

# **A NEW WORLD DISORDER?**

Navigating a Polycrisis

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Visiting Professor Kings College London**

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# It's a world of polycrisis...



... and people feel that existing institutions are set to let them down in the future...

72%

of global citizens are worried that government and public services won't look after them in the future

58%

would like their country to be the way it used to be

56%

of global citizens wish for a strong leader instead of their current elected government

**Base:** 37,008 adults aged 16-74\* across 36 markets, interviewed online Sep 23<sup>rd</sup> – October 7<sup>th</sup> 2022 \*age range varies within this frame by market

**Source:** Ipsos Global Trends 2023



**These crises are not going away  
anytime soon—context matters...**



**GLOBAL  
TRENDS**  
2023

# MACRO FORCES



**We've identified  
26 macro forces  
impacting societies,  
markets and people**

# Never forget the Macro forces affecting the whole planet

Ipsos focuses on the key forces impacting societies, markets & people.





# The key trends in 2023....





A wide-angle photograph of the Faisal Mosque in Islamabad, Pakistan, during sunset. The mosque's unique modern architecture, featuring a large central dome and four tall, slender minarets, is silhouetted against a sky of orange and blue. The polished stone plaza in the foreground reflects the warm light of the setting sun. People are seen walking and sitting on the plaza. In the background, the green hills of the Margalla Range are visible.

**But what does  
Ipsos Global  
Trends mean in  
Pakistan?**

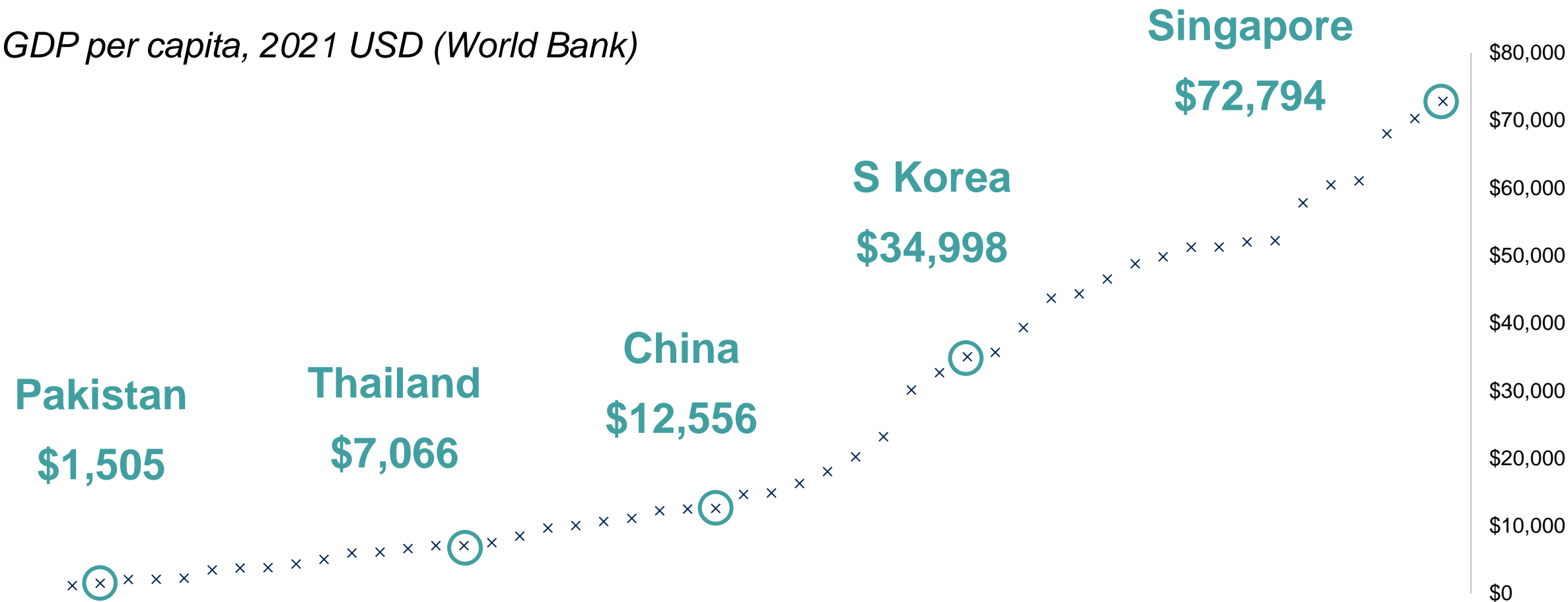
**Ten things to  
know**

# GLOBAL TRENDS VS PAKISTAN #1

**1 PAKISTAN IS DIFFERENT!**

# At one end of the income distribution for Ipsos Global Trends

GDP per capita, 2021 USD (World Bank)



World Bank 2021 Estimates; GDP per capita in current USD  
<https://data.worldbank.org/indicator/NY.GDP.PCAP.CD>





