

A NEW WORLD DISORDER?

Navigating a Polycrisis

Explore the trends:



Climate Antagonism

Conscientious Health

Authenticity is King

Data Dilemmas

The Tech Dimension

Peak Globalisation

A Divided World

Capitalism's Turning Point

Reactions to Uncertainty and Inequality

The Enduring Appeal of Nostalgia

Search for Simplicity and Meaning

Choices over Healthcare

**GLOBAL
TRENDS
2023**



CLIMATE ANTAGONISM



Climate change has become a visceral reality and people want collaborative leadership

Climate change has become a visceral reality with the past year seeing the largest number of climate-related disasters in recorded history. But there is rampant debate about who is responsible for climate change and how to address it: some consumers are changing how they make purchasing decisions according to their environmental impact, while others (particularly Gen Z) are putting the responsibility squarely on the shoulders of government, systems and corporations.

There is, however, a vast difference across regions between who is concerned about climate change and who is not. And the countries where people are talking about it least may be the countries that are doing the most about it.

One of the challenges we face in mobilising action around climate change is that it is never people's number-one priority. There is always something – Covid-19 over the past few years, and the cost of living crisis right now – that individuals find more pressing.

There is, though, a growing understanding of a collective need for environmental justice. For example, cleaning up one of the dirtiest rivers in the world, the Citarum River in West Java, Indonesia, requires the collective action of the government and thousands of businesses along the river bank for the tens of millions of households who depend on water from the river.

Globally, there is also debate about development – should developing countries be allowed to grow in the same ways that developed countries previously did?

Brands can help consumers meet their individual needs around climate change. Many people want something that lasts, with less packaging.

But consumers are not always able to make the trade-offs. We can't expect consumers to shoulder the burden of sustainability, especially with rising inflation. Above all, people want collaborative leadership from governments, corporations and NGOs on this issue.

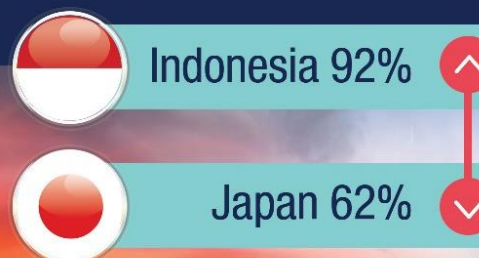
Thought Starters

- 1 Many still rely on goods and services that worsen climate change. Can you create better- quality products that won't soon end up in a landfill, at a price people are happy to pay?
- 2 Individual action is a drop in the bucket, while government pledges and corporate impact aren't enough. How can your organisation work with all these actors to effect change?
- 3 In a world whose existence is threatened and where the future is uncertain, does every business have the right to exist?

82%

APAC consumers

feel that we are heading for environmental disaster unless we change our habits quickly



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CONSCIENTIOUS HEALTH



Mental health is as much of a priority as physical health. Look for ways to support both.

Health is no longer just about physical well-being. Mental, emotional, financial and other aspects of health are becoming part of the conversation, broadening our collective understanding of what it means to be 'in good health'.

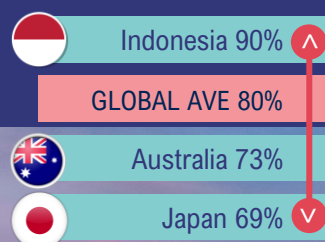
At the same time, there is a growing realization of how connected our health is to everything around us, including our local environment and the world at large. This goes beyond the microbiome of the gut or macro-biome of the home to examine health through three lenses: me, my world and the world. This drives a connection between sustainability and health.

However, this holistic, aspirational view of health is chiefly prevalent among wealthier consumers, regions and nations; countries and people who are less well-off economically usually have to focus on the effects of physical ill-health.

At the same time, closer examination of the structural impacts of people, government, societies and business reveals that there are many systemic impacts to health – for example, a shift to eating more processed food is leading to an increase in diabetes and heart disease. Chronic health conditions tied to environmental factors such as air quality and pollution are also being explored, with the findings often being that systemic inequities are driving negative outcomes for marginalized groups.

