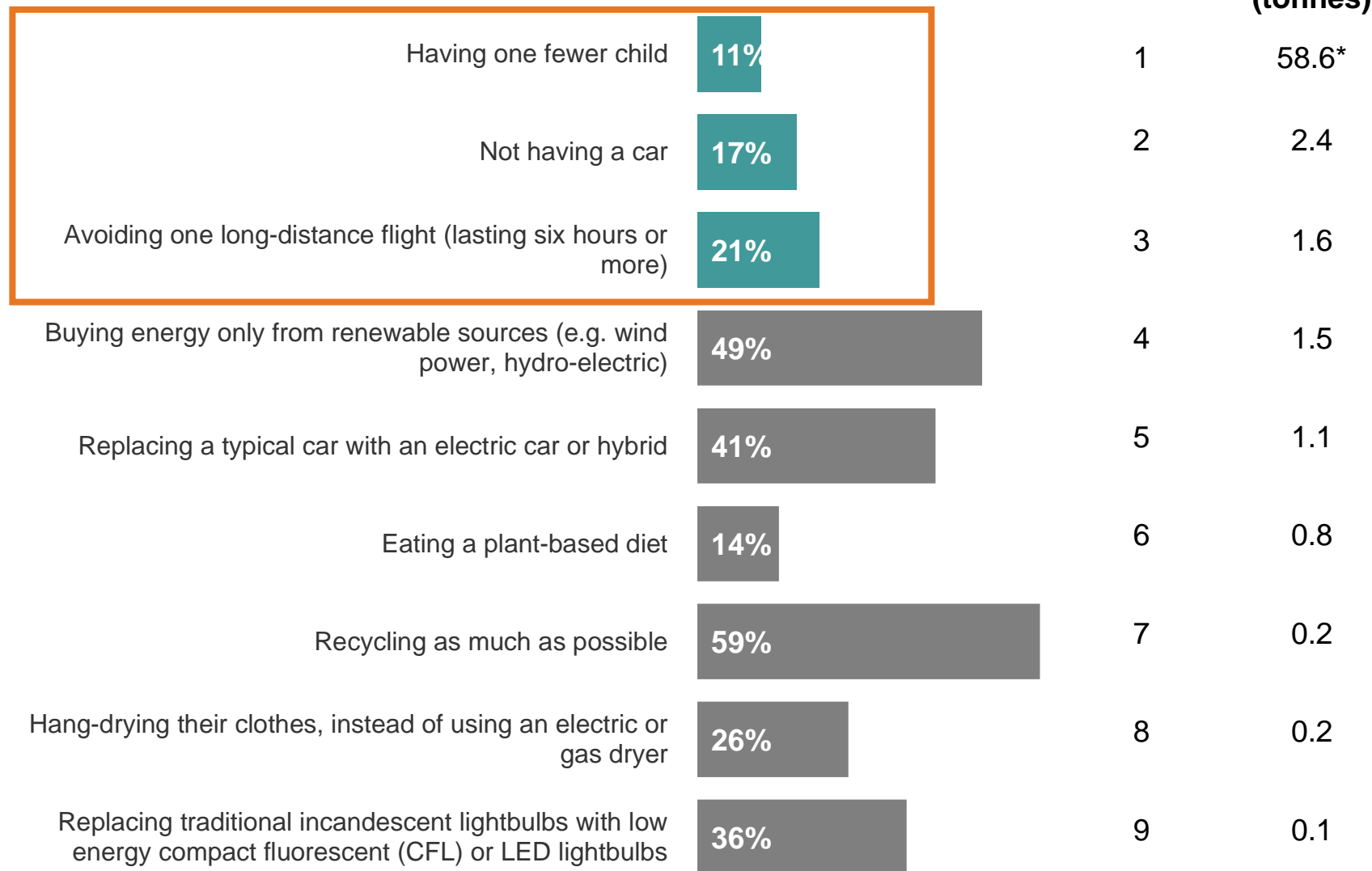
Q.

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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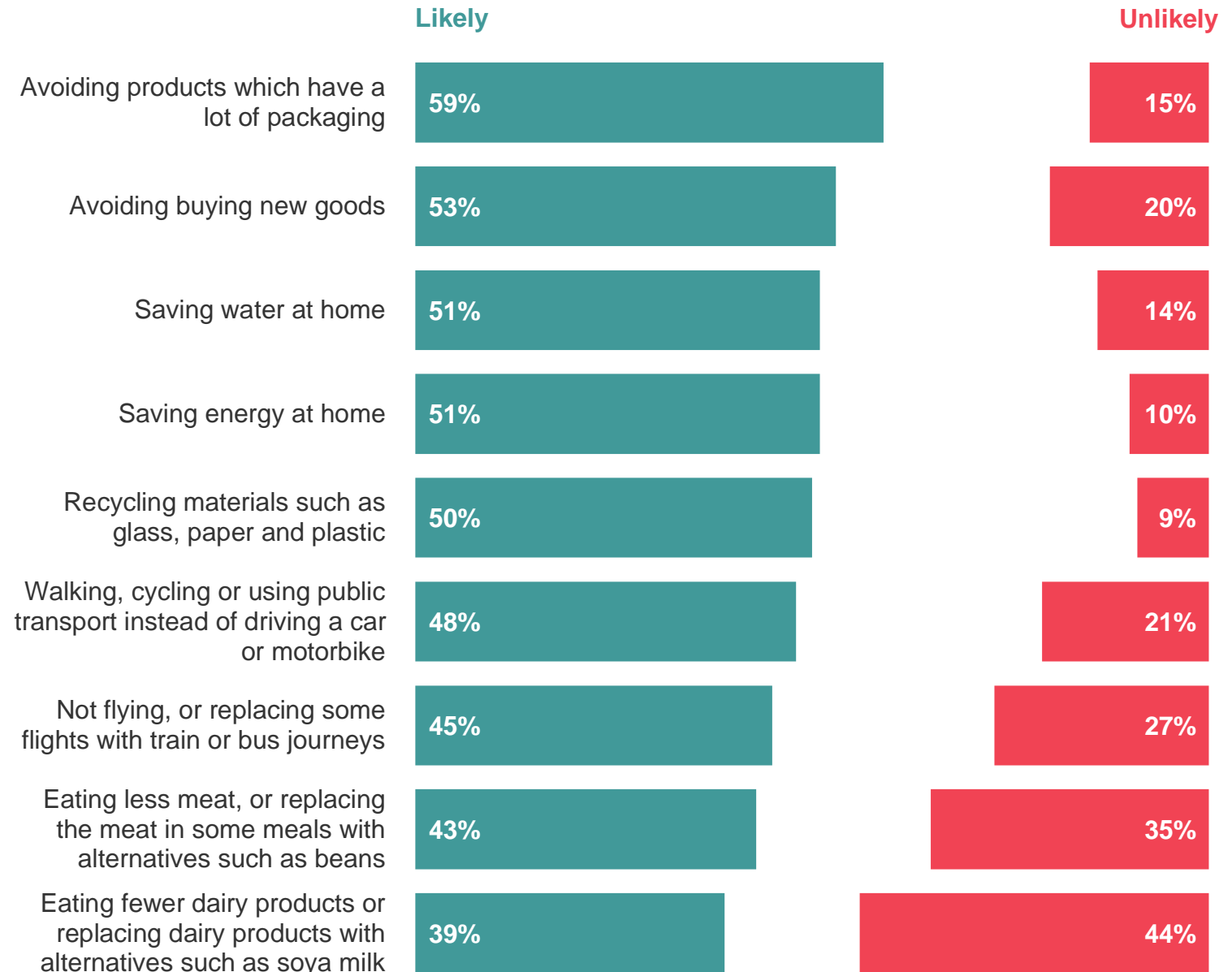
A person wearing a helmet and a backpack is riding a bicycle on a city street. In the background, there are several parked cars, including a white car in the foreground and a silver car behind it. The scene is set outdoors with trees visible in the distance.