# Pakistan is different!

## The demography of a transitioning nation

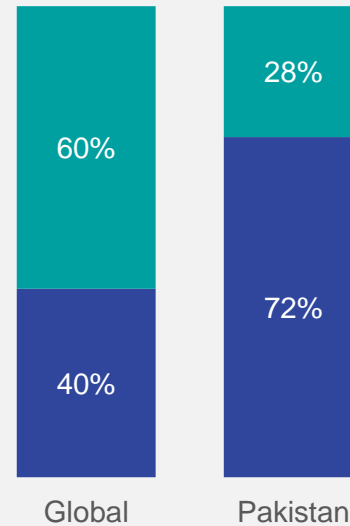
### Age

■ Under 35 ■ 35 to 49 ■ 50 to 74



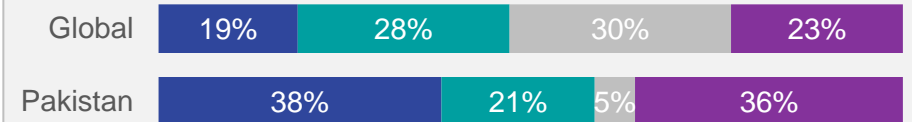
### Marital Status

■ Married ■ Not Married



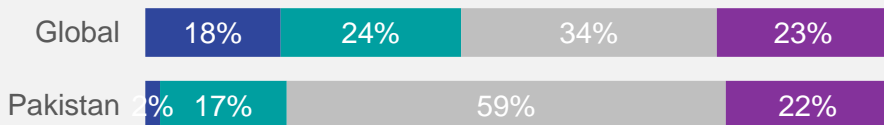
### Income

■ Low ■ Medium ■ High ■ No Answer



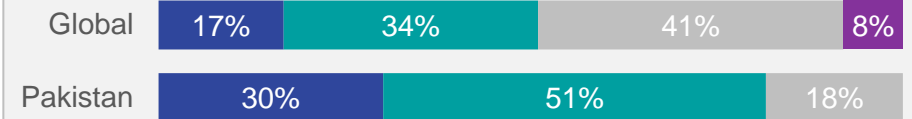
### Generation

■ Baby Boomer ■ Gen X ■ Millennial ■ Gen Z



### Education

■ Low ■ Medium ■ High ■ No Answer



# GLOBAL TRENDS VS PAKISTAN #2

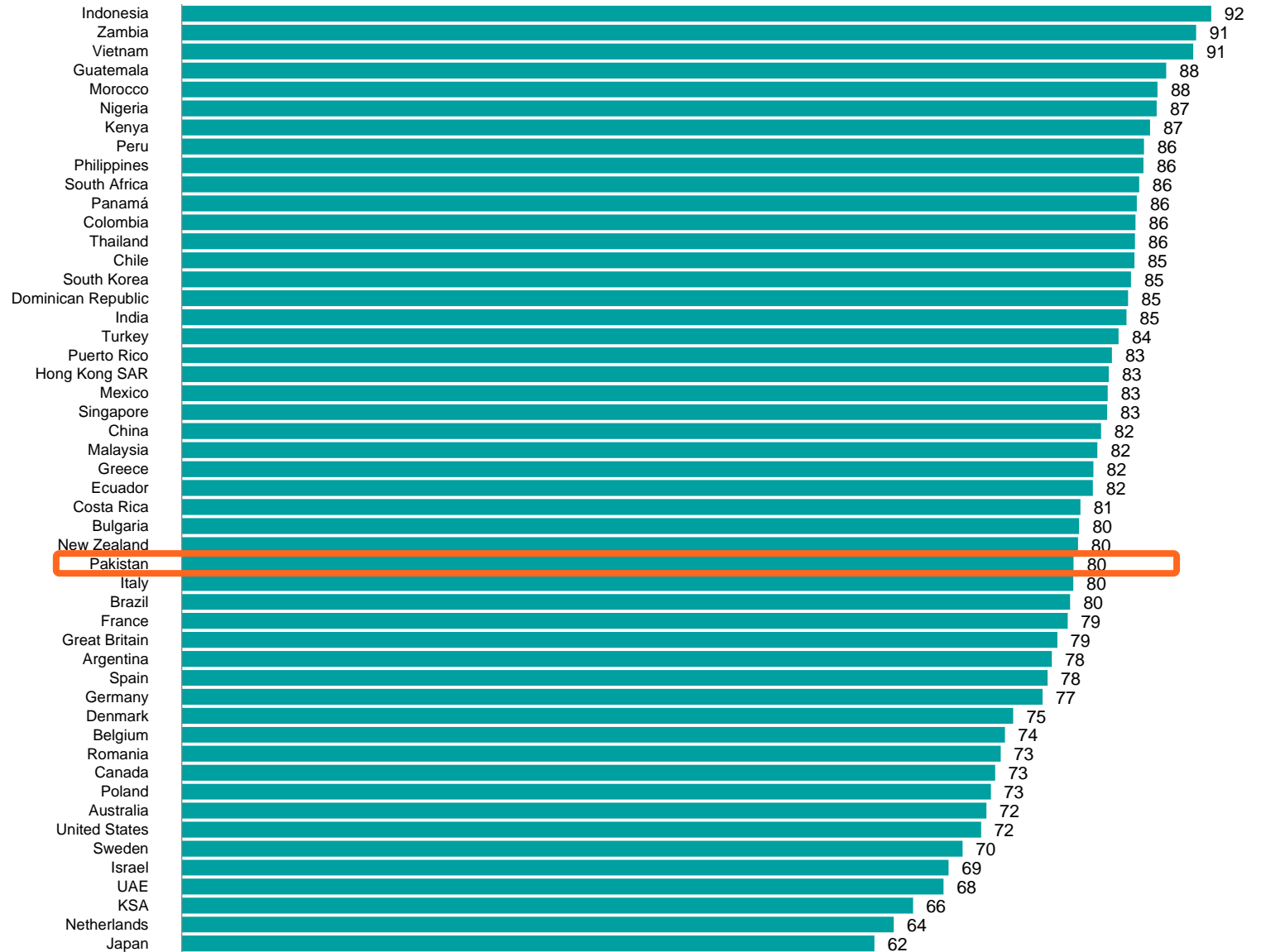
**2 Pakistan is at the sharp end of the global climate crisis**

# Before the flood

## Views on climate change were in the middle of our 50 countries...

“We are heading for environmental disaster unless we change our habits quickly”

% agree





## But after, views are changing fast, especially among the young

70%

Agree “I am concerned about the environmental impact that climate change has on Pakistan”

68%

Agree the 2022 floods were due to climate change

80%

Cite climate change as an important issue in deciding how they will vote

*British Council Next Gen Research 2023*

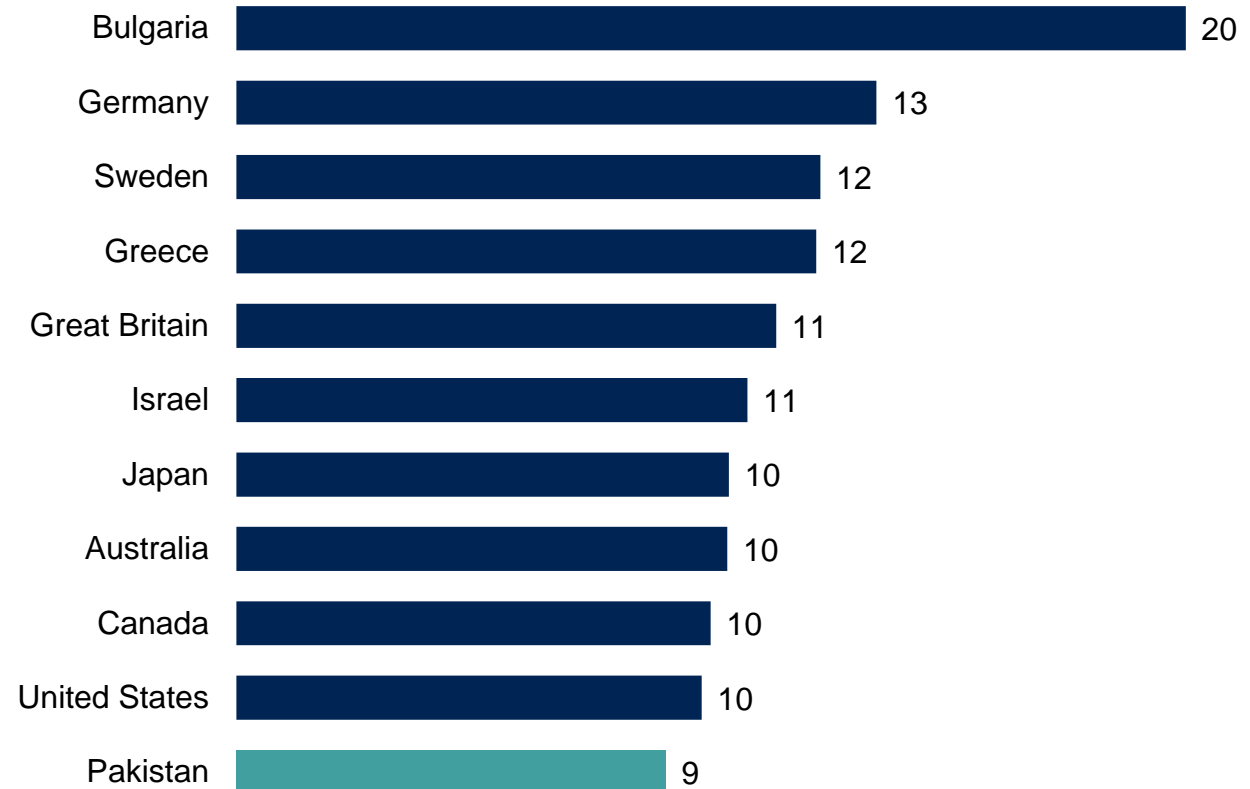
# GLOBAL TRENDS VS PAKISTAN #3



**Mental well-being is  
secondary to physical health**

# Pakistan is one of only 11 of 50 countries where physical health is prioritized over mental wellbeing

Net difference between  
“I need to do more to look after  
myself physically”  
and  
“I need to do more to look after my  
mental well-being”