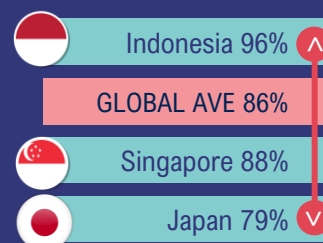
Thought Starters

- 1 How does your business or brand support a more holistic view of health beyond the physical – for your customers and your employees?
- 2 Do your innovations, strategic plans and growth opportunities take into account the systemic drivers of health and well-being?
- 3 Consumers often have to choose between 'good for me' and 'good for the planet': how can you help customers find the right balance?



82%

APAC consumers agree 'I need to do more to look after my mental well-being'



87%

APAC consumers agree 'I need to do more to look after myself physically'

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AUTHENTICITY IS KING



Corporations are responding to calls for fairness and support for key issues by making an effort to demonstrate their empathy

The days when corporations could focus on providing good products at good prices and expect the marketplace to respond favourably are fading fast. Increasingly, these aspects are taken for granted and consumers are asking hard questions, such as: 'What issues do you care about? More than caring, what do you actually do about these issues? How do you treat your workforce? What is your ESG (environmental, social and governance) policy? How diverse is your workforce and how inclusive are your working practices?' and expecting robust answers. Increasingly, the answers to these questions will drive marketplace success.

Authenticity is an important, but increasingly complex, concept in the competitive, fast-changing global marketplace of 2022. It is also one that interacts with many of the other trends on our list. Successful brands need to blend elements of localness, naturalness, heritage, trust, empathy, consistency and purpose at the same time as offering good products at the right prices.

With modern customers increasingly adept at spotting fakery and insincerity, it is about more than simply shoehorning a topical cause into one's latest marketing campaign. Customers expect brands to pick issues that matter. They expect them to choose issues and support them. They expect this support to be about more than mere words; it should include actions, in the form of financial support, events and spokespersons. They want brands to choose the right issues – issues that mean most to their audience, and issues that have a natural, rather than a forced, association with the brand.

This discerning attitude to the activities of brands extends to channel choices too. With more and more people now familiar with online shopping, expectations are high and tolerance for missteps is low. Most people will only shop online while it offers genuine advantages of time and/or money, or ideally both.

Thought Starters

- 1 Do you understand which issues or causes matter most to your target audience, and which ones most naturally resonate with your brand identity and heritage?
- 2 Are you prepared to act on causes, rather just talk about them? People are increasingly looking for brands to do more than simply engage on an intellectual level. How can you invest in practical support for the causes you embrace, and how this will affect your budgets?
- 3 If you already have a strong brand purpose or want to step into this space, are you ready for the inevitable scrutiny and pushback that will follow?



63%

APAC consumers

are willing to pay extra for a brand image that appeals to them



81%

APAC consumers

feel it is possible for a brand to support good causes and make money at the same time

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DATA DILEMMAS



While there is concern about loss of privacy, most feel it is inevitable. Still, businesses cannot take access to private data for granted

Whether it's that eerily accurate advert that pops up after you and your spouse have agreed to buy a new sofa, or your quick acceptance of the default cookie settings on a website so you can read an article a colleague just sent you, at times we all question who has our data and what they're doing with it. But how much do people really care? And perhaps more importantly, are they willing to do something about it?

Despite constant news of hacks, data breaches, scams and online manipulation, people have not really changed their habits around data privacy and security. The majority of people across the globe either know, or assume, that their data is being collected and used, but they don't know who has it, what is being done with it, and how they can prevent their data from being collected.

The alternative is not using social media platforms and services at all, but this leaves no middle ground for those who are privacy-minded. While requiring opt-in for certain functionality is becoming more common, brands such as Apple have begun

pushing for enhanced data privacy in order to differentiate themselves and reassure customers.

Beyond the consumer landscape, there's increasing worry about the use of citizens' data by foreign governments and state actors, for uses from hacking to inciting social upheaval. Data has become the currency of a technological cold war. This has led to protectionist laws about where data can be stored and even which technology providers are allowed to do business.

