

A NEW WORLD DISORDER?

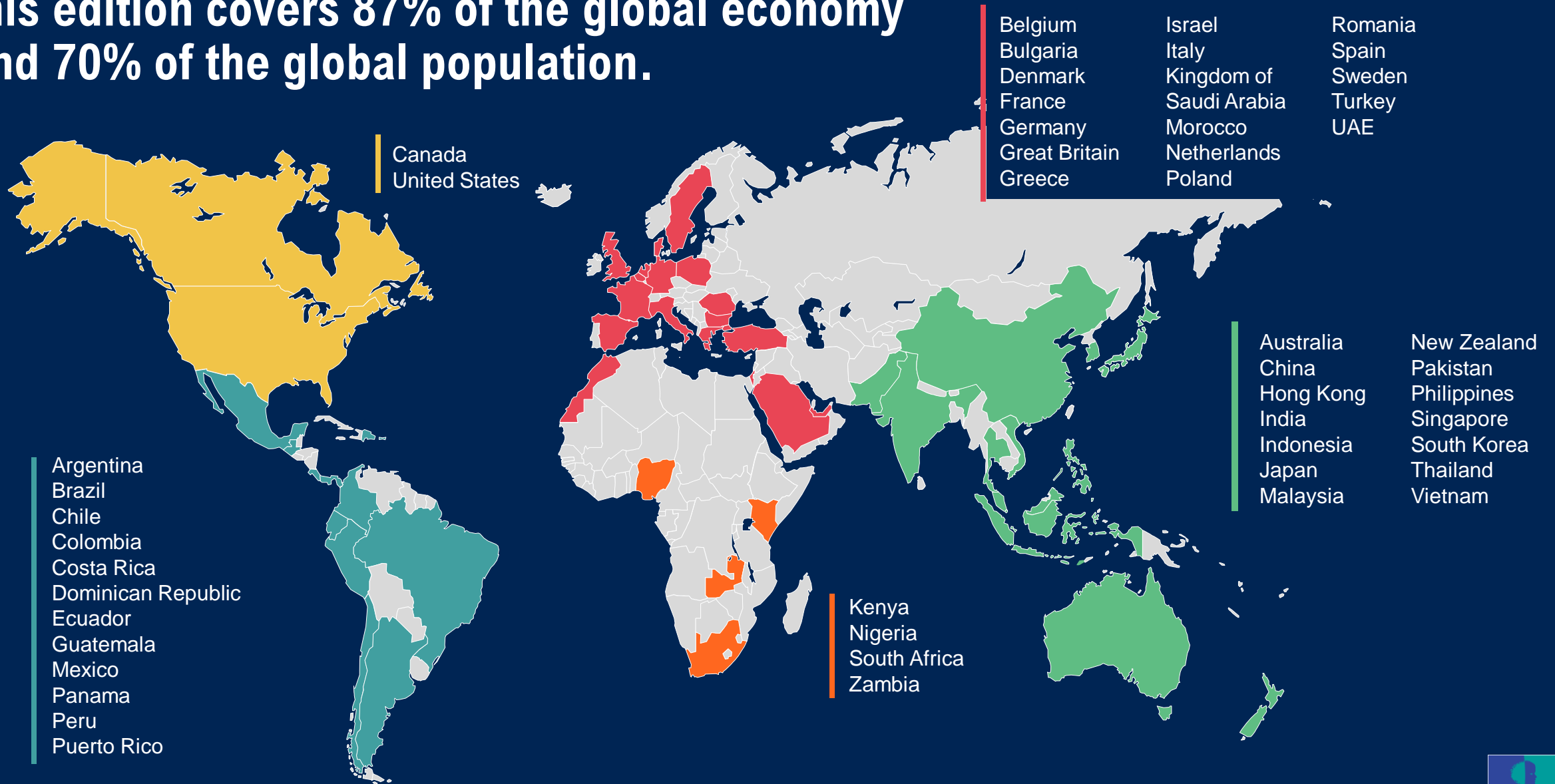
Navigating a Polycrisis

GLOBAL
TRENDS
2023

March 2023



Fielded in 50 markets across 48,000+ interviews,
this edition covers 87% of the global economy
and 70% of the global population.



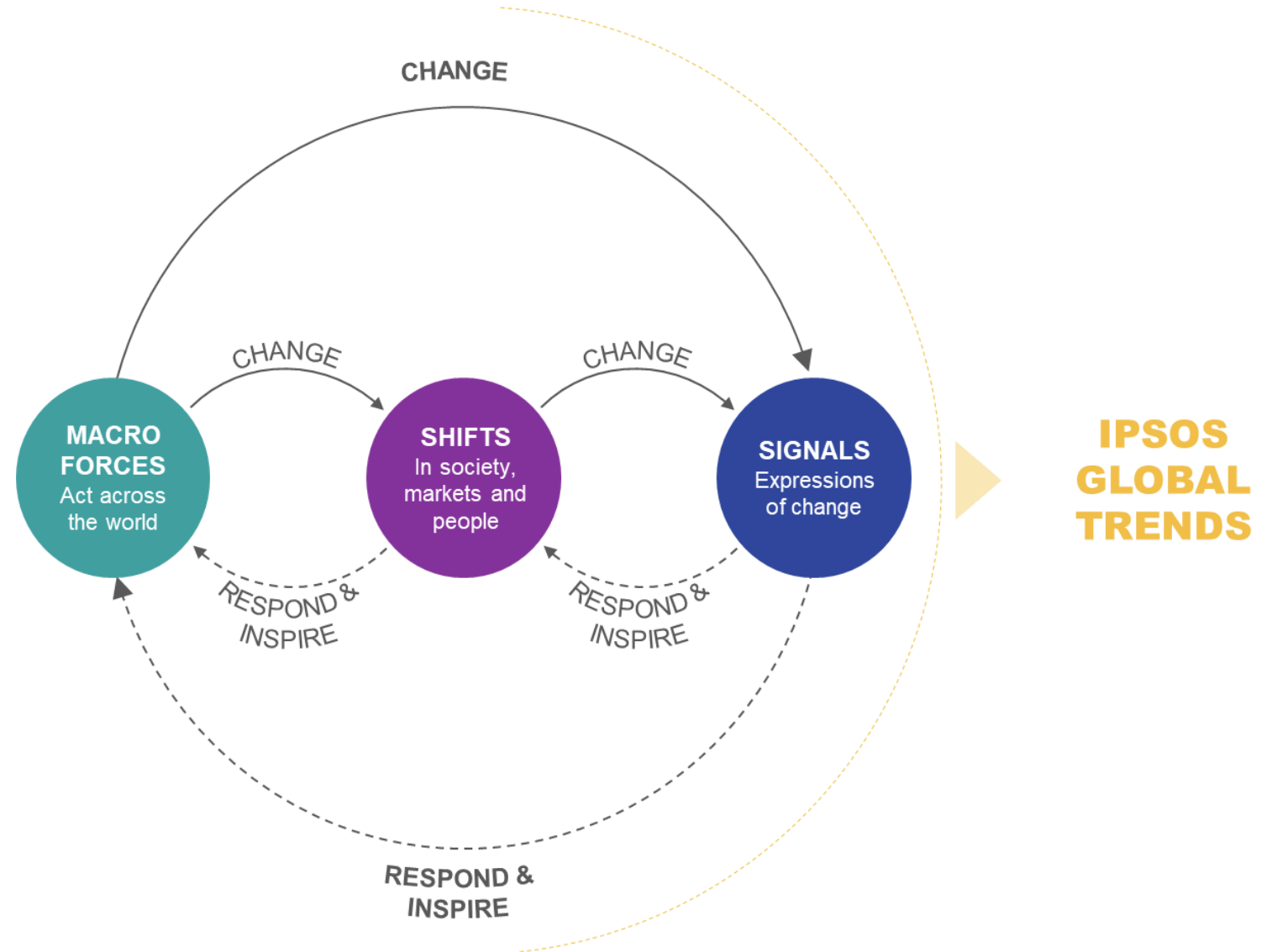
**GLOBAL
TRENDS**
2023

OUR TRENDS IN 2023

Ipsos's Theory of Change helps us look at how change happens across several levels

We used this framework to develop our 12 Trends in 2020, and to monitor how they are evolving over time.

