

**GLOBAL
TRENDS**

Understanding Asia



As Asia's economic, political, and cultural influence continues to grow in an interconnected and complex world, the importance of understanding Asia-Pacific has never been more important. Ipsos' latest **Global Trends report** 'In search of a New Consensus: from Tension to Intention', now celebrating its 10th year, highlights what our consumers and citizens think and feel in a world of rapid change and complexity. This comprehensive study unveils a framework of nine Global Trends, based on more than 50,000 interviews across 50 markets, representing three quarters of the world's population and 90% of the world's GDP, providing a view of how the world feels from a human perspective. Ten years on, we find what is unchanged and what has shifted in public attitudes and values.

Our Ipsos Understanding Asia report returns in 2024 at a pivotal moment, just days after the U.S. Presidential Election and implications on Asia and the world. Here we look at the region through three key Ipsos Global Trends: Technowonder, Retreat to old systems and Climate convergence. These are just some highlights to give you an insight into the depth and breadth of our Global Trends Study and implications for Asia-Pacific citizens and consumers.

If you'd like more information on the nine trends, how demographic changes and shifting social attitudes will shape the future of Asia-Pacific societies and economies, and understand the implications for your brand and industry please contact us at understandingasia@ipsos.com



Hamish Munro
CEO APEC

Trend: Technowonder

If 2023 was the year when generative AI was introduced to the wider world, 2024 is when it needs to show its potential and become more embedded in our lives and work. While much of the world is divided over the benefits and drawbacks of AI, people in Asia are ready for the advances the new technology can bring. In Asia Pacific people are more likely to believe AI is having a positive impact on the world compared to those globally (68% to 57%).

As many brands are introducing AI into their consumer-facing work, understanding which consumers are more open to this technology is key. There are some markets, and people, more open to this experimentation than others.

In our survey we find China the most open to embracing technology. They rank first out of the 50 markets surveyed in agreeing that AI is having a positive impact on the world. Chinese consumers are more likely than others in the region to say they cannot imagine life without the internet, that modern technology will be key in solving future problems and think social media companies are a positive thing in contrast to their perceived negativity in the West.

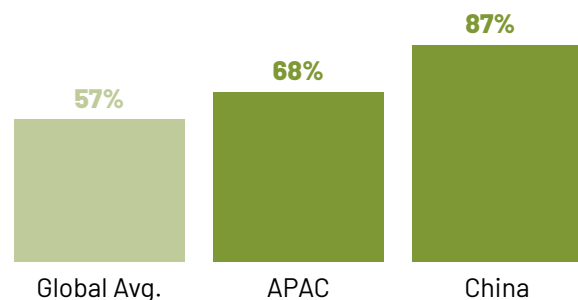
However, while new technology brings benefits, it also raises concerns. What's more the feeling that technology is not beneficial is on the rise in some places. Since 2013 the proportion of Indians who say that technological progress is destroying our lives is up 19 percentage points (pp) and in Japan the figure is up 18pp.

One area where apprehension and concern is perhaps greatest is around privacy and security. All markets in Asia are concerned about how their information is being collected by companies (71% on average). This worry is particularly high in the Philippines (86%), Thailand and Singapore (both at 81%).

As brands push for greater personalisation of services, they will need to be mindful to find the balance between making it easier for their customers to find new products but also ensure their privacy is being respected.

At a glance

Artificial intelligence is having a positive effect in the world we live in (% agree)



76% say they are concerned about how information is collected about me when I go online is being used by companies. Highest in Philippines (86%) and Thailand (81%).

Points to consider

Capitalizing on Asia's Tech-Ready Consumers: Asian consumers, with their openness to new technology, present strategic opportunities for brands to introduce and expand AI-driven products and services in these markets. Marketing efforts should focus on highlighting the positive impacts of AI and how it can enhance consumer experiences. Brands can leverage this receptiveness to test and refine AI innovations, ensuring they meet local preferences before a broader international rollout.

Balancing Innovation with Privacy Concerns: While there is enthusiasm for AI, there is also a high level of concern regarding privacy and data security, especially in markets like the Philippines, Thailand, and Singapore. Brands would need to develop and communicate robust privacy measures, balancing personalization with privacy to build trust and maintain consumer confidence. This approach can differentiate a brand as both innovative and trustworthy.

AI Integration in Workplaces: With a stronger belief that AI will make jobs better, especially in younger markets like India and Vietnam, businesses can look to push further in introducing the new technology into workers' roles. By integrating AI into operations and highlighting its role in enhancing efficiency and job satisfaction, businesses position themselves as forward-thinking employers.

Trend: Retreat to Old Systems

As highlighted in the previous section technology is bringing great change and there is nervousness in some markets. In the region as we head into a new world living with AI, there is a desire among some to turn back the clock.

At times of great transition, it is perhaps unsurprising to see a feeling of going back to times when things were a bit simpler. As we look ahead there are complex questions that need answered, including rapidly ageing populations, how to move away from our dependency on fossil fuels, as well as questions around the role of AI in our society.

Among young people there is a nervousness for the future. For Asian men and women in their teens and 20s the world of previous generations is better than the one they are faced with today. Despite the rapid economic growth and increase in personal wealth seen across Asia Pacific in the last 20 years, 57% of Gen Z in Asia Pacific say they would have preferred to have grown up at the time their parents were children. Only 40% of Baby Boomers feel the same and this feeling is stronger with young people in Asia in comparison to their global counterparts (51%).

