

IPSOS VIEWS PODCAST: GLOBAL TRENDS STUDY

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Aynsley: Welcome to this first Ipsos Views Podcast of 2022.

And what better way to start this year than by hearing from none other than Ipsos's new Global CEO, Mr Ben Page, who will be discussing some of the key findings from our latest Global Trends Survey.

Hi Ben, thanks for joining us today and for taking some time out from your very hectic schedule. We really appreciate that. We're speaking just a few days before Christmas in the last knockings of 2021. For most of the people listening to this it will probably be the very early days of 2022.

It does feel that at the end of almost every one of the most recent years we seem to be saying "well, what an unprecedented or tumultuous or incredible year it's been". But when it comes to world affairs perhaps we should wait and let history be the judge of what was truly significant and what wasn't.

It's certainly been a big year for you of course. You've got a new wife, new job, new home. So, congratulations on all of that.

Ben: Thank you very much.

Aynsley: I know this also means you're learning a new language too. So, if you'd excuse my horrific accent maybe I can start by asking you whether you agree that *plus ça change, plus c'est la même chose*

Ben: [Laughs]... Oh dear! *Plus ça change*. Yes, I think the issue is that we're too close to the, I won't do this in French, but we're too close to the trees to see the forest. So, it took about four or five years after the financial crash in 2008 for the wave of populism that spread over the West to really become visible. And in terms of the political ramifications of the pandemic in the West or indeed in Asia which is in some ways suffering more than the West because the severity of the lockdowns in some countries.

Again, the impact I think won't be visible immediately. I mean, the most obvious has been the acceleration of things like the digitisation of the economy because of the need to reduce contact in many parts of the economy. But also, I think for at least for knowledge workers... and we first of all must recognise that large proportions of people are not able to work from home... but for those who can, the last two years have been in some ways revelatory. And I think they have broken the taboo about remote working that existed before the pandemic.

But we do need to be very cautious about all of this. And as you know in the Global Trends Report what we can see of course really is more of a continuation of existing trends rather than a new world that people keep talking about.

Aynsley: Thank you for that lovely segue into my next question because we are here mainly to talk about the findings of our new Global Trends Survey which undoubtedly could temper some of the more hyperbolic claims that have been made about the world we currently live in... even though many of the habits and traditions have been disrupted by the pandemic... here we are immediately before Christmas having our Christmas disrupted by the latest wave of the virus.

There is actually limited evidence from the survey that our underlying attitudes and values have changed. So why do you think that is?

Ben: Well values... remember we think about values as the sort of bedrocks of who people are. So, values are things like do you think gay people should be allowed to get married? What do you think about the death penalty? And things like that don't change overnight.

So, in research we're measuring essentially three different levels of belief if you like. We measure on the surface *opinion*. You know... what you thought about that TV show last night or that football match. Often quite shallow. What did you think about that speech by that politician last night? It's quite immediate, gut reaction but people aren't really dwelling on it.

Below that you have *attitudes*. Maybe how do you feel about the government in your country? Or the particular government that you have in your country.

But below that are the *values* and I think values are those are fundamental things. They change very slowly. So, in many Western countries for example in my lifetime our attitudes to homosexuality have completely changed. The country I was born in, in Britain, it was illegal to be gay when I was born. And yet now most people, 91% of people say that gay men and lesbians should be free to live their lives as they see fit. And indeed 2 out of 3 people say that Prince Harry, if he had married a man rather than Meghan Markle that would have been fine by them. Probably Meghan Markle would have been happier!


So, you know... values are deep rooted. And therefore a few years of the pandemic won't change them. If it goes on for a decade then we may see some differences. And I think the fact that we're now into second year of the pandemic and potentially a third year given the way it's going, we may start to see more change particularly over how people work.

But I'm still cautious because people have talked about the death of the office, but we still need offices. We're social animals. And the idea that we're all going to become people who stare at a screen all day miles away from anybody else and never see anybody in real life, I think we need to be quite cautious about that.

