GLOBAL TRENDS 2020

Understanding Complexity

Ipsos

ACKNOWLEDGEMENTS

Ipsos Global Trends is very much a team effort. Thank you very much to all the authors for their insightful points of view. Thank you also to all the editors, designers, proofreaders, operations and analytics teams who worked to create another great edition of Ipsos Global Trends.

Please let us know what you think, and what you'd like to see in future editions.

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Foreword

Ben Page
Chief Executive,
Ipsos MORI

Welcome to Ipsos Global Trends 2020 – this report outlines some of the headlines from more than 370 questions asked across 33 countries, and updates previous editions from 2013 and 2016.

We have analysed the data in more depth than ever, highlighting the world's values and trends in one in-depth survey. Whether you are interested in populism, brand building, climate change, politics or social issues, you will find useful insights here.

Using advanced analytics and expert analysis on this huge data set, we have identified 12 trends and 36 values that will dominate the world in the 2020s.

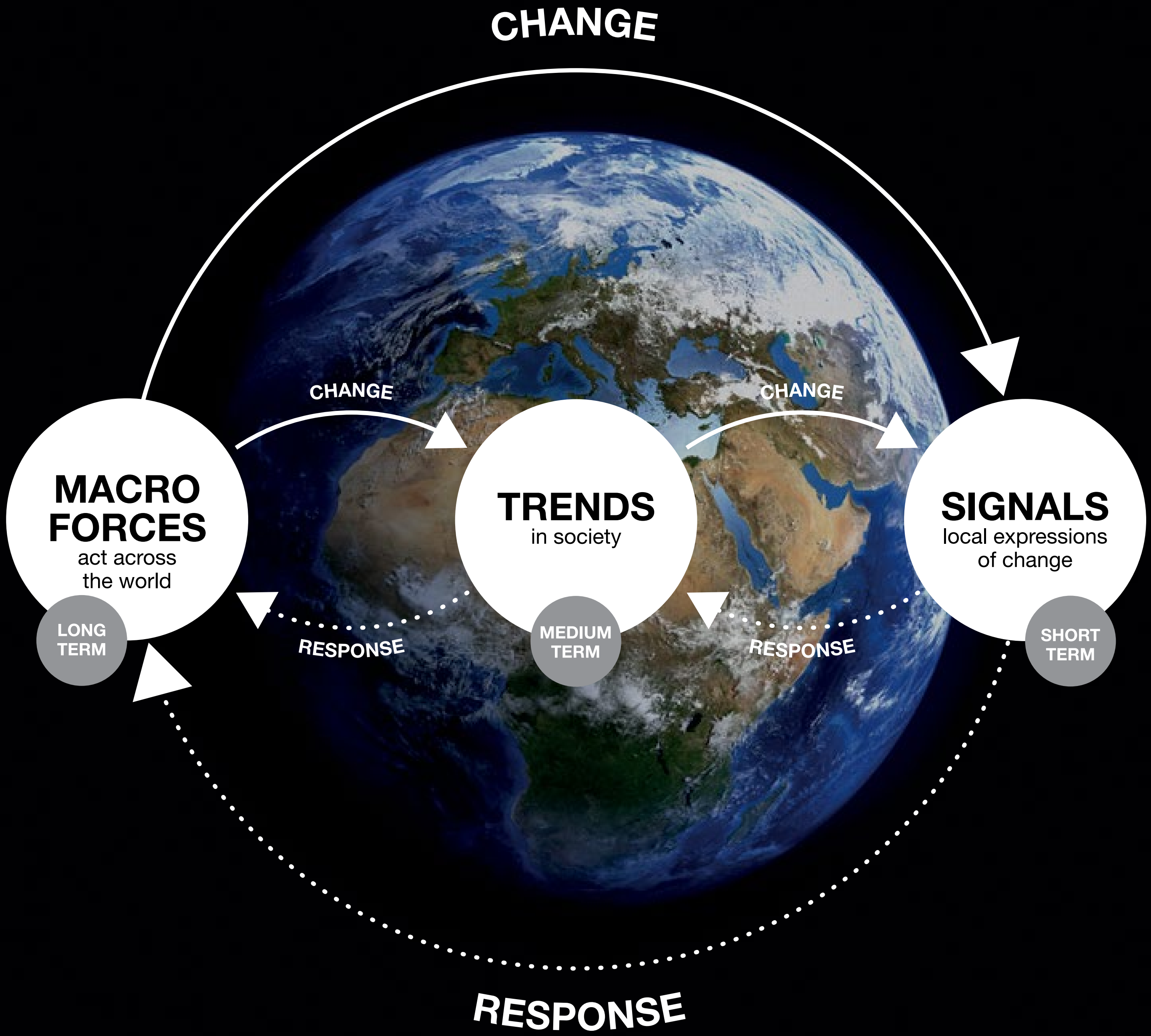
- Climate emergency and antagonism
- A world divided by its values
- Choices over healthcare
- Reactions to uncertainty and inequality
- Capitalism's turning point
- Peak globalisation
- Data dilemmas
- Conscientious health
- Authenticity is king
- The search for simplicity and meaning
- The tech dimension: technophilia and technophobia
- The enduring appeal of nostalgia

Looking at our trends, at first sight you may see a world challenged by power conflicts, populist risings, climate emergency and frightening technology. Yet we have also found satisfaction with living standards rising globally, and a gentle rise in self-fulfilment.

In a populist age – at least in western media – we find rising support for globalisation, and improvements in ratings of local public services globally. We find more people worried that technology is destroying our lives, but simultaneously more people saying we need technology to solve our challenges. For this reason, we have called this edition Understanding Complexity.

We have included short reflection essays from Ipsos teams in France, Canada, the US, Brazil, the Netherlands, Australia and the UK, reflecting Ipsos' truly global reach – we are present in 90 markets. These are for those thinking about their organisation's challenges in the years ahead. Do get in touch if you would like more detail on any of the trends here – we are only able to put the headlines into this print edition of the report, and more value derives from working through the trends across the 33 countries as they affect you.

We look forward to hearing from you.
ben.page@ipsos.com


CHANGE
CHANGE
CHANGE
MACRO FORCES
act across the world
LONG TERM
TRENDS
in society
MEDIUM TERM
SIGNALS
local expressions of change
SHORT TERM
RESPONSE
RESPONSE
RESPONSE

Our theory of change

In this edition we connect the global to the local, providing a way to understand how human interaction shapes – and is shaped by – our world.

Our theory looks at how change operates across different timeframes, through longer-term macro forces, medium-term trends in society and shorter-term signals – which express real behavioural change.

Macro forces are the long-term shifts which act across all markets and societies. These form the context against which people and organisations act. We have identified six macro forces: *dynamic populations*; *growing inequality and opportunity*; *geopolitical tensions*; *the fragile planet*; *technological tipping points*; and the *data world*.

At the other end of the scale, signals are localised and short-term expressions of change. They can occur at the level of a single country, or a community within a specific area, and will vary dependent on the target audience.

In the middle, we have trends. These are the core of this report. These are cultural attitudes and values which emerge from the interaction between people and the planet. Trends can emerge, enter into mainstream culture, and fall out of practice in response to macro forces and signals. Importantly, this model acknowledges the role of feedback loops in terms of understanding the complexity in our world. Macro forces impact trends and signals directly – the arrows on the top half of our diagram show the directions of top-down change. But the decisions made by individuals can also ladder up to impact the world through a bottom-up response. Emerging signals of change impact wider trends in society, which over time can have an impact on our planet.

Our model, reflecting the circular nature of change, offers a useful framework to understand the complexity of the 21st century from either a top-down or bottom-up perspective. Overleaf we provide greater detail on the macro forces we see acting on the world, before revealing the trends we have unearthed through this year's Global Trends survey.

Macro forces

10 Dynamic populations

14 The fragile planet

16 Growing inequality and opportunity

20 Geopolitical tensions

22 Technology tipping points

24 Data world

How the planet changes

Macro forces are the world's broadest currents of change, providing long-term context for changing attitudes, values and behaviours. We have identified six macro forces, evolving from those we defined in 2017.

As demography and migration patterns change, we see *dynamic populations*, but also *growing inequality and opportunity*. In 2017, we talked about the multipolar world; now *geopolitical tensions* have sharpened. Since 2017's report, our desire for sustainability has increased. However, our changing climate and the increasing demand for resources have led to our world becoming *the fragile planet*. We see new technologies about to take off in *technological tipping points*.

Finally, we are defining a new macro force for 2020. 'Data world' describes how AI, powered by big data, redefines the kind of knowledge we can create about our world; yet also destabilises our information ecosystem.

2020 sees the dawn of the Anthropocene – a new geological era – named for the changes human activity has made to our planet. Perhaps for the first time, we are shaping these macro forces as much as they are shaping us.

Sarah Castell
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Dynamic populations

The world's demography is in flux, and *dynamic populations* will shape the narrative of the 2020s.

Europe will continue to age, with reproduction below replacement levels in all European countries in 2016.[01] In our 2017 report we identified the macro force of demographic change shifting the world's societies. Now, in 2020, we see the impacts beginning to be felt.

Populations are rebalancing between old, young, rich and poor, and critical tipping points are predicted. Despite the spending power of the asset-rich older generations in the west, governments are under pressure to provide services for ageing populations, and change employment patterns to cope.

China is also beginning to age – and quickly. By 2050, it is predicted that 330 million Chinese people will be over the age of 65 – more than the current population of the US.[02] As population growth peaks and begins to decline, the burden of caring for the elderly may be a difficult one to bear. Unlike the west, China does not have the infrastructure to provide this care, and income disparity is particularly bad due to the historic one-child policy concentrating wealth.[03] Indeed, due to the legacy of Mao's policy – and to growing affluence – India is expected to surpass China as the most populous country within the decade, if not sooner.[04] More than half the projected global population rise up to 2050 will be in just nine countries: India, Nigeria, Pakistan, Congo, Ethiopia, Tanzania, Indonesia, Egypt and the US.

These dramatic shifts in demography will disrupt and reform our economic and social landscape. The risk of the west becoming outcompeted as emerging economies grow and expand beyond manufacturing into services is very real. Whereas five years ago we speculated about the political response to this anxiety, in 2020 the shape of the future is clearer: populist politics and protectionist policies are on the rise. The appeal of protectionism may be further enhanced by a growing productivity problem. This, along with the decline of traditional manufacturing industries, means there are few guaranteed income boosts on the horizon for western governments.

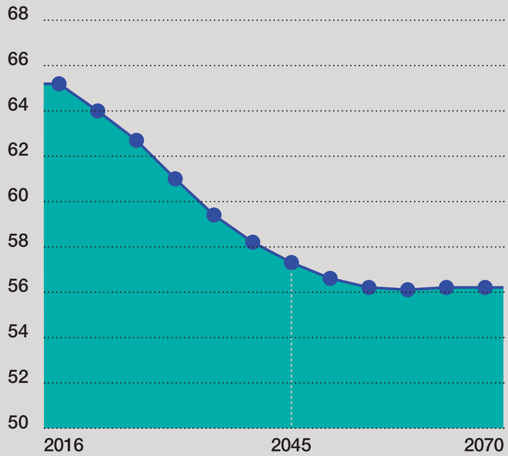
Immigration and the movement of people is another huge factor here in changing countries, and the world. The movement of people from south to north, from emerging markets to developed ones, is changing our societies' consumption, politics and culture. Immigration helps some societies have the workers they need – but also disrupts them. How the world deals with ongoing population flows, both of economic migrants and the hundreds of millions of climate change, political and religious refugees will remain a key challenge in the 2020s.

This dynamism is also borne out in shifting health and living conditions. Urbanisation and the rise of megacities, especially in emerging countries, bring new lifestyles and pressures. In east Asia, thirteen megacities have populations that exceed 10 million (around the size of Sweden); Shanghai is more than twice as large as that.[05] Over the coming decades,

"More than half the projected global population rise up to 2050 will be in just nine countries"

While increased longevity will expand Europe's population, the proportion of working age population has already started to decline

% of the EU population who are working age (aged 15-64)

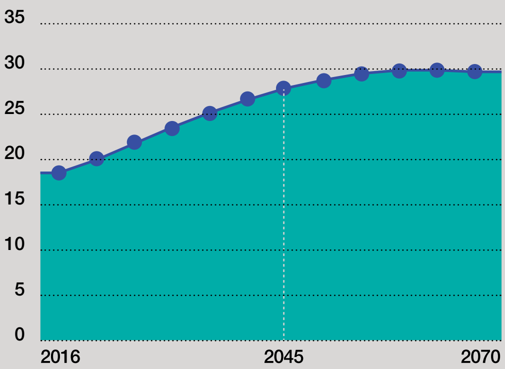


Source: European Commission

“ Dramatic shifts in demography will disrupt and reform our economic landscape ”

By the time the youth of today reach old age, it’s likely that the elderly will make up nearly one-third of Europe’s population

EU’s elderly population (65 and over) as % of total popluation



Source: European Commission

agglomeration – where more densely populated areas can become more economically productive – will accelerate. However, if overcrowding, pollution and rising living costs also continue to increase, then megacities may become synonymous with poor mental and physical health.

The power of *dynamic populations* will become more relevant than ever in the 2020s. Fertility only began to slip below replacement rate relatively recently. In Spain, where fertility is among the lowest in Europe, this first occurred around 1980 – just 30 years ago.[06]

Government attempts to address fertility rates, such as flexible working or, in a more direct approach, the Danish ‘Do it for Denmark’ campaign, or advancements in robotics will be necessary to avoid the decline in childcare responsibilities being supplanted by the responsibility to care for elderly relatives.[07]

The increased impact of *dynamic populations* is matched by an increased ability to understand and predict them. It is often said that ‘demography is destiny’; this time, it is.