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

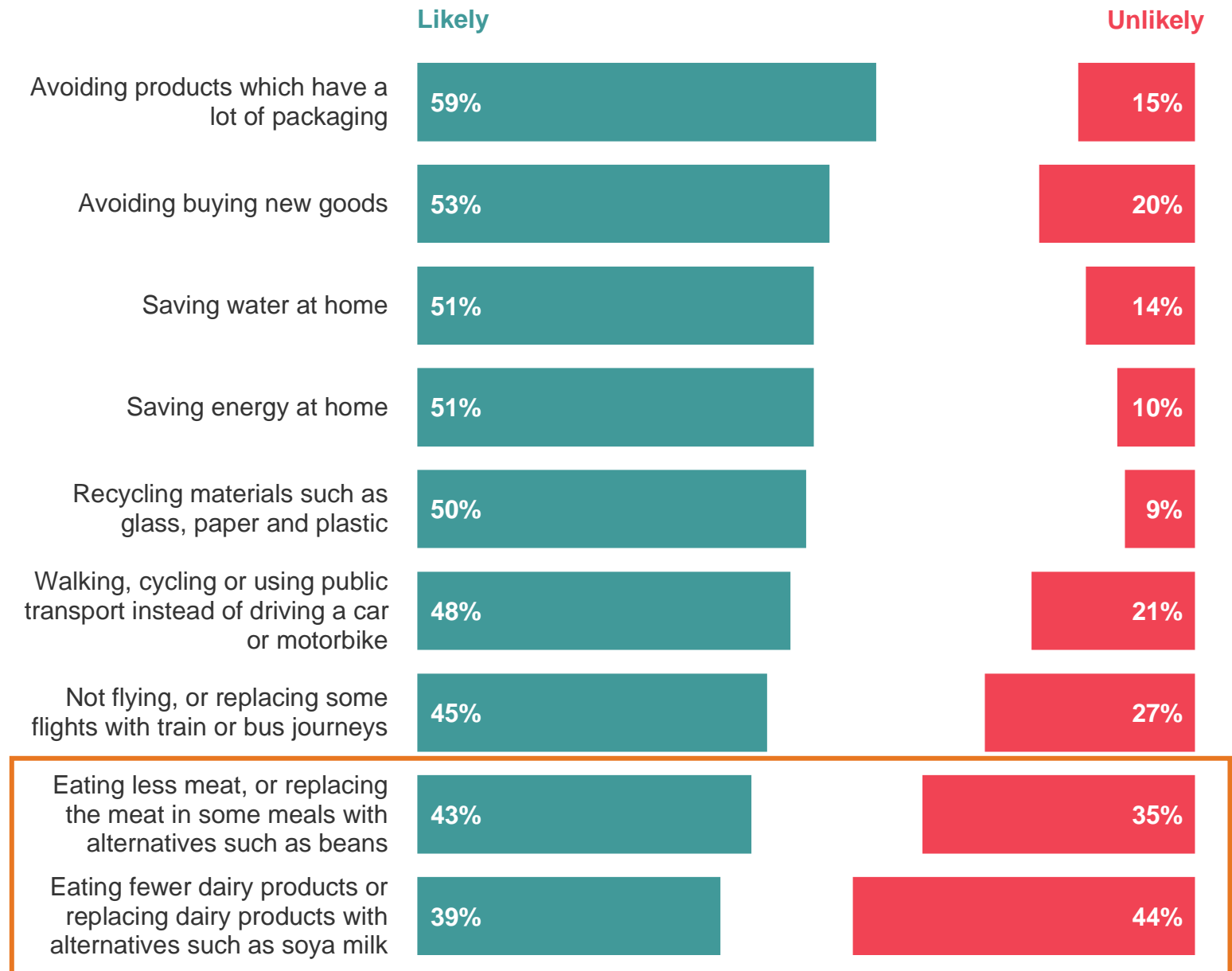
Q. Thinking about things you might do in order to limit your own contribution to climate change, how likely or unlikely would you be to make the following changes within the next year?



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?



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

The image shows a promotional graphic for a quiz. On the left, a screenshot of the quiz landing page is displayed, featuring a navigation bar with links to HOME, SLIDES, DATA ARCHIVE, CONTACT, and a prominent 'TAKE THE QUIZ' button. Below the navigation bar is a section titled 'THE QUIZ' with a background image of hands typing on a keyboard. The text below this section 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 screenshot is a large, detailed image of the Earth from space, showing the Americas. At the bottom right of the graphic, the text 'GAME CHANGERS' is written in a bold, sans-serif font, and the Ipsos logo is in the bottom right corner. A copyright notice at the bottom left reads '© Ipsos | Perils of Perception 2021 | April 2021 | PUBLIC'.

Take the Quiz!

EMPTY PLANET



EMPTY PLANET

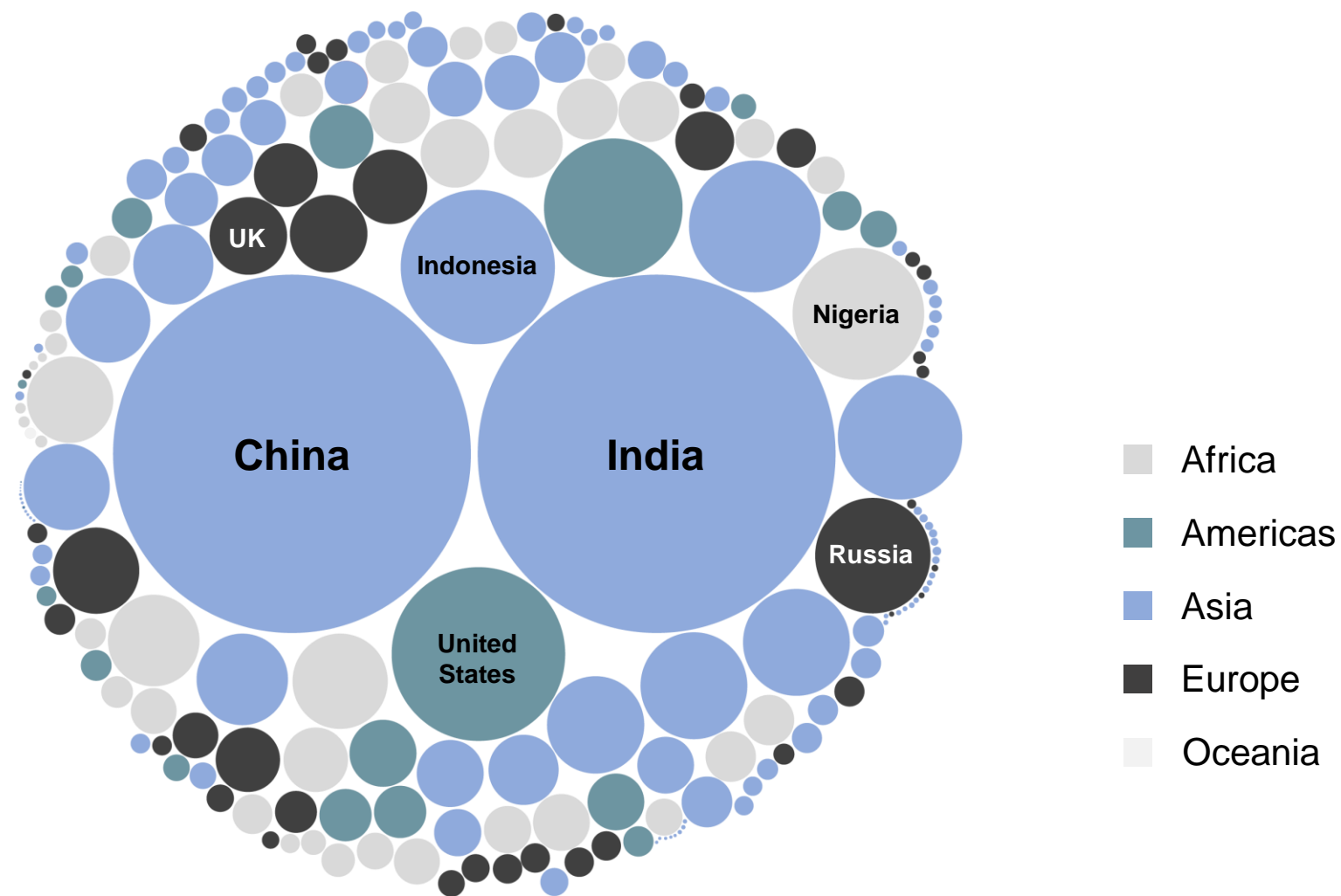
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Darrell Bricker
Global Service Line Leader, Public Affairs