- **Macro Forces** operate at a broad level and have far-reaching impacts within a market and across borders.
- **Shifts** are changes in values and attitudes across society, markets and people that we have been tracking over time.
- **Signals** are local changes, such as new product launches.



Our six global Macro Forces and key themes

Operating at a broad level, Macro Forces have far-reaching impacts within markets and across borders, affecting societies, markets and people.



At a glance: the Ipsos Global Trends



CAPITALISM
CAUSED THIS
CLIMATE
CATASTROPHE

CAPITALISM'S TURNING POINT

70%

of APAC citizens feel their government and public services will do too little to help people in the years ahead

74% globally

Pressures are prompting a rethink of how the world works – and technology may provide some of the answers

Signals



The most impactful Macro Force themes affecting this trend

1

Climate change



2

Rethinking institutions



3

Pervasive technology



4

Employee power shift



There are signs of a reset when it comes to attitudes to wealth, money and status

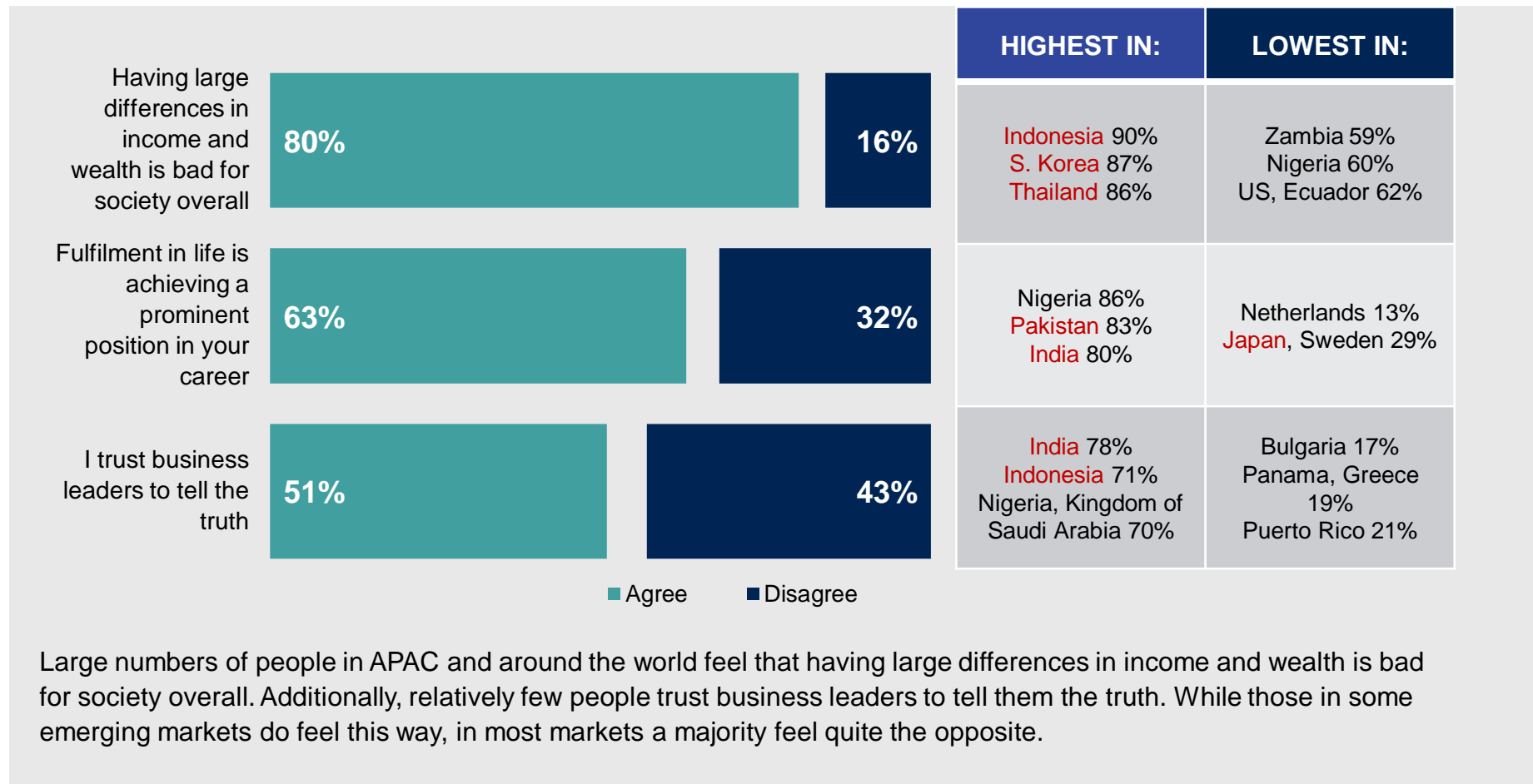
APAC Markets

To what extent do you agree or disagree with the following statements?

Base:
16,003 adults aged 16–75 across 14 markets, interviewed online between 23 September and 14 November 2022

Source:
Ipsos Global Trends 2023

Filter:
Market: APAC



Trust in business leaders is much higher in emerging markets

To what extent do you agree or disagree with the following statement?

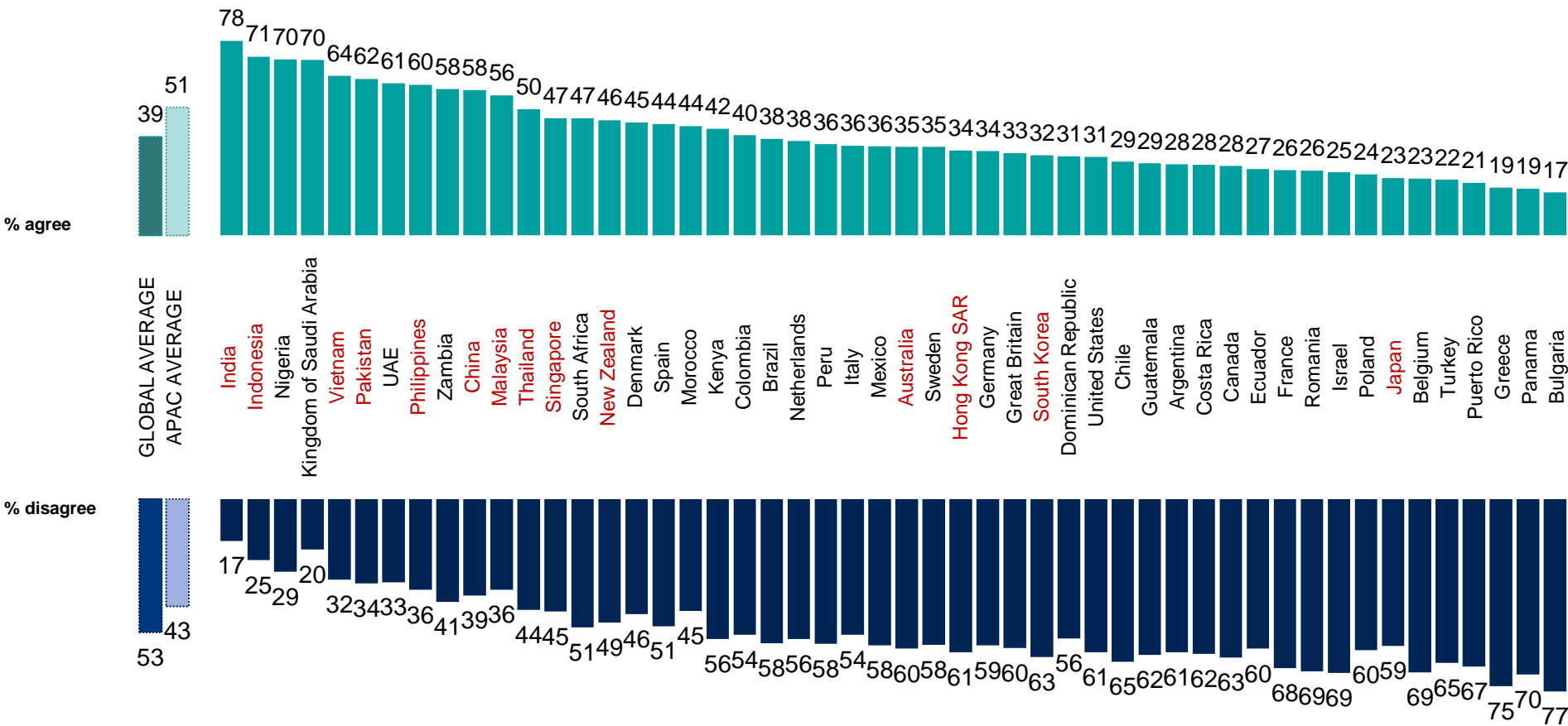
I trust business leaders to tell the truth