Ipsos Global Trends 2023

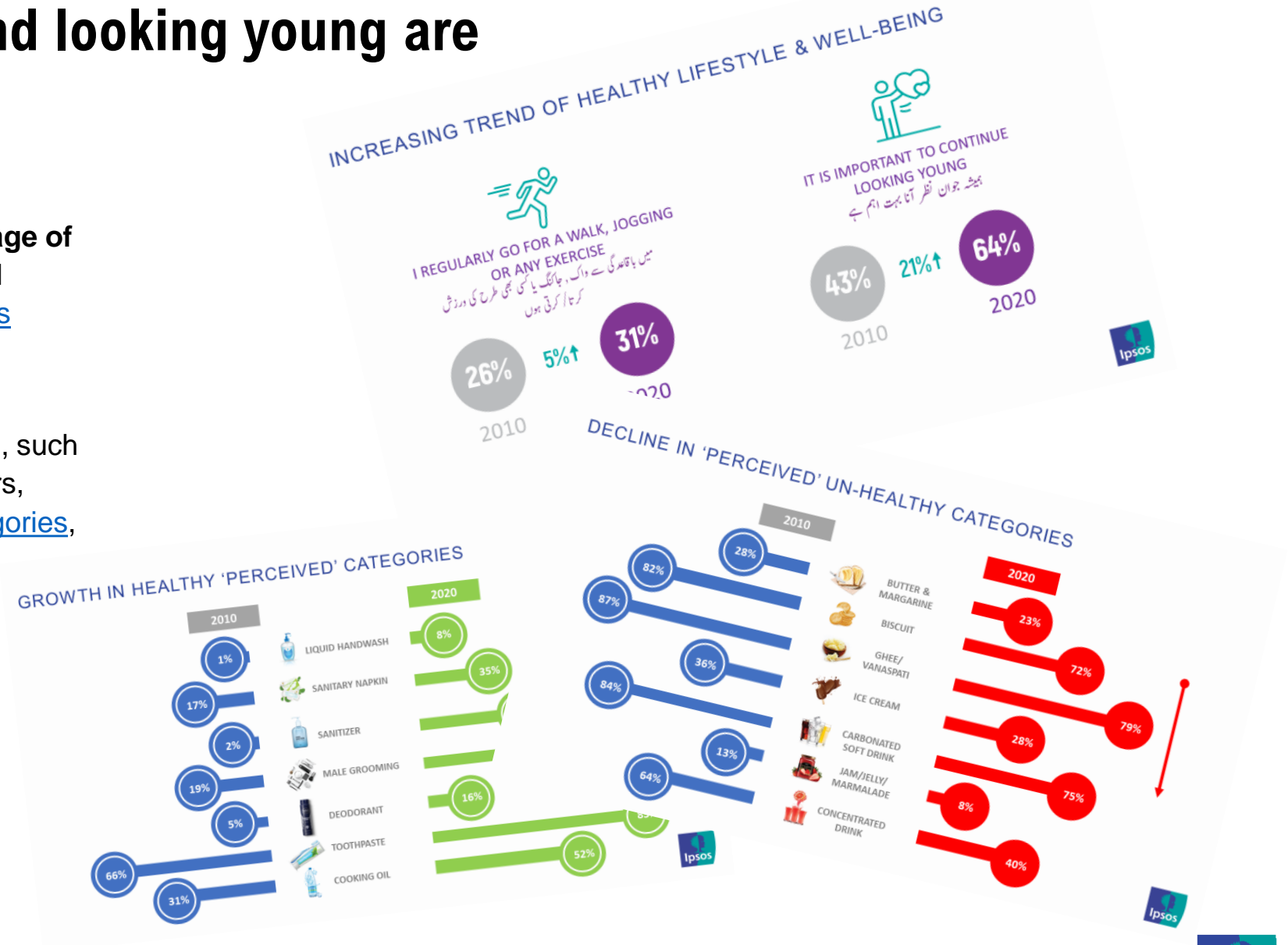


# Signal: Diet, exercise and looking young are priorities in Pakistan

## Signal

An Ipsos [study](#) shows a rise in the percentage of people in Pakistan who regularly walk and consider it important to look young. [\(Via Ipsos Consumer book'22\)](#)

The [study](#) also reveals an increase in the perceived importance of healthy products, such as handwash, sanitary napkins, and sanitizers, while the usage of perceived [unhealthy categories](#), like CSDs and Ghee, has decreased.



# GLOBAL TRENDS VS PAKISTAN #4

## 4 Brand image matters in Pakistan

# Brands matter more in Asia, the Middle East and Africa

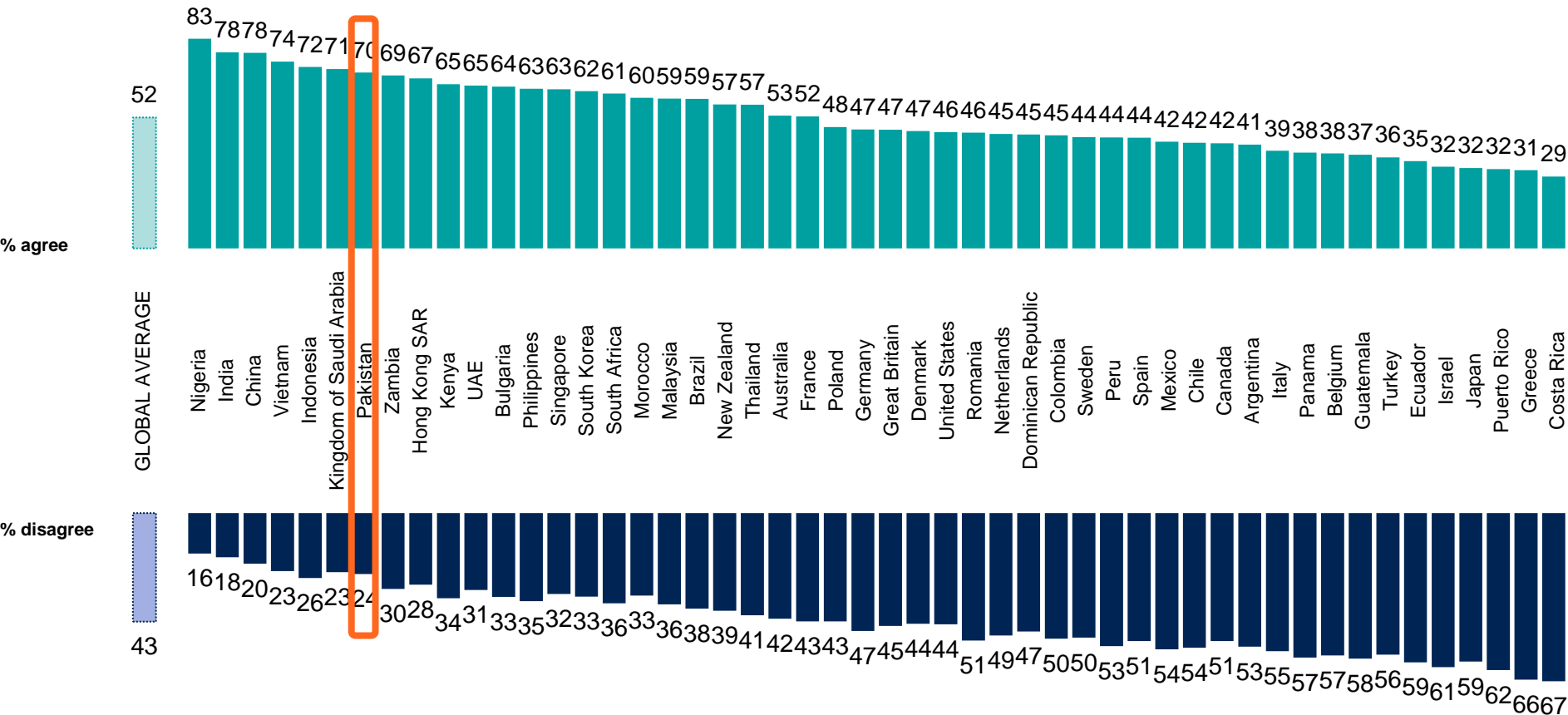
To what extent do you agree or disagree with the following statement?