Aynsley: This whole framework does remind me a lot of what I learned in "A" Level history. The example used there was the outbreak of World War 1: was it caused by the Archduke getting assassinated, or was it actually caused by longer term tectonic shifts in the balance of the great powers across Europe? And of course, the answer is well, it's a bit of both. But probably it's more underlying structural issues.

Ben: I mean what we're seeing in the world at the macro level of course is a massive shift of power and wealth from Europe and America towards Asia. And you know that's driven by a whole range of structural factors.

But it means that many people in America, many people in the West and interestingly now in Latin America... which is the world centre of populism at the moment... the angriest people in the world are actually in Latin American countries like Colombia and Peru.



But the reason all those countries is so disrupted is because the future that they imagined, and it's a very... it's one of the things that makes us human is to think about the future. Other animals use tools, other animals think, but they don't think anywhere near as much about the future as humanity does, but we're not very good at thinking about it in terms of our accuracy.

But certainly, the expectations in the West were of endless growth and most people in the West believe that it's the normal state of affairs that your children should be richer than you. And of course, what people in the West have seen over the last decade since the crash is that their children may not end up being richer than them. And in fact, may end up being poorer than them. And that's made them very, very angry and wanting to blame people. But that's caused by structural change in terms of wealth, power etc.

So, I am a marxist with a small "m", which might seem strange for somebody running a global business listed on the Stock Exchange. But what I like about structural analysis is that those deep-rooted things are there - but it does need the trigger. So, if you go back to World War 1, the gunpowder is stacked up in terms of the Great Power rivalries between Germany and France and Britain etc. But of course, it takes that individual event, and there are endless historical events that you can look at where even the people involved didn't necessarily expect it to happen the way it did.

And indeed, you know one of the things that we can see is that as a species we're constantly blindsided by things. We were blindsided by the financial crash in 2008. You know all the experts didn't really predict that. We were blindsided by the pandemic.

All the experts, including Ipsos of course, had predicted that a pandemic could be a massive disruptive factor. Anybody doing any work looking at futures, the trends etc could have said one of the risks for the future is a global pandemic with a virus but somehow governments when it finally happened weren't perhaps as prepared as they should be. Although having said that the speed at which humanity was able to pivot and product vaccines in a few months that would have previously taken many years is I think a demonstration of what we can do when we put our mind to it. At least in the developed countries.

I think an interesting challenge is the uneasiness or unevenness of who's actually had the vaccine. The fact that the West, I think we've given out more booster jabs now in Western countries and in the North of the world than we have, you know first stage vaccines in the entire developing world which shows that we are a little bit one-sided in terms of how these things are applied. But nevertheless, we are able to pivot but we're not very good at predicting the future.

And so, what we're trying to do with Global Trends of course is to look at those underlying deep-rooted values but also some of the shifts in human society and see what we can see emerging over time. We're always in a sense looking backwards when we ask people questions. But at the same time, we can try and detect change and we can of course start to imagine different outcomes in the future. But certainly, uncertainty is probably the only thing we can be absolute certain about.

Aynsley: More on predictions later actually. Though in your answer you've anticipated my next question which is about the latest iteration of Global Trends including some countries that haven't featured in it before such as Nigeria, Kenya, Indonesia, and Thailand. Were you surprised by anything that you found in those markets?

Ben: One of the things that's interesting is that in many ways they might be more content in some ways than others. So, for some of those markets they're also very, very different. "I find shopping

online more difficult than shopping in traditional stores”: Indonesia 24% agree. Nigeria 65% agree. So, we mustn’t generalise too much about some of these countries.

One of the things that’s interesting in those countries is that the expectation of business to step up and be counted and so you can see that most strongly in Nigeria. More than any other country on earth. 87% in Nigeria want business leaders to speak out on social and political issues. In Thailand it’s 77%. But down in France it’s only 51% which is the same as America. One of the few things perhaps the French and Americans agree on.