Base:
48,579 adults aged 16–75 across 50 markets, interviewed online between 23 September and 14 November 2022

Source:
Ipsos Global Trends 2023

Filter:
Market: All markets

APAC markets highlighted in red



The young in APAC are more trusting of business leaders and more focused on their careers

APAC Markets

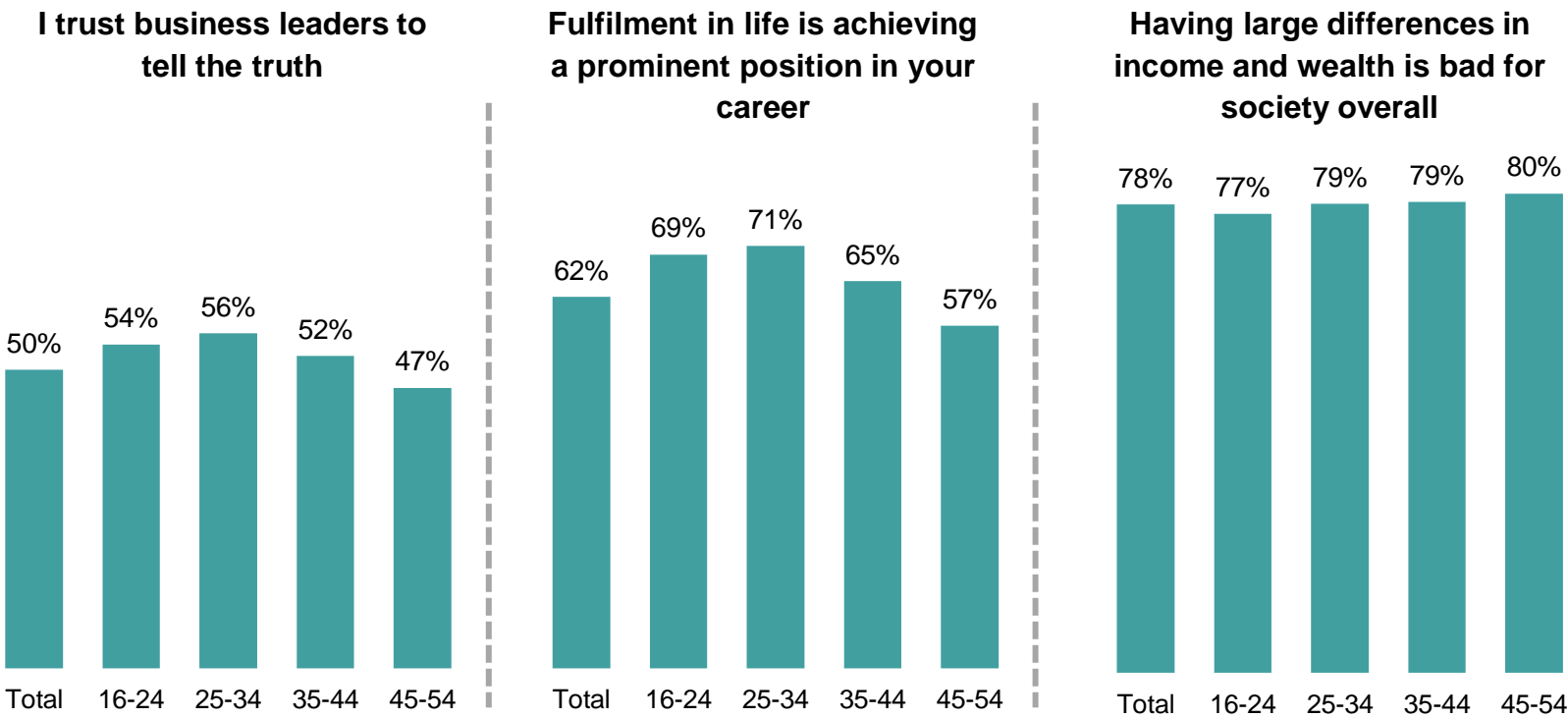
To what extent do you agree or disagree with the following statements?

% agree

Base:
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Filter:
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People of all ages agree that having large differences in income and wealth is bad for society overall. Yet, we see age disparities between younger and older people’s views on trust in business leaders and the belief that progress at work is the route to life fulfilment; here the young are more positive than the older cohorts.



Many people want brands to help society, and consumers claim to be prepared to pay more to support them, and this is especially more pronounced in APAC

To what extent do you agree or disagree with the following statement?

