

A NEW WORLD DISORDER?

Navigating the polycrisis

Key takeouts for the
CONSUMER HEALTHCARE SECTOR

GLOBAL
TRENDS
2023



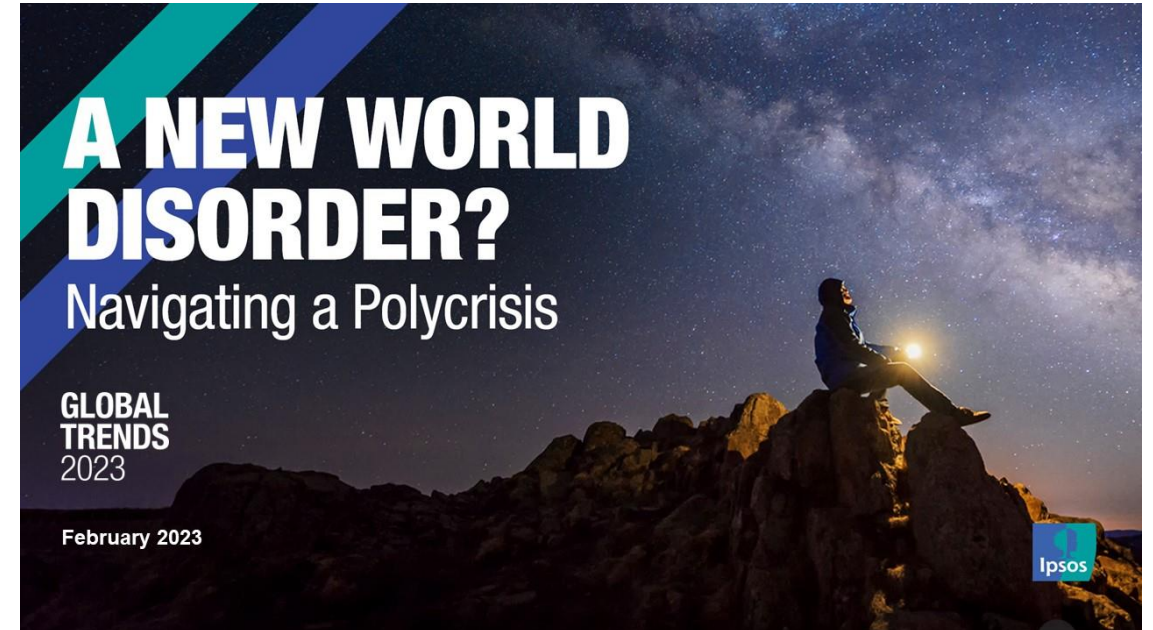
IPSOS GLOBAL TRENDS 2023: TRACKING HOW ARE PEOPLE CHANGING

Since 2013 Ipsos has been tracking the values, attitudes and behaviours of people around the world via our Ipsos Global Trends service (IGT). This year's survey, conducted at the end of 2022, is our biggest ever, comprising some 48,000+ interviews across 50 markets, with strong representation across all regions, allowing us an unprecedented window into the lives and concerns of the public.

Understanding change within any sector is about understanding both top-down and bottom-up change:

- **Top-down change** refers to broad cross-category changes. These affect people irrespective of their relationship with specific product categories but will have different impacts from one sector to another
- **Bottom-up change** refers to specific changes within individual categories – both changes in what users need and want, and changes in what those in category bring to the market and how they do so

Ipsos Global Trends is a hugely valuable resource to understand top-down change. Our 2023 report entitled “**A NEW WORLD DISORDER? Navigating the polycrisis**” is available for download.



For more insight, data, marketplace signals and thought-starters relating to the Macro Forces and trends described on this page, download our free Global Trends report for 2023: <https://www.ipsos.com/en/global-trends>

IPSOS GLOBAL TRENDS COVERS SIX MACRO FORCES (INCLUDING 26 DETAILED THEMES) AND TWELVE GLOBAL TRENDS

SIX MACRO FORCES AND KEY THEMES



TWELVE GLOBAL TRENDS



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WHAT DOES THIS MEAN FOR THE CONSUMER HEALTHCARE SECTOR?

In this document, our **Consumer Healthcare** category experts have evaluated the macro force and trend dimensions covered in IGT and identified the key factors that will shape the **Consumer Healthcare sector** during 2023 and beyond.

From these, we have identified **seven key drivers of change** and brainstormed some thought-starter implications for each.