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

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

**Source:**  
Ipsos Global Trends 2023

**Filter:**  
Market: All markets



# The result – a multiplicity of brands in the local market

## Signals

Pakistan has **double** the number of major local brands of **cooking oil** now compared with 2010

**1.5x** the number of **ghee** brands

**3x** as many **spices!**

## INCREASE IN # OF LOCAL BRANDS

CATEGORIES	NO. OF BRANDS THAT CONSTITUTE 80 % OF CONSUMERS' SHARE	
	2010	2020
LAUNDRY SOAP	8	19
INSECTICIDES	4	7
CREAM/ LOTION	5	9
COOKING OIL	13	27
LIQUID MILK	2	7
PICKLES	2	4
GHEE	19	28
SPICES	2	6
CHOCOLATES	5	12



# GLOBAL TRENDS VS PAKISTAN #5

5

**Pakistan: the home of data  
apathy?**



# Pakistan and India are at the forefront of a more data apathetic mindset – Europe is the outlier

To what extent do you agree or disagree with the following statement?  
Net agreement [% agree, % disagree]

**People worry too much about their privacy online. I'm not concerned about what companies, or the government know about me**

**Base:**

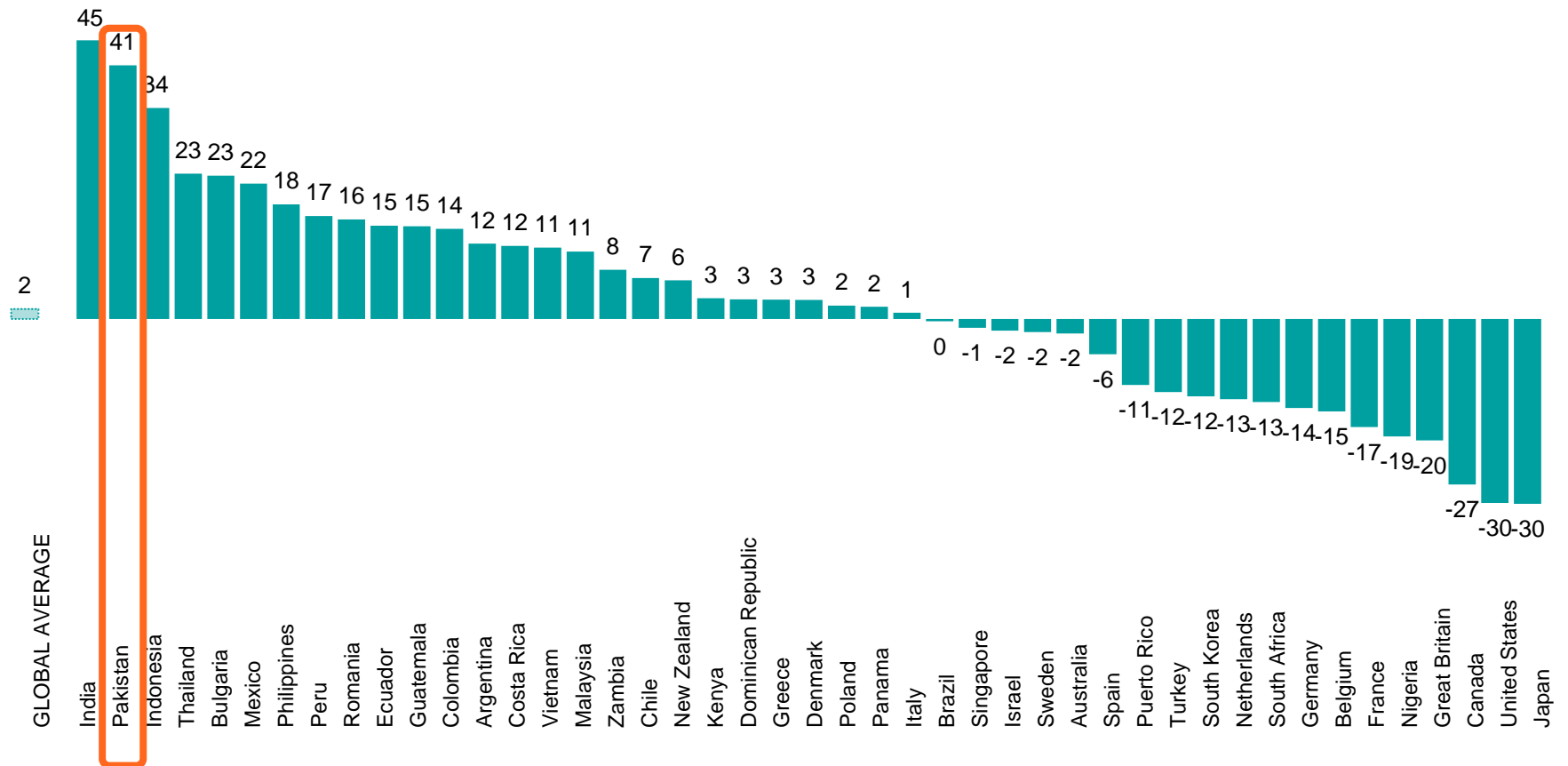
48,580 adults aged 16–75 across 50 countries, interviewed online between 23 September and 14 November 2022