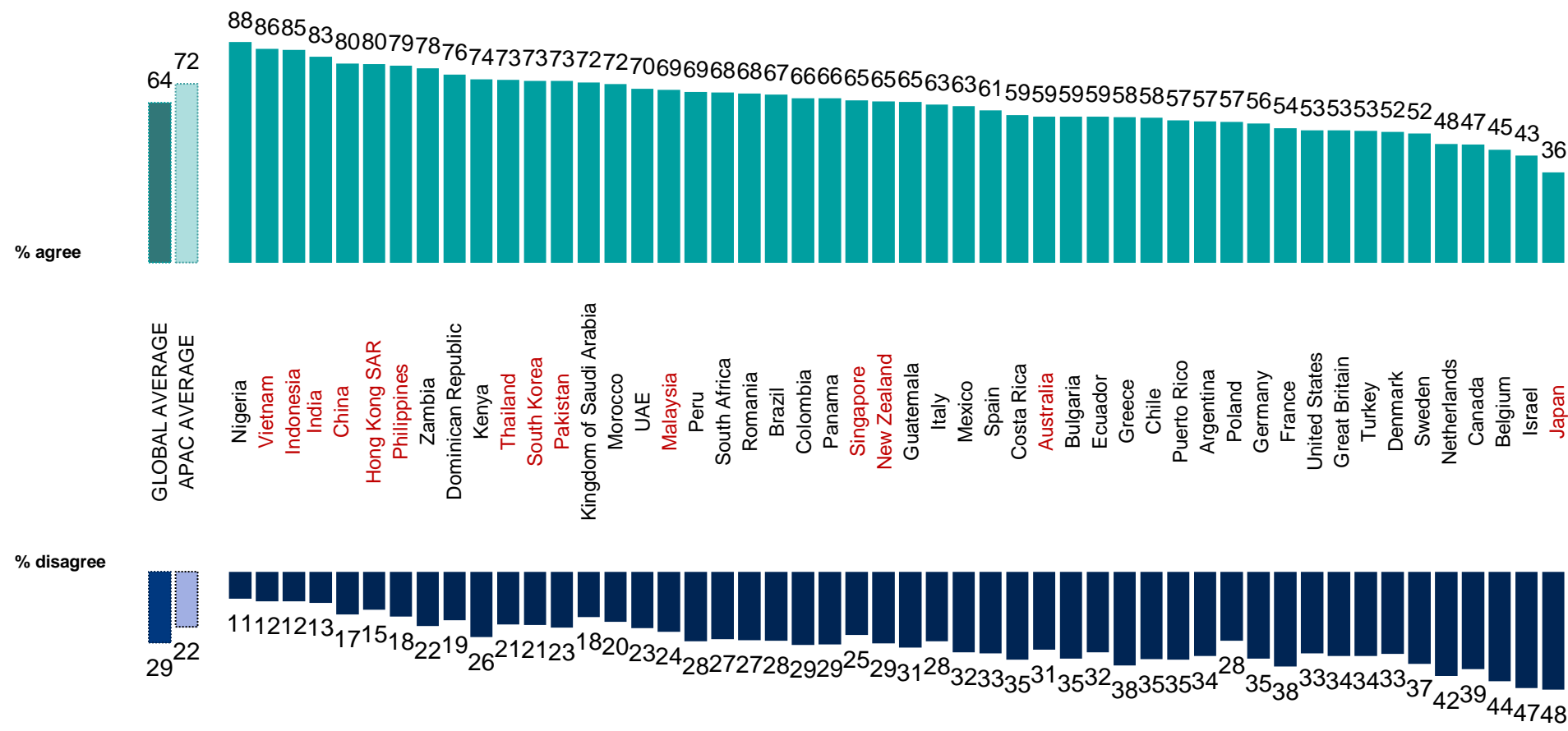
I try to buy products from brands that act responsibly, even if it means spending more

Base:
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Source:
Ipsos Global Trends 2023

Filter:
Market: All markets

APAC markets highlighted in red



How do brands thrive with a new model of doing business?

Thought Starters

Consumers vs. shareholders

- Do you truly know what your consumers value?
- And does that trump what your shareholders value?

Meaningful impact

- Does your business model really serve stakeholders, or society?
- How can you incorporate ESG impact?

Short vs. long-term

- Is your business defined by its next-quarter returns instead of long-term growth?
- How can you transition to a more sustainable business model?



AUTHENTICITY IS KING

62%

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

52% globally

81%

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

80% globally

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

Signals



The most impactful Macro Force themes affecting this trend

1

Systemic
health
inequality



2

Rethinking
institutions



3

Climate
change



4

Growing
mental
health
crisis



Generally, people in Asia, the Middle East and Africa place the highest value on brand image

To what extent do you agree or disagree with the following statement?

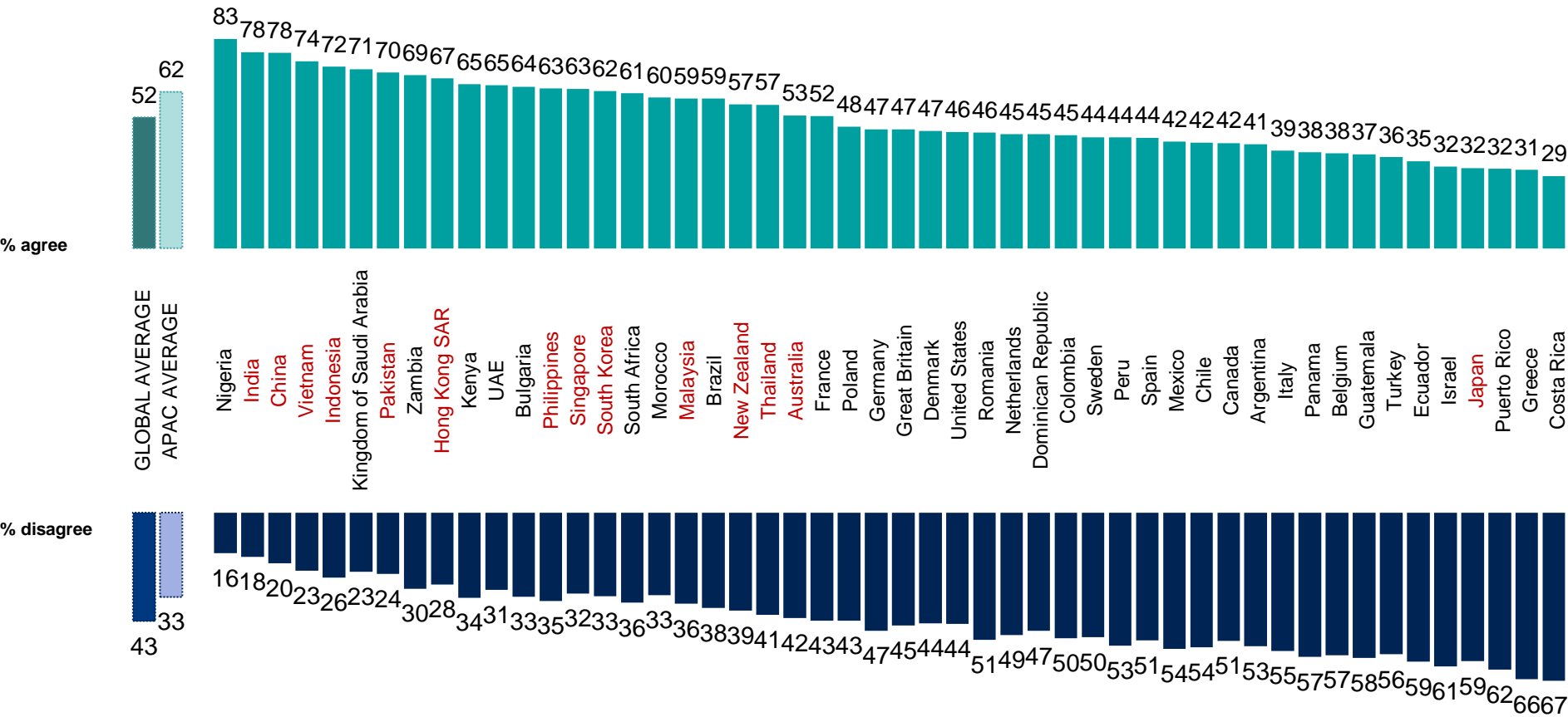
I am generally willing to spend extra for a brand with an image that appeals to me

Base:
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Filter:
Market: All markets

APAC markets highlighted in red



The value that people place on brand image is rising in many markets around the world