Once you have digested these, please:

- Download our free Global Trends report for 2023 for more insight, data, marketplace signals and thought-starters relating to the Macro Forces and trends described in this document, : <https://www.ipsos.com/en/global-trends>
- Healthcare access, attitudes to health and local health lore are highly driven by cultural factors and traditions. The trends we have outlined in this document are global in nature but, of course, will vary widely from one market to another. We can leverage our 50 country dataset to help you understand what these trends look like in the markets you care about. Contact us to discuss how we can help you navigate the polycrisis and beyond.



THESE BROADER MACRO FORCES AND GLOBAL TRENDS DRIVE CHANGE IN THE CONSUMER HEALTHCARE SECTOR

DRIVERS OF CHANGE ACROSS POPULATIONS



DRIVERS OF CHANGE IN CONSUMER HEALTHCARE

HEALTH GOES HOLISTIC

THE FOCUS CONTINUES TO SHIFT TOWARDS PREVENTION

HEALTHCARE PLAYING CATCHUP ON SUSTAINABILITY

A GROWING ROLE FOR TECHNOLOGY IN HEALTHCARE

INFLATION PUTS PRESSURE ON HEALTH AND HEIGHTENS INEQUALITIES

NAVIGATING THE TRUST DIVIDE

ACCESS TO SOLUTIONS AND INFORMATION DRIVE SELF CARE



Our six global Macro Forces and key themes

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

Societies in Flux	Tech-celeration	Inequalities and Opportunities	Environmental Emergencies	Political Splintering	Well-rounded Well-being
Ageing populations	Pervasive technology	Rise & fall of middle classes	Climate change	Plateau of globalisation	Growing mental health crisis
Community migration	The immersive frontier	Employee power shift	A greener way of thinking	Security dilemmas	Systemic health inequality
Life stage evolutions	AI advances & quantum computing	Generational wealth disparities	Over-development	Rethinking institutions	Integration of health & technology
Greater ethnic & religious diversity	Increased automation	Impacts of inflation		Increasing geopolitical conflicts	
Identity fluidity	Toll of technology	Alternative value structures		Entrenched inequality	

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HEALTH GOES HOLISTIC

THE WHAT?

What drives holistic health?

Macro Forces:
WELL-ROUNDED WELL-BEING

Trends: **CHOICES OVER HEALTHCARE** and **CONSCIENTIOUS HEALTH**

While the pandemic understandably required governmental-level oversight, legislation and enforcement, the longer-term trend has been for people to want more direct access to healthcare and more control over their solutions and outcomes. Consumers continue to want more access to providers and specialists, regardless of their location, and more control over their well-being. Medical professionals have been weathering the pandemic and demand fair compensation and treatment.

Health is becoming more holistic, taking into account multiple meanings of well-being. The interconnectedness of health with other systems is also being examined, to begin to address inequities.

80%

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

86%

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

THE "SO WHAT"?

What might this mean for the Consumer Healthcare sector?

People place a high value on both mental and physical health - in many cases it is regarded as an essential pre-requisite for a happy life. While mental health is a growing priority for all, our IGT data shows that it is particularly challenging for the young because of factors like the pressure to live "perfect" lives from social media and influencers. This group needs urgent support.

People increasingly know what they are supposed to do to stay healthy but there is a large and growing see-do gap, made larger by the high cost of living, buying and eating healthily and the cost of OTC medications. The gap is also impacted by a growing shortage of medical professionals in Western Europe at least and hence importance of self care which we will talk more about later. The desire to live healthily all too often bumps up against the pressures of reality – busy lives, the desire for indulgences, and so on. In addition, social media influencers help perpetuate unhelpful images of healthy perfection, putting unnecessary pressure on people and creating guilt with every lapse.

How can health providers recognise more all-encompassing definitions of health? How can they provide products and services that enable both physical and mental health? How can they take the pressure off consumers who feel pressure to live "perfectly healthy" lives?

WHO IS ALREADY ACTING ON THIS?

Marketplace innovations are embracing broader definitions of health



[Gympass](#) mindfully welcomes Headspace into its wellbeing network

China's [Peace work pods](#) aim to boost mental health for those using the company's quiet, privacy-first space to avoid crowded offices and noisy cafes.



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THE FOCUS CONTINUES TO SHIFT TOWARDS PREVENTION

THE WHAT?

What drives the move to prevention?