By 2050, it is predicted that 330 million people in China will be over the age of 65

The fragile planet

2020 is expected to be one of the hottest years on record.[08] In 2019, Australia caught fire. Indonesia is planning to move its capital city from Jakarta, which is being swallowed by the sea.[09] In the 2010s, climate change was topical, in the 2020s climate emergency – 2019 'word of the year' – will be headline news. As heat records are shattered around the globe, scientists raise concerns around negative feedback loops creating exponential temperature increases.[10]

Evidence to prove human damage to the environment is mounting. There have been 17 of the hottest years on record in the last 18 years.[11] Antarctic ice loss has tripled over the last decade.[12] The acidity of our seas has increased by around 30% since the Industrial Revolution.[13] The threat of climate change, previously seen as predominantly perilous to animals and coral reefs, is now knocking at the door of the world's wealthiest nations. Traditionally warm areas, such as Australia and the Middle East, may become uninhabitable in parts.[14] Europe is beginning to sweat.[15]

In Global Trends 2020, *climate emergency* is the strongest common value among people across the world – and in this case, we can say with certainty that changing values are translating into changing actions. The formation of the international activist group Extinction Rebellion in 2018 demonstrates the strength of feeling. Moreover, there is now political weight behind the idea of change, at both a global and local level. There is demand for drastic action at a local level that would have been previously unthinkable. Portugal aims for a 55% reduction in carbon emission by 2030, Finland plans to ban burning coal by 2029, and the United Kingdom intends to be net carbon neutral by 2050.[16]

The threat of climate change, however, is felt unevenly. Cities at sea level, such as Lagos and Mumbai, are on red alert. In contrast, other countries are unwilling to change course. The United States blocked a nonbinding measure to encourage countries to boost greenhouse gas reduction targets at the 2019 United Nations Climate Action Summit.[17] Australia, despite facing wildfires and soaring temperatures, did not even attend the summit; coal mining contributes about 8.5% to its GDP.[18] The inaction of the Australian Government while their largest city, Sydney, faces the most toxic air on earth – more than 12 times hazardous levels – demonstrates the tension between economic interests and climate politics.[19]

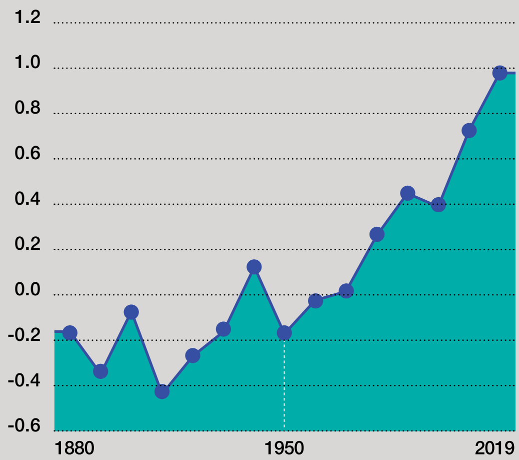
There is a correlation between climate change denial and other nationalist views in many countries. Balancing the scales between the economic interests of the nation state and our planet's health is not, for many, simple. This conflict is played out on a personal level too. Land management will have a huge impact on mitigation, which involves all of us rethinking our water use and diet choices, in addition to our energy use.

Resource depletion – be it water, soil fertility or rare earths – is another key element of this provoking new technical and economic challenge, and political tensions, as we have shown elsewhere. Brands will need to take a proactive stance. Eco-friendly options may no longer be a 'nice-to-have'. We may no longer be able to force our environment to adapt to us; instead, humanity will need to adapt to a changing environment.

“There have been 17 of the hottest years on record in the last 18 years”

The world's temperature has been rising since the 1950s

Global land-ocean temperature index (°C)



Source: NASA's Goddard Institute for Space Studies

Growing inequality and opportunity

Despite rising global prosperity over the last few decades, division between wealthy and poor is growing. Rising living, housing and education costs are also making middle-class expectations difficult to access in the west. Millennials are 10 percentage points less likely to sit in the same economic bracket than Baby Boomers were at their age.[20] This trend is changing the world: while in the west the middle class is shrinking, in Asia and Africa the trend is reversed. By 2030, two-thirds of the middle-class population will live in Asia.[21]

Automation will change the labour market, and it is unlikely to benefit the poor. While technology may change work-life patterns, facilitating more flexibility and freedom, it will remove jobs from the economy in the medium term. Academics have predicted that on average, each new robot will remove 1.6 jobs.[22] Indeed, the World Economic Forum states that some studies suggest 50% of workers risk losing jobs to automation; with the less educated and minorities at highest risk.[23]

In the west, the 'loss of future' is dramatic. In Britain in 2003, only 12% expected their children to be poorer than them, now it is 45% – a massive change. And Britain is less pessimistic than some other European countries!

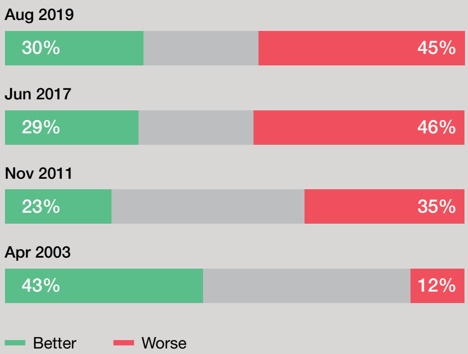
Automation triggers a larger issue: the benefits of technology are not trickling down. We are more likely to work into our twilight years and, in some countries, the twilight hours. The move away from final-salary pensions to defined contribution schemes has made early retirement less feasible – delaying it for many.[24] State retirement ages have also increased. In America and Britain, hours worked have increased since the 2000s – particularly among higher-income workers.[25] In Japan, where working hours are some of the longest in the world, there is a term for death by overwork: 'karoshi'.[26] Long days are not necessarily translating into high productivity; Japan's productivity is the lowest among G7 countries.[27]

However, there is growing opportunity. More liberal values globally are providing opportunities for women, and the world has made progress on cutting the education gap between men and women.[28] While women remain at a disadvantage, particularly in developing countries and in tertiary education, there has been significant improvement. In south Asia, girls can now expect to receive twice as many years of education as in 1990.[29] Improving education for women has a direct economic impact; it is projected that, in India, if one per cent more girls enrolled in secondary school, it would result in a $5.5 billion increase in GDP.[30]

'Leapfrogging,' the theory that emerging markets may be able to rapidly grow their economies through capitalising on existing technological innovations, also represents opportunity. The United Nations hopes that frontier technologies may represent an even playing field for all countries.[31] Investment will be necessary to ensure the infrastructure exists to support this

Almost half (45%) of the UK feel today's youth will have had a worse life than their parents – up 33 percentage points from 2003

To what extent, if at all, do you feel that today's youth will have had a better or worse life than their parents, or will it be about the same?

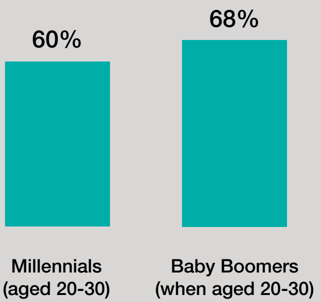


Source: Survey on behalf of Deloitte LLP for State of the State 2019
Base: c.1,360 UK adults

> “Long days are not necessarily translating into high productivity; Japan’s productivity is the lowest among G7 countries”

Millennials are likely to be poorer than Baby Boomers were at their age

Share of population in middle-income households by generation and stage at the life cycle (% middle class)

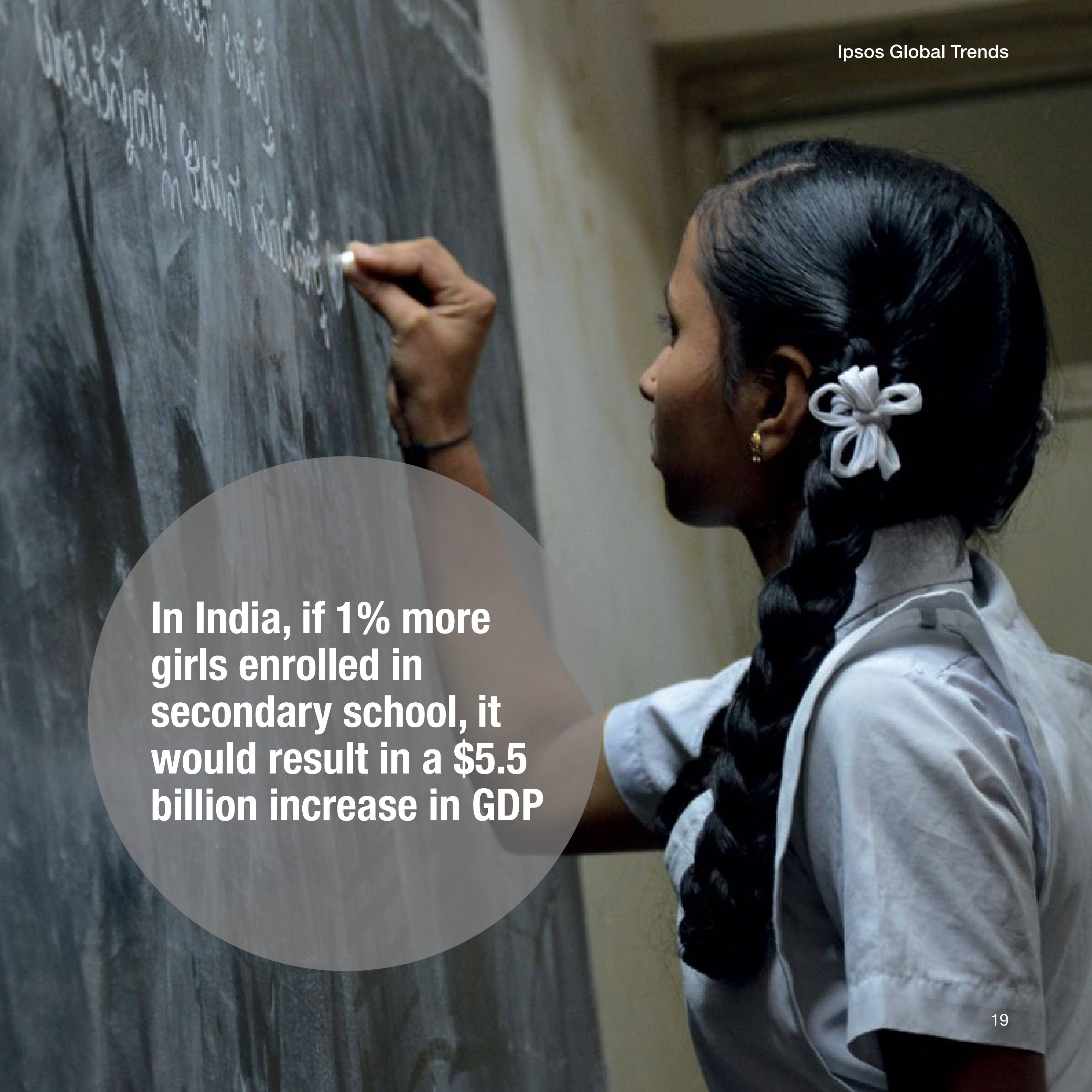


Source: OECD Secretariat calculations based on data from LIS Data Center, expect EU-SILC for France (2014), Ireland (2014), Iceland (2014) and Sweden (2015).

technology, but whether rapid or not, economies are likely to grow.

Around the world, the living standards of many of the poorest have been improved through globalisation, yet wealth remains concentrated among the few. This is particularly concerning in countries such as India, where extreme poverty still exists and state systems of support are not comprehensive. Healthcare costs push almost two Indians into poverty every second, while it is estimated that there will be 70 new millionaires every day until 2022.[32]

Technology has changed the fabric of our world, but it has not changed the structure of it. The lines of income inequality are deepening. While Asia and Africa enter their prime, the west continues to wrestle with its productivity paradox – and social consequences of the loss of an expected future of rising prosperity.



In India, if 1% more girls enrolled in secondary school, it would result in a $5.5 billion increase in GDP

Geopolitical tensions

The west no longer leads the world. Over the last decade, America's geopolitical clout has diminished while China has become a superpower. This fragmentation has transformed us from a unipolar to a multipolar world – and the shift has caused friction. The global atmosphere is thick with geopolitical tension. The future, previously assumed to be dominated by liberal capitalism, is less clear than ever before. Protectionism, populism and polarisation are on the rise, and tension is mounting as social, economic, environmental and political value systems are pressed into an uneasy compromise.

The breakdown of multilateralism is a key facet of these burgeoning tensions. The rise of the east has destabilised the position of western-born, global institutions such as the World Trade Organization, United Nations and World Bank. Plus, the removal of the US from the UN Human Rights Council and its move to withdraw from the Paris Climate Agreement undermine their legitimacy: under Trump, America is America first, global second.[33] Meanwhile, Brexit sees Britain apparently break with its nearest neighbours, weakening multilateralism. The globalisation we saw from 1990-2010 has turned to divergence and nationalism.

The power of populist sentiment cannot be ignored. Tribalism is winning hearts and minds. If the narrative of previous centuries was that of the triumph of liberal capitalism in the west, where citizens were equipped to compete in a globalised free market, we are now in a more complex world where many western citizens demand governments protect them from globalisation.