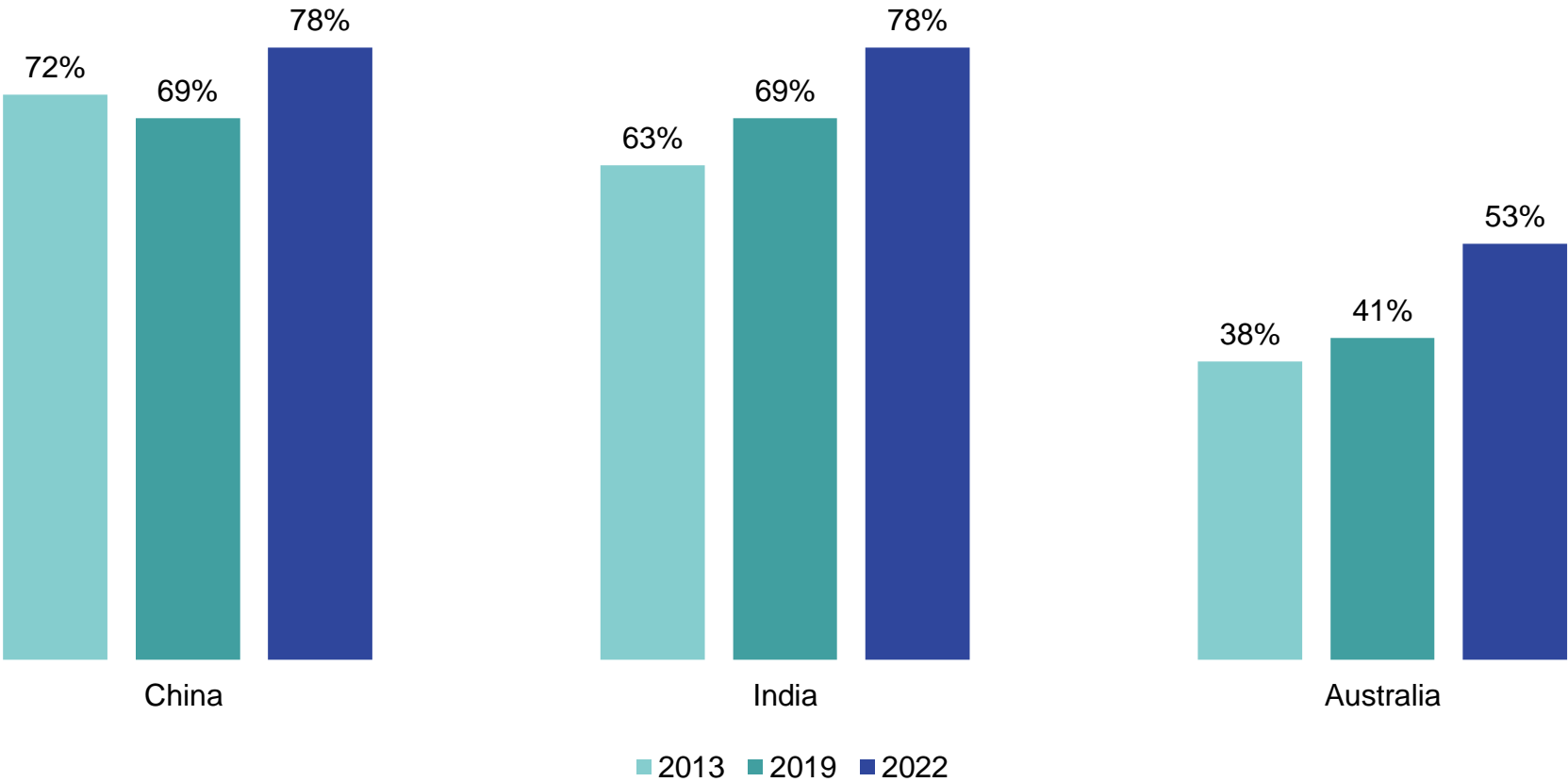
APAC Markets

To what extent do you agree or disagree with the following statement?
% agree

I am generally willing to spend extra for a brand with an image that appeals to me

Base:
500–1,000 500–1,000 adults aged 16–75 (18–75 in US and Canada) per market per year

Source:
Ipsos Global Trends Series

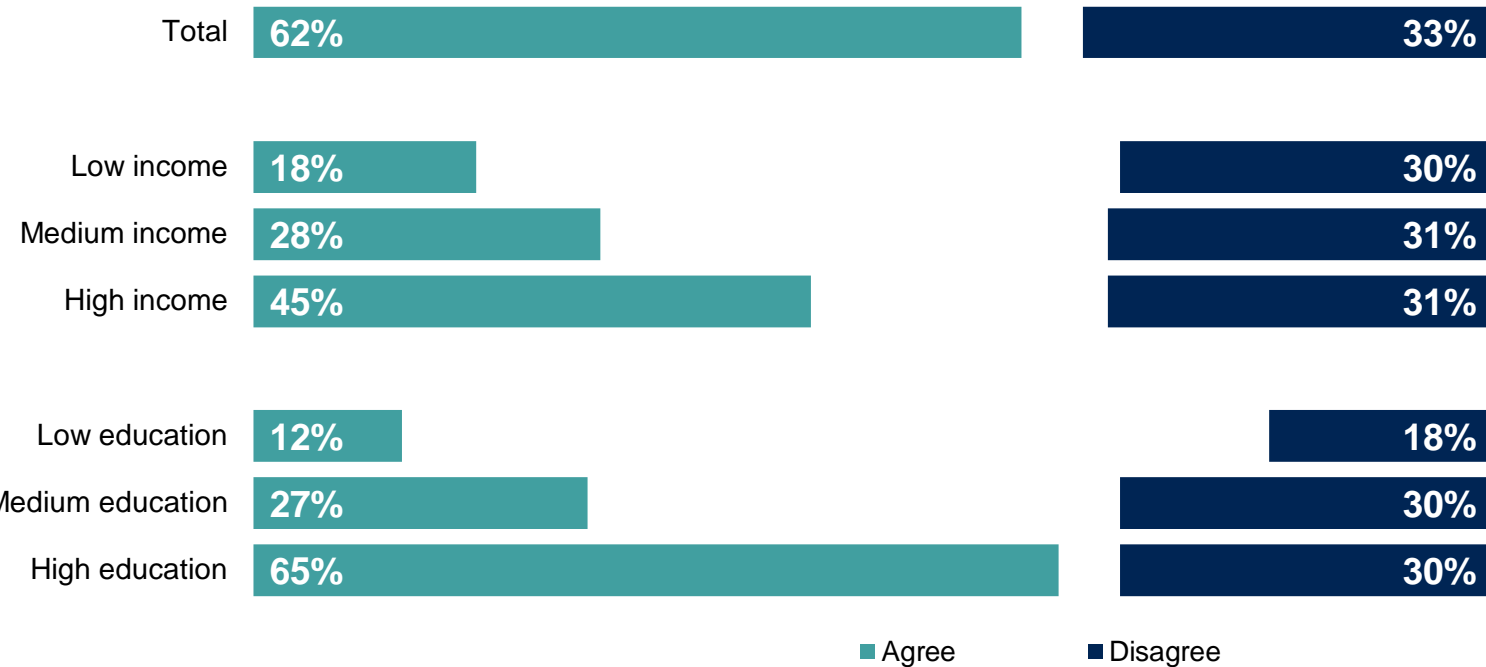


But brand image is more important to people with higher incomes and higher levels of education

APAC Markets

To what extent do you agree or disagree with the following statement?
% agree

I am generally willing to spend extra for a brand with an image that appeals to me.



Base:

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Source:

Ipsos Global Trends 2023

Filter:

Market: APAC

Concern about the authenticity of brands is not evenly distributed. The proportion of those willing to pay extra for the 'right' brand image is significantly higher among higher-income and/or higher-education individuals than those with more modest levels of these attributes. It is a pattern that has been repeated throughout recessions across the decades: so-called 'luxury' attributes such as brand purpose (applied to ethical production or environmental impact, for example) are often much more difficult for shoppers to justify when times are hard and money is scarce. Such a pattern suggests that there may be an economically driven back-to-basics mentality for a while, but this may mean that demanding customers will want goods with a high-price image, but at lower price points.

Build stronger, more authentic relationships with customers

Thought Starters

Focus on relevant issues

- 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?

Walk the talk

- Are you prepared to act on causes, rather just talk about them?
- How can you invest in practical support for the causes you embrace, and how this will affect your budgets?

Prepare for scrutiny

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?