THE POPULATION BUST

COUNTRIES BY POPULATION SIZE



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

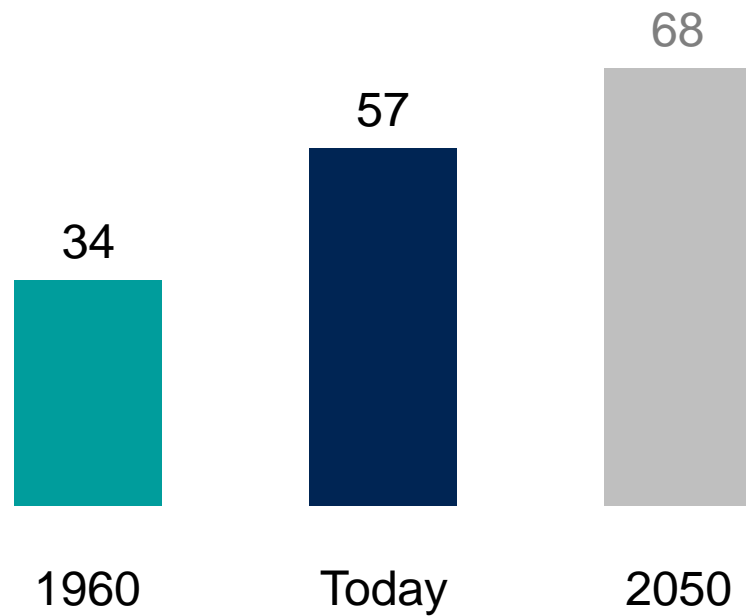


Ageing

URBANIZATION

THE BIGGEST MIGRATION

% of the World's Population Living
in Urban Areas



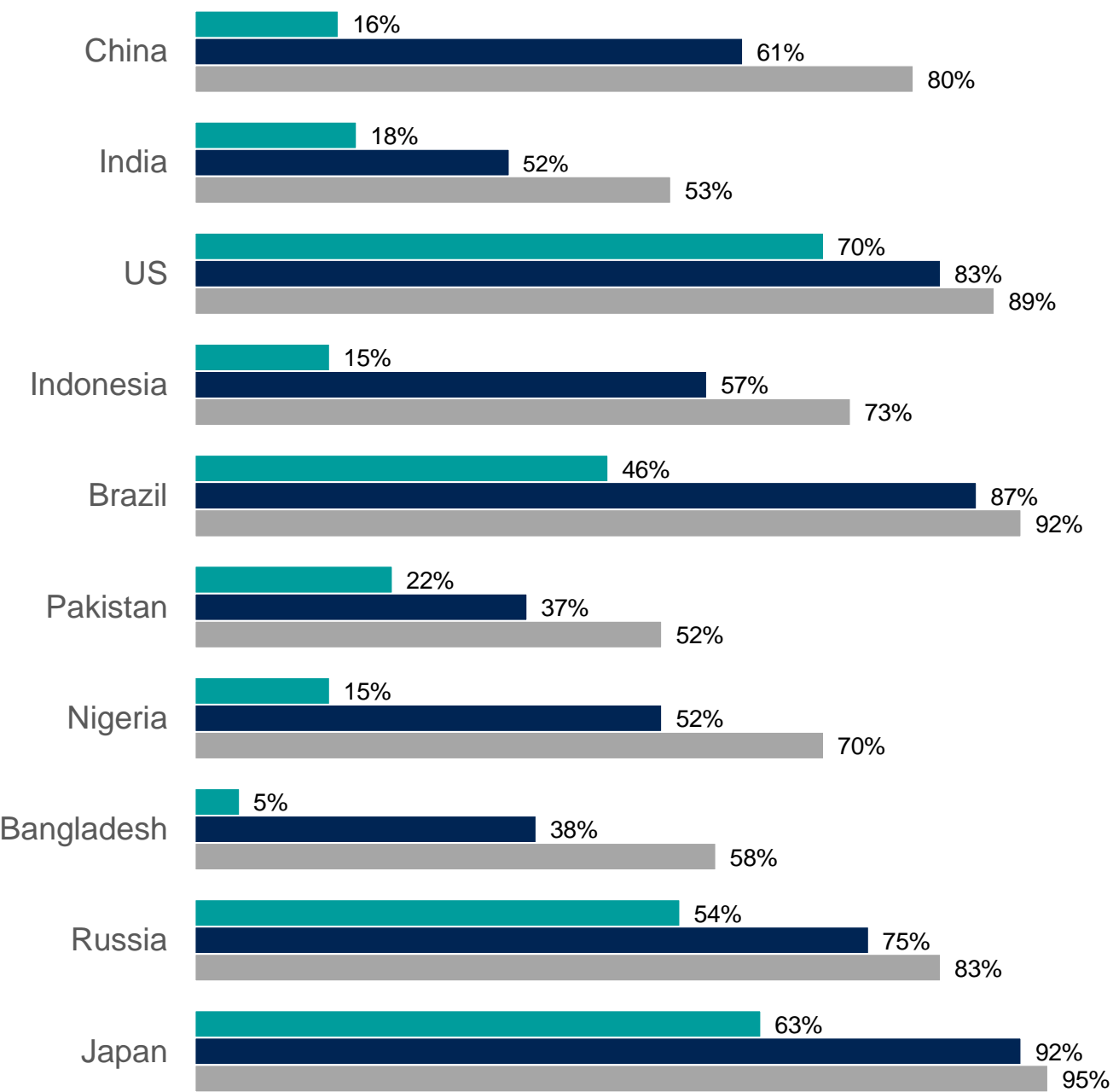
URBANIZATION

10 most populous countries

1960 – 34%

Today – 57%

2050 – 68%



FERTILITY



THE MAGIC NUMBER

2.1

FERTILITY WILL CONTINUE TO DECLINE...