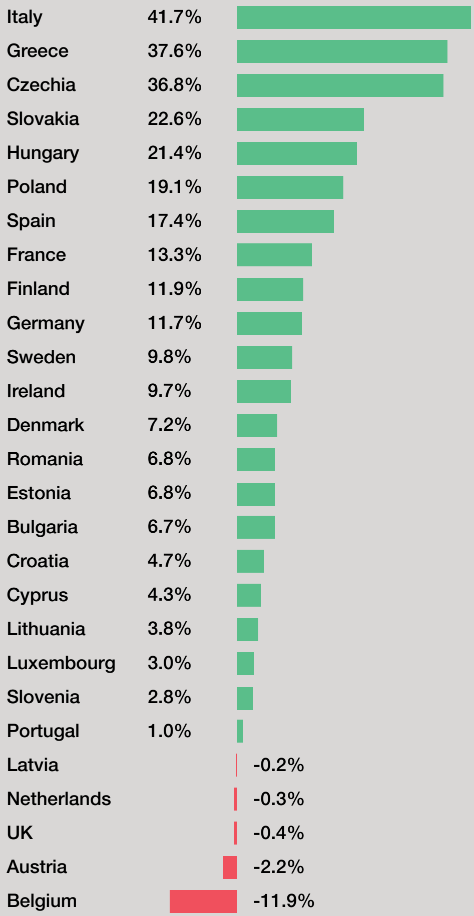
The threat of global recession exacerbates international tensions. The International Monetary Fund categorises global economic activity as ‘weak’ and fraught with uncertainty – due, in part, to trade tensions.[34] China appears to be emerging bruised from an ongoing trade war with the US.[35] Moreover, as America withdraws from the Middle East, there are fears that Russia may exploit the resulting power vacuum[36] and carve out a new role, not as a superpower, but as a global disruptor. Events in early 2020 in Iraq and Iran have muddied the waters further, risking the escalation of another conflict.

Economic prospects are further strained by increasing global debt and resource conflicts, sparking headlines whenever countries prioritise their economic prospects over sustainable use of resources. Trump’s decision to retreat from Obama’s Clean Power Plan,[37] Bolsonaro’s insistence that the Amazon belongs to Brazil,[38] and Scott Morrison’s continued defence of coal in the face of catastrophic bushfires in Australia are but a few of the high-profile examples of nationalist interests superseding environmental concerns.

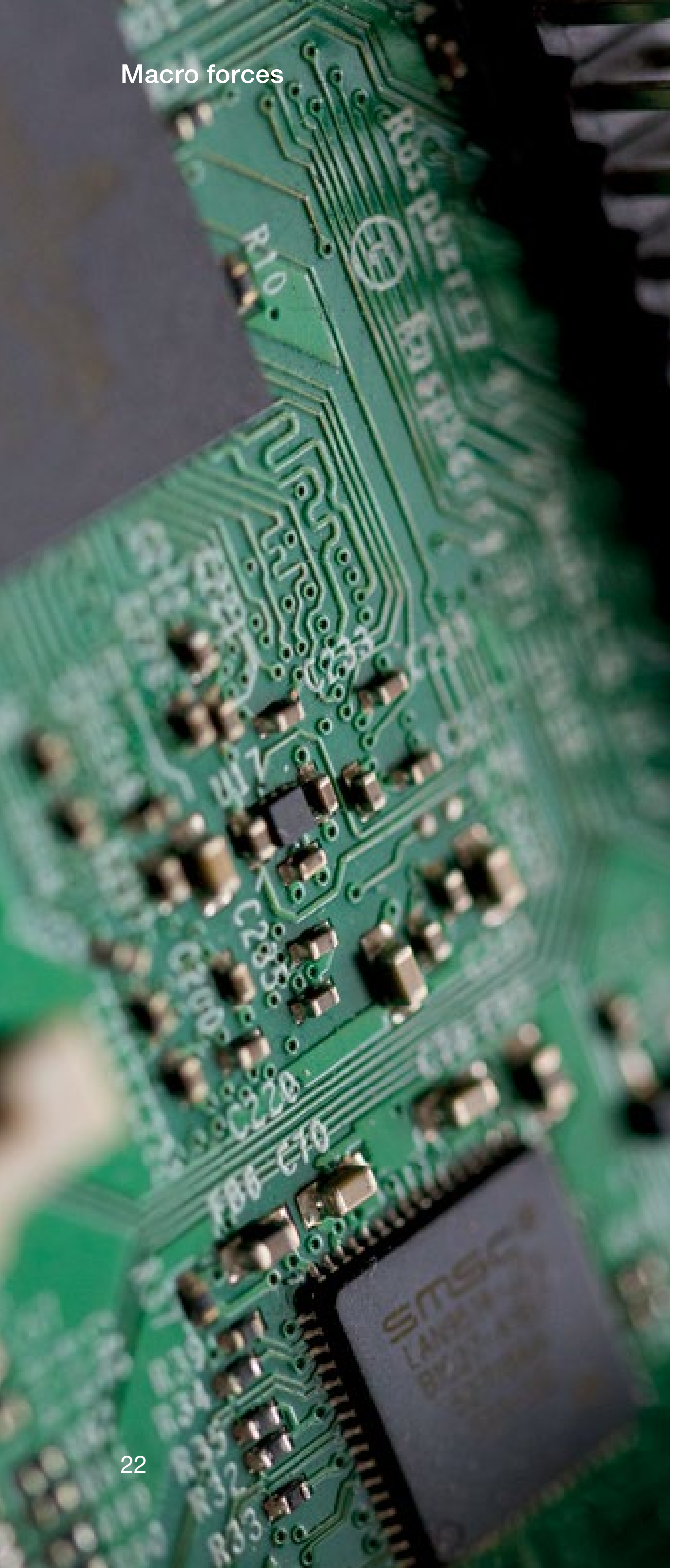
These political and economic tensions occur against a backdrop of social and cultural divergence. Examine Hong Kong, Chile, India or Iran and we see the limits of rising liberal values, globally. The shape of globalism may be changing. We enter the 2020s with international bodies in decline and geopolitical tension increasing. The ideology of the nation state is increasingly significant, above economic prospects, international charters or even basic human rights.

Populist sentiment has grown in the majority of European countries

Growth of populist vote share in the national elections of selected European Union countries from 2008 to 2018



Source: Statista March 2018



Technology tipping points

Technological evolution is a certainty. Cyber-physical systems, Big Data and the Internet of Things (IoT) have been changing the infrastructure of our world. In the 2020s, these phenomena, which are still in their nascency, will rapidly accelerate due to the increasing digitisation of key areas such as health, science, transport, communications and energy. The ubiquity of technology, and its increased ability to connect and communicate, has paved the way for this tipping point. Beneath the surface, we are moving towards an explosion of change.

Over 50% of our global population is now online, and the other half is following fast. To be precise, around 726 million people joined the web in the last three years.[39] These new users will change the shape of the internet. Many of them will be lower income. They are choosing smartphones over laptops and tablets and are more likely to use voice commands than people in the west; many may speak a language but not be able to read or write it.[40]

Geodata and the IoT will create new markets and supply chains. Connectivity here has serious ramifications if you enable manufacturers to tap more directly into the rhythm of supply and demand. Through connected devices, supply chains will morph from local to global, powered by a well of data that surpasses human understanding.

The automation of manufacturing, services and mobility has already begun. Artificial Intelligence (AI) will reach what Gartner terms the 'Plateau of Productivity', in which the technology becomes both mainstream and viable.[41] McKinsey estimates that 70% of companies may adopt at least one AI technology by 2030.[42] It is unlikely they will all use it well, but those that do could manage to take us to a place where man and machine are indistinguishable.

Bioscience has the potential to be transformative in the 2020s. Gene editing (CRISPR) technology will likely soon be able to edit genomes to allow animal organs to be accepted into human bodies – transforming, and perhaps saving, the lives of people currently waiting for organ transplants.[43] Similar technology can also be used to combat inherited diseases, and even cancer. Elsewhere, gene therapy experiments are using the body's immune system to fight cancer through re-engineering our cells.[44]

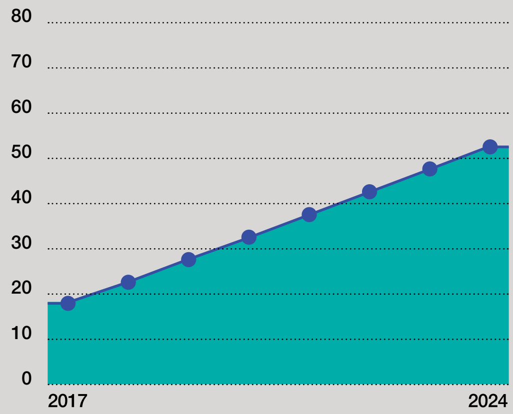
Technology has inarguably improved science, health, communications and transport. However, technology has not necessarily corresponded to increased economic productivity. Indeed, many of the most technologically advanced countries have seen productivity stagnate and stall, as discussed in *growing inequality and opportunity*.[45] This is what is termed 'consumer surplus' – the value of new technology exceeds what a customer pays for it. Good technology does not equal good profit.

In the 2020s many questions around technology will be resolved. The scaffolding is in place. This will be the decade in which AI, geodata, the IoT, bioscience, and quantum computing are given the opportunity to change our world. Whether this change will be surface-level or truly transformative remains to be seen.

“726 million people have joined the web in the last three years”

Almost one-third of US homes are 'smart homes', this is set to grow to more than half of all homes by 2024

Total % 'smart homes' in the US



Source: Statista March 2018

Data world

Information is now almost as vital to our survival as food. Our need to share and, crucially, validate information is a driving force. Even so, information is a double-edged sword. Humans are skilled liars. It is perhaps one of the defining features of our species. Babies lie from six months old.[46]

Misinformation is central to our species and the stories we tell about ourselves. We have built bastions of information to guard against lies. For most of human history, information has – for the most part – moved us towards empirical truth and shared understanding. Lies existed, but on a smaller scale. Misinformation was a theoretical question for historians. In the last decade, that has all changed. The information space we exist in, which the globalised world uses to communicate, has been corrupted. Worse, it is too big and too complex for human arbitration.

We live in an era of unregulated information. How the global flow of information is controlled, and who by, is unclear. We know that algorithms control programmatic display marketing, and we know that governments and companies are using this to try and influence people. However, we do not know the extent of the problem or how to combat it.

What we do know is that Facebook claims to have deleted 2.19 billion fake accounts in 2019.[47] We know that fake news has influenced elections and contributed to the anti-vaxx movement, which has been blamed for several measles outbreaks in 2019.[48]

We are time-poor, and traditional news sources are struggling to compete with social media platforms. Algorithms are creating dangerous information ecosystems. They are, perhaps, even harder to combat because they do not intend to harm us. However, this selected content fuels opinion bubbles and mass movements that are insulated from challenges or questions. This is perhaps why the World Economic Forum named rising cyber dependency as one of the biggest threats to global security in their 2019 Global Risks Report.[49] We rely almost entirely on our information infrastructure, and we cannot accurately track how it is being sold, who to, or why.

Globally, we risk technology wars, as different countries adopt different models of internet regulation. Can the world sustain a plurality of standards, and if not, to what extent will it generate hostility?

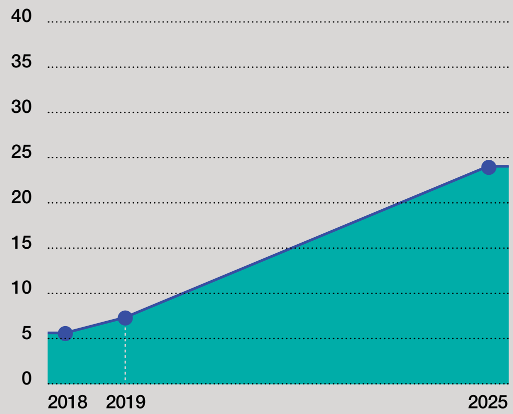
Data value exchange is under debate. It is unlikely to be a quick or easy conversation. In the 2020s, states and corporates will be questioning how they should use the data they collect – and pay for.

And yet, data science and algorithmic power, used wisely, could transform our understanding of human systems. The potential is still in its infancy. Artificial Intelligence (AI) may be the only way to control and tame the diversity of information. How to do this ethically will be the next big question.

“We live in an era of unregulated information. How the global flow of information is controlled, and who by, is unclear”

The amount of data passing through our phones has increased by more than 30% in the last year alone

Data traffic per smartphone in gigabytes (GB) per month

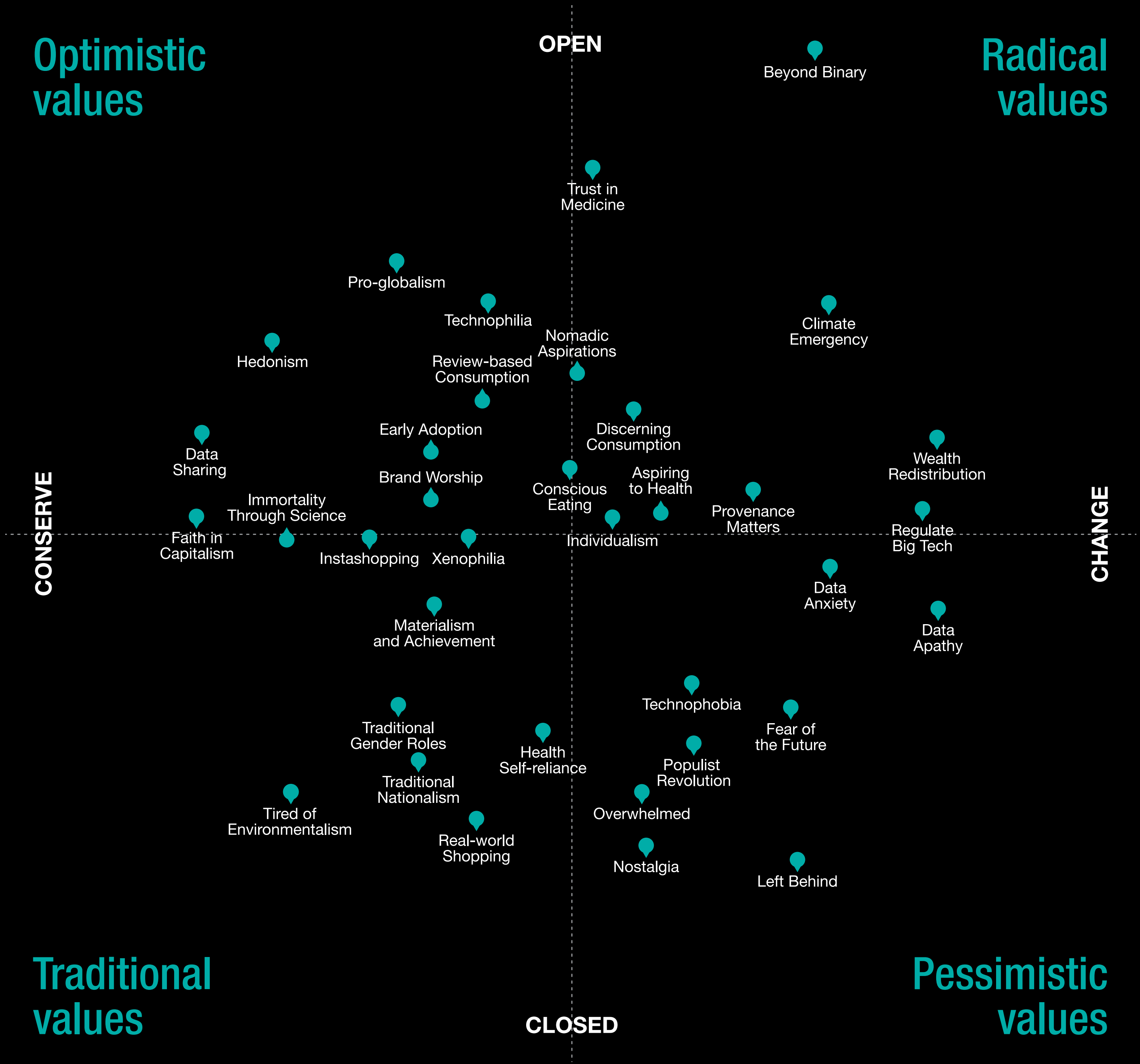


Source: Ericsson Mobility Visualizer

Ipsos Global Trends for 2020

Introduction

Our trends are based on the values that unite – and divide – us around the world. By exploring global attitudes on brands, government, advertising, politics, social policy, technology and more, we have identified the strongest 36 values that people hold globally.