SEARCH FOR SIMPLICITY AND MEANING

78%

of people in APAC wish
they could slow down the
pace of their life

73% globally

Brands recognise the public appetite for downtime, calm, quiet and minimalism

Signals



The most impactful Macro Force themes affecting this trend

1

Community migration



2

Alternative value structures



3

Over-development



4

Pervasive technology



5

A greener way of thinking



6

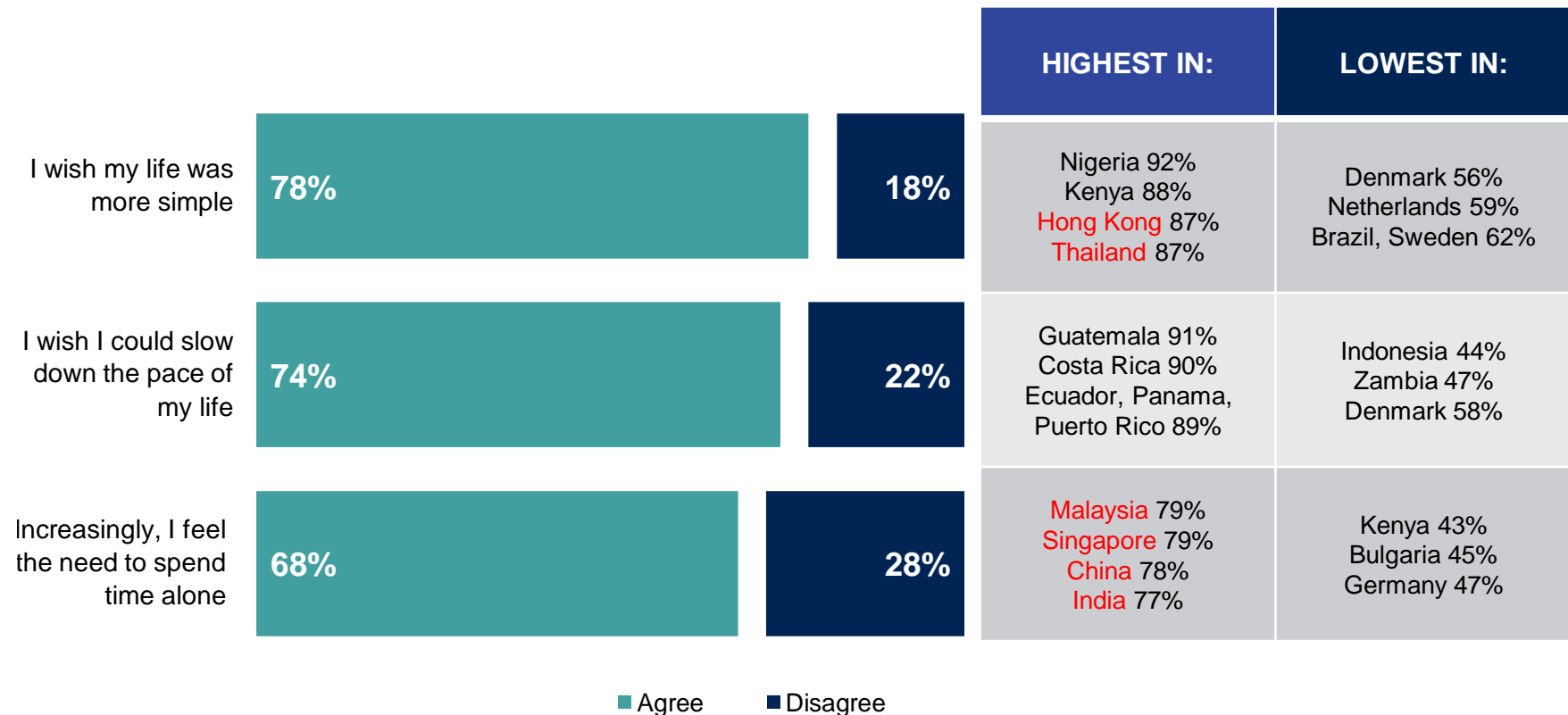
Increasing geopolitical conflicts



Simplicity is highly sought after in Asia and Latin America

APAC Markets

To what extent do you agree or disagree with the following statements?



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Source:
Ipsos Global Trends 2023

Filter:
Market: APAC

The difficult past few years have made people around the world feel that life is busy and out of control. While Covid-19 forced people back into their homes and allowed them to spend time with family, it also cut down on time alone. Even a commute offers significant headspace and time for contemplation. And, while lockdown reduced the need for people to move quickly from place to place, it clearly didn't diminish the sense of time poverty many people felt, as working from home led to a blurring of boundaries between home and work, making it difficult for people to switch off. Across the markets covered in both our 2022 and 2021 surveys, these three indicators of a desire for simplicity showed very little change.

Simplicity remains important

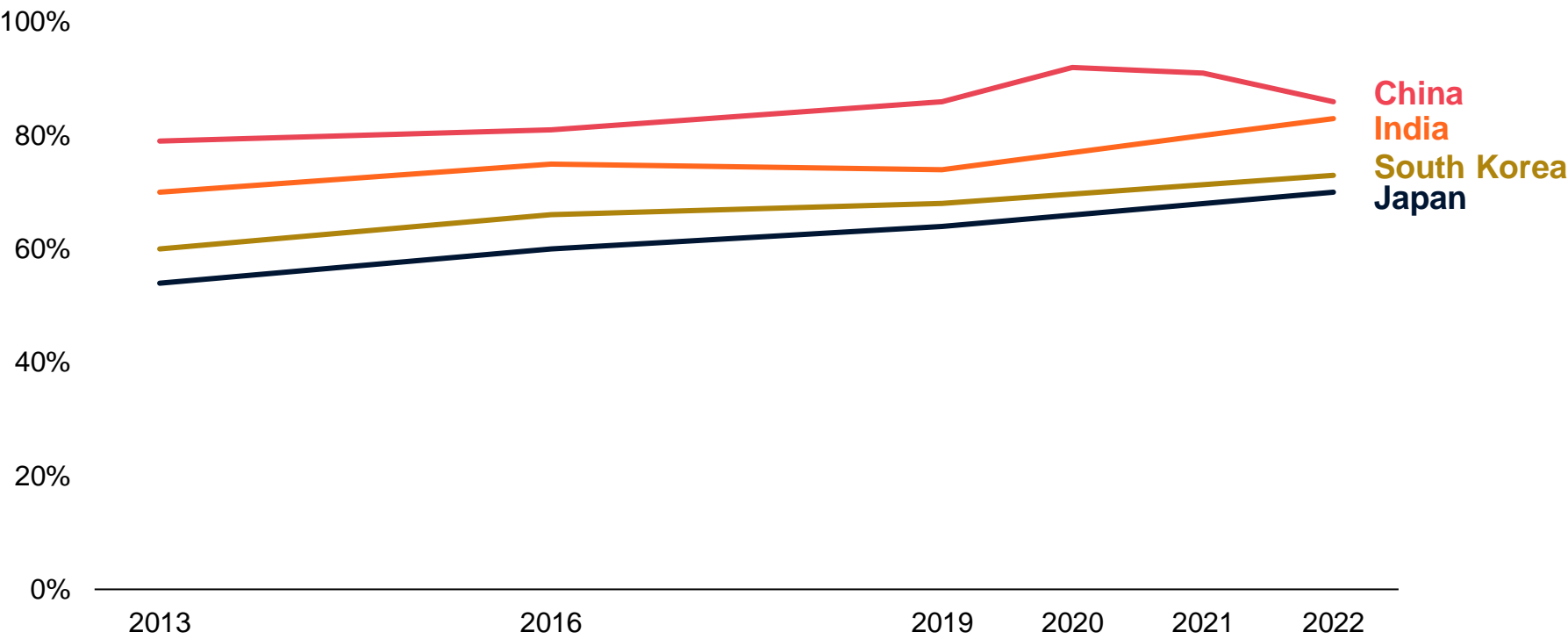
APAC Markets

To what extent do you agree or disagree with the following statement? (% agree)