Macro Forces:
**WELL ROUNDED
WELLBEING** and
INEQUALITIES

Trends: **SEARCH FOR
SIMPLICITY AND MEANING** and
**REACTIONS TO UNCERTAINTY
AND INEQUALITY**

Over recent years, healthcare economists have been advocating a greater priority on prevention over cure, on behalf of the healthcare systems they represent. Governments around the world have acted to legislate against some unhealthy habits – policies aimed at reducing smoking or the consumption of foods high in sugar and/or fat are just two examples. There are signs that the global public is getting the message. In part, this may be a consequence of the closer relationship between health and incomes: more are in the gig economy meaning down time is unpaid time; spending some money now to avoid negative health issues might be a better economic option than spending more money later to resolve issues that arise from living unhealthily.

72%

say they will “sacrifice convenience if it means getting healthier products”

THE “SO WHAT”?

What might this mean for the Consumer Healthcare sector?

Prevention is better than cure as the old adage has it but genuinely adopting preventative approaches can require people to make quite profound lifestyle shifts and changes to well-entrenched habits.

For a sector where business models are typically predicated on the purchase and usage of solutions, often on a very long-term basis for chronic conditions, adopting a more preventative approach will clearly put pressure on financial stability.

How can the healthcare world find business models that support a move towards preventative mindsets and behaviours?

WHO IS ALREADY ACTING ON THIS?

Marketplace innovations are attempting to enable prevention rather than cure



Beyond Meat and American Cancer Society [partner](#) to advances research on plant-based meat and cancer prevention.



Pencils made from carbon recaptured by air purifiers installed by [Otrivin](#) help bring clean air to India's schoolkids

HEALTHCARE PLAYING CATCHUP ON SUSTAINABILITY

THE WHAT?

What drives sustainability?

Macro Forces:
ENVIRONMENTAL EMERGENCIES and **WELL-ROUNDED WELL-BEING**

Trends:
CLIMATE ANTAGONISM
CONSCIENTIOUS HEALTH

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.

28 July

Earth Overshoot Day in 2022: the date by which demand for natural resources had exhausted what the Earth can regenerate

80%

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

THE “SO WHAT”?

What might this mean for the Consumer Healthcare sector?

While sustainability still concerns most people, there are major stumbling blocks to a green life and some evidence suggesting that concern may have dipped this year. Yet this is an existential issue for us all. Definitions of sustainability are also evolving and diversifying to include considerations purpose, ethics, health and culture and this new broader perspective may be the tipping point to bring about behaviour change. Like other sectors, healthcare must focus on reducing its own impact.

However, healthcare has another sustainability challenge. The changing global climate is accelerating the development of certain health conditions (such as air pollution raising allergy incidences, extreme heat driving infectious disease, etc).

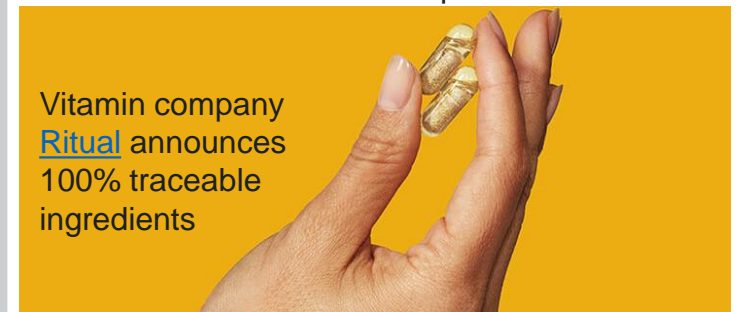
What does sustainability look like in healthcare? Packaging reduction, emissions, reduction, lower drug wastage and other initiatives will all contribute to a less impactful sector.

WHO IS ALREADY ACTING ON THIS?

Marketplace innovations are embracing sustainability



[Chemist](#) partners with [Pharmacycle](#) to recycle medicinal blister packs



Vitamin company [Ritual](#) announces 100% traceable ingredients

A GROWING ROLE FOR TECHNOLOGY IN HEALTHCARE

THE WHAT?

What trends do we see in data & technology?

Macro Forces:
TECH-CELERATION and
AGEING POPULATION

Trends: **DATA DILEMMAS** and **THE TECH DIMENSION**

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?

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.

71%

can't imagine life without the internet

81%

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

THE “SO WHAT”?

What might this mean for the Consumer Healthcare sector?