Optimistic values
Radical values
Traditional values
Pessimistic values
OPEN
CLOSED
CONSERVE
CHANGE
Beyond Binary
Trust in Medicine
Pro-globalism
Technophilia
Hedonism
Review-based Consumption
Nomadic Aspirations
Climate Emergency
Early Adoption
Discerning Consumption
Data Sharing
Wealth Redistribution
Brand Worship
Conscious Eating
Aspiring to Health
Immortality Through Science
Provenance Matters
Regulate Big Tech
Faith in Capitalism
Instashopping
Xenophilia
Individualism
Data Anxiety
Data Apathy
Materialism and Achievement
Technophobia
Traditional Gender Roles
Health Self-reliance
Fear of the Future
Populist Revolution
Traditional Nationalism
Tired of Environmentalism
Overwhelmed
Real-world Shopping
Nostalgia
Left Behind

Global Values Map

This map shows the relationships between the values that people hold. The further apart two values are, the less likely it would be to find someone who shares attitudes from both. For example, someone who is close to the value of *climate emergency* is much less likely to also have views aligned to the value of *tired of environmentalism*, whereas the values of *brand worship* and *instashopping* tend to map together.

The quadrants map out what can be broadly seen as pessimistic versus optimistic values, and traditional versus radical values.

Mapping reveals important clusters of global values. For example, pessimism about the future, distrust of technology and *nostalgia* are closely aligned with the *populist revolution* value. In contrast, having a strong orientation towards career and earning money *(materialism and achievement)* links to stronger affiliations with brands, interest in foreign products and shopping through smartphones – as well as a more traditional view of gender roles.

It also shows the polarising global values, via the distance of the values mapped furthest from the centre of the chart. For instance, both sides of the climate debate stand alone in opposite corners, and we see a similar gap between those who want greater autonomy around their health and those who continue to prize the advice of medical professionals. The most distant value, however, is *beyond binary* (a value which respects inclusivity for all), highlighting this as one of the keys areas of social debate for the coming decade.

While this map gives a good sense of how our 36 values unite us – or divide us – around the world, looking at the differences across markets is also very telling. Globally, *climate emergency* unites us as the most powerful value, but is held at a significantly higher intensity in markets which are feeling the consequences of climate change more abruptly: Mexico, Colombia, India, Peru, Turkey, Indonesia and Chile. At the other end of the scale in the US, Netherlands and Japan – whether through pessimism or desensitisation due to public discourse – we see significantly lower than average value intensity levels. Interestingly, Sweden, home of Greta Thunberg, also sees a significantly lower value intensity than the global average.

Spain and Canada lead the charge when it comes to *beyond binary*, from supporting the rights of LGBTQ+ community to strongly believing in gender equality. China, the Netherlands, Germany and the Indian middle classes share a higher than average value intensity around *hedonism* – while Turkey and South Africa are most likely to feel *left behind*.

These are just a few observations on our Global Values Map, their intensity levels and country differences that help to explain how we can start to understand complexity in our world.

See page 111 for more information.

Trend framework

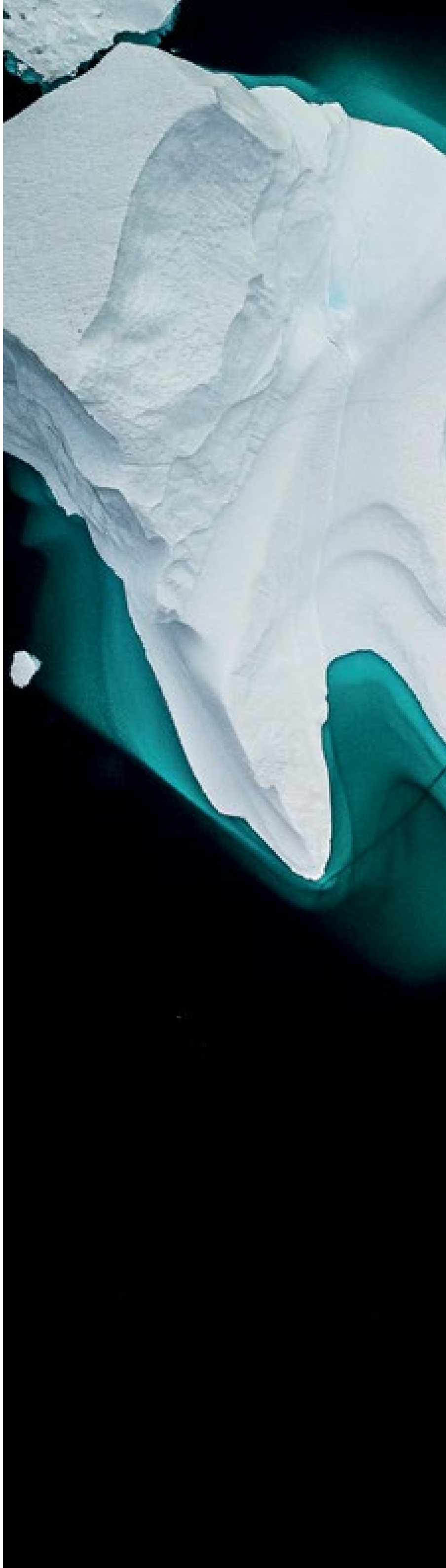
The 36 values we have identified can be grouped into twelve global trends, or themes, presented in this report, representing the core issues of our time, including: climate, healthcare and tech, reactions to inequality, capitalism and the search for simplicity.

In the subsequent sections, our Ipsos global trends team will explore how this framework is developing and being expressed in individual attitudes and opinions, along with the implications for business, government and society.


CHOICES OVER HEALTHCARE
Health Self-reliance
Immortality Through Science
Trust in Medicine
CLIMATE ANTAGONISM
Climate Emergency
Tired of Environmentalism
CONSCIENTIOUS HEALTH
Aspiring to Health
Conscious Eating
AUTHENTICITY IS KING
Brand Worship
Discerning Consumption
Instashopping
Provenance Matters
Real-world Shopping
Review-based Consumption
DATA DILEMMAS
Data Anxiety
Data Apathy
Data Sharing
THE TECH DIMENSION
Early Adoption
Regulate Big Tech
Technophilia
Technophobia
PEAK GLOBALISATION?
Nomadic Aspirations
Pro-globalism
Xenophilia
A DIVIDED WORLD?
Beyond Binary
Hedonism
Individualism
CAPITALISM'S TURNING POINT
Faith in Capitalism
Materialism and Achievement
Wealth Redistribution
REACTIONS TO UNCERTAINTY AND INEQUALITY
Fear of the Future
Populist Revolution
Traditional Gender Roles
Traditional Nationalism
THE ENDURING APPEAL OF NOSTALGIA
Left Behind
Nostalgia
SEARCH FOR SIMPLICITY AND MEANING
Overwhelmed

Climate antagonism

Values
Climate Emergency,
Tired of Environmentalism



Heatwaves, forest fires and extreme weather; school strikes organised by Greta Thunberg; and news that the Arctic permafrost is thawing decades earlier than predicted. These are just some of the reasons that 80% globally think we are heading for environmental disaster unless we change our habits quickly – a view steadily on the rise since 2013. The conversation has shifted from climate change to *climate emergency*, and this trend unites most people in a way little else does – but will it lead to action?

While *climate emergency* is our most intense global value in 2020, sentiment varies by country. More than 90% of people in emerging markets such as Indonesia, Turkey, Mexico, Peru and India agree we are heading for environmental disaster – many of them are witnessing rapid and massive environmental degradation. In contrast, less than two-thirds of the United States, Japan and the Netherlands agree. The biggest change of any market is in Great Britain, with an increase in those expecting environmental

disaster from 59% in 2013 to 78% in 2019. What’s more, our analysis of social media across the US, UK, Australia and South Africa over the last year showed mentions of #climateemergency rise to be more than double that of #climatechange.[50]

The past decade has seen a huge increase of pressure on our global ecosystems, and in turn people have started to become more active in scrutinising what businesses are or are not doing to actively repair our fragile planet. Eighty-two per cent globally agree that the climate change we are witnessing is largely the result of human activity. Emerging markets that are witnessing vast growth in industry see human activity as a driver of climate change: Indonesia, Colombia, Mexico and India all agree by more than 90%.

People now expect organisations to actively promote sustainability initiatives; ‘greenwashing’ will no longer pass muster. People are increasingly aware and educated, and expect organisations to be transparent in their behaviours. At least two-thirds (67%) in virtually every market agree that companies do not pay enough attention to the environment. The emphasis

is on renewable energy, reduced plastic and meat consumption, shorter supply chains, and reforestation – but despite the actions of Extinction Rebellion and other movements, there is a very long way to go until we will see mass behaviour change on a large enough scale to make a difference.

There remains a trade-off between ethical consumption and convenience. Countries, companies and people are increasingly expected to do the right thing. It can be argued that, on an individual level, it's never been easier to stop taking that plastic bag.

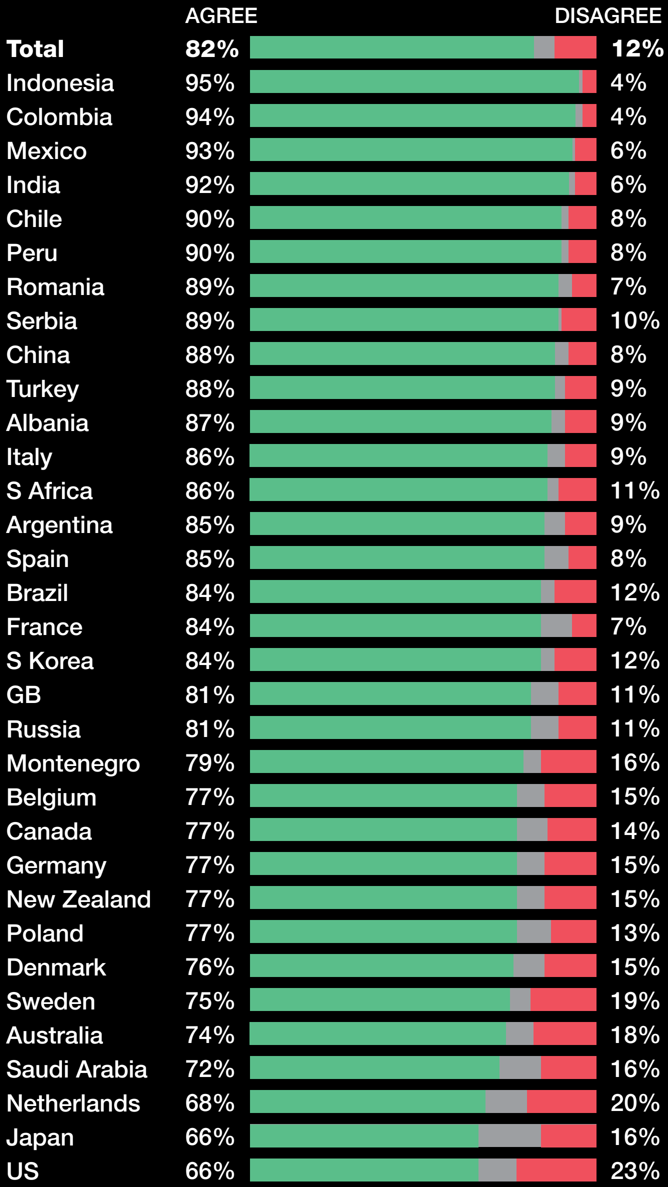
At the same time, this edition of Global Trends also sees a backlash across the west. Many are *tired of environmentalism*. More than a third (37%) globally say that they are 'tired of the fuss that is being made about the environment', and many of these are climate sceptic. There is a clear age divide on this. Thirty-nine per cent of 16-24-year-olds globally agree that 'even the scientists don't really know what they are talking about on environmental issues' – compared to 53% of 60-74-year-olds. This may be a case of climate scepticism, or a belief in the power of technology to solve our problems and continue to provide convenience at any cost. In the face of widespread protests, there is also more assertive climate denial in many societies, linked to populist, anti-establishment movements, no matter what the science shows us.