And so, what we see, and you see it also in many South American countries is that where the State is weak, people actually want business to step in and do more because government is failing and therefore maybe business can fix things or take a stand. And I think that is interesting.

So, I wouldn’t say there was anything massively surprising between Nigeria and Indonesia etc. except on some of these questions just how different they are. But rather this expectation that we can see that we talk about brand purpose in the West. But actually, what’s very clear is that people, where government is weak, places like Indonesia, they really want government, brands to step up and be counted.

Also, the other thing that’s very clear is that developing countries... and here particularly Thailand is top in this... wanting the country to be the way it used to be. So, in China only 24% want China to be the way it used to be. And the reason for that is within living memory people in China can remember Granny starving to death in the Great Leap Forward at the end of the 1950’s, beginning of the 1960’s.

In contrast somewhere like Thailand and Nigeria with massive economic growth in recent years... but of course, also lots of problems, challenges, infrastructure problems etc. 8 out of 10 people in both Thailand and Nigeria want the country to be the way it used to be.

I would say that almost anybody in any country where they say they want the country to be the way it used to be, in Britain the figure is 50%, and it was as high as 56% among Brexit voters, actually we’re not really wanting to go back to the 1960’s. But what we’re expressing is our worry and anxiety and discontent about the present. You know we don’t really in Britain I think want to go back before the National Health Service or to child labour or something like that. Or in America, back to when slavery existed. But rather what it is, is an expression of discontent about the present.

Aynsley: For all the justifiable concern at the moment at vaccine hesitancy and conspiricising, our rising confidence in medical science is one particularly positive finding from the survey, with stronger growth in developing markets I noticed. Is that because they’ve got further to come do you think? This was all done before the emergence of Omicron, but I see confidence in vaccines seems to have taken more of a hit in more developed markets but done quite well in LatAm and Asia. What’s your take on that? Are you seeing any patterns in the data?

Ben: What we’re seeing globally is this rise in trust in medicine... the belief that eventually all diseases will be treatable is really interesting. And of course, the fact that the vaccine has been developed so quickly will give a lot of people hope that if something else comes along we’ll be able to fix it. And of course, actually again in terms of the wisdom of crowds... the public saying that they think, you know... more people believing that all disease is going to be treatable, you know... they are in some ways right to sort of reach that conclusion because we will see during the 2020’s we’re at that point where we may see finally you know... many treatments for certain types of cancer coming forward... gene therapies etc.

The technology, medical technology is advancing incredibly quickly and it's helped by things like AI. I was really taken by DeepMind's work on folding proteins and understanding how proteins work. And the reason that's so important is that I think we've moved from something like understanding like 17% about how human cells work or proteins in human cells work, to about 96% of it in about a few short months which shows what AI can do.

When you then take that knowledge and apply it to treatments we may yet be able to do it... so, I don't think I'm particularly surprised. You could argue that humanity is sensible to sort of take that view.

I think the uneven pattern of take-up on vaccines however shows how it's not just about what science does or doesn't do but also about deep-rooted and back to values which changed much more slowly. So those former Communist countries where governments really were failing and corrupt even after the end of Communism retain that deep mistrust of governments.

And of course, Romania is having a bad Pandemic. But Romanians have a high level of mistrust of their government because of what happened under Communism. And so that is incredibly strong. And so, you can tell them anything you like but they're not going to take it and instead people will die in their masses.

So, we can see that belief in vaccines is correlation with taking them or not. Although having said that, the French... who love to complain... and I speak as a proud resident of France now, as Global CEO of Ipsos of course. In the end actually they were very sceptical about vaccines to start with. But ultimately with a little bit of coercion from their President, Emmanuel Macron they have actually gone on ultimately and got vaccinated the same as other major Western European countries.

I lost a friend who was a Jehovah's Witness because originally Jehovah's Witnesses didn't believe in vaccines at all: period, end of. They've actually ameliorated their beliefs, but I think my friend was a member of a traditional bit of the Jehovah's Witnesses and so he wouldn't get vaccinated, whatever I told him. Every week he came here and every week I told him to get vaccinated and every week he ignored me and now he's dead.