**Source:**

Ipsos Global Trends 2023

**Filter:**

Market: All markets

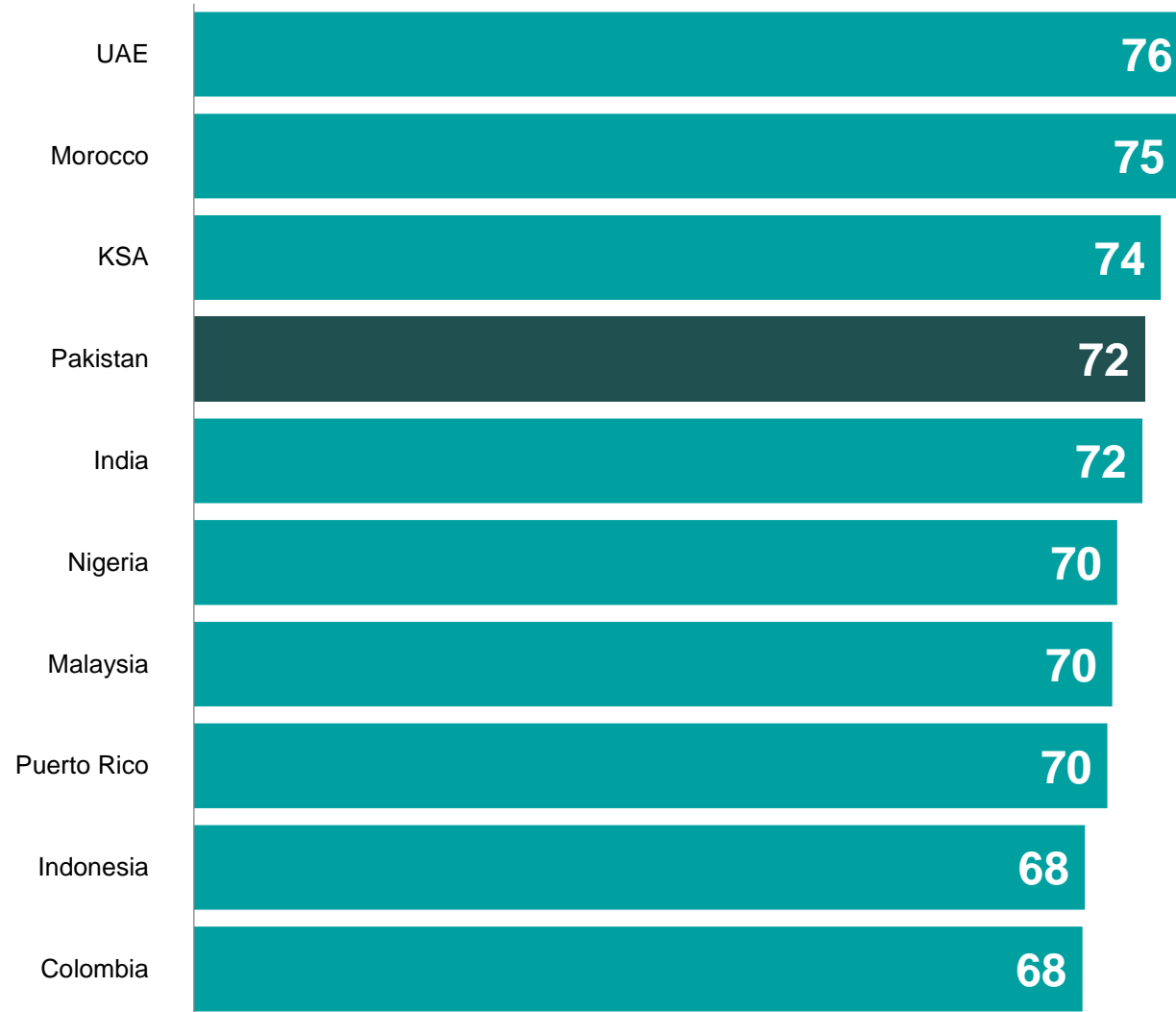


**But Pakistan is also in the top five countries concerned about technology**

**A more extreme data dilemma?**

**“I fear that technical progress is destroying our lives”**

**% agree – top ten**



Ipsos Global Trends 2023

# GLOBAL TRENDS VS PAKISTAN #6

## 6 A nation of idlers? The lowest engagement with arts of 50 nations

# Pakistanis report far fewer activities compared with the global or BRIC average – a vast potential audience

*Which of the following, if any, have you done in the past week?*

**Base:**  
48,541 adults surveyed across 50 markets between 23rd Sep - 14th Nov 2022. For full methodology see [ipsosglobaltrends.com](https://www.ipsosglobaltrends.com).

**Source:**  
Ipsos Global Trends 2023

	% agree – Pakistan	Global Average	BRIC
Watched TV (live or streaming)	35%	58%	56%
Socialised with friends outside of your home	24%	38%	35%
Used a social network (e.g. Facebook, Twitter)	22%	61%	57%
Gone for a walk	21%	50%	46%
Socialised with friends at home	20%	30%	34%
Visited a shopping mall or retail store	14%	44%	42%
Watched films/videos	12%	52%	56%
Listened to music	11%	57%	55%
Played video games (including console, PC, smartphone)	10%	28%	36%
Socialised with friends through gaming / social media	8%	27%	38%
Read a novel/book	7%	28%	40%
Played sports (including going to the gym)	6%	23%	31%
Visited a gallery or museum	6%	7%	13%
Attended a live performance (e.g. concert, theatre)	6%	8%	16%
None of the above	12%	3%	3%

# Building entertainment opportunities is a priority for developing consumption

## Saudi Arabia to host '600 per cent' more music events from 2022

► Princess Haifa bint Mohammed Al Saud says music is the beating heart of the kingdom's tourism strategy