In Global Trends 2020, we find *tired of environmentalism* is close to *traditional nationalism* when we map people's views (see page 28). The 2020s will be a continual battle over the upheavals necessary to manage climate change.

80% of people around the world believe we are 'headed for environmental disaster unless we change our habits quickly'[i]

Source: Ipsos Global Trends
Base: 22,614 adults aged 16-74 across 33 countries, interviewed June – July 2019

Climate change we are currently seeing is largely the result of human activity



Conscientious health

Values
Aspiring to Health,
Conscious Eating

As concern about the environment rises, or – more cynically – as marketers look for new ways to entice customers, the link between what is good for us and what is good for the planet has grown. Organic, natural and plant-based options are becoming a more prominent part of the supermarket vista. We see signals in the ubiquity of brands such as Hippeas (organic chickpea snacks) and Rude Health, which were previously only common at health food shops, in supermarkets, while bigger brands jostle to position their products in the ‘natural’ space. Even Babybel, a cheese which (if not processed) would be an odd choice for a dinner party, has an organic version of the classic snack. However, how do consumers feel about their health and wellness? Is fitness as aspirational as it once was, or do we have bigger fish to fry? Are people really consuming more conscientiously – or just claiming to?

Nearly nine in ten people want to be fitter. This is becoming a near unifying concern in some areas; in China and Indonesia more than 95% want to improve their physical health. This is unsurprisingly higher among older generations, though not by as much as one might assume. Baby Boomers are only 3% more likely to want to be fitter than Gen Z. This perhaps bodes well for the 75% of us who find that, the older we get, the more we worry about our health. The feeling that we need to do more to look after ourselves is equally strong among all age groups; peak fitness, it seems, eludes us all.

Eight in ten think eating right is central to good health, but at the same time there is a global obesity and diabetes crisis. Concern is not leading to meaningful change. There is a generational difference

too: Baby Boomers are 7% more likely than Gen Z to agree that good food is the route to good health.

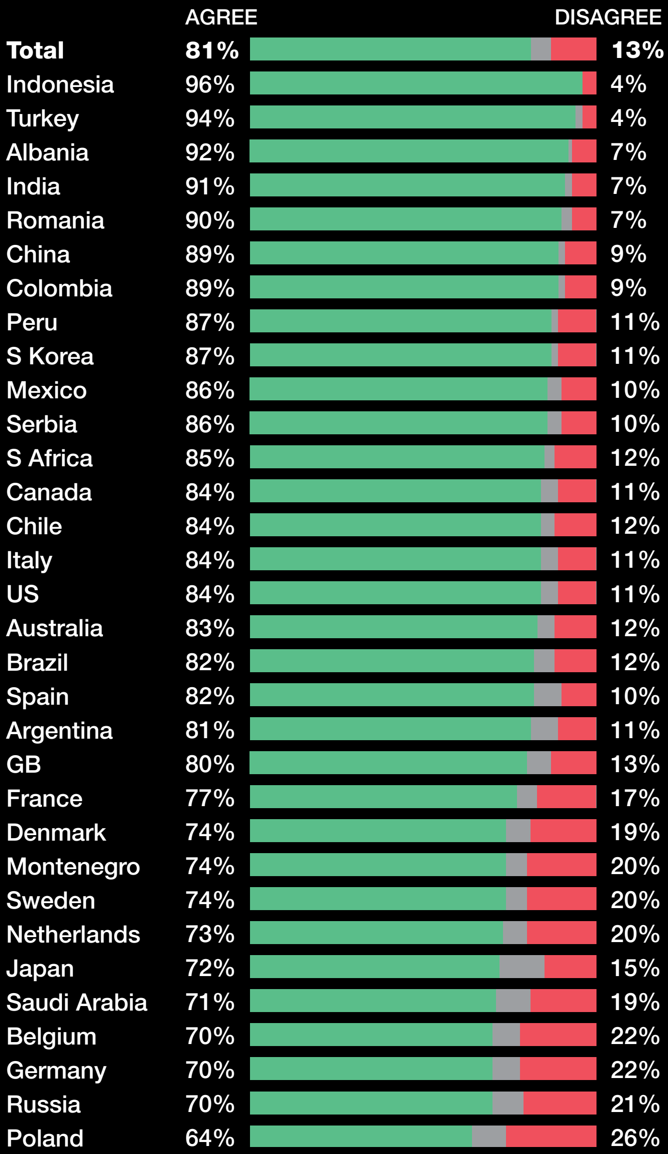
However, when it comes to food and the environment, the opposite is true. Despite Gen Z's youthful disregard for healthy eating, they are most likely to make it a priority to eat organic – 6% more so than Baby Boomers. Millennials and Gen Z are also slightly more likely to be willing to pay more for products that don't harm the environment. This difference in perspective is even more pronounced in terms of strong agreement, where more than a quarter of Millennials and Gen Z prioritise the planet, compared to one in five Baby Boomers.

At a global level, interest in organic food and willingness to pay more for sustainable ingredients have risen since 2016, however, the strength in uplift among the younger generations suggests this sentiment will continue to grow – perhaps even more strongly – in the 2020s and beyond. Globally, we see something of a cultural convergence, with countries which previously valued environmentally friendly food such as Spain maintaining their position, while those previously below average, such as Poland and Great Britain, have been catching up (the latter has seen a 12 percentage point increase since 2016).

In the 2020s, environmental awareness will become something of a hygiene factor for all brands, as we move towards a more conscientious position globally. Climate concerns become more pronounced, it may be that the balancing act between our own health and the planet's wellbeing becomes increasingly visible.

63% of people globally are willing to pay more for food products that don't harm the environment[ii]

Of all the things I can do to maintain good health, eating right is the most important



Source: Ipsos Global Trends
Base: 22,114 adults aged 16-74 across 32 countries, interviewed June – July 2019

Authenticity is king

Values
Brand Worship, Discerning Consumption, Instashopping, Provenance Matters, Real-world Shopping, Review-based Consumption

Authenticity is the retail and brand trend for the 2020s. Mass retail will need to acknowledge, build and embrace experiential spaces which bridge the digital-physical divide and give customers experiences to remember. Brands will also need to engage, more than ever, with matters bigger than their product benefits.

Discerning consumption is on the rise. Some 78% of consumers globally believe it is possible for a brand to support a good cause and make money at the same time, and there are now significantly more people willing to spend more on brands that act responsibly (59%) than on brands that have an image that appeals to them (45%). Marketers need to ensure that responsibility is at the heart of their communications. Especially for younger people who are significantly more likely than older generations to be willing to put their hands in their pockets to spend more on a brand that acts responsibly.

When it comes to actually buying products most people say that online shopping is better when they know exactly what they want (74% agree). This is aided by

online reviews (75% agree – a rise of 8% since 2013), and driven by better deals (72% agree). However, with *review-based consumption*, brand familiarity and image still matter; people say they trust online recommendations if they are from a well-known site or app (58%).

While revenue in the global e-commerce market is forecast to amount to $2.2 trillion in 2020,[51] it will still only account for a 16% share of total global retail sales[52] – there is still a large proportion globally that value *real-world shopping*. This behavioural data is echoed in attitudes. We find that half (48%) of people globally usually visit a store to check out a product before making an online purchase and one-third find online shopping more difficult than shopping in traditional stores. The evidence suggests that shopping outlets are not dying – but they need to change. The rise of *instashopping* means that we also need to acknowledge the growing popularity of social commerce: 31% of the connected global population now say they do most of their shopping on smartphones.

Brand worship is still widespread, with a majority using a brand as

a shortcut to decision-making but is markedly more prevalent in emerging versus established markets. Personal experience with a brand is also important – three-quarters of the global population (73%) are more likely to trust a brand they know. However, nearly three-quarters (70%) think that branding is an excuse to make money. This cognitive polyphasia about brands (holding conflicting ideas at the same time, without conscious dissonance) is enduring: overall people value brands that are helping them save time.

People also value local products, with 70% more likely to buy products that are locally grown than those that are grown elsewhere, increasing to around one in eight in many emerging markets, suggesting that *provenance matters*. China is more likely than anywhere else to prefer local brands made in a specific city or region (74%), which implies the origin of products is very important.

Knowing where something came from, how it was made, grown and raised – and increasingly its impact on the planet and our bodies – will continue to grow in prominence in the 2020s, along with trends towards instant gratification, social shopping online, and real-world physical experience.

In Global Trends 2020, *instashopping* values are close to *brand worship* and *xenophilia* (the love of foreign products) on the Global Values Map (see page 28). In the 2020s we will likely see global brands trying to appeal more and more to social media fans and continuing to dominate social-commerce.

Almost 6 in 10 people say they tend to buy products from brands that reflect their personal values[iii]

Significantly more people are willing to spend more on brands that ‘do real good’ over just an image that appeals to them

Source: Ipsos Global Trends
Base: 22,614 adults aged 16-74 across 33 countries, interviewed June – July 2019

Data dilemmas

Values
Data Anxiety, Data Apathy, Data Sharing

Global anxiety about the way companies use our personal data has risen by 8% since 2013. However, as we explored in 'Trust: The Truth?', even in the early 1990s, before the internet, the majority (66%) were concerned about their personal data. A rise of 8% is relatively small given that many people are now living in surveillance societies – and despite anxiety, few have dramatically changed their online behaviour in the west. Behaviour aside, the 2018 Cambridge Analytica scandal, fears of voter manipulation around the 2016 Trump campaign and the Brexit referendum have made data privacy, if not sexy, definitely top of mind. Now, nearly three-quarters of the world are concerned about how companies are collecting their digital breadcrumbs – and what they plan to do with them. Governments are not held in much higher regard; globally 67% of us are concerned about how our governments use our personal data – a 6% rise since 2013.

More and more people see personal data being used by companies, and governments, to build a vast bank of inferred information that allows them to predict our personality, tastes and political pressure points. There is now an even greater desire for

“Despite our suspicions, the risk of data sharing is seemingly increasingly worth it”

transparency; more than eight in ten think companies should give more detail upfront about the data that is collected by their websites. However, in spite of this growing concern and desire for clarity, people are becoming increasingly comfortable with *data sharing*.

Despite a growing suspicion that big data is being used nefariously, nearly half of us will happily give our information away in return for personalised services and products – a 7% rise since 2013. A similar pattern occurs with our willingness to share data with brands we like. In fact, despite our suspicions, the risk of *data sharing* is seemingly

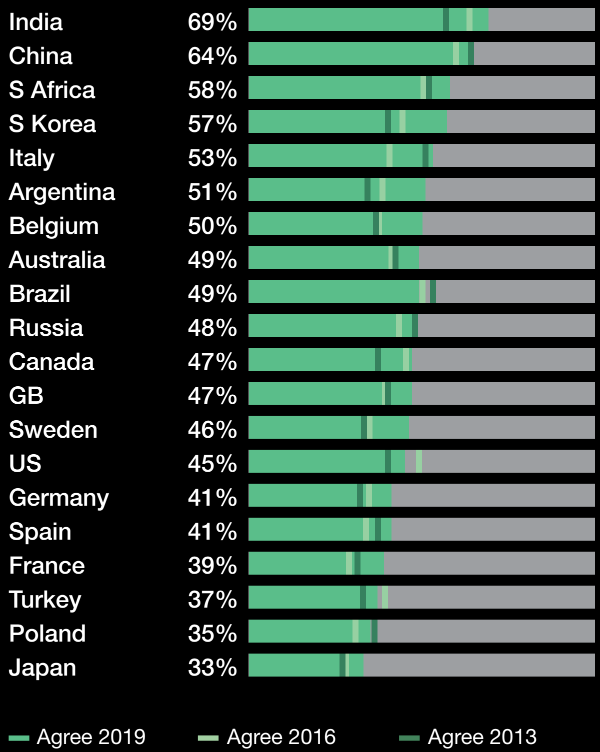
increasingly worth it – particularly in China and India where around two in three are happy with the data/ personalisation trade-off.

This tension has been most pronounced in the past three years and is in part – perhaps unsurprisingly – driven by younger generations. More than half of Millennials and Gen Z are happy to trade data for personalisation – most likely because they are more exposed to the benefits: curated Spotify playlists, ASOS recommendations and TikTok's algorithmically produced 'For You' videos. However, willing ignorance and apathy are also on the rise. Most of us now think that losing privacy due to technology is an inevitable part of the future (a 6% rise) and we are 11% more likely to think that people worry too much about online privacy. Despite the risk, an increasing number of us seemingly would prefer not to know too much – or care – about data privacy.

67%

of us are concerned about how our own governments use our personal data[iv]

I am comfortable providing information about myself to companies who are online in return for personalised services and products



Source: Ipsos Global Trends
Base: 16,034 adults aged 16-74 across 20 countries, interviewed June – July 2019

The tech dimension

Values
Early Adoption, Regulate Big Tech, Technophilia, Technophobia

As internet usage keeps rising a key value is *early adoption*, the hunger for the next and newest technology. Globally, 7 in 10 try to keep up with technology (70%), and as many as 9 in 10 online people in India, Peru and Indonesia. Older, more established markets tend to score lower here, with around two-thirds of many European countries trying to keep up. Those associated with this value are also more likely to feel well informed about scientific developments – 56% across all countries overall. However, tradition still matters: while globally 4 in 10 say they are usually among the first of their friends to try out new things and that they prefer innovative over traditional brands (both 39%), half disagree (52% and 47%).

The core tension within this trend is between love and distrust of modern technology – both are present within our trend framework and of similar strength.

Technophilia – a strong enthusiasm for technology – includes agreement that technology generally makes life better. Globally, three-quarters agree this is the case (77%), ranging from 9 in 10 in India, Russia and Indonesia, and two-thirds of those in Saudi Arabia and Japan. Established markets fall into two camps – those whose views are close to the global average (Italy, Great Britain and New Zealand) and those who are less optimistic, such as Denmark (72%) and France (68%). Among the twenty nations Ipsos has measured since 2013, belief in the life-improving power of technology has crept up too, from 73% to 77%.