So, it just shows that beliefs matter. And one of the things that we do of course is to try and really understand those and what drives them. I think again this is endlessly fascinating but assuming people are rational is not going to get you very far.

Aynsley: On a completely unrelated matter, I thought it was interesting that scepticism about Big Tech seemed prevalent in the findings as well. But at the same time, that people also seem to be relaxed about losing control over their own data. Do you think that's because there's particular associations with the big firms, Facebook, Google and Apple etc or because consumers understand the potential of data sharing more than they understand the risks to them of surrendering their own agency over it? And related to this, what do you make of China being the most negative about Big Tech? Is this linked to them having a very different ecosystem?

Ben: They're told by their government that tech needs to be managed of course aren't they? So, I think, also China is of course the most highly regulated society. It's also a society that is far more, I don't know when you last went there Aynsley.

Aynsley: I've never had the pleasure.

Ben: Ah, well, what you will realise when you go there is that it's one of the most tech enabled societies on earth but also probably with fewer legal protections for privacy than in say most Western countries.

So, you'll find an old lady selling fish on the street in a bucket. So, she's just got a bucket full of fish. But when you have your fish in your bag and you pay, you just pay by tapping your phone on this old lady's phone. So given how much tech and surveillance there is in China, in some ways it's not surprising that they're perhaps most concerned about it

But generally, people all over the world exhibit of course *cognitive polyphasia* about technology. So, we're very concerned about it and say that it needs to be regulated more but we're also simultaneously saying that we accept that we're going to lose privacy and it's almost inevitable. So, we've got this sort of duality to our attitudes. But we don't experience cognitive dissonance about it, or not very often.

So, we're cheerfully spending far too much time on our smartphones but at the same time we're addicted to them, and we know we are. But somehow we're able to be worried about it but carry on doing it at the same time without experiencing cognitive dissonance. So, if you're asked about it or say somebody needs to rein them in and regulate it more, but at the same time you're saying that it's inevitable that we all lose privacy and there's not much we can do. It's a very common phenomenon.

In fact, I'm doing a speech on it at the UK Market Research Society in the Spring of 2022. Cognitive Polyphasia. One of the key things that researchers constantly examine. Conflicting ideas about the same thing at the same time without experiencing dissonance. That's cognitive polyphasia.

Aynsley: So, following up on the China point in particular, I thought there was a fascinating mix of findings there, even allowing for the fact that we're not able to ask all the questions there.

So, as you mentioned there, they're the least nostalgic of all the countries in the study. Nonetheless, I thought there was a faint sense at least that the people there aren't entirely happy. There were very negative results on being overwhelmed, big tech, social media, as we've just said. They tend to agree that climate disaster is imminent. They like globalisation, perhaps recognising it's been an important export industry for them. They imported the jobs of course.

And curiously one thing they share with the US is that they are the least likely of all the countries in the study to say that they feel like they're a citizen of the world rather than a citizen of their country.

Ben: And that's a change actually. I need to look at that trend on that. But I think there of course you've got the trade war between Biden and Xi and of course Trump and Xi, and this pivot. And so, there's been a big... over the last two years, we saw it first in 2020, but it's continued into 2021... there was a rise of patriotism in 2020. Most countries seeing more people in the country saying that they wanted to buy domestic products etc.

But I think in the case of China it was most dramatic because of the Trump/Xi standoff during 2020 and I think you know the whole policy of China which is in some ways now in permanent lockdown. They're not allowed to leave. And indeed, many people are not expecting normal travel arrangements in China in terms of people leaving China to go elsewhere to really kick in until after the People's Congress which is in September 2022 when President Xi will undoubtedly secure lifetime rule.

And so they don't want, for all sorts of reasons, people travelling. And they're worried about the pandemic. They've got a zero Covid strategy. But I'd also say that it probably suits them to have Chinese people spending money in China and not abroad.