The wave of health-focused app development that we saw over recent years seems to have calmed slightly, perhaps waiting for a game-changing innovation (such as calories-in tracker apps that are as easy to use as the calories-out apps enabled by wearables). But technology is driving healthcare change in a multitude of other ways too: drone delivery of prescriptions, telemedicine, predictive healthcare and others. It also links with some other healthcare trends since it is helping to create a more informed and empowered patient.

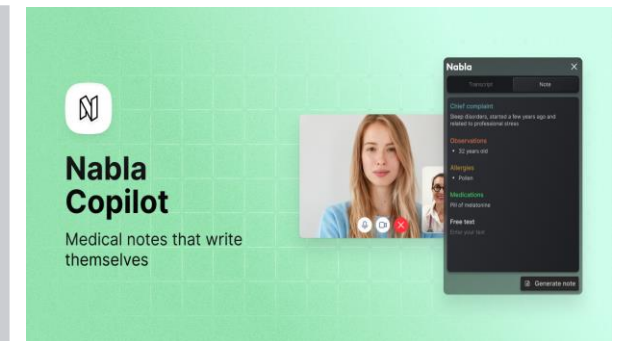
In addition, ageing populations mean a need to transform the way healthcare is managed, particularly long term illnesses. This transformation is likely to be driven by data and technology.

Many initiatives in this area stand or fall on access to customer data and as personalisation tech matures and spreads into contextual personalisation (based on dimensions such as location, weather, mood, the body's vital signs, and so on) rather than merely forecasting based on previous product usage, the demand for data will only become more intense?

How will healthcare brands make the case for accessing customer data to drive personalisation?

WHO IS ALREADY ACTING ON THIS?

Marketplace innovations are leveraging new technologies to enable health



AI-enabled chrome extension [Nabra](#) can turn patient conversations into documents

China Mobile Hong Kong, together with health tech company Heals Healthcare, unveiled its mobile health app - [Dr. HK](#) - for teleconsultations.



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INFLATION PUTS PRESSURE ON HEALTH AND HEIGHTENS INEQUALITIES

THE WHAT? What drives health inequalities?

Macro Forces:
IMPACTS OF INFLATION
and **SUPPLY CHAIN ISSUES**

Trends: **INEQUALITY & UNCERTAINTY** and **DIVIDED WORLD**

Healthcare providers – both commercial entities and state healthcare systems - have had their work cut for them over recent years. Lockdown affected supply chains and caused major stockout issues, drug costs have been rising, and the incidence levels of many conditions have been exacerbated by the pandemic. At the same time the cost of living crisis and the inflationary environment are forcing people to examine their spending priorities very closely. In theory, nothing is more “valuable” than our health but short-term, day-to-day considerations such as paying utility bills and putting food on the table may mean that longer-term commitments to health may be cut from household spending, or at least cut back, potentially storing up problems for further down the line.

1/3 of the world will be in recession in 2023

Kristalina Georgieva,
IMF’s Managing Director,
1 January 2023

70% of global consumers feel that the rate of inflation (the rate at which prices are rising) will go up a lot or a little in the coming year.

THE “SO WHAT”? What might this mean for the Consumer Healthcare sector?

People increasingly know what they are supposed to do but there is a large and growing see-do gap, made larger by the high cost of living, buying and eating healthily and the cost of OTC medications.

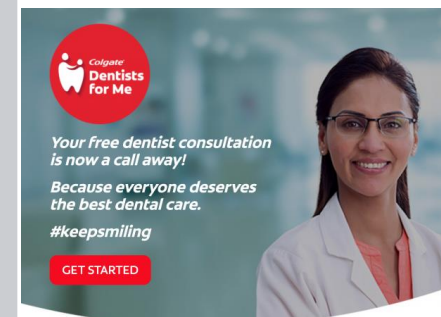
The cost-of-living crisis is forcing consumers to think more carefully than ever about what they buy. It is also heightening inequality between individuals and, since, health is now tied so tightly to spending power, those inequalities are increasingly evident in health outcomes, effectively creating, or heightening a two-tier society of health enabled and health excluded.

How can health providers close this gap and make health products more easily accessible to those with limited resources?

WHO IS ALREADY ACTING ON THIS? Marketplace innovations are trying to remove cost barriers to health



Retailer Boots [addresses the cost-of-living crisis](#) with price freeze on 1,500 products



Colgate launched **Dentists For Me**: a teledentistry platform connecting people across India with over 150 dentists, free-of-charge.

NAVIGATING THE TRUST DIVIDE

THE WHAT?

What puts trust in short supply?