With the recent proliferation of data protection initiatives worldwide, there is more transparency and choice around how consumers are tracked – but the picture is not yet complete. As we approach a cookie-less world, marketers and data companies will position and evolve their services to maintain business as usual.

Thought Starters

- 1 What's the return on investment for customers who share their data? And how can you communicate this simply and effectively?
- 2 If transparency in data practices continues, are you ready to let your customers see how your organisation works?
- 3 Is it possible to create products and services that operate without customers having to opt in, or that handle data anonymously and retain it temporarily?

81%

APAC consumers

feel that it is inevitable that we will lose some privacy in the future because of what new technology can do



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THE TECH DIMENSION



People need to be persuaded that new technologies will improve their lives rather than adopting them without question

The rapid pace of technological change and disruption over the past few decades cannot be understated. However, years on, many people are wondering whether the promises made by Big Tech have been kept, and what we need to do collectively to harness the potential of tech – and mitigate its risks.

Even though technology may seem pervasive in our everyday lives, there's still considerable digitisation of industries and systems to be done. For example, interactions with government or banking websites rarely feel technically optimal.

Now that technology is embedded in our daily lives and routines, many people are asking the question: 'Has it made our lives better or worse?' The answer is, it depends. It depends on who you ask, where they live, and what specific technology you're asking about.

Has digital technology made good on the promises it made of greater efficiency and better connection and collaboration? Social media in particular has been questioned. Many users are now choosing a 'digital detox',

with some claiming that the end of Instagram is near, as it becomes more heavily monetised and vies for user attention by replicating other apps versus innovating on its own.

Speaking of monetisation, after years of growth, Big Tech is pulling back. Massive layoffs and reductions in spending have hit an industry that has seen little hardship to date. But is this enough to stave off greater calls for accountability and regulation? Among government detractors, concerns of national security as it relates to foreign technology are commonplace. Will the internet eventually fracture between east and west?

Last, we would be remiss not to mention the metaverse and generative artificial intelligence, which has captured the world's attention, even though we don't quite know what it is. Is it here already? Is it a PR pivot? Or will it be the next big thing for societies, markets and people?

Thought Starters

- 1 Take stock of what tech might be good for, and what it is not. Just because we can use tech for something, this doesn't mean we should.
- 2 What role can you and should your organisation play in the next evolution of the web? Could the web become more accountable, equitable and secure?
- 3 How might you integrate technology in such a way that the focus is on the value or experience created for customers, not on the tech itself?



Indonesia 86%



Singapore 82%



Philippines 72%

78%

APAC consumers

can't imagine life without the internet

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PEAK GLOBALISATION



Over the past year, there has been a marked return to global brands but the industry is still seeking the right balance between global and local

The world remains divided on the benefits of globalisation. Increasing travel, greater cultural exchange and the rise of cheap products (facilitated by low labour costs and developed international supply chains) represent significant benefits to many. However, the dilution of local cultures, perceived lifestyle homogenisation, increased consumerism, rising emissions and faster habitat loss are all among the significant impacts of globalisation.

Many commentators feel that we have already reached peak globalisation and are moving to a world where protectionist policies, shorter, more secure supply chains, and a greater focus on nationality and local community will create a smaller, less globalised landscape. We at Ipsos are less sure.

Over the 1990s and 2000s, cheap labour in Asia coupled with relatively inexpensive, reliable global shipping drove consumerism and fuelled the march of globalisation. The growth of the middle classes in China drove up labour costs, governments focused on more lucrative industrial sectors, and manufacturers switched to other offshore markets. Covid-19 and global conflicts put huge pressure on global supply chains and

forced manufacturers and retailers to prioritise resilience and agility of supply through tactics like nearshoring and friendshoring.