Aynsley: Taking a bit of a left turn: the extent to which a country acknowledges the existence of racism seems to be linked to how ethnically heterogenous that country is... which would seem to make sense. Do you see this same pattern? And the renewed discord around the issue as the growing pains of integration and diversity?

Ben: I think so. Most of the evidence is that when people spend time together they get used to each other. And so, a lot of the data I have seen over the years, the 30 years of my career is that you're most likely to see, I don't know... racial tension, disruption etc, riots even, where there's been a fairly rapid change in a population and people aren't used to each other.

The data shows that homogenous populations of whatever type, white, black, brown, green are generally more content than heterogenous populations. But over time even heterogenous populations, providing they're stable, find out how to get on with each other.

The challenge is if you've suddenly gone from a minority being 10% of the population to 20% of the population or to 30% of the population and it's happened very, very quickly. Then you often will see tension. I think one of the things the pandemic showed us, and we talked about this in 2020, is that in Western countries... and we need to be a little bit careful because generalising about Britain and America because we're Anglo Saxon and applying that to all Western countries in itself is foolish because in France of course everybody is French. They don't, race officially does not exist. But of course, it does. But officially it's illegal in France to ask about someone's race.

I think what was interesting about the pandemic is that it focussed people's attentions on these issues. And so, you often had the children of immigrants being very agitated and engaged by the murder of George Floyd in Minneapolis in a way which they'd only seen on a screen. Somebody they didn't know but suddenly it typified and symbolised a whole set of things that perhaps people were reflecting on.

The pandemic was unequal in its impact by in terms of the rich or poor, black, or white of course in many societies. And I think for many countries the Black Lives Matter movement in the wake of the murder of George Floyd was a sort of rallying cry. As you know in Britain, we had the highest ever level of concern about race relations in 2020. And we've been measuring it since 1974.

Now of course it wasn't like the race riots of 20 years ago. Very, very different sort of set of circumstances. But somehow spending time locked up indoors focusing on these things has really focused people's attention on inequalities and unfairnesses. And we've seen, of course, the rise in expecting business to step up.

We've seen ongoing demands that companies do more on equality. Not just racial equality but actually on gender, on all sorts of aspects of diversity... and most businesses saying that they want to do more on it.

Again, we need to be careful because it's not absolutely everywhere. But it's very strong in America, Canada, the UK, a number of the markets. And gender equality I think is an ongoing rising issue around the world. And indeed, at Ipsos we will continue to focus on it.

But it is interesting how that happened at the same time as the pandemic. And I think it's an interesting... it sounds terribly dispassionate... but it was an interesting by-product of the pandemic.

Aynsley: Yes, I think around that time we noticed a lot of pent-up frustrations from many different groups didn't we? But that one really did go to the heart of a lot of underlying structural issues which maybe in other cases, in other outbursts were perhaps a little bit more superficial by comparison.

Anyway, that said, I notice that six of the seven countries where more than half of the respondents did not agree with the statement that “people from different backgrounds and ethnic minorities in my country are treated fairly” have a strong Catholic tradition... with Ireland, Italy, and Argentina not far behind. Given that these countries are found in almost every part of the world, do you think there might be an element of Catholic guilt evident there?

Ben: I think it's more about the history of colonisation by Spain and Portugal and which countries Spain and Portugal colonised and taking their religion with them, than it may be about Catholicism per se to be quite honest. I think you might need to look at the ethnic mixture and the histories of slavery and migration in those countries as much as you look at religion.

Aynsley: Yes, I did notice that the Philippines actually seemed to buck the trend.

Ben: And they're very, very Catholic. I think the other thing is that also... again you'd need to go and look at the data again... look at Catholics. We should be able to look at Catholics versus non-Catholics or by strength of belief. That might be a good hypothesis to test. But I think it's more about the history of those countries than simply religion. because of course in many developing... overall religion is in many Western countries at least in retreat. I'd need to go and look at the data in some of those countries because they have very strong evangelical movements.

I think correlation may not be causation in this case Aynsley.