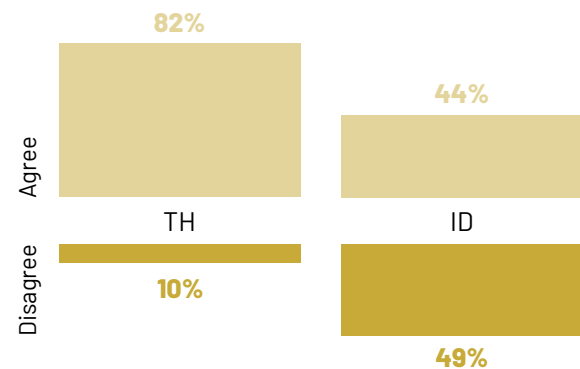
The retreat to old systems is not just represented across ages but across markets. These societal topics are where we perhaps see the greatest difference in attitudes within Asia. This is especially true around gender roles.

While 62% in Asia Pacific say things would work better if more women held more leadership positions this varies a lot across the region. In Thailand, the country with the highest number of female CEOs, 82% agree with this statement. In Indonesia only 44% feel women should hold more senior jobs, and in fact more people disagree with the statement than agree.

Brands that seek to embrace the nostalgia trend will need to be able to marry the positive aspects of the past and traditions but yet remain new and distinct.

At a glance

Things would work better if more women held positions with responsibilities in government and companies



57% of Gen Z in Asia Pacific say they would have preferred to have grown up when their parents were children. Only 40% of Baby Boomers say the same.

Points to consider

Blending Tradition with Innovation: Brands can capitalise on the nostalgia trend by integrating elements of familiar past traditions with modern innovation. This approach can create communication and engagement opportunities that resonate with consumers' longing for simpler times while still offering contemporary relevance and appeal.

One Size Doesn't Fit All: Asia Pacific is not a region of homogenous attitudes and values; it is a spectrum of point of views and division on some of the biggest topics societies are facing today. It is important not to generalise and understand who you are targeting.

Connecting with the Future-Anxious Consumer: With a nervousness for the future, there are opportunities for brands to display more empathy with consumers in their communication and marketing and connect with them at their level.

Trend: Climate Convergence

This year is expected to be the hottest year on record globally, breaking the previous record set only last year. Asia is precariously positioned to face potentially greater consequences from this global problem. The World Meteorological Organisation finds that temperatures in the region are **rising faster than the global average**.

There is broad acceptance that climate change is a reality, and immediate action is needed. Eighty-four per cent in Asia Pacific say we are heading for environmental disaster unless we change our habits quickly. In the last decade, as extreme events have increased, the number who agree with this statement has grown. Since 2013, the year of the first Ipsos Global Trends, the number of Australians who believe we need to change our habits for the sake of the environment has risen 15pp.

The question now is no longer is climate change happening, but what can we do and who should lead. As part of the push towards Net Zero in 2050 there will have to be trade-offs to meet those goals.

Individuals believe they shouldn't be the one to make greater changes to their daily life. Three in four (73%) in Asia say they are already doing all that they can to save the environment. This feeling is particularly high in Indonesia (91%), Thailand (89%) and Philippines (87%).

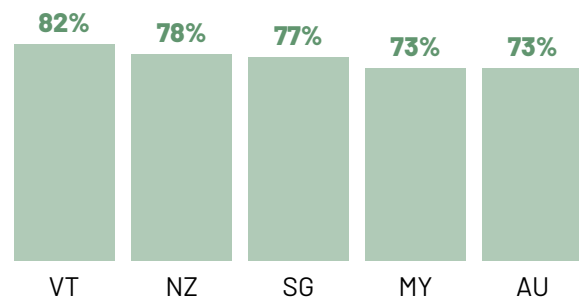
Brands have a major role to play here, and they are expected to step up and be leaders in this space. Seventy-five per cent say companies are not paying enough attention to the environment.

If action is not taken, or corporate leaders are not seen as pulling their weight, we could start to see apathy set in. In some places it is already apparent with majorities in India, Taiwan Region, Indonesia and Thailand feeling it is already too late to do anything about climate change.

On the road towards Net Zero brands not only need to show they are doing their fair share, but also make it easier for consumers to make their own strides in this journey.

At a glance

Companies do not pay enough attention to the environment



73% in Asia Pacific say they are already doing all that they can to save the environment.

Points to consider

Brands as Environmental Leaders: Brands should demonstrate commitment because people expect companies to help and don't think they are doing enough.

Facilitating Consumer Action: People also need help to feel like they are contributing to solutions – through everything from policy to programming to packaging. The sense of collectivism is high in Asia. Combining this with the desire to try new things makes Asians open to different ideas to save the environment. So far many of the most successful environmental initiatives in the region have connected it with fun. For example, as part of Bangkok Car Free Day the roads were closed for traffic and street food and arts and crafts were in its place.

Methodology

These are the results of a 50-market survey conducted by Ipsos on its Global Advisor online platform and in partnership with other global Ipsos teams around the world. The survey was conducted using Ipsos Online panels in all markets except for India which used its mixed-method "IndiaBus", and Zambia which used a face-to-face methodology. Ipsos interviewed a total of 50,237 adults aged 18-74 in the United States, Canada, Hong Kong SAR, Israel, Malaysia, New Zealand, South Africa, Türkiye and Vietnam; 20-74 in Thailand; 21-74 in Indonesia and Singapore; and 16-74 in all other markets between Thursday, February 15 and Wednesday, April 23, 2024.

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