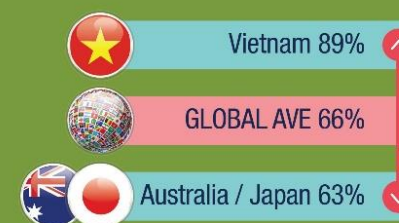
Having found more stable supply chains out of necessity, many people have come to appreciate the benefits of these (their reliability, lower cost, shorter lead times and lower environmental impact) and consumers have started to adopt a more local-first attitude.

It is clear, though, that attitudes to globalisation are strongly linked to the economic development of nations and the living standards of their populations: of the top 20 countries ranked in terms of how much they feel that globalisation is 'good for my country', ten are in Asia, six in Latin America and three in Middle East/Africa. Only one (New Zealand) falls outside these emerging regions.

For corporations, the issue is complicated by the need to balance lower production costs with unstable supply chains: the outcome is an effort to stabilise supply via nearshoring, often presented as an effort to support local communities.

Thought Starters

- 1 Where does your organisation sit along the global-to-local continuum, and can, or should, this positioning be flexed?
- 2 Is your supply chain optimised to stay agile in the short term and resilient in the longer term?
- 3 Do you truly know what your consumers value more – the sustainability and reliability/speed of supply that come with local production, or the lower costs of a more global approach?



74%

APAC consumers
think globalisation is 'good for my country'



55%

APAC consumers
Think global brands make better products that are just local to my country

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A DIVIDED WORLD



Divisions can be created by inequalities and rising diversity, but they also create fertile territory where brands can have a voice

The pandemic was (we hope) a rare event. It could have united the world against a common enemy. Instead, forces worked to drive and expand wedges between people in many nations about precautions and vaccines.

The polycrisis is both a driver and a result of our new world disorder. The existence of disagreements on multiple fronts – from the climate to human rights, immigration to fiscal policy, gender fluidity to data privacy, and around the ethics of artificial intelligence and synthetic biology – means that it's hard to build a coalition to solve any of them.

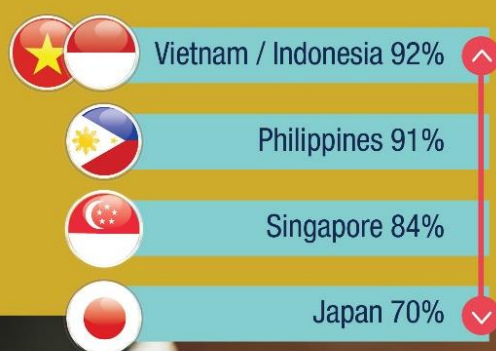
The technology and tools that connect us are also able to drive us apart. Headlines highlight divisions between us every time we log on.

At the same time, people are looking to brands to play a role in solving these crises, and to help them reach their individual goals on issues like sustainability. They want brands that share their values. But many of the issues that brands could take a stand on are fraught with danger, so it's hard for brands to make the meaningful changes their customers want – because not all of their customers want the same things.

Yet, fundamentally, we share so many values. We see that in the data, again and again. We get caught up in the expression and implementation of those values, but that leaves room for hope that the forces dividing our world could also help to bring it together.

Thought Starters

- 1 Does your brand or organisation have a role to play in relieving some of the tensions in our society, where government cannot?
- 2 How do you continue to take a stand and align your organisation's values with your customers' values? How do you respond to potential backlashes?
- 3 Do you have a role in keeping the peace, enabling a mature, calm debate among those with differing points of view?



85%

APAC consumers

agree that it is up to everyone to work out their own set of principles to guide their decisions