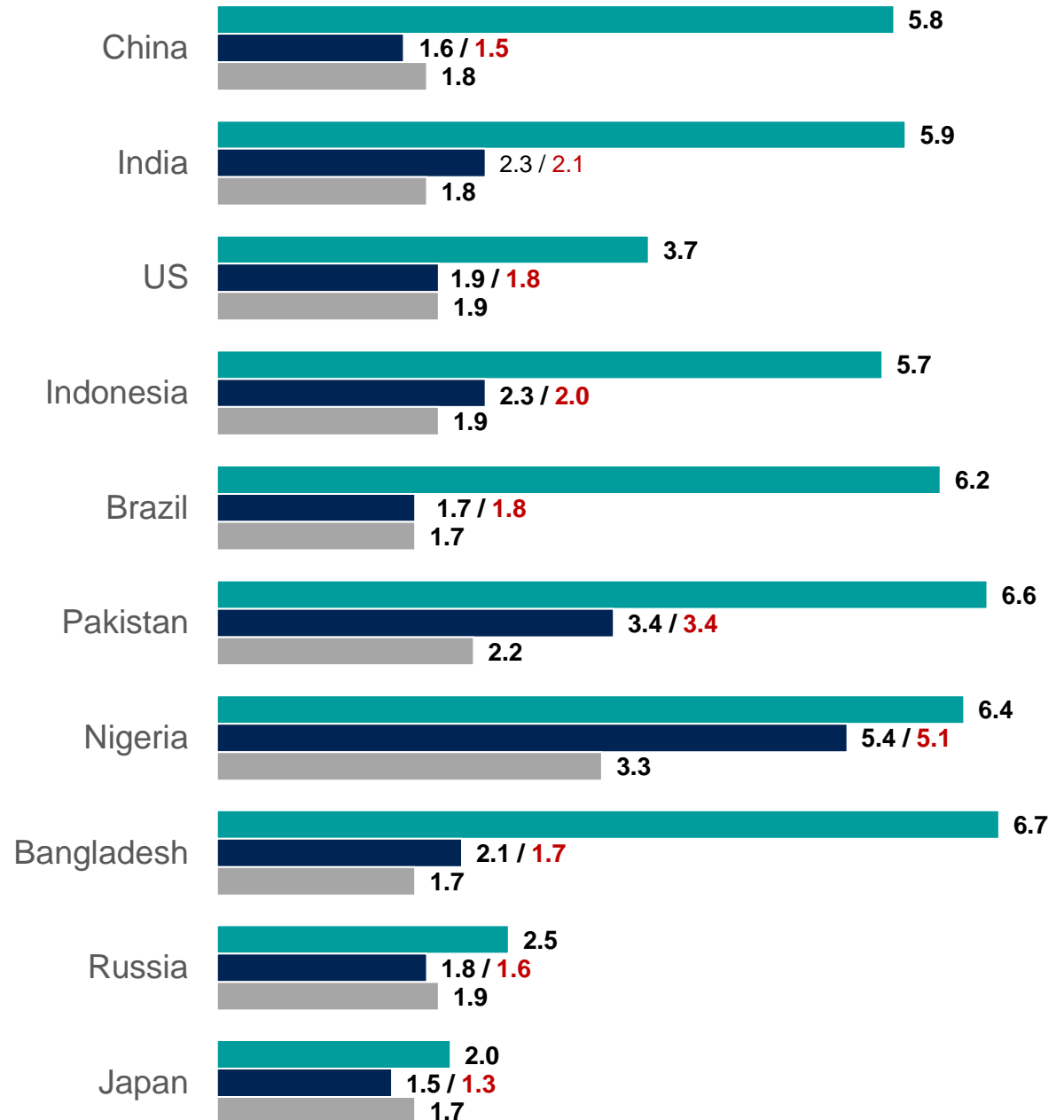
10 most populous countries

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



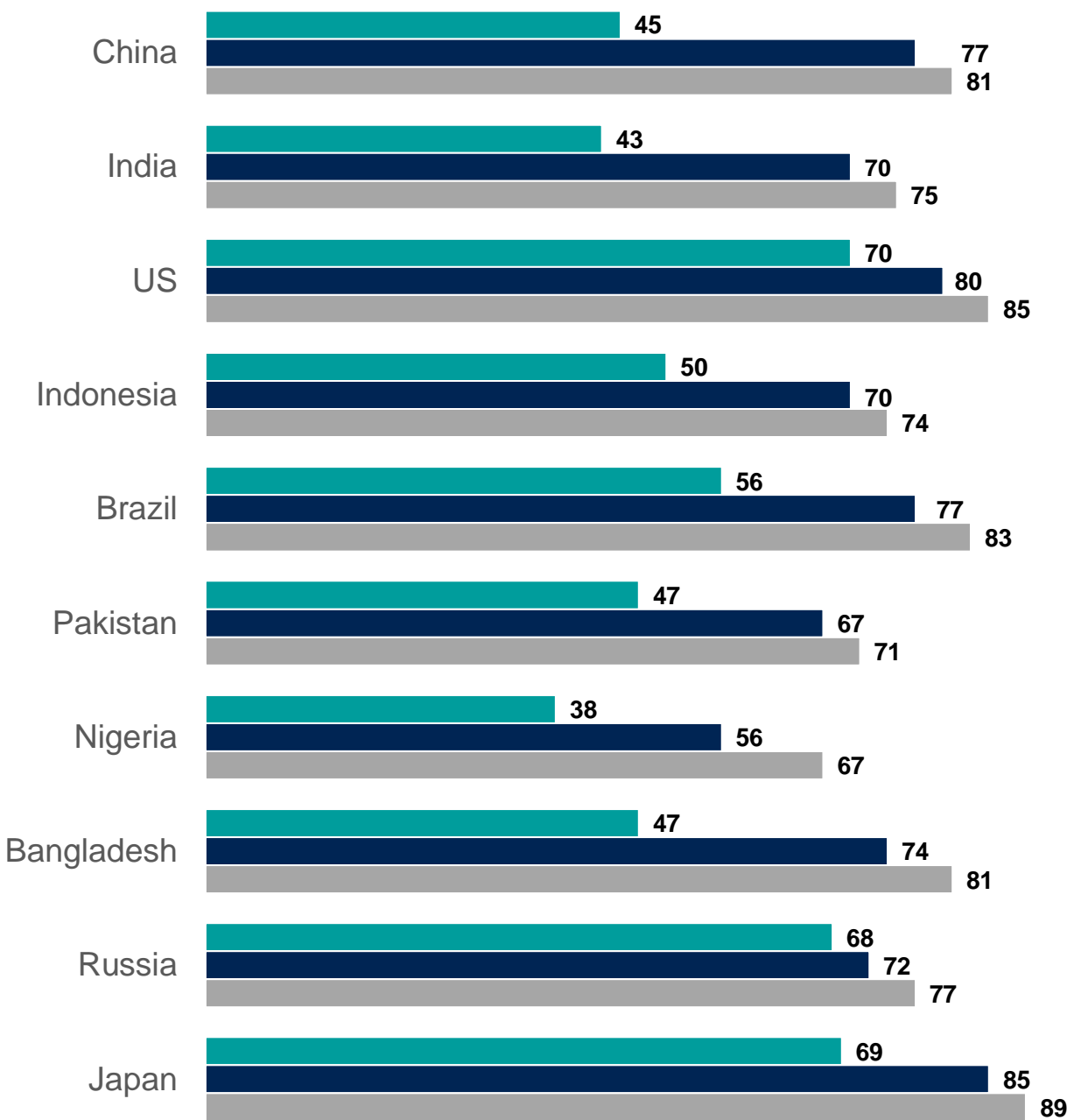
LIFE EXPECTANCY

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

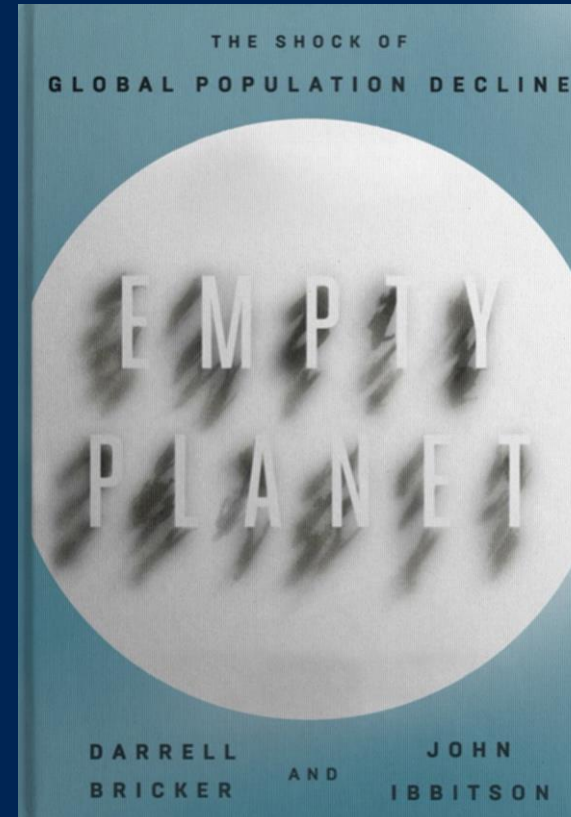
Impact on key demographics

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



THANK YOU

Contact: Darrell.Bricker@Ipsos.com



MOBILE PLANET

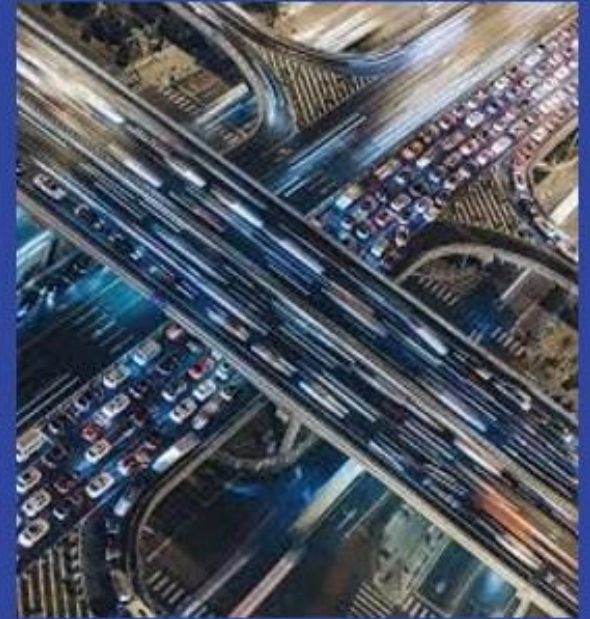
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Peter Otto
Chief Client Officer