Macro Forces:
LIFE STAGE EVOLUTIONS
and **GENERATIONAL**
WEALTH DISPARITIES

Trends:
UNCERTAINTY &
INEQUALITY and
CAPITALISM'S TURNING
POINT

The recognition that healthy outcomes are often a collaborative effort between individuals, the state and the private sector is relatively recent but the relative contributions of the three players is complex and fluid, depending on the country and the precise circumstances of the individual. Over recent years, the contribution of the government has been subject to scrutiny, debate and very public and sometimes violent protest (as seen in France over the issue of raising the retirement age to 64). While the situation varies very much from one country (and government) to another, concern over whether the government will provide enough help is becoming widespread.

36%

Just over one-third feel their government is good at planning for what life will be like ten years from now

74%

of global citizens are “worried that government and public services in my country will do too little to help people in the years ahead”

THE “SO WHAT”?

What might this mean for the Consumer Healthcare sector?

Data from the latest annual [Ipsos Trustworthiness Barometer](#) suggests that faith in the government continues to be low, while the pharma sector may be basking in public appreciation of the global COVID vaccine efforts. 22% regard their government as trustworthy (and 45% as **untrustworthy**) while the comparable figures for pharmaceuticals companies is 34% trustworthy and 27% **untrustworthy**).

With the sector now including pharma-only companies, pharma + consumer healthcare companies and consumer healthcare specialists, the challenges of creating and maintaining trust varies hugely.

How does the healthcare sector capitalise on the legacy post-COVID positivity towards the sector? How do healthcare providers position themselves as a support mechanism for the public without alienating the healthcare systems that are their biggest customers? What are the right public-private partnership approaches that will enable the public to find the information and solutions they need?

WHO IS ALREADY ACTING ON THIS?

Commercial organisations are attempting to help those disillusioned with healthcare systems



NGO [offers mammograms](#) to socially vulnerable women.

Walgreens, Uber and DoorDash [partner](#) to offer free Paxlovid delivery to underserved communities.



ACCESS TO SOLUTIONS AND INFORMATION DRIVE SELF CARE

THE WHAT?

What trends drive self-care?

Macro Forces:
INEQUALITIES & OPPORTUNITIES
and **PERVASIVE TECHNOLOGY**

Trends: **CHOICES OVER HEALTHCARE, TECH DIMENSION**
and **REACTIONS TO UNCERTAINTY AND INEQUALITY**

While the trust divide is forcing people to become less reliant on the state, other factors are driving up their ability to self-serve. A growing culture of resilience, agility and self-sufficiency combined with the empowerment offered by technology and the internet is allowing people to seek out information and opinions to create healthy outcomes- from both accepted authority figures but also their own networks.

All of this is being underpinned by an uncertainty about both short-term and longer-term futures: rather than rely on provisions that may be around for long, it may just be easier for people to take control.

83%

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

THE "SO WHAT"?

What might this mean for the Consumer Healthcare sector?

While a self-help philosophy is admirable and eminently practical for many product sectors, health is an area where mis-steps can prove very damaging, even fatal.

For many people the YouTube how-to video or the TikTok campaign may represent a sea change in their knowledge of an issue but with little or no regulation of this content, there is a real danger of misinformation.

Pharmacists are increasingly emerging as a useful point of informed contact for patients who may not be able to secure time with healthcare professionals but have questions that they cannot answer via the routes discussed above.

How can the healthcare industry ensure that people who are willing and able to find new solutions and information that they can trust can do so? If the pharmacist role does grow- what does this mean manufacturer? Do they need to be even closer to pharmacists?

WHO IS ALREADY ACTING ON THIS?

Marketplace innovations are making health knowledge and solutions easier to access

Guyingyang is a health KOL, with over 2.7m followers. He answers nutrition questions and provides the professional knowledge to reduce the wrong impressions people have about food and nutrition.



Supermarket's [pharmacists trained](#) to give advice on more serious health conditions

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 countries
- **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



About Ipsos

In our world of rapid change, the need for reliable information to make confident decisions has never been greater.

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide a True Understanding of Society, Markets and People. To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do. So that our clients can act faster, smarter and bolder. Ultimately, success comes down to a simple truth: You act better when you are sure.

GLOBAL TRENDS 2023

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

Billie.Ing@ipsos.com

Nick Chiarelli
Nick.Chiarelli@Ipsos.com

ipsosglobaltrends.com

Globaltrends@ipsos.com

GAME CHANGERS