# GLOBAL TRENDS VS PAKISTAN #7



**Pakistan has trust in  
business leaders over  
government**

# Part of a broader trend: trust in business leaders is much higher in emerging markets

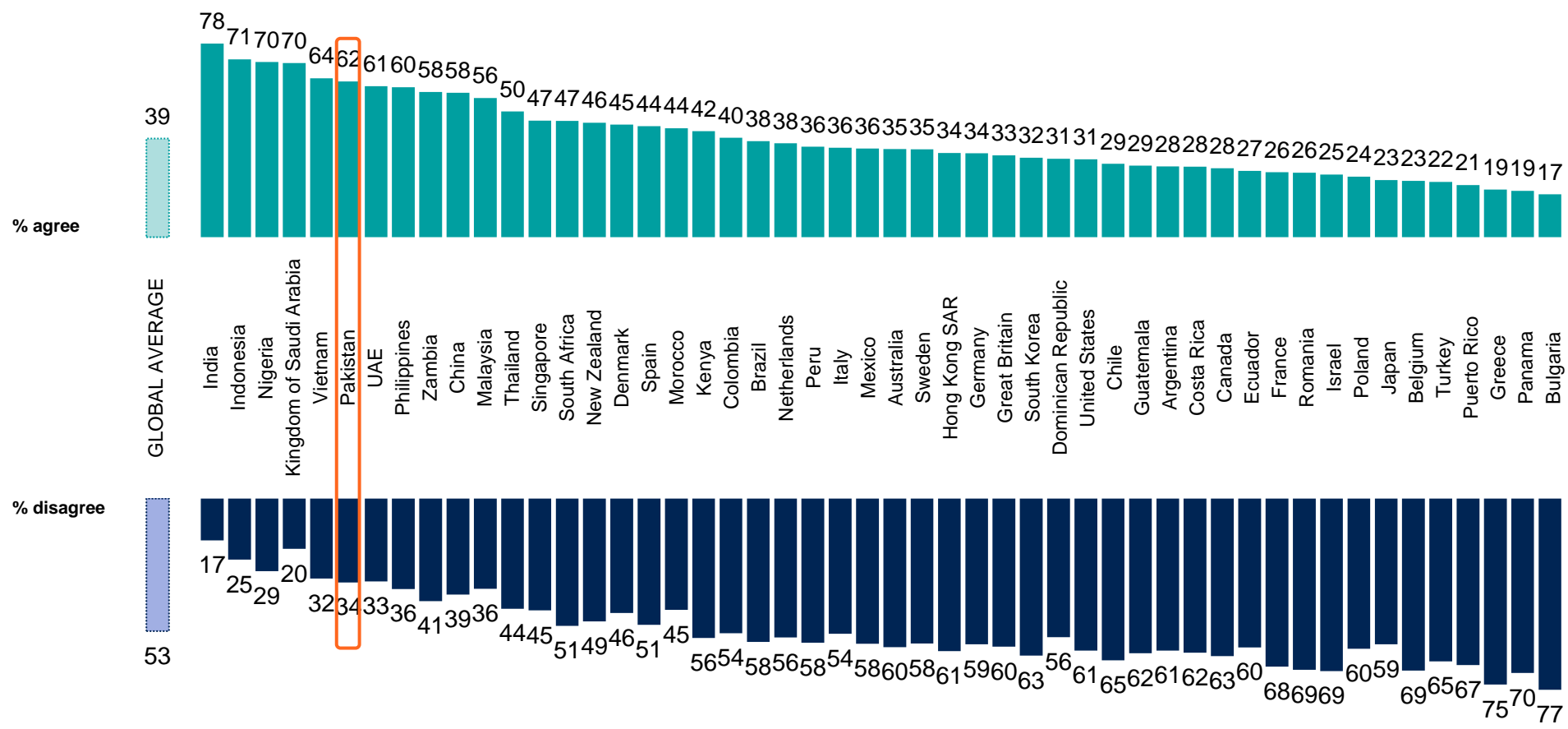
To what extent do you agree or disagree with the following statement?

I trust business leaders to tell the truth

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

Source:  
Ipsos Global Trends 2023

Filter:  
Market: All markets



# But in Pakistan the gap is especially wide: government is less trusted than the oil and gas sector

The Ipsos Trustworthiness polling:

- The **banking** sector is the most trustworthy of those surveyed, followed by public services and tech companies.
- **53%** find the government to be **untrustworthy** and 50% say the same about the media



# GLOBAL TRENDS VS PAKISTAN #8

**8** Pakistan's attitudes to gender are far from the global average



**85% of  
Pakistanis agree**  
**“The main role of  
women in society  
is to be good  
mothers and  
wives”**

**Global average  
agreement: 41%**





# GLOBAL TRENDS VS PAKISTAN #9



**Do Pakistanis want a  
'*Puraana*\*' Pakistan?**

*\* Old*

# Pakistan has a double first in nostalgia

83%

Agree “I would like my country to be the way it used to be”

Highest score of all 50 countries

78%

Agree “Given the choice I would prefer to have grown up at the time when my parents were children”