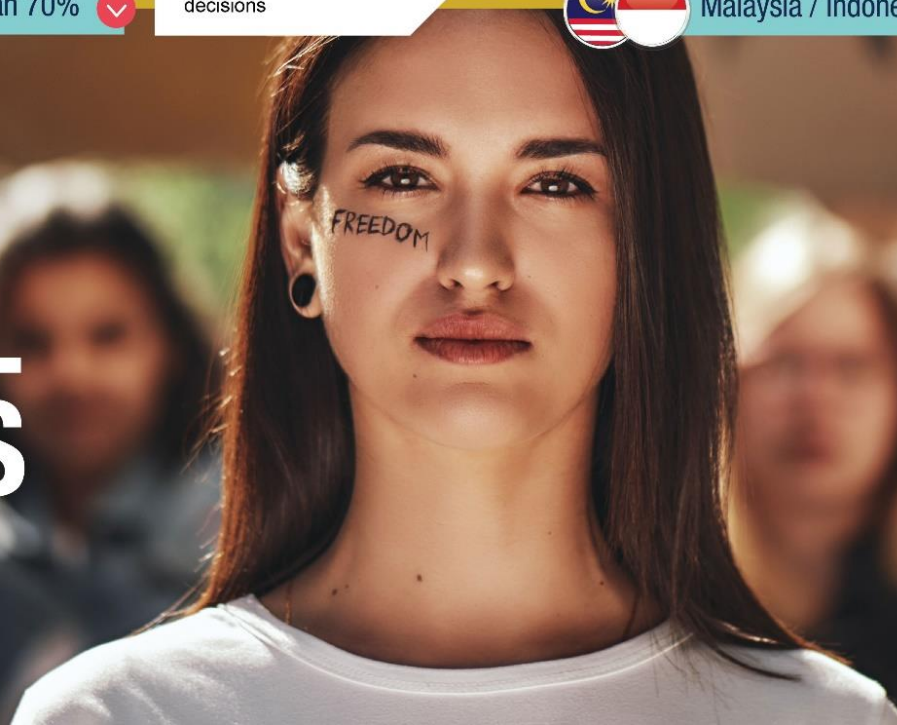


76%

APAC consumers

agree that transgender men and women should be free to live their lives as they wish

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CAPITALISM'S TURNING POINT



There are signs of a reset in attitudes towards wealth, money and status. Many people want brands to help society, and claim to be prepared to pay more to support them

We are seeing a movement away from shareholder value at all costs to a more holistic understanding of the human and environmental impacts of capitalism.

The combined effects of the pandemic, the climate emergency and the cost of living crisis may be driving a reassessment of individual goals and priorities.

In the past, capitalism was all about growth. Indeed, it has always been couched in the narrative that it allows for greater competition and greater innovation, which in turn lead to lower prices and higher wages overall. It has often been coupled with democracy as well, the assumption being that free people and markets will benefit the largest number of people, but those ideals are now being decoupled and closely examined.

New ways of thinking about the role of businesses, economics and institutions are

prompting a re-examination of capitalism and an exploration of alternative models that consider the needs and well-being of multiple stakeholders rather than simply maximising profits for owners.

While activists may hope for an end to capitalism, a more accurate prediction may be that we're entering a new era of capitalism that questions the way business is conducted and the toll it takes on people and the planet.

There has been a growing realisation of the ecological toll of capitalism and the human impact of inequality within and across markets.

We are now considering the impact of capitalism, exploring investor-friendly economics, and coming up with better alternatives, such as Triple Bottom Line, which realigns businesses' goals against ESG metrics.

Thought Starters

- 1 Do you truly know what your consumers value – and does that trump what your shareholders value?
- 2 Does your business model really serve stakeholders, or society? How can you incorporate ESG impacts?
- 3 Is your business defined by its next-quarter returns instead of long-term growth? If so, how can you transition to a more sustainable business model?



63%

APAC citizens

say fulfillment in life is achieving a prominent position in their career



72%

APAC consumers

say they try to buy products from brands that act responsibly, even if it means spending more

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REACTIONS TO UNCERTAINTY AND INEQUALITY

Helping people feel stable and valued helps them to deal with uncertainty and inequality

Uncertainty has become the only certainty. People in many markets are facing economic instability as currencies shift in value, inflation rises, supply chains continue to be disrupted, and governments change. Financial inequality, already a driver of change, worsened in the pandemic. In every corner of the globe, struggles to achieve parity based on gender, race, ethnicity and religion dominated headlines. Where can people turn to find confidence, and how can they hedge their bets in an uncertain climate?