I wish my life was more simple

Base:
500–1,000 500–1,000 adults aged 16–75 (18–75 in US and Canada) per market per year

Source:
Ipsos Global Trends Series



Simplicity is important to everyone, though the desire for solitude declines with age

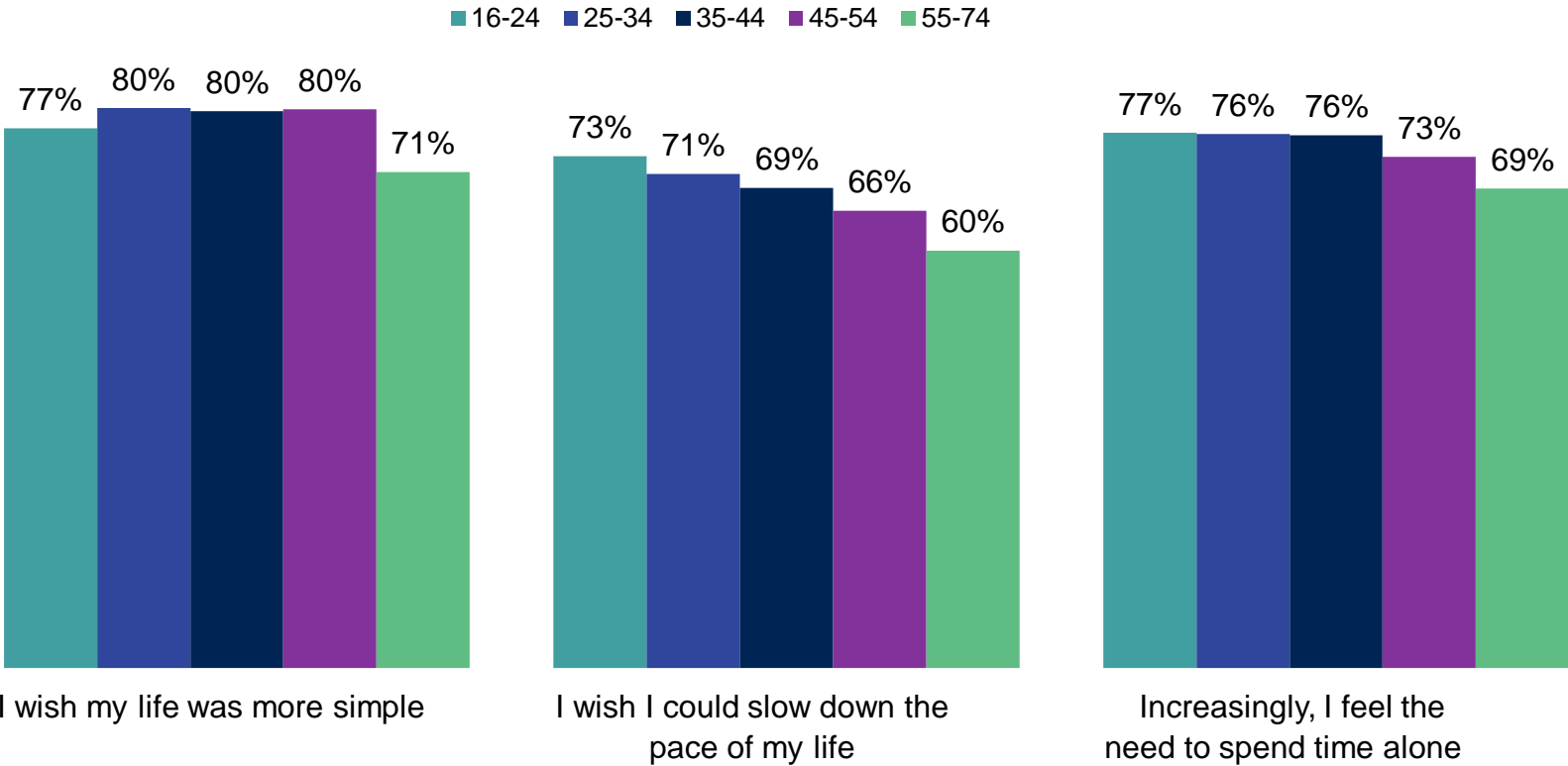
APAC Markets

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Source:
Ipsos Global Trends 2023

Filter:
Market: APAC



People of all ages feel that their life is too complicated and fast-paced. In both cases, the feeling is slightly less pronounced in people aged 55 years and over. Similarly, most people in all age groups place a high value on moments of solitude, though this perception is noticeably lower for older people – who, of course, are more often alone.



Avoid the temptation to complicate things

Thought Starters

Delivering with ease

- Are your services, products, purchasing and content channels as friction-free as possible, or do they require significant mental resources from your audience?

Delivering internally

- How do you balance the need to offer your employees a good work–life balance with the need to reduce costs and maintain productivity?

Respecting people's space

- How do you maximise the effectiveness of your marketing outreach while still respecting your audience's right to headspace and downtime?





THE ENDURING APPEAL OF NOSTALGIA

61%

of people in APAC want
their territory to be the
way it 'used to be'

60% globally

The rosy retrospection of nostalgia provides fertile territory for brand activations

Signals



The most impactful Macro Force themes affecting this trend

1

Security
dilemmas



2

Increasing
geo-political
conflicts



3

Over-
develop-
ment



4

Pervasive
technology



5

Genera-
tional
wealth
disparities



6

Impacts
of inflation



Feelings of nostalgia are highest in Asia and Africa

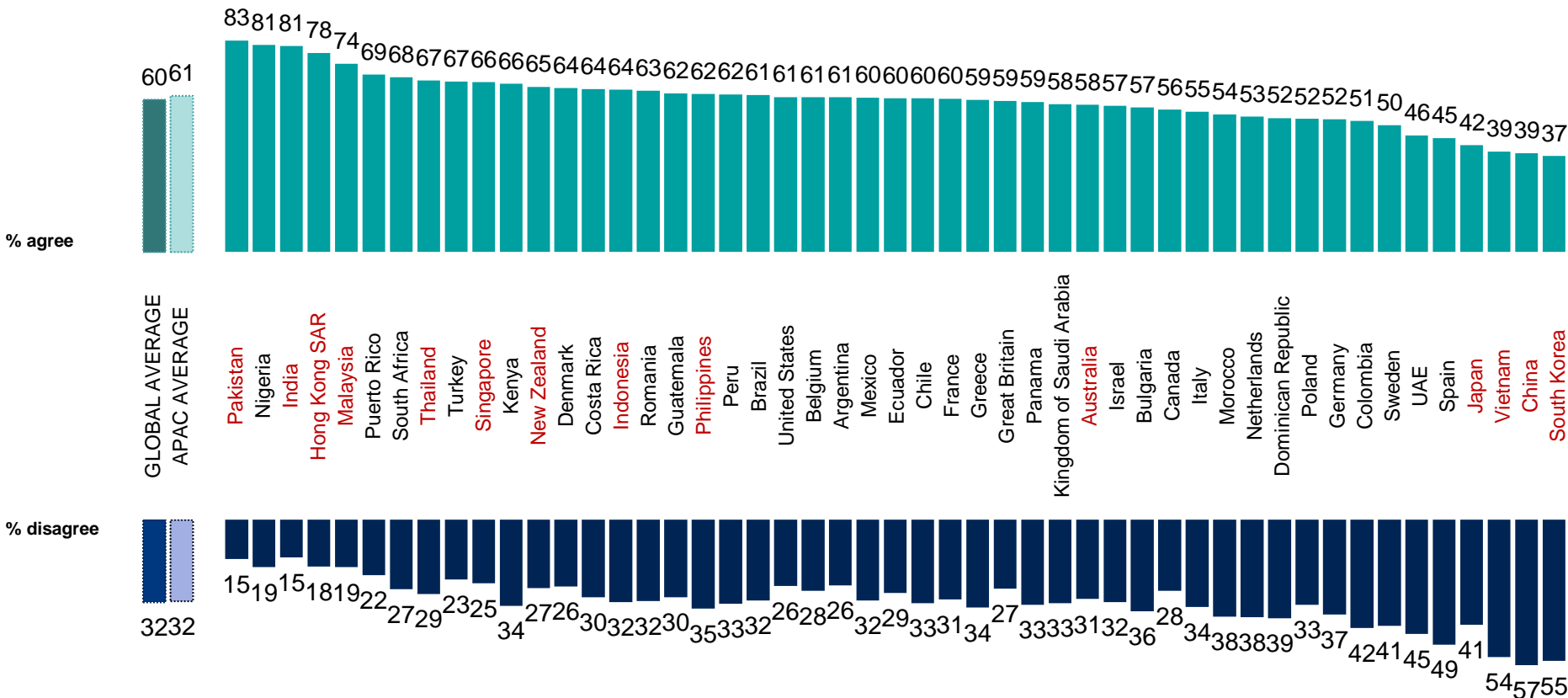
To what extent do you agree or disagree with the following statement?