Globally, two-thirds express a belief in a ‘tech fix’ – 66% agree that we need modern technology because it alone can solve future problems. Age is not a factor here – Gen Z are as likely to agree this is the case as Baby Boomers (67% and 65%) – but we do find men more optimistic than women (70% versus 63%), as well as those in higher income brackets (70% versus 61% for low-income groups). Big cities are the focal point for belief in high technology; 72% of their residents believe in technological fixes, compared to 59% of those in the countryside.

Other core measures related to *technophilia* show the potential for ‘love’ to tip over into ‘overload’, as

7 in 10 cannot imagine life without the internet. Six in ten say the same about their smartphone, and two-thirds feel they are constantly looking at screens these days.

The other side of this trend is *technophobia* – the fear of, and pushing back against the pervasive nature of technology. Half of the public agree that technical progress is destroying our lives (52%). We have tracked a significant increase in this belief since 2013. Agreement is somewhat stronger among young people; 53% of Gen Z and Gen X agree, along with 54% of Millennials, compared with 48% of Baby Boomers.

A similar view is that developments in science and technology are too fast: overall more than half agree this is the case (55%). Those in Asian economies – most notably South Korea (64%) and China (63%) – are among the most likely to agree, reflecting the hectic pace of change these societies have witnessed and rapid adoption of technology. Older people are also more likely to agree, with 6 in 10 Baby Boomers feeling unable to keep up (59%). This is also related to feeling that scientists are trying

new things without thinking about the consequences, a view held by 57% worldwide.

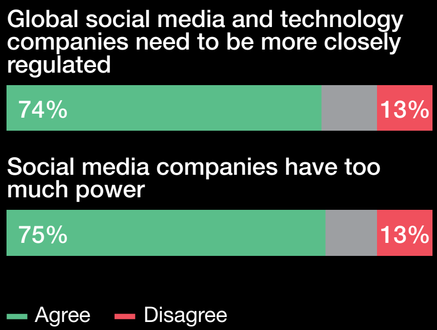
Another aspect of *technophobia* is concern about the impact technology is having on our lives and wellbeing: 6 in 10 say technology makes it harder for them to ‘switch off’. This is another concern which has grown over the span of Global Trends, from 52% in 2013 to 60% in 2019. This sense of burnout is led by younger people, with two-thirds of Gen Z struggling to switch off, compared with only half of Baby Boomers (65% versus 49%). Additionally, two-thirds of the global public worry that the internet is making young people’s expectations about sex unrealistic, including 67% of parents.

Finally, the strongest value within this trend – *regulate big tech* – links to wider anti-establishment and anti-elite sentiment – the urge to control and regulate social media. Worldwide, three-quarters agree that social media companies have too much power (75%), and this view is held uniformly across age groups. A very similar proportion (74%) agree that global social media companies need to be more closely regulated, including 86% of Britons. While questions over the practicalities of online regulation remain, there is clear public demand for government action. We have already seen France and the US arguing over digital taxation – expect more of this in the 2020s.

In Global Trends 2020, we find the value *regulate big tech* close to *data anxiety* and *data apathy* on our Global Values Map (see page 28). Given that by historical standards we are only at the begining of what the internet means – it took 100 years for the implications of printing to become clear – tensions over privacy, data and power will all feature in the 2020s.

77% agree that technology generally makes life better[v]

Three-quarters of the world agree there is a need to Regulate Big Tech



Source: Ipsos Global Trends
Base: 22,114 adults aged 16-74 across 32 countries, interviewed June – July 2019

Peak globalisation?

Values
Nomadic Aspirations,
Pro-globalism, Xenophilia

The world remains starkly divided on the net benefits of globalisation. The ‘digital nomads’ associated with the values in this trend see the increasing travel and cultural exchange of a high-tech global economy as positive – yet just as many see a globalised world as a dangerous and unbounded space that threatens the established order. While close to half globally feel more a ‘citizen of the world’ than a citizen of their country (47%), a very similar proportion do not (44%).

This trend highlights three key facets of attitudes towards globalisation. The first two are tied to taste and personality – a strong interest in products and content from abroad or being open to moving abroad or to another part of your home country. The final element speaks more about personal evaluations of the costs and benefits. Unsurprisingly, a feeling of being a ‘winner’ of globalisation is a powerful influence on pro-globalisation attitudes.

One value within this trend speaks to those with a footloose feeling, happy to move region or country for a variety of reasons. Two-thirds of the planet say they would like to experience living in different parts of the world, ranging from 88% of

people in Colombia to just one-quarter (26%) of those in Japan. The allure of new cultures is a bigger draw for young people, with three-quarters of Gen Z interested (76%), compared with half of Baby Boomers (50%). Half of people would go further still, saying they would move to a new country for work (51%), with agreement concentrated in emerging economies including Colombia (81%), South Africa (80%) and Peru (76%). However, people in China are among the least willing to move to a new country, with just one-quarter willing to emigrate for work. This is the second-lowest score, ahead only of Japan (20%). Young people are more open to moving abroad – and the gap between them and older people is wider, too: Gen Z are twice as likely to move abroad for work than Baby Boomers (68% versus 33%).

The global public are split on whether 'global is best'. Half say they prefer foreign-made films and entertainment (51%); with South Africans (71%), Indonesians (69%) and Brazilians (67%) most likely to agree. In the home of Hollywood, Americans are least likely to agree (21%), with Britons and the Japanese also more in favour of local content (32%). Those living in larger cities – potentially exposed

to a wider range of cultures – are also more likely to favour global content. Fifty-five per cent of big-city dwellers agree, compared with 44% of rural inhabitants.

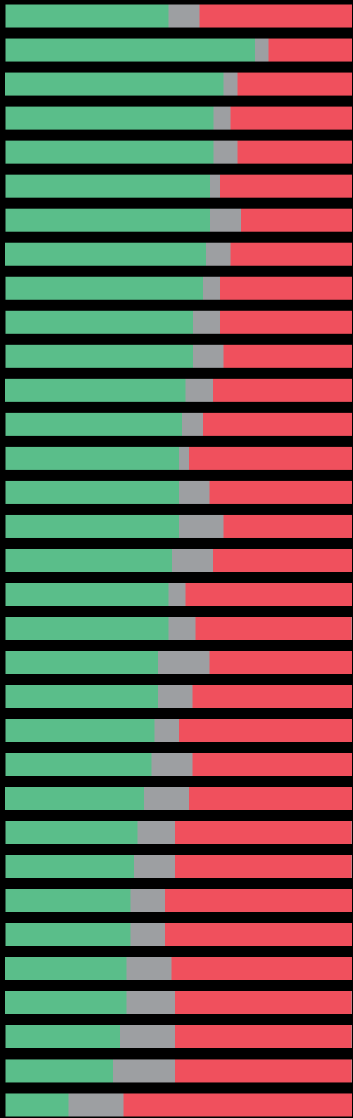
However, the inverse is true when considering global brands. While four in ten say global brands make better products than local ones (39%), almost half disagree (47%). Every country where the majority prefer global brands are in emerging markets, led by India and Turkey (65%), while European and other established nations are much more likely to rate local brands. China is the midpoint: half are in favour of global brands. This perhaps signals that a future world-leading economy is beginning to trust its homegrown brands.

The blunt economic logic of globalisation is a major factor in its acceptance: those who feel they – and their country – benefit from a global economy are more likely to be associated with this *pro-globalisation* value. The majority of the planet agree that globalisation has been good for their country (58%). However, in most countries, a smaller proportion feel they have personally benefited from the global economy (53%). This perception gap differs across the world, with the biggest differences in Japan, Romania, Canada, Germany and Great Britain – where a significantly higher proportion of people feel that globalisation has benefitted the country more than them personally. A difference of 111 million people. In the 2020s, with multilateralism under pressure, the debate over globalisation, the winners and losers, and tension over how much is 'enough' will continue.

64% of us would like to experience living in different parts of the world[vi]

Source: Ipsos Global Trends
Base: 22,114 adults aged 16-74 across 32 countries, interviewed June – July 2019

57% of people in emerging markets feel like a 'citizen of the world', versus 41% in established markets



	AGREE	DISAGREE
Total	**47%**	**44%**
India	72%	24%
Turkey	63%	33%
Peru	60%	35%
S Africa	60%	33%
Colombia	59%	38%
Saudi Arabia	59%	32%
Mexico	58%	35%
Chile	57%	38%
Belgium	54%	38%
Brazil	54%	37%
S Korea	52%	40%
Romania	51%	43%
Indonesia	50%	47%
Italy	50%	41%
Spain	50%	37%
Argentina	48%	40%
Albania	47%	48%
Serbia	47%	45%
France	44%	41%
Germany	44%	46%
China	43%	50%
GB	42%	46%
Australia	40%	47%
Denmark	38%	51%
Montenegro	37%	51%
Netherlands	36%	54%
Sweden	36%	54%
Poland	35%	52%
US	35%	51%
Canada	33%	51%
Russia	31%	51%
Japan	18%	66%

A divided world?

Values
Beyond Binary, Hedonism, Individualism

Overall, the world is becoming more socially liberal, but divisions across societies remain. In Ipsos Global Trends 2020, we trace four changing divides in personal values: *individualism*, support for democracy, attitudes to religion and spiritualism, and a fast-emerging cultural divide on LGBTQ+ issues.

The divide between two of the powerful nations on Earth remains strong. In the US, 9 in 10 (88%) say that one's personal feelings are the best way of making decisions, versus three-quarters (74%) in China.

There are wide differences on the value of democracy – even within well-established democratic states. Globally, seven in ten think democracy is the ideal governance system, although in France and Poland just six in ten feel the same. The figure drops to less than half in Russia. In the US, a self-styled bastion of democracy, just two in three now think democracy is the best way forward – a drop of six percentage points since 2016 (the year of Trump's election). In contrast, eight in ten Swedes and Danes think democracy is the best form of government, in part reflecting higher satisfaction with both politics and public services, and lower levels of corruption.

Spiritualism also divides countries along the emerging-established market line we have seen elsewhere. In developed countries, only a minority are interested in developing a more spiritual side. In contrast, 8 in 10 of those in India, China and South Africa agree. A similar pattern emerges around ideas of positive inspiration. In Germany, more than half actively reject the idea of finding new and positive sources of inspiration,

> **“Even traditionally conservative Russia has seen a nine percentage point rise in support for LGBTQ+ rights since 2013”**

whereas in Indonesia 90% seek it. However, this distinction between east and west may be positioning as much as philosophy – as relatively high numbers in the west say they do try to find time to switch off on a regular basis.

Attitudes towards gay, lesbian and trans people also divide the world. In some nations there is consensus: in Great Britain and the Netherlands more than nine in ten agree that gay men and lesbians should be free to live their lives as they wish. Others see things very differently. In Indonesia, for example, less than a third feel the same way. As a result, the value tied to social liberal sentiment – *beyond binary* – rises to the top right of our Global Values Map (see page 28), highlighting that it is more divisive and radical than many others and will be a key area of social contest in the 2020s.

Globally, we have seen a six percentage point increase in liberal attitudes since 2013. South America has become notably more liberal, with the proportion

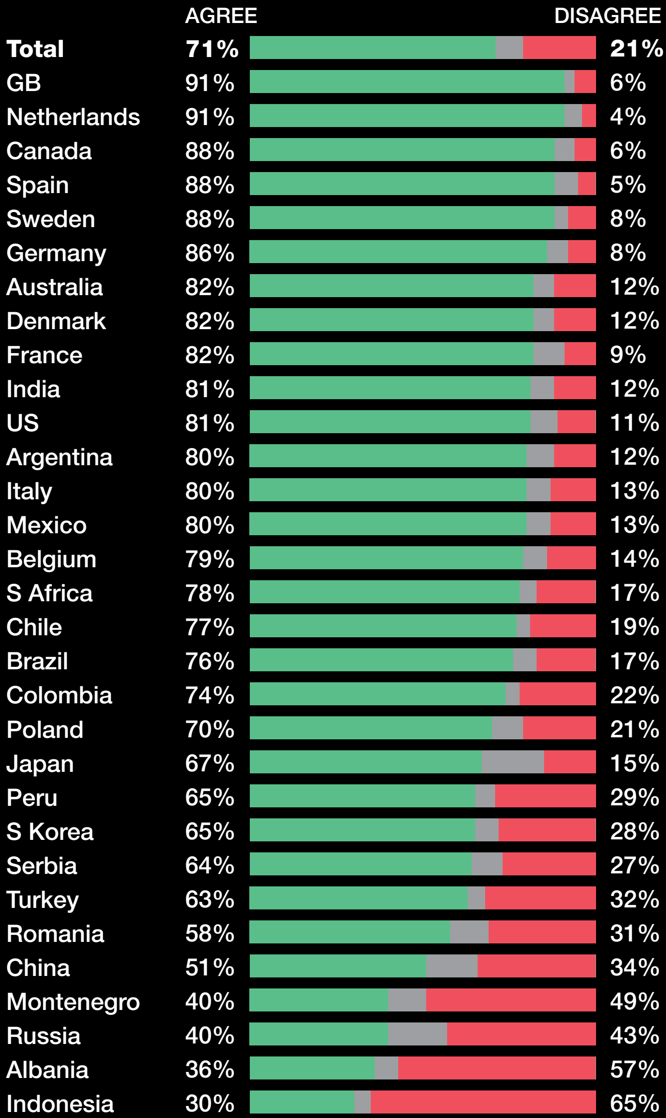
of Brazilians agreeing that gay men and lesbians should be free to do as they wish increasing by 15 percentage points over that time. This is reflected by a spike in Brazilian social media traffic following the criminalisation of trans and homophobia in June 2019. Even Russia, which remains one of the most conservative countries, has seen a nine percentage point rise in support for LGBTQ+ rights.

We see signals of this in social media as well, but linked to specific events, rather than a general overall trend. For example, in Asia we see a stark contrast between Chinese firm Sina Weibo's ban of #LGBTQ in April, and Taiwan being the first in the region to allow same-sex marriage.