GAME CHANGERS



FUTURE OF MOBILITY

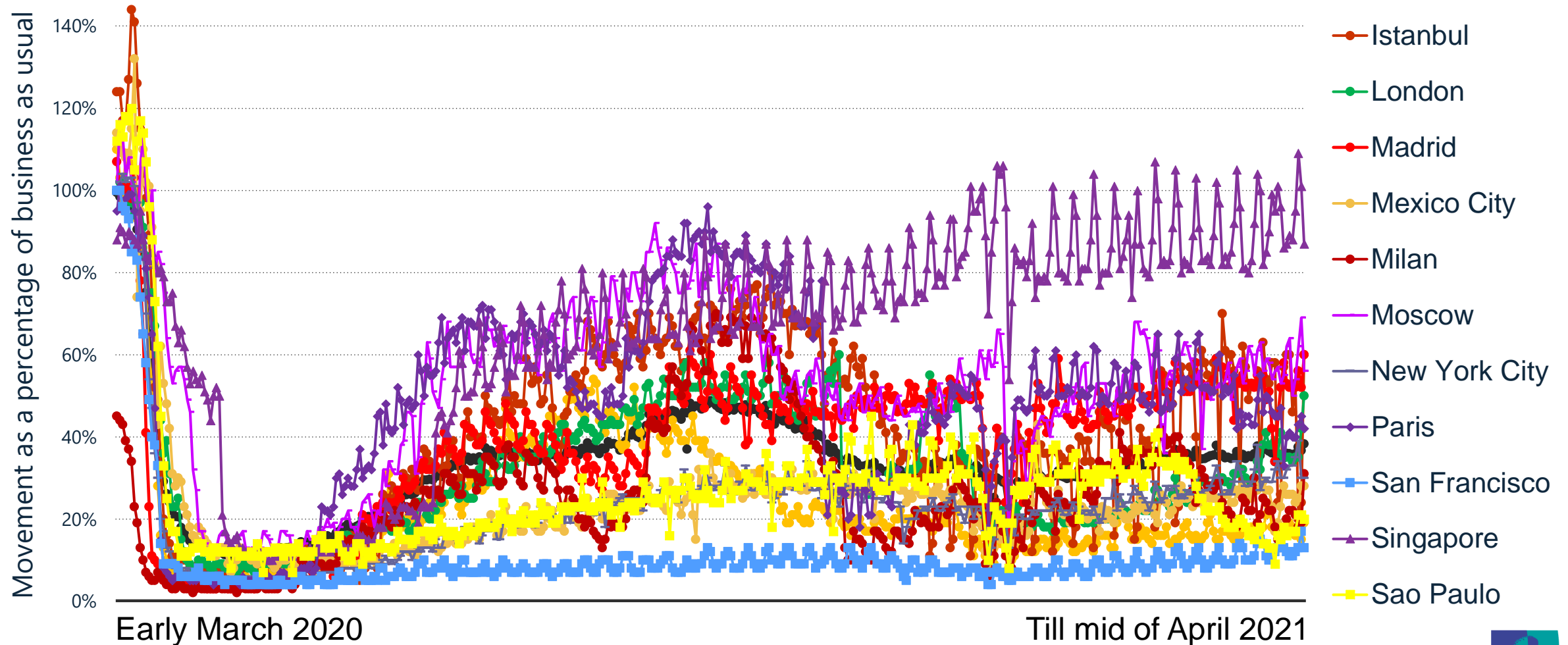


CURRENT STATE OF MOBILITY, IS A STATE OF **IM**MOBILITY



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

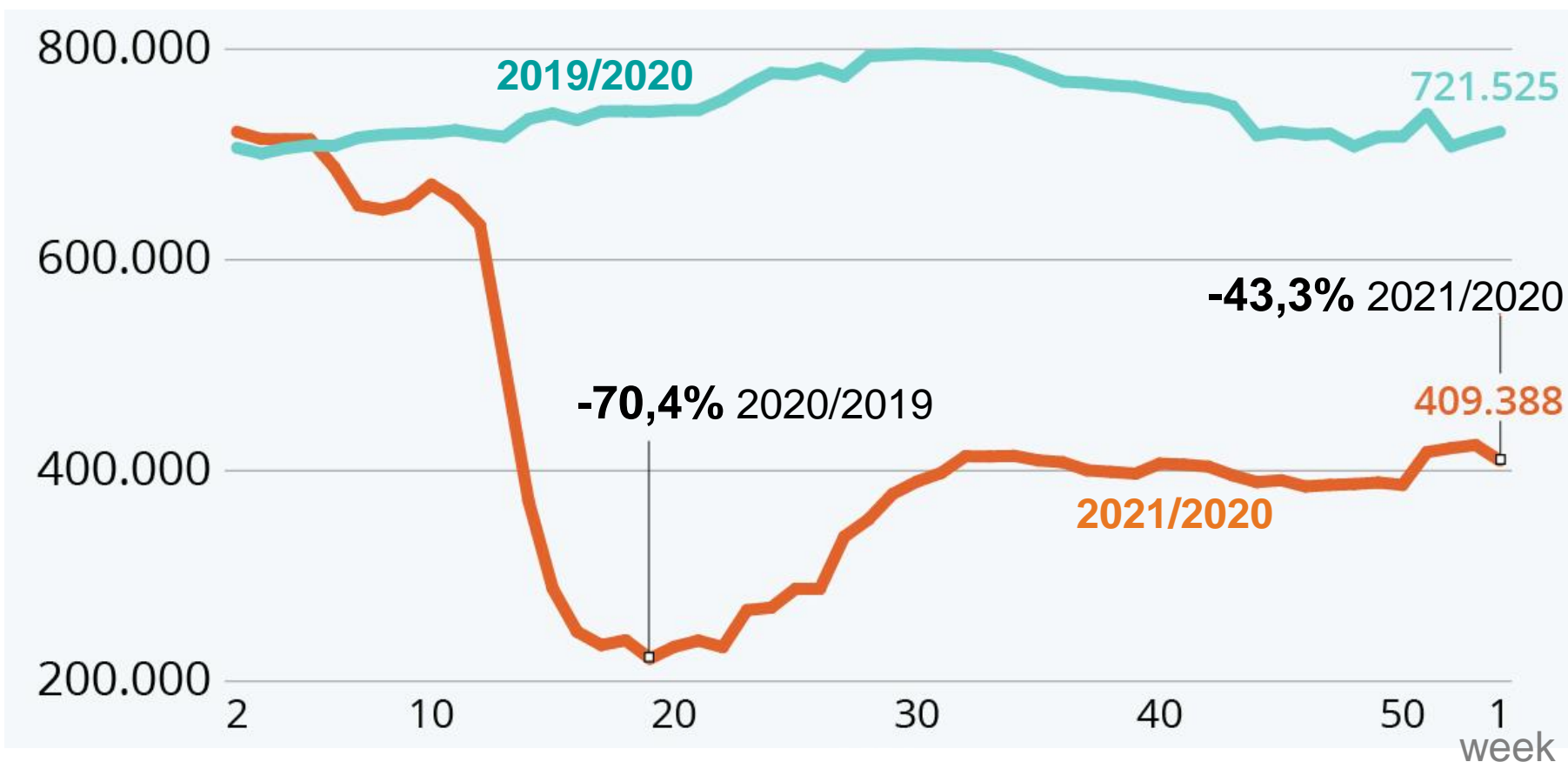


TRENDS

#1 IMMOBILITY

GLOBAL AIR TRAFFIC FAR AWAY FROM RECOVERY

Number of planned departures of regular flights



Source: OAG, statista

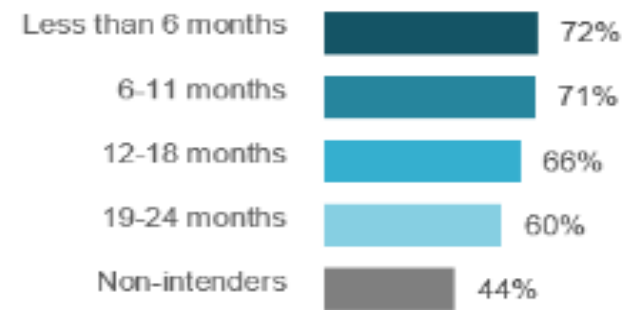
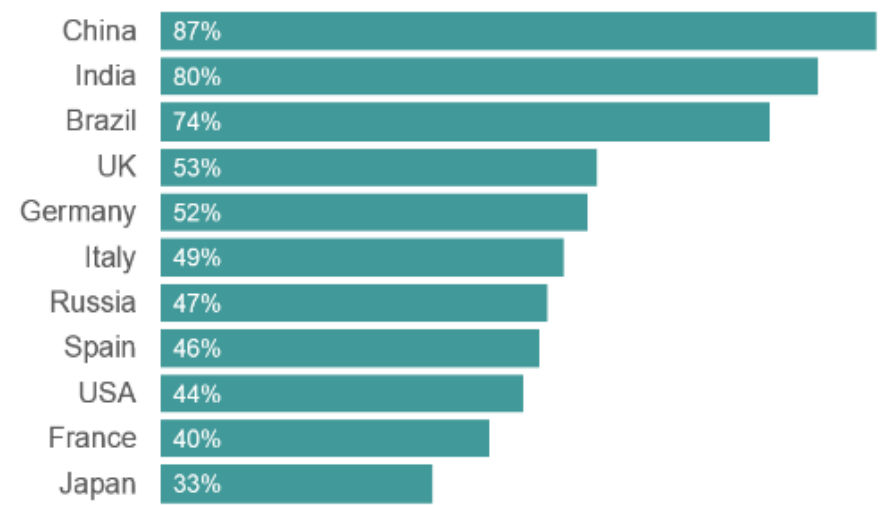
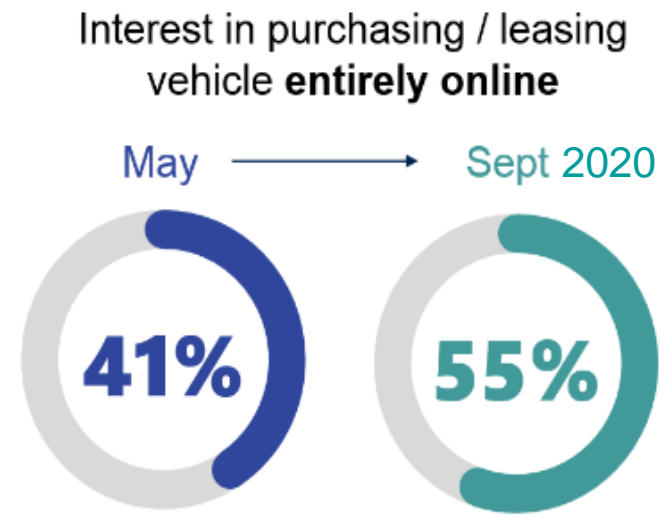
TRENDS