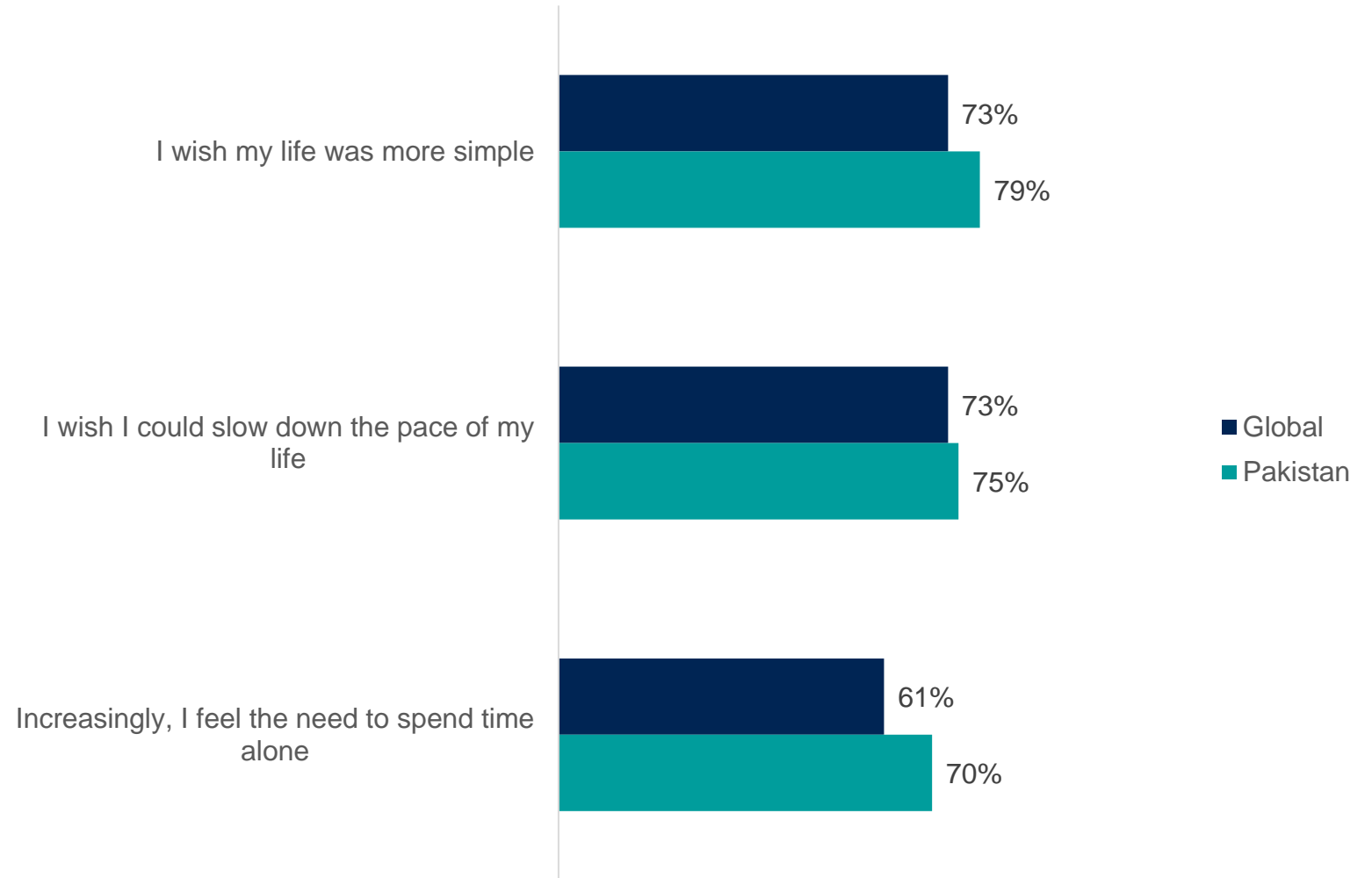
Highest score of all 50 countries

*Ipsos Global Trends 2023*

# But this doesn't equate to a strong craving for simplicity

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

% agree



Ipsos Global Trends 2023

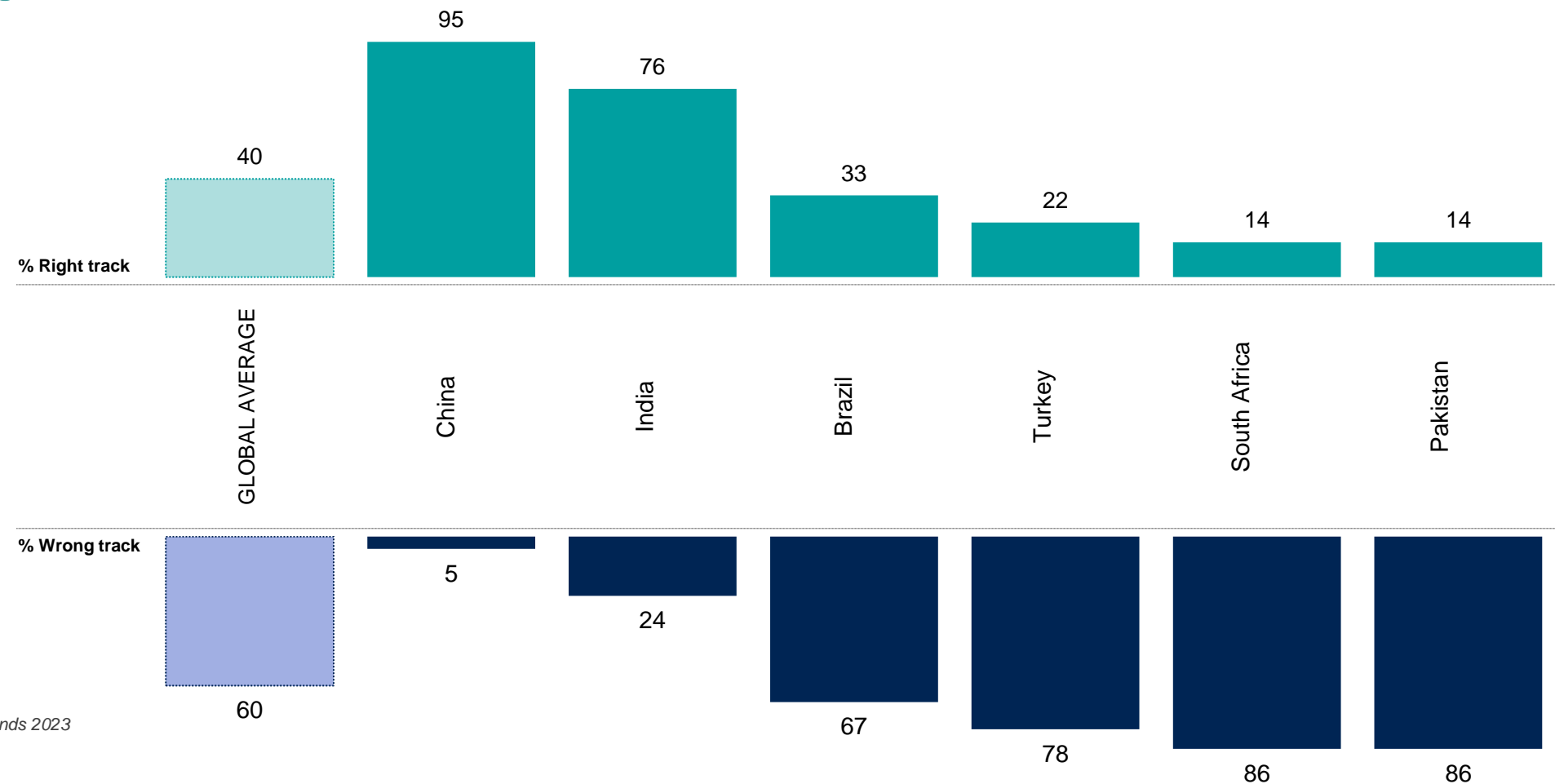
# GLOBAL TRENDS VS PAKISTAN #10

**10** Despite it all,  
Pakistanis remain  
optimistic



# An alarming number of Pakistanis believe their country is on the wrong track

Generally speaking, would you say things in this country are heading in the right direction, or are they off on the wrong track?