The wealth gap had increased before the pandemic in many countries and has widened as inflation and interest rates hit record levels in 2021. But now the economy seems to be in better shape in many markets. Meanwhile, there is ongoing uncertainty for people living from month to month, and the prospect of a recession is causing additional anxiety.

Further inequalities abound, from the continuing mistreatment of ethnic and

religious minorities around the globe, to gender inequality and systemic racism. Geopolitical conflicts such as Russia's war on Ukraine, and the resulting energy crisis, have added to the uncertainty, as have worsening climate-related disasters. And despite collective efforts to eradicate Covid-19, it continues to spread throughout the world.

Since the Covid-19 pandemic, interventionist governments have returned. Countries worldwide are looking to build and defend local champions in strategic industries such as batteries, solar panels and semiconductors.

Citizens are grappling with these inequalities and uncertainties, both short-term and longer-term, in myriad ways. It's hard to make big decisions when there is little clarity about what tomorrow might bring, and people crave certainty and safety in such an environment.

Thought Starters

- 1 Trust in institutions is still high, but it has been damaged. Where will people turn for certainty and truth? How do you make sure you and your communications are trusted?
- 2 How do you deliver consistency to your customers and citizens in the face of labour and supply chain issues and market uncertainty?
- 3 Will rising inequality tip over into political action? How can you support those striving for equality and equity in a polarised and inflationary world?



83%

APAC citizens
say the world is changing too fast



53%

APAC citizens
say the main role of woman in society is to be good mothers and wives

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THE ENDURING APPEAL OF NOSTALGIA



The rosy retrospection of nostalgia provides fertile territory for brand activations. Help customers to find the feel-good factor in their past

When the here and now is unrelentingly grim, people are faced with two means of escape: look back to when times were happier, and simpler; or try to look ahead to when times will get better. Right now, the second of these routes is made all but impossible by the highly uncertain pathway to the future, which is beset by profound and potentially existential economic, environmental and geopolitical challenges. No wonder, then, that people all over the world, and of all ages, are finding solace in the past. While this is a constant feature of being human, it increases at times of uncertainty, like now.

For some, there are also other perceptions that life is not what it used to be: the more globalised the world we live in, the more technology intrudes in our lives, changing the way children experience childhood. Some people may want to turn the clock back, but others view these changes as signs of developmental progress.

There's also a vast difference across regions between those who feel nostalgic and those who don't. But it is clearly not just about geography. Nostalgic feelings seem higher in

some Asian markets (India and Hong Kong, for example) but are very low in others (such as South Korea, China, Vietnam and Japan).

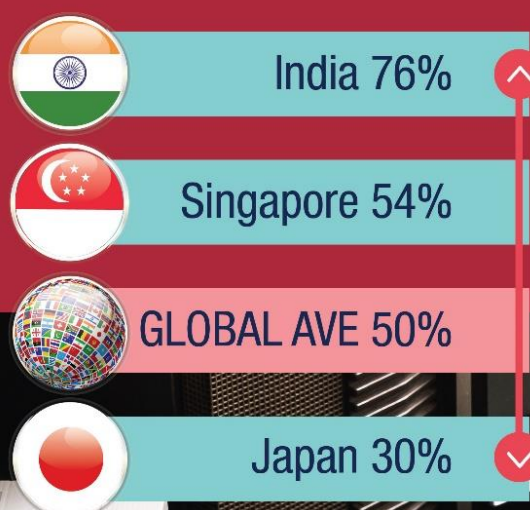
A nostalgic mindset can take many forms. For some, it can simply mean revisiting one's own memories; for others, the TV shows and music of yesteryear serve as reminders of happier times.

Nostalgia can also take on more significant forms: sometimes the contrast between the current situation in a country with what the collective memory suggests it was like in the past can be the basis for political change.

Corporations, particularly those with a long history, can leverage nostalgia through feel-good messaging, but also by resurrecting product formations/recipes from the past.

Thought Starters

- 1 Can you leverage your history and/or heritage to tell a story that mentally transports your customers back to better times?
- 2 Have you retired any products, services or marketing and communications campaigns that you can dust off and reuse today?
- 3 Don't reject nostalgia as a tool just because your target audience are Millennials or Gen Z. They are just as likely to have a recent past that they feel nostalgic about.