#1 IMMOBILITY

#2 DIGITAL
PURCHASE

CAR PURCHASES ARE BECOMING DIGITAL

Customers made the switch and Automotive brands now follow



Source: Ipsos Navigator



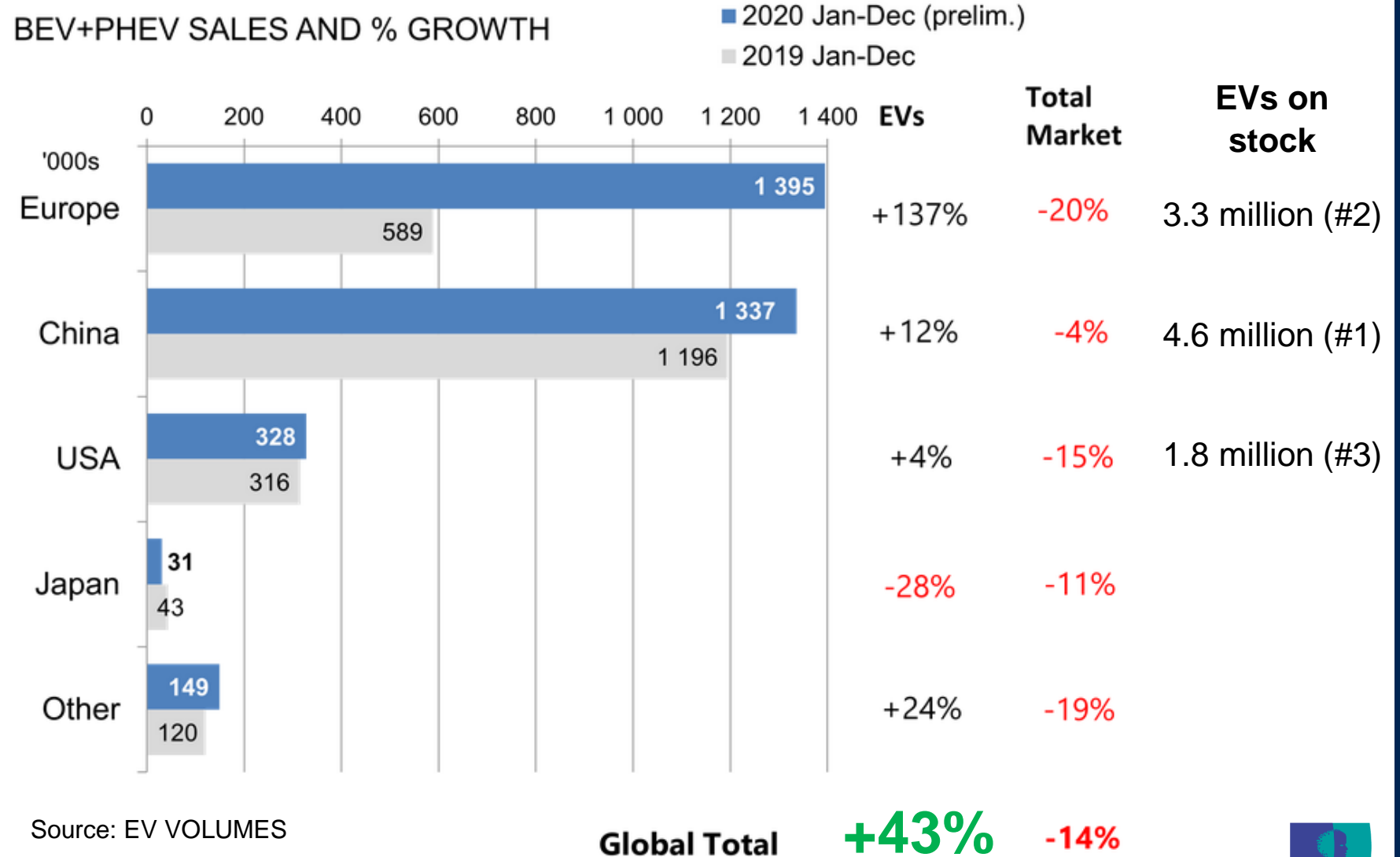
TRENDS

#1 IMMOBILITY

#2 DIGITAL
PURCHASE

#3 ELECTRIFICATION

CAR SALES WERE DOWN – BUT EVs ARE UP



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

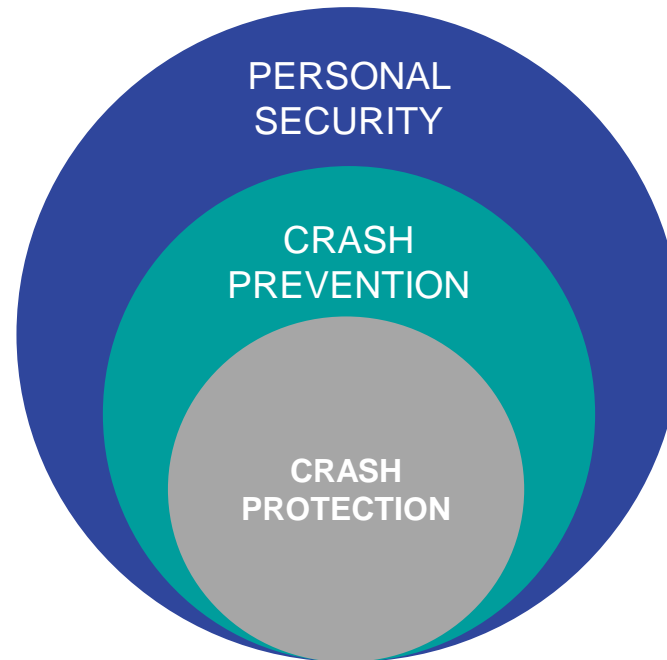
#3 ELECTRIFICATION

#4 CONNECTIVITY
before AUTONOMOUS

#5 REDEFINED
SAFETY

REDEFINING SAFETY

PRE-COVID

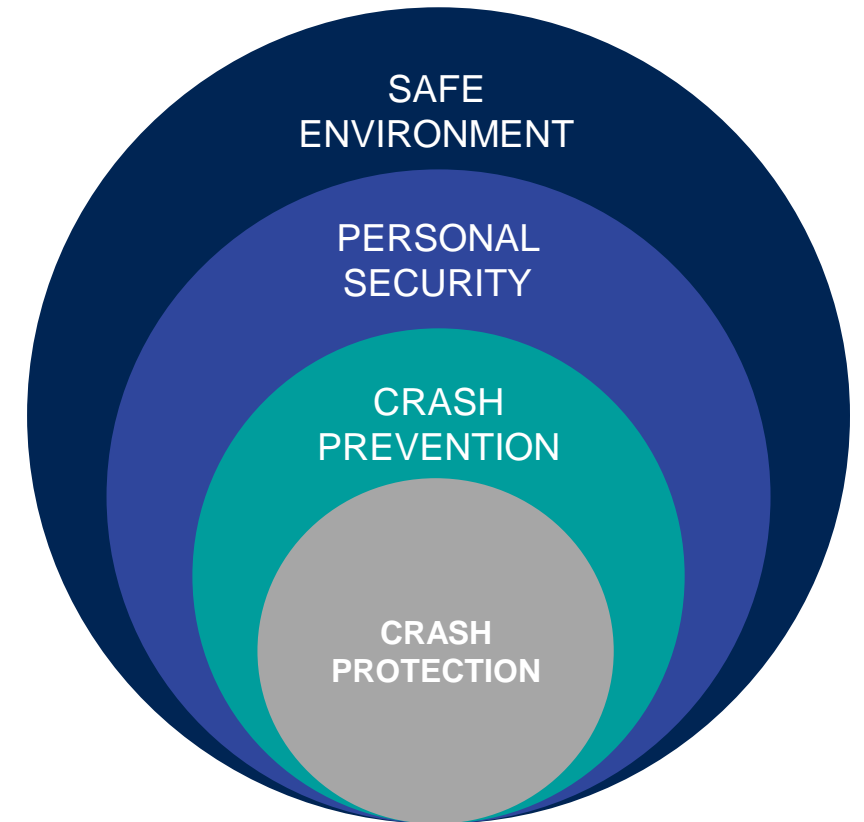


+ as **touchless** as possible

+ incl. **air filtration**

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

POST-COVID



+ incl. **antibacterial** surfaces

TRENDS

#1 IMMOBILITY

#2 DIGITAL
PURCHASE

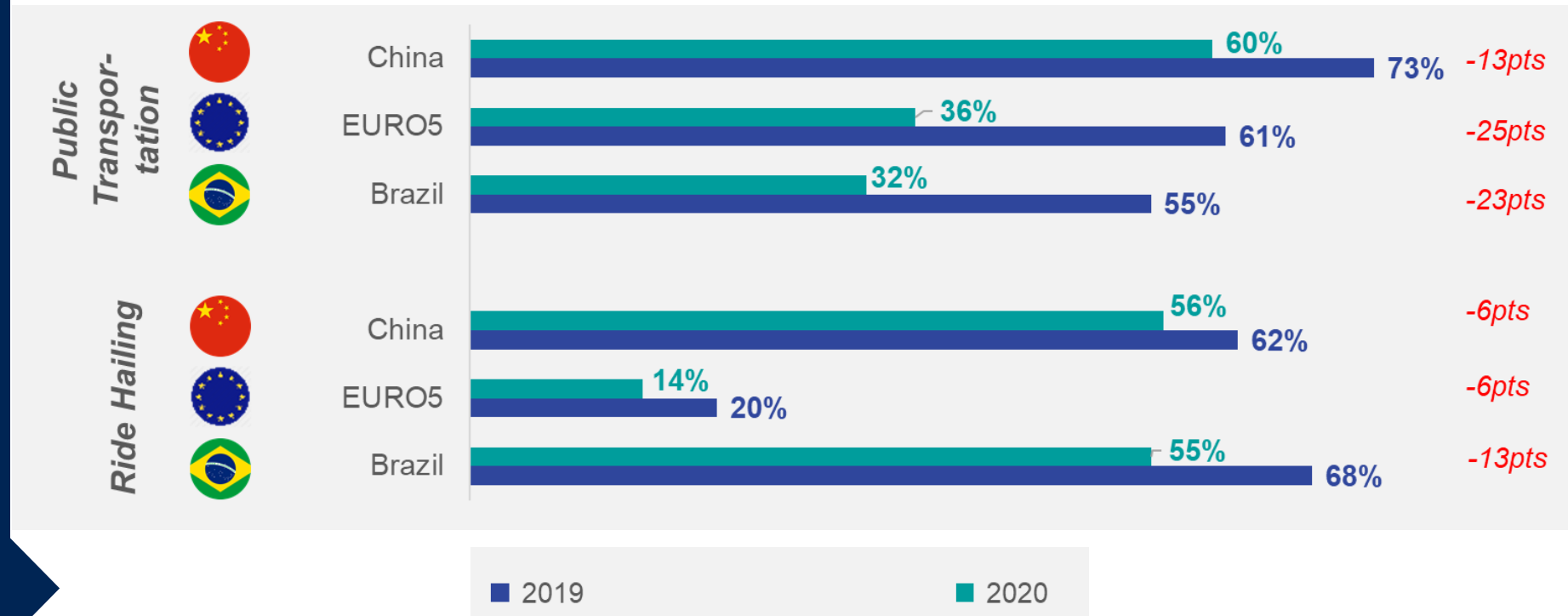
#3 ELECTRIFICATION

#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

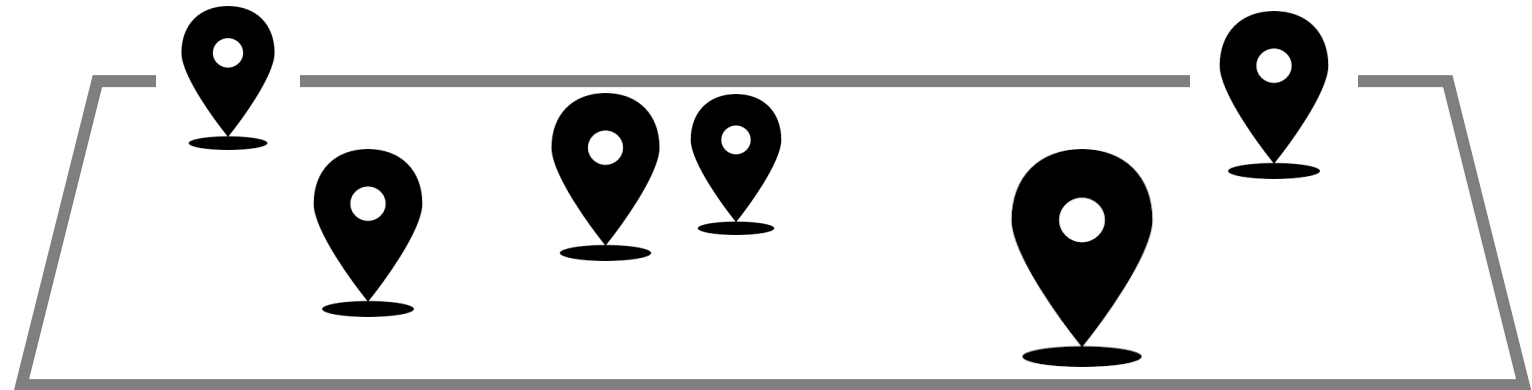
#6 DECLINE IN
COLLECTIVE
TRANSPORTATION

#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

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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* 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

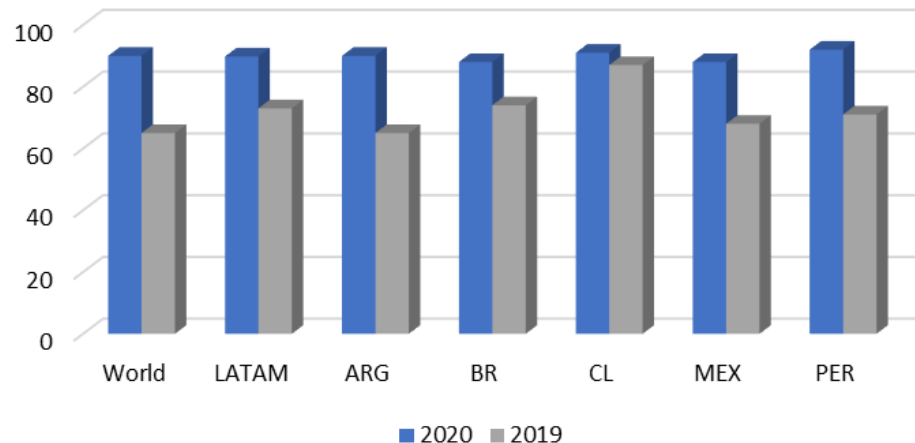
Let's look at Latin-American citizens' feelings and perceptions nowadays