One might think cultures will converge as the world becomes more connected, but it is clear that much still divides us – and is likely to continue doing so. If multinational companies continue to grow, and climate challenges do not reverse the trend of international travel, it is likely that global connections will continue to drive a sharing of values. Moreover, as Netflix and other streaming services dissolve the national borders that were the preserve of local television, cultural references and nuances may well also become wildly more shared. It was only five years ago that Netflix first commissioned content from outside the US, and yet this foreign content has performed well outside its country of origin. As we enter the 2020s, we do so in a world that is connected, but still very diverse, an important message for marketers and politicians alike.

In the US just 2 in 3 think democracy is the best way forward[vii]

Gay men and lesbians should be free to live their own life as they wish



Source: Ipsos Global Trends
Base: 21,614 adults aged 16-74 across 31 countries, interviewed June – July 2019

Capitalism's turning point

Values
Faith in Captalism, Materialism and Achievement, Wealth Redistribution

After a few decades of dominance, western liberal capitalism is now competing with authoritarian capitalism in China and Russia. The post-Cold War logic that 'west is best' has cracked. Inside western societies there is also rising political conflict over the role markets and the state should play in people's lives. While six in ten (62%) globally agree with the meritocratic ideal that if you work hard you will get ahead, it is under threat in key European countries. Only half of those in Germany (53%) and Spain (50%)feel their economies produce rewards that reflect their efforts, as do just four in ten people in Italy (41%).

One core response to this perceived inequality of outcome and opportunity is support for *wealth redistribution* – one of our top ten values of 2020. It encompasses the widely held view that national economies are rigged to advantage the rich and powerful (74% agree globally) and that large income differences are bad for society (76%). Despite its strength, it is important to note that redistributionist sentiment appears to have stalled; the proportion who feel their economies are rigged fell slightly, from 76% in 2016 to 73% in 2019, with notable drops in the US (from 78% to 70%) and Spain (85% to 74%). Global sentiment on large income differences remains at similar levels to previous years. The US continues to be an exception, with the lowest agreement globally that income inequality is a problem (55%).

Despite support for *wealth redistribution*, capitalism still has its supporters – it has after all lifted millions out of poverty. For example, while more than half say they do not trust business leaders to tell the truth (58%) or have a lower level of trust in businesses (51%), a substantial minority do trust the leaders of industry

(38%). Trust in business leaders is strongest in emerging markets such as India, Saudi Arabia and China (64%, 63% and 43%) but some established markets record similar levels of faith (Denmark and the Netherlands on 42%). Globally, Millennials are more likely than Baby Boomers to trust business leaders to tell the truth (36% versus 28%). Although, as our previous research on ‘Generations’ highlights, this may be a ‘life stage’ effect of being young, and their higher level of trust may be eroded over time.

The final element of our economic choices speaks to human attitudes towards success; how we achieve it and how we display it. Across the twenty core Global Trends countries tracked since 2013,[53] we’ve seen the proportion who agree that fulfilment in life is achieving a prominent position in your career rise from 39% to 44%, including a 14 percentage point surge in Italy (36% to 50%), increases of twelve points in Australia (26% to 38%) and nine in the US (30% to 39%). However,

“The materialistic divide between emerging and established markets looks set to grow”

the work-orientation of those most established economies remains dwarfed by views in the emerging markets: 76% of Indian, 68% of Saudi and 56% of Chinese citizens agree that getting ahead matters in life.

The world remains divided by its attitudes to conspicuous consumption – those in emerging markets are more likely to want to flaunt their wealth. China tops this list: more than three-quarters (78%) say that they measure success by the things they own, a significant increase from 2016 (70%). This contrasts strongly with the austere Swedes, where materialism is seen as a sign of success by just 18% – itself a doubling of the sentiment in 2013 (9%).

There is also an urban angle to *materialism and achievement* with city dwellers more prone to ostentation: 42% of those living in big cities share this materialistic impulse, compared with 34% in rural areas. The economic allure of megacities is strongly felt in emerging markets, where most would choose to live in a big city if they had the choice (72% of online Indians and Chinese, compared with 27% of Britons and 25% of French) – and, with increasing numbers of their citizens moving to the cities, the materialistic divide between emerging and established markets looks set to grow.

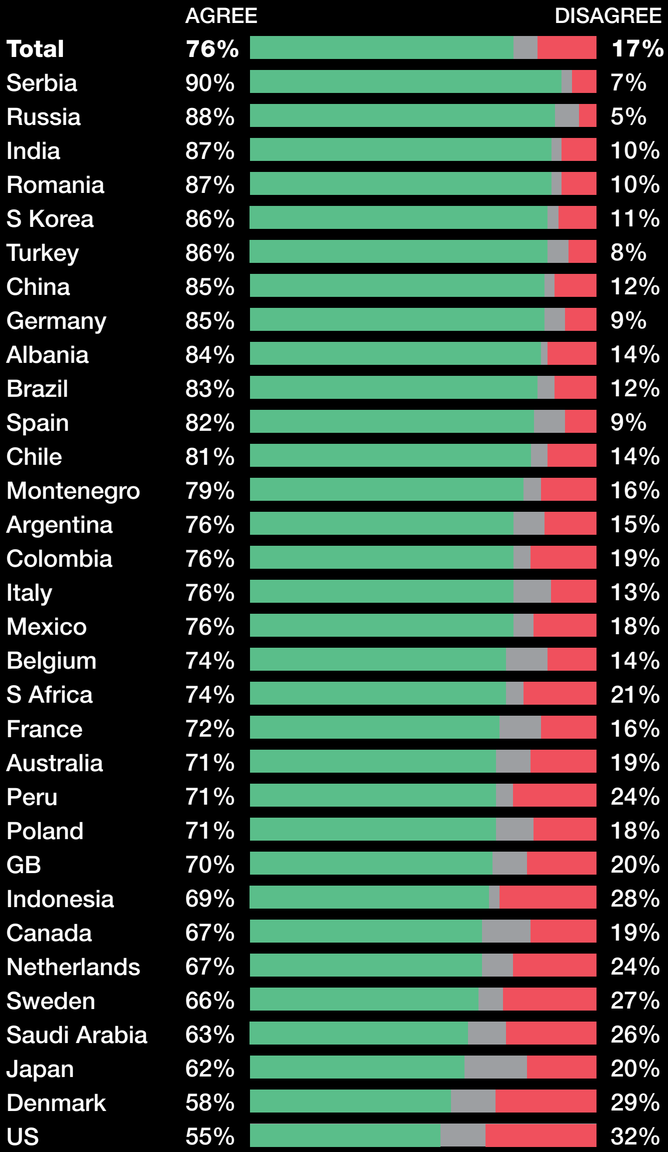
The desire for *wealth redistribution* sits close to mistrust of big tech and big data on our Global Values Map, while *faith in capitalism* close to a willingness to share personal information (see page 28). The world is dividing over whether to be optimistic or pessimistic over established institutions, and anxiety about the status quo has become increasingly visible over the past year. The protests of 2019 in Hong Kong, France, Chile and elsewhere are current signals of *capitalism’s turning point*.

This tension speaks to a deeper fragmentation in society between trust and distrust. We predict that the 2020s will see continuing tensions between rural and urban areas, and over the role of the state and markets.

In the US, 55% believe that 'having large differences in income and wealth is bad for society' – the lowest of all markets surveyed[viii]

Source: Ipsos Global Trends
Base: 22,114 adults aged 16-74 across 32 countries, interviewed June – July 2019

The majority think that unequal wealth distribution is bad for society

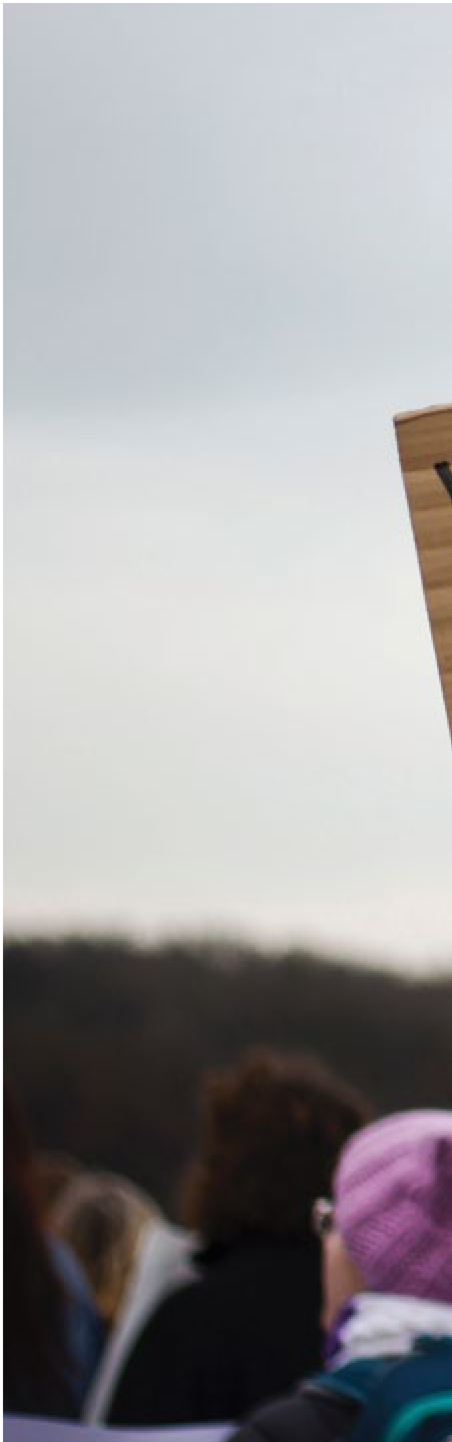


Reactions to uncertainty and inequality

Values
Fear of the Future, Populist Revolution, Traditional Gender Roles, Traditional Nationalism

Despite continuing improvements in health and quality of life worldwide, anxiety about the future pervades many countries. Seventy-eight per cent of people agree we live in an increasingly dangerous world and 52% expect a global conflict to erupt in the next 25 years. Concern about the speed of change is another trigger; eight in ten say the world is changing too fast. This feeling of a lack of control is higher among those living in emerging markets such as Turkey (95%) and Mexico (92%) who have seen a great deal of social and economic change in their lifetimes.

This trend also encompasses some of the key reactions to this 'loss of the future' – namely a strengthening of tradition and populists who claim to represent traditional values. Common reactions include seeking certainty in traditional views on religion, gender roles and the nation state, among others. Half (46%) feel it is important that people from their country remain 'very different' to all other nationalities, including



three-quarters of Turks (74%) and two-thirds of Chinese citizens (64%). Meanwhile, 62% feel very proud of their country overall, and there are only four countries where less than half agree with this statement (South Africa, Italy, Belgium and Germany).

While just over half (54%) feel their religion or faith is very important to them, this varies dramatically across the world; between 94% in Indonesia and 18% in Japan. Those living in big cities are more likely to agree (58%), reflecting the importance ascribed to religion and identity in the cultural clash fostered by megacities, and where the global megacities are (Asia, Africa and Latin America).

Taking a closer look at traditional gender roles, since 2013, roughly four in ten have continued to believe that the role of women in society is to be good mothers and wives. A reminder that increasing equality in developed and European markets is not a worldwide trend. Gen Z are less likely to agree than older age groups (34%), and this may signal a liberal shift in attitudes in the future driven by generational replacement, as has been observed in research in Europe and America.[54]

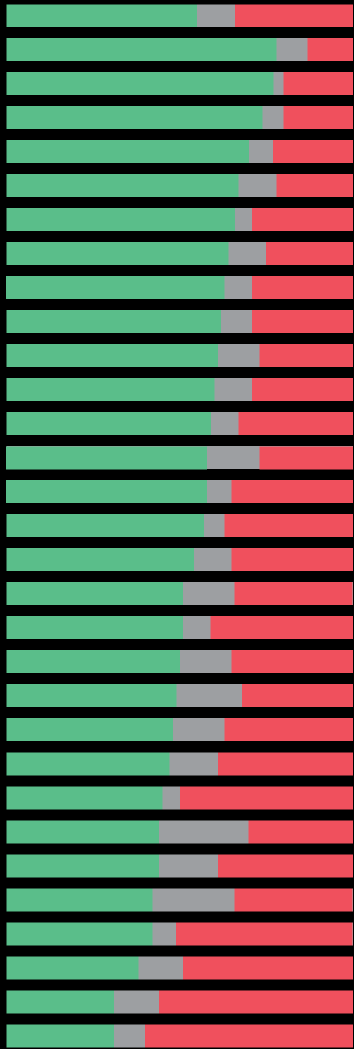
“ Four in ten globally still say that the role of women is to be good mothers and wives ”

The search for comfort in a more secure and appealing past is in part driving populism, the revolt against the elites who are seen as responsible for the current state of things. Around the world, more than half of citizens (55%) say they want a strong leader instead of their current government – including 78% of Romanians, 67% of Britons and 49% of French citizens. Support is higher still among the lower-middle classes, with six in ten of those on medium incomes agreeing (58%). However, there are signs that 2016 may have been the high-water mark of populist sentiment, at least in Europe. For example, the proportion who agree we need guides and mentors more than politicians fell by nine percentage points in Spain and eight points in Italy between 2016 and 2019.

Along with *capitalism’s turning point*, this trend looks to continue long into the 2020s, as western societies remain deeply pessimistic about the opportunities available to their younger generations. As we noted in 2016, this looks completely different in Asia, of course, where optimism is much higher.