Aynsley: Yes, I know there was a strong... obviously there were lots of countries from Latin America there, but there were one or two others that crept in such as Ireland and Italy I thought maybe gave me cause just to hypothesise about it. But you know I accept that you're a far better researcher than I am so I shall defer to you on that.

I wonder what you think the survey results tell us about some of the big global issues of the day such as climate change, inequality, the role of the State and the return of inflation?

Ben: Well, I mean this study shows that people... this and our other study shows that people want the State to step up. And I think in general what you're seeing in many Western countries is as people feel they're losing out compared to other places or parts of the world, the future that they were promised isn't arriving. They're worried about migrants and immigration etc.

What you're seeing is people going we've move in a sense from a period in the 1990's where, for example, Tony Blair and Bill Clinton believed that the role of the State was to enable people to compete in a global marketplace. So, you provide a safety net, so nobody will starve to death. But beyond that you provide training and help people to compete in a global marketplace.

Where we are now, epitomised by Trumps America First, is you know... reversing that. “Protect me, stop immigrants, stop Chinese steel being dumped here”, and now of course with Covid 19 “provide jobs, invest in services”. And so, people want... the State is back. Countries have shown that ultimately only the State will fix things in a crisis. That's what States are here for after all: that's their job. And so, they are certainly here.

What we're now not clear about is whether this huge rise in debt and the effective printing of money by governments over the last 18 months or so, plus the rebound, is going to lead... and the disruptions in terms of supply in the global supply chains... is going to lead to a severe bout of inflation and how long that will last for.

Of course, nobody really knows. It seems to be more persistent that many of the first guesses earlier this year were. And that has combined with ageing populations, you know... may have all sorts of deep-rooted issues.

Nobody in Japan really predicted that they would have decades of deflation. And so, the risk is that inflation is going to bite the West quite hard. We just literally don't know.

The populations in our daily polling are very concern about inflation and expect that their wages will not keep up with the price of goods and services. So, people are quite cautious and that may mean of course that they don't spend, and economy slows down. We'll see how it all plays out of course and we'll be measuring it.

Aynsley: Finally, I'd like to turn to the *Global Prediction Survey* which we've just published which reveals, among other things, that more than three quarters of us say that 2021 was a bad year for the country that we live in. People all over the world think that in 2022 inflation is going to become a serious problem. That we're unlikely to become more tolerant of one another, and that extreme weather will become more common. Taken together it sounds quite bleak, but in spite of all of this the same proportion that thought 2021 was a bad year also expect 2022 to be a better year for them!

Ben: Hope springs eternal Aynsley! Hope springs eternal. The natural human condition is optimism. It's how we conquered the world.

Of course, what you haven't mentioned is at the beginning of 2021 about the same proportion of people from memory also believed that 2021 would be a better year than 2020. It just didn't turn out that way. So, I'm afraid I take a large pinch of salt with the finding that everybody's optimistic about 2022 because we did the survey a month or so ago and I fear that with Omicron now coming in and economies starting to shut down, as the Netherlands has just done, we may be becoming a bit more pessimistic.

The bottom line is that we remain everywhere optimistic about our personal circumstances, and more so than everywhere else. And the country that I'm sitting in now, Britain for example, is actually for example far happier but also fatter than it thinks it is. So, we're generally personally optimistic and publicly pessimistic about the world. I think that applies to most countries to be honest.

But the fact that we're more optimistic about 2022 I'm afraid we have to look at the evidence and suggest that the public aren't brilliant predictors of what's going to happen.

Aynsley: And I think on that note it's probably a wise moment to draw things to a conclusion and I'd just like to say thank you very much Ben for your time today. The next time I see you I'm going to be in Britain, it's going to be Christmas so I will probably be happier and fatter myself I hope, and I hope you'll be too. Happier at least.

Ben: And fatter. I intend to eat an inordinate amount of excellent food in the next 56 hours or so.

Aynsley: Why not? You deserve it. You've earned it this year, I think.

Ben: Thank you Aynsley