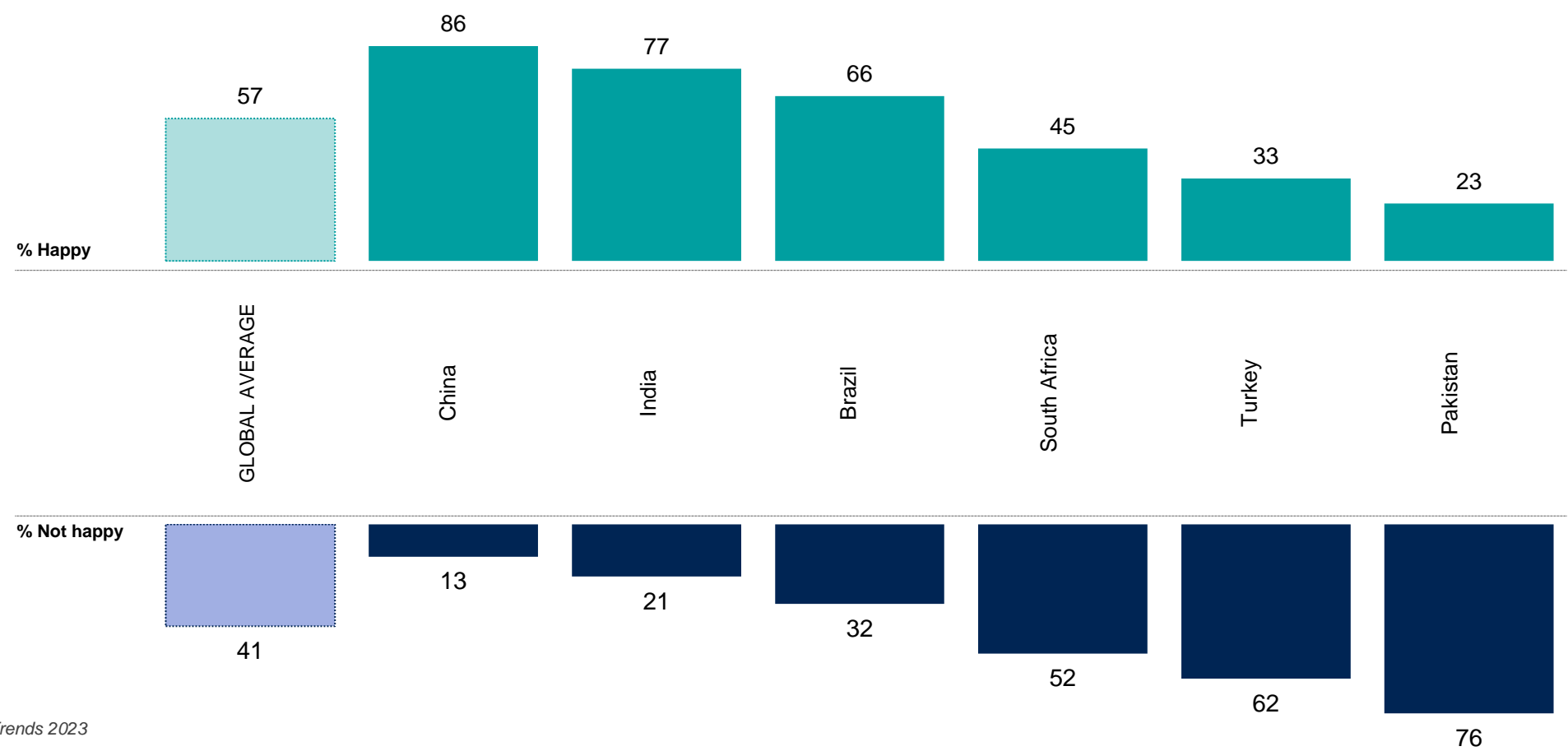


Ipsos Global Trends 2023



# Pakistan is also experiencing a happiness recession

Taking all things together, would you say you are...Happy?



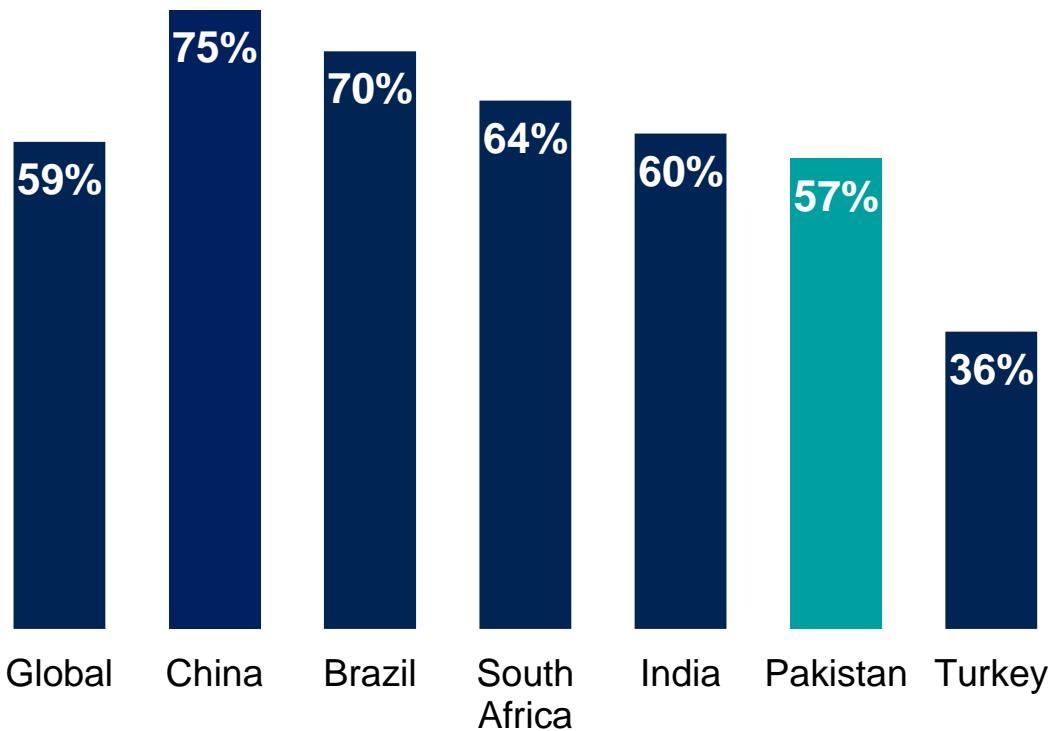
Ipsos Global Trends 2023



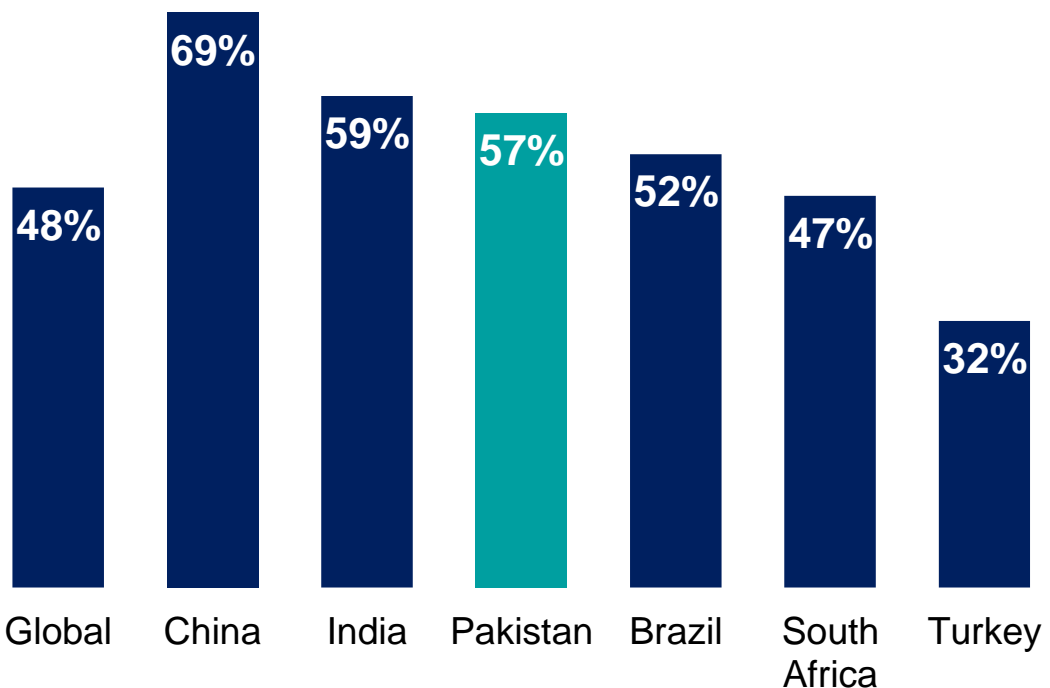
# Yet Pakistanis are more optimistic for their local area than the average, and on par for themselves

Looking ahead to the next 12 months, are you optimistic or pessimistic about the following?

You and your family?



The city/town/village where you live?



Ipsos Global Trends



**And they are  
the fifth most  
optimistic of 50  
markets for the  
state of the  
world in general**

**53% are  
optimists!**



**GLOBAL  
TRENDS**  
2023

# FINAL THOUGHTS



# The way forward

## How can Pakistan advance in an age of polycrisis?

1

### A country with unique challenges

On the front line of the geopolitical, economic and climate pressures of the polycrisis.

Opinions are shifting rapidly as events unfold.

2

### But one with unique strengths too

Despite its nostalgia, a firm faith that tomorrow will be better than today. Brand image and choice matter; Pakistanis have more trust in business than in government

3

### A need for societal solutions

A focus on increasing social and cultural activities, women's participation in work. What role can business play in charting a route towards these goals?



# Thank you.