57%

APAC citizens

if given the choice, would prefer to have grown up at the time when their parents were children

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SEARCH FOR SIMPLICITY & MEANING



Busy, stressful lives mean that people need time out.

Busy lifestyles and social mobility bring both opportunity and threat. The desire for simplicity seems to be an inevitable by-product of societal advancement, the rapid growth of the middle class, aspirations to personal development and the acquisition of material goods, resulting in cultures with longer working hours. The top eight markets that agree with the wish that 'my life could be simpler' are all in Asia, while many markets where this desire is least prevalent are developed Western nations, particularly those in Europe.

By many objective measures, life is busier today than ever. Sleep has become the new well-being aspiration and stress is talked of in terms more usually associated with viral or bacteriological epidemics.

The pace and complexity of life and our collective inability to tune out are spawning a huge spin-off industry: hotels that boast of poor Wi-Fi connectivity as a benefit, and

meditation and mindfulness apps are just some of the ways that the challenges of busy lives are being turned into commercial opportunities.

At the beginning of lockdown, in many countries commentators began to speculate about the enforcement of a 'smaller life' that would prove a moment of global epiphany that could shift the world's priorities away from consumerism and a continual focus on 'more'.

As lockdowns eased, many people have wanted to make up for all the time they lost, but once that knee-jerk, back-to-the-big-life thrill fades, brands will have an opportunity to remind the world that it once seemed to be on the verge of taking a different path.

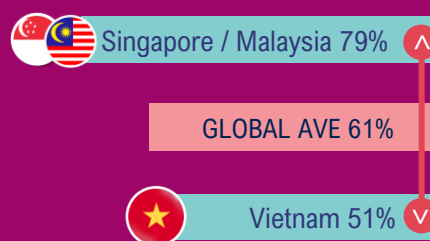
Thought Starters

- 1 Are your services, products, purchasing and content channels as friction-free as possible, or do they require significant mental resources from your audience?
- 2 How do you balance the need to offer your employees a good work-life balance with the need to reduce costs and maintain productivity?
- 3 How do you maximise the effectiveness of your marketing outreach while still respecting your audience's right to headspace and downtime?



74%

APAC citizens
wish they could slow
down the pace of their
life



68%

APAC citizens
increasingly feel that they
need to spend time alone

GLOBAL TRENDS 2023

CHOICES OVER HEALTHCARE



While there is a widespread belief in the power of science to solve major health problems, people still want to retain control

The pandemic led to many changes in healthcare, which will be felt for decades to come, particularly in developed markets. Chief among these was speeding up the availability of virtual visits, allowing patients to consult with specialists and physicians around the world. This democratisation has increased competition in the market by removing some of the physical boundaries of care.

Post-pandemic, ageing populations and longer waiting lists, along with a rising demand for health services, are challenges that healthcare systems are struggling to meet. For example, in 2023 the National Health Service is once again the biggest issue in Britain, according to the general public¹.

Covid-19 highlighted how critical doctors, nurses and support staff are to our collective health, and how little they are recognised. In much the same way that we've seen a shifting power balance in other workplaces, healthcare workers are organising to lobby and strike for better working conditions and compensation.

As populations continue to age, this will place more stress on healthcare systems and providers. Governments will urgently need to debate how healthcare should be monitored, paid for and delivered. And as technology continues to pervade everyday life, we'll see greater advances in remote biometrics and AI-enabled early detection of diseases – which will be especially important with over-worked providers and a greater population of patients with serious illnesses.

Thought Starters

- 1 The boundaries of health and wellness have blurred; how can your organisation help from outside the healthcare industry?
- 2 Will your industry be impacted in the same way that healthcare has been disrupted by advances in systemic and personal technology?
- 3 How can your brand help deliver on emerging needs in healthcare – for both patients and providers?



85%

APAC citizens

agree 'I would like more control over decisions about my health'

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