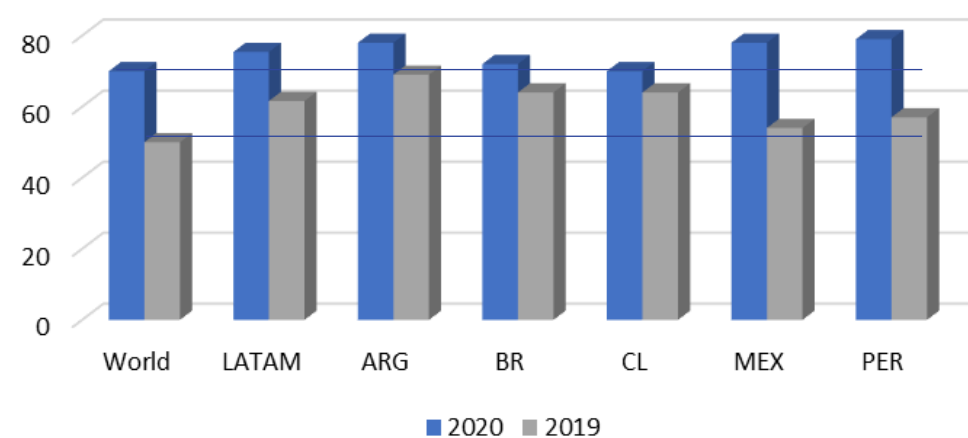
Perceptions 2020

- **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



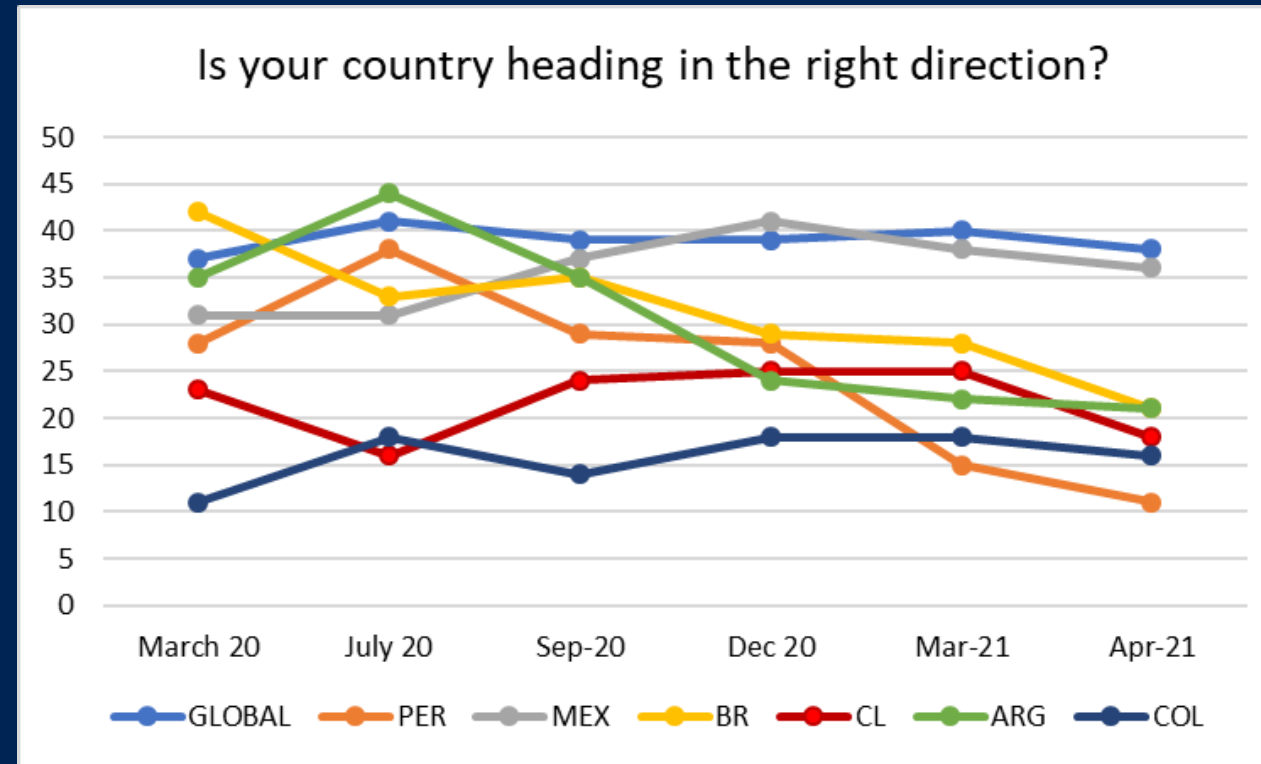
Was this a bad year for me and my family?
% of respondents who agreed



Source: Ipsos Global Advisor – 2021 Predictions – December 2020

What about today...

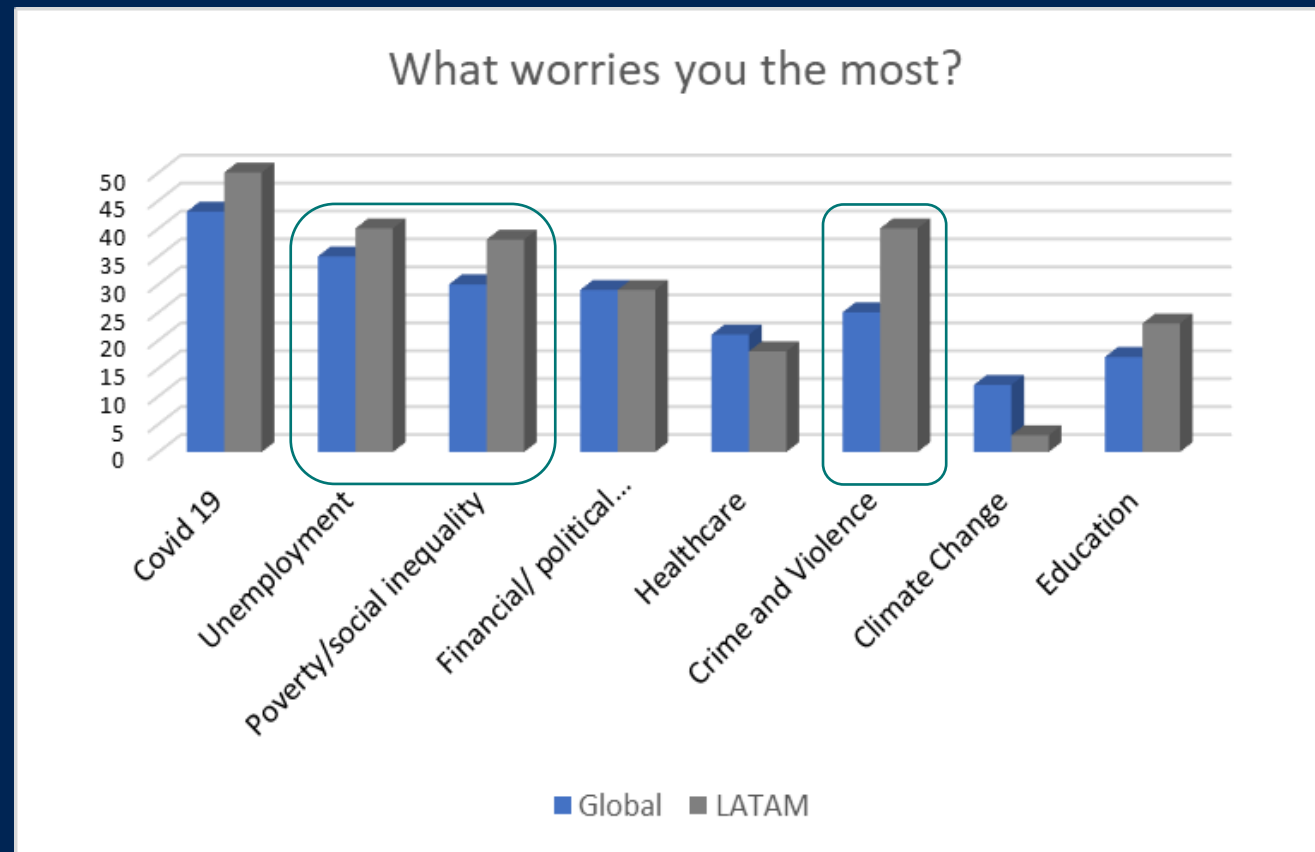
- **People still feel pessimistic about the present**, 80% perceiving that their respective countries are going in the wrong direction.
- **Sentiment that has been deteriorating in the past months**