I would like my market to be the way it used to be

Base:
48,579 adults aged 16–75 across 50 markets, interviewed online between 23 September and 14 November 2022

Source:
Ipsos Global Trends 2023

Filter:
Market: All markets



APAC markets highlighted in red

Nostalgia is up year on year, but not everywhere

YEAR ON YEAR CHANGE 2022 VS 2021

To what extent do you agree or disagree with the following statement?

I would like my market to be the way it used to be

Base:
48,541 adults aged 16–75 across 50 markets, interviewed online between 23 September and 14 November 2022

Source:
Ipsos Global Trends 2023

Filter:
Market: All markets

LARGE INCREASES IN:		MODERATE INCREASES IN:		STABLE/ NO CHANGE IN:		DECREASES IN:	
Chile	+18%	Colombia	+9%	United States	+2%	Philippines	-6%
China	+15%	GB	+9%	Italy	+1%	Turkey	-9%
Argentina	+13%	Germany	+8%	Pakistan	+1%	Thailand	-15%
Peru	+11%	Canada	+7%	Singapore	0%		
Brazil	+11%	India	+7%				
Denmark	+10%	Mexico	+6%				
		Romania	+5%				
		Indonesia	+5%				
		Australia	+5%				
		S Africa	+5%				

The adoption of nostalgia is not universal: perhaps some markets are happier to remember their past than others. Globally, the numbers expressing an affection for the past are up three percentage points from 55% last year to 58% this year. The phenomenon seems to be especially prevalent in Latin America, with marked rises in nostalgia in Chile, Argentina, Peru and Brazil. Overall, nostalgia is up in 16 of our markets (markedly in six of them), flat or stable in four, and it has fallen in two Asian markets – the Philippines, where it has fallen from 68% last year to 62% this year and even more so in Thailand (down from 82% to 67%).

APAC markets highlighted in red



Nostalgia affects everyone

APAC Markets

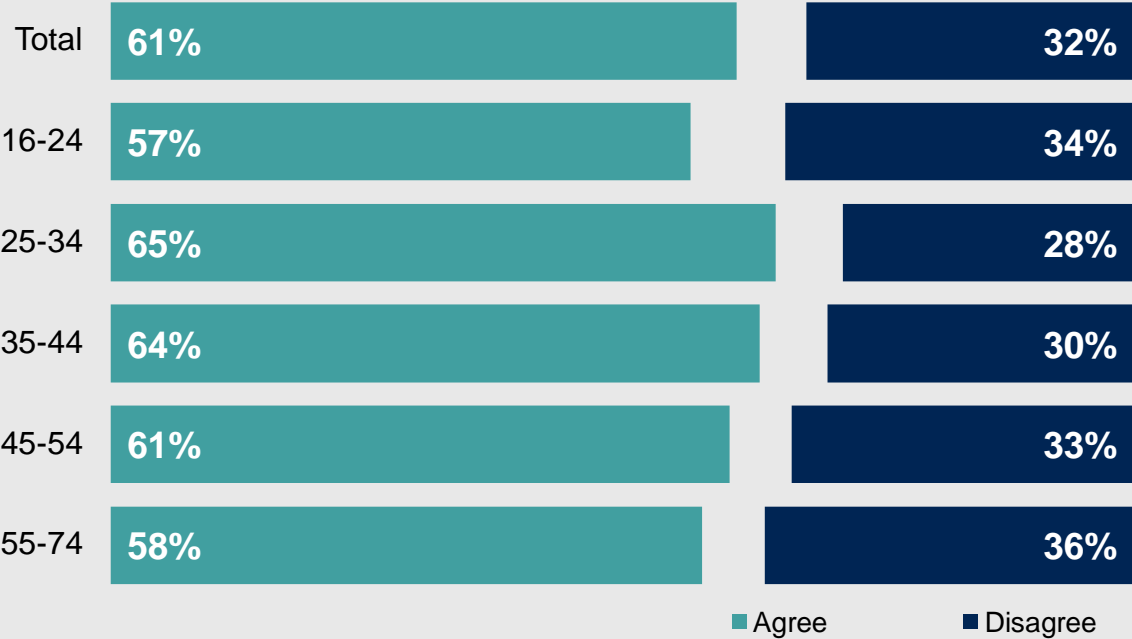
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Filter:
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When today's world is depressing, people of all ages can find comfort by thinking about happier times. Older people simply have more 'past' to be nostalgic about.

The data backs this up: levels of nostalgia, as evidenced by agreeing with the statement **'I would like my market to be the way it used to be'** vary by only 7 percentage points from top to bottom. It's virtually identical for those in their mid/late 20s all the way up to those in their mid-70s. It is only teenagers and those in their early 20s who lag, and even there, some 57% yearn for happier times.



Help customers to find the feel-good factor in their past

Thought Starters

Leveraging heritage

- Can you leverage your history and/ or heritage to tell a story that mentally transports your customers back to better times?

Bring the past back

- Have you retired any products, services or marketing and communications campaigns that you can dust off and reuse today?

Breaking misperceptions

- 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.



**GLOBAL
TRENDS
2023**

FINAL THOUGHTS

‘These crises require organisations to plan better for the future and anticipate and plan for both positive and negative outcomes in order to survive. We can’t predict the future, but we can help you prepare for it.’

– Billie Ing, Global Head of Trends and Foresight, Ipsos Strategy3

Every crisis can be an opportunity to improve your organisation, and people's lives

We can help you leverage the trends:

Beyond this public report, get in touch with the The Global Trends and Foresight Team to discuss:

- **In-depth analysis** of the trends or a specific market's attitudes – and how they will change
- **A custom presentation** tailored with data & signals for your organisation and key markets
- **Workshops & activations** to apply the trends to your strategic planning processes
- **Data access** through your Ipsos team, or directly via our Portal for up to 50 markets
- **Macro Forces** with supporting data, to feed into your own foresight processes
- **Market-specific highlights** to inform your global footprint and strategy

We can help you shape the future:

Beyond the trends, our advisory services in trends and foresight consulting include:

- **'Future of...'** foresight consulting to prepare for the obstacles and opportunities ahead
- **Trend Tracking** to monitor trend evolution and scale
- **Custom trends frameworks**, inspired by Ipsos Global Trends but customised for your organisation
- **Scenario building** and horizon scanning to consult with your organisation on preparation
- **Innovation sprints** to turn the trends into platforms for growth and to develop concepts



Thank you



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