Source: Ipsos Global Advisor – April 2021

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

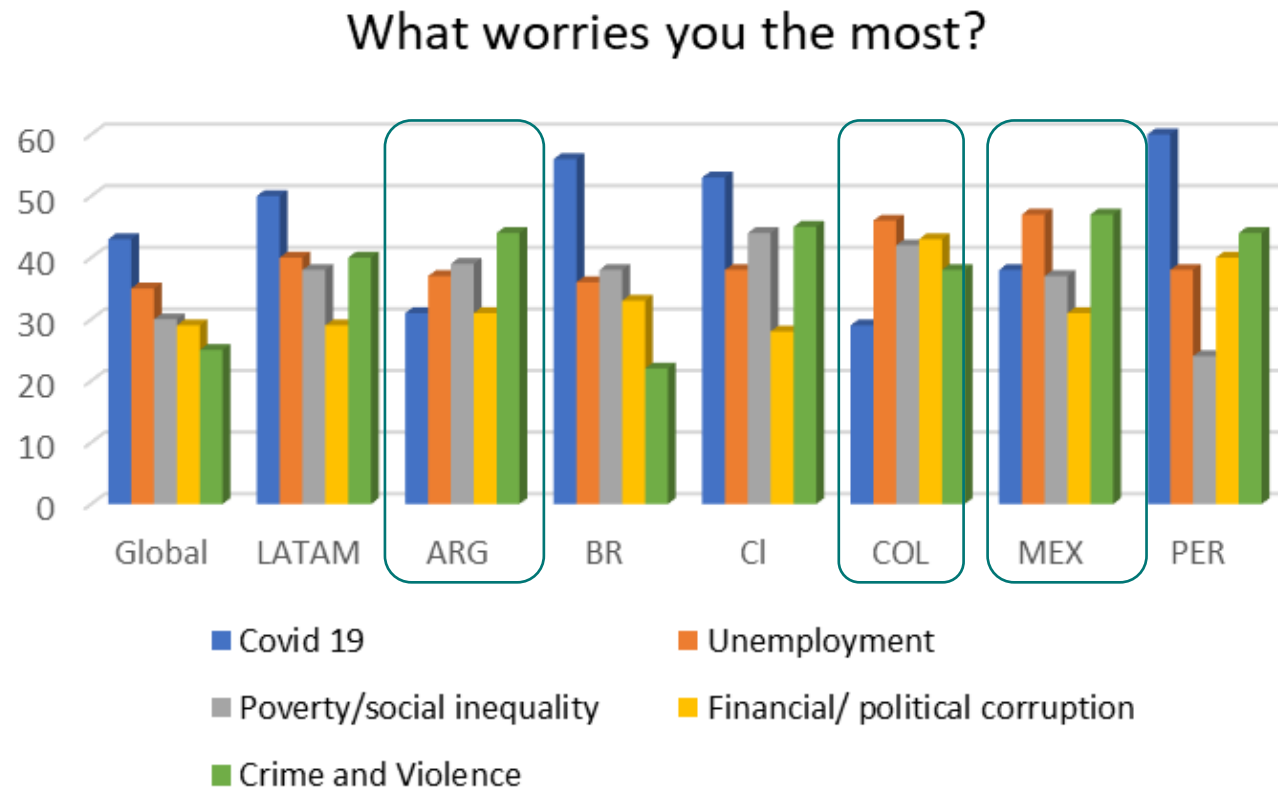
- Besides COVID, **Latin-Americans** are very worried about issues **affecting their everyday life**
- People are **less worried** about issues impacting in the **long term**



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

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?

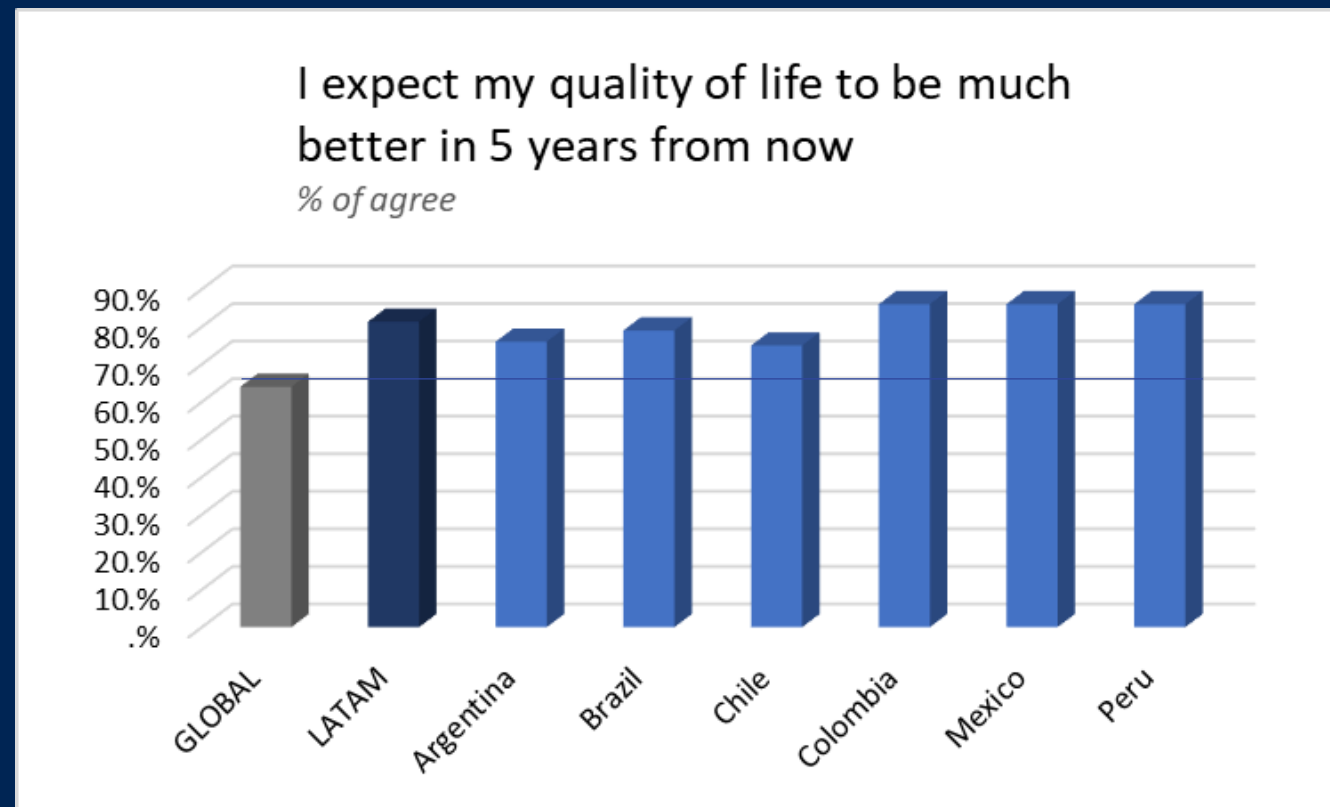
- Latin-Americans are very optimistic when it comes to the future



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

The background is a complex, abstract composition. It features two stylized faces in profile, facing each other. The faces are composed of various colored shapes: teal, brown, and grey. The eyes are represented by concentric circles. The mouths are simple curved lines. The faces are surrounded by large, stylized leaves in shades of teal and brown. The overall style is reminiscent of mid-century modern or bohemian art. A semi-transparent teal banner is overlaid across the center of the image, containing white text.

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 (%)



Source: Ipsos Global Trends December 2020 & November 2021

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



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



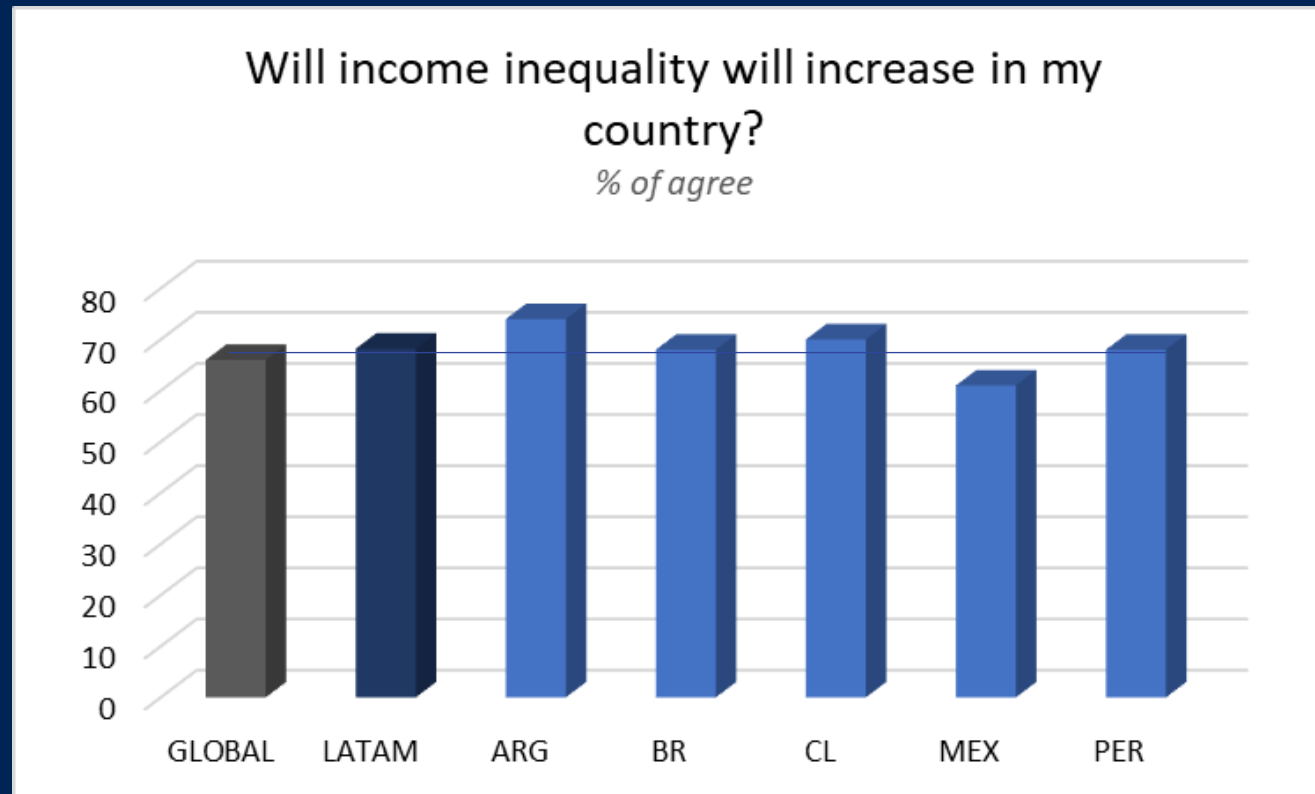
Corporations will be failing employees and consumers if they do not act now on climate change



Source: Ipsos Global Advisor- Earth Day March 2021

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.**