More than half of people expect there will be a world war within the next 25 years[ix]

I wish my country was run by a strong leader instead of the current elected government



	AGREE	DISAGREE
Total	**55%**	**34%**
Romania	78%	13%
Albania	77%	20%
S Africa	74%	20%
Peru	70%	23%
GB	67%	22%
Colombia	66%	29%
Australia	64%	25%
Mexico	63%	29%
Montenegro	62%	29%
Poland	61%	27%
Argentina	60%	29%
Brazil	59%	33%
Canada	58%	27%
Chile	58%	35%
India	57%	37%
Germany	54%	35%
Belgium	51%	34%
Indonesia	51%	41%
US	50%	35%
France	49%	32%
Italy	48%	37%
Spain	47%	39%
Turkey	45%	50%
Russia	44%	30%
Serbia	44%	39%
Japan	42%	34%
S Korea	42%	51%
Netherlands	38%	49%
Denmark	31%	56%
Sweden	31%	60%

Source: Ipsos Global Trends
Base: 20,611 adults aged 16-74 across 30 countries, interviewed June – July 2019

The enduring appeal of nostalgia

Values
Left Behind, Nostalgia

Ever since the economic crash of 2008, *nostalgia* has been a key trend for the established economies in the west. Half the planet wishes that their country was 'the way it used to be'. However, those living in emerging markets in east Asia are less likely to feel this way (China, 27%, South Korea, 36% and Indonesia, 43%), where the past is often less attractive – there were famines in living memory in some of these countries, for example.

This can perhaps be put down to what Gideon Rachman coined as 'Easternisation' – a widespread feeling in the west that things used to be better, and at the same time, a rise in prosperity (at least for influential sets of society) in the east. It is also a feature of the 'loss of the future' that we have seen across western Europe and the US. In the UK, 45% now think their children will be poorer than them – before the crash of 2008 that figure was just 12%. As a result, we find both values within this trend clustered close to a variety of other pessimistic values on the Global Values Map (see page 28), including *overwhelmed, fear of the future, technophobia,* and – most pertinently for democracies – *populist revolution*.

Nostalgia differs by age; younger people (aged 44 and younger) are far more likely to have personal nostalgia – wishing to grow up at a

time when their parents were born – while older people (aged 45+) are more likely to desire societal nostalgia, wanting the country they live in to be the way it used to be. This may well reflect the fact that young people are less well-off in relative terms than their parents, while older people feel the world is evolving too fast.

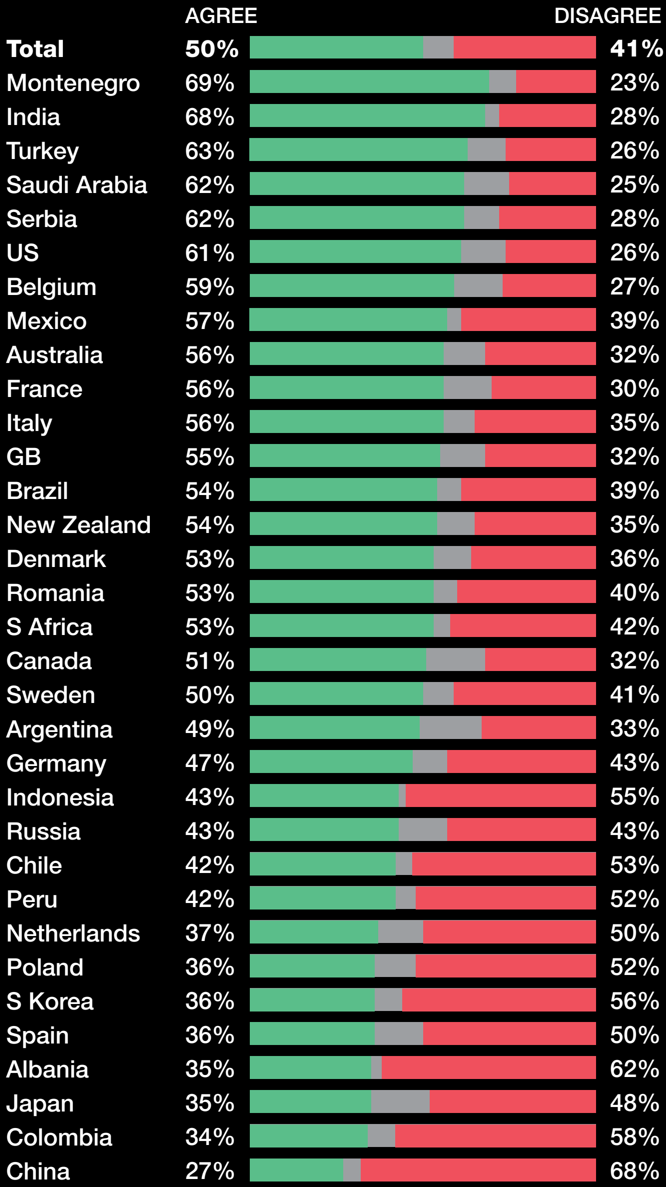
Of course, our memories of the past are almost certainly not accurate. Nor – as we have examined in our 'Perils of Perception' series – are we accurate in our perceptions of the present. For example, Italians believe that 48% of their population is over 65, when it's actually just 22%.

Psychologists show that the 'rosy retrospection' effect is at play – people remember things differently each time they retrieve past memories, editing out the bad points over time. More recent events and new ideas can often alter how people remember feeling about the past. So, it's worth remembering that people don't literally want to go back in time or have the exact past, they want a comfortable version of it – the best bits to counteract how they are feeling about today's society. Given continuing uncertainty, and an ageing population, much of the world will spend the 2020s thinking that the past is better than the future. Reassuring citizens will matter for both brands and politicians.

64% of people agree they led happier lives in the old days when they had fewer problems to cope with[x]

Source: Ipsos Global Trends
Base: 22,614 adults aged 16-74 across 33 countries, interviewed June – July 2019

Half of people say they would like their country to be the way it used to be

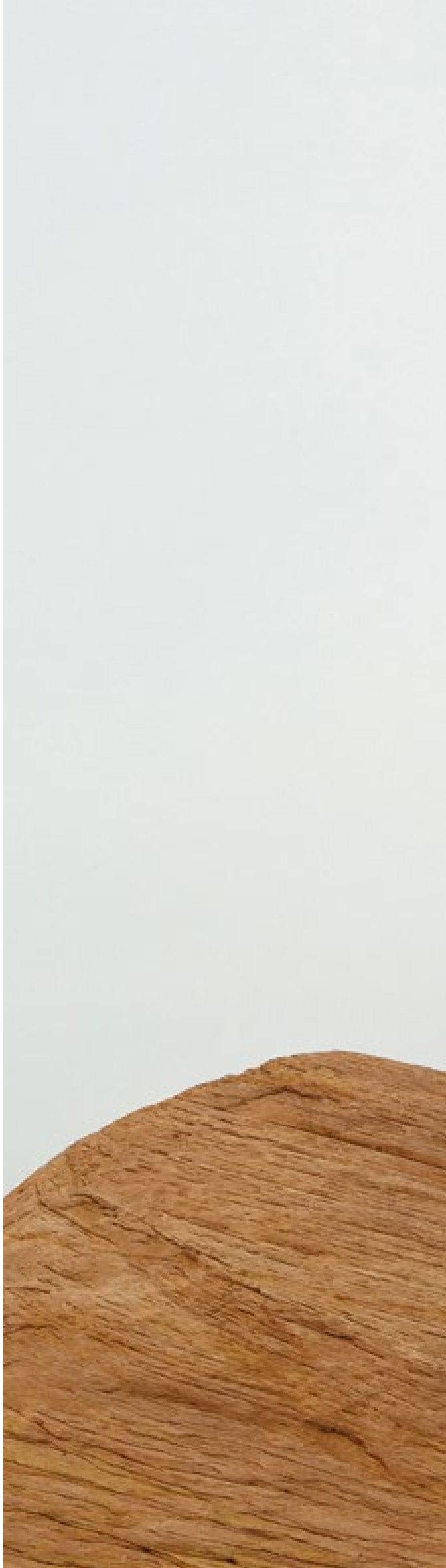


Search for simplicity and meaning

Values
Overwhelmed

Simplicity is increasingly a luxury. The success of Marie Kondo's 'The Life-Changing Magic of Tidying' demonstrates the stress consumerist culture can create; Black Friday and January sales offer cheap dopamine spikes but result in onerous piles of semi-disposable plastic clutter. Globally, 63% of us wish our lives were simpler – and more than three in five wish we could slow down the pace of our lives. Today, more than half of us (52%) feel *overwhelmed* by the multitude of choices we have about how to live our lives – a rise of 4% since 2013. Indeed, in what Barry Schwartz calls 'The Paradox of Choice', an abundance of options is not always positive; too much choice can stress us out. We do not have the time to look at, or the mental capacity to assess, the relevant benefits of the 2,069 'little black dresses' currently available on ASOS. Not having done so, we cannot ever make a fully informed choice. We live in a world where a better dress, job, house, even partner, might be just one more swipe away.

The need for simplicity does not exist in a vacuum. Our analysis connects it to a desire for solitude, and a feeling that other people's problems are a burden. Social connection is not, perhaps, a salve for the *overwhelmed* in modern society – it may be part



of the problem. It is possible that our urban, connected world is contributing to this search for simplicity and solitude. Many studies have linked social media use and depression or speculated that the edited, online lives of others can cause discontentment with the lived reality of our own. The three countries most likely to buy products or experiences that will ‘look good in photos online’ (India, Saudi Arabia and South Korea) are also disproportionately likely to feel that their lives have become meaningless with half or more feeling this way.

Should we be concerned by these figures? Is it acceptable for 30-50% to feel *overwhelmed* or emotionally fatigued? Does this suggest that we need a global campaign to increase awareness of mental health? Today, around 55% of the world live in urban areas, an increase of around 5% since 2010, and that number is projected to continue to rise. Single-person households are also on the rise. In Europe, a third of people live alone, a rise of 3.7 percentage points over the last decade. Our living circumstances are changing – and the political, social and environmental situations we face are changing too. Transnational

optimism is fading, wealth inequality is growing, and the pressure to take personal action to counter the *climate emergency* is perhaps the highest it has ever been. It’s natural to conclude that people may have a greater need to switch off, now more than ever.

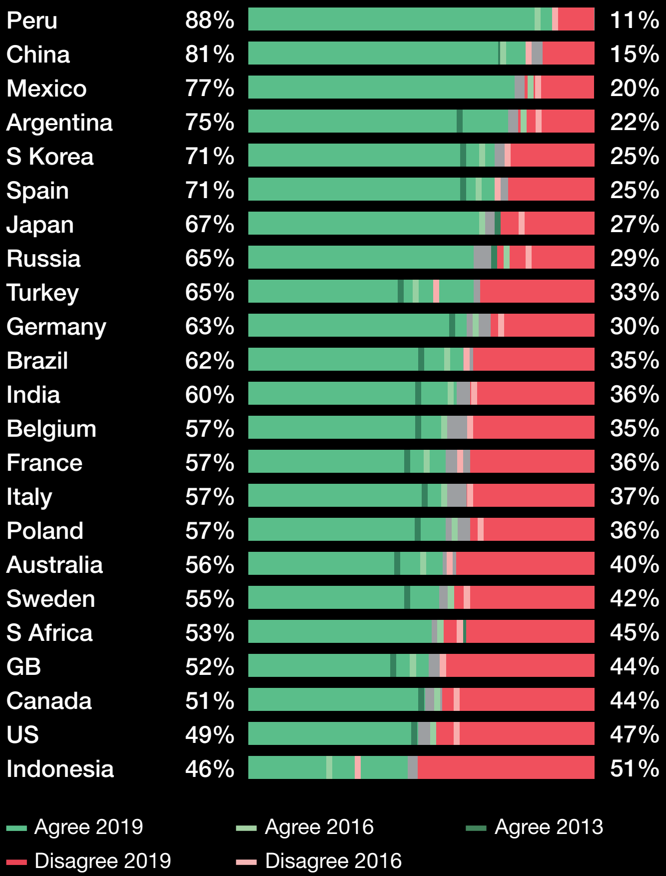
Stress and melancholy is not a new trend, however. Our 1999 Socioconsult study showed that 49% of people in Great Britain wanted to slow the pace of life, and today that stands at 52%, pretty much unchanged. Two decades of technological expansion, globalisation and innovation has only seen a rise by 3% in Britain.

So, the world may be more complex than it has ever been and we can often feel *overwhelmed* but, a sense of perspective is important. Being human means one always faces choices, and we must strive to not ‘overthink’ or see trends that don’t really exist. Where technology is changing quickly, our emotions are changing slowly – if at all. Moreover, we are more equipped to recognise and combat these changes than ever before. Understanding the complex interactions between humans, society, and to an increasing degree technology, is becoming possible on a more nuanced scale than ever before. Indeed, technology may be the bridge that allows us to move from a world in which individuals adapt to society towards one where an individual’s needs are met.

As with media stories about ‘trust’ being in crisis (see our report 'Trust: the Truth?'), feeling *overwhelmed* and worthless are not new. Rather in the 2020s, we may be more compelled to search for more simplicity and meaning with rising living standards globally, more technology and more choice. Brands which can provide easy choices which can make life simpler, will continue to thrive in the 2020s.

6 in 10 wish their lives were more simple[xi]

I wish I could slow down the pace of my life



Source: Ipsos Global Trends
Base: 17,539 adults aged 16-74 across 23 countries, interviewed June – July 2019

Choices over healthcare

Values
Health Self-reliance, Immortality Through Science, Trust in Medicine

While technology has been a core part of the giant leap in global life expectancy and standards of health, it has also facilitated misinformation and anxiety. There is an enduring sense that health should be assessed face-to-face, between human and human – not man and machine.

There is a tension between *trust in medicine* – the propensity to follow a doctor's advice, and *health self-reliance* – the inclination to find out information on healthcare independently, including the desire for self-control and alternative therapies. The tension between these values is illustrated by their distance on our Global Values Map (see page 28).

More than three-quarters (78%) globally want more control of their healthcare. This feeling is stronger in eastern countries, such as India and Indonesia, and parts of South America – where between 80-90% of people agree. In western Europe, people are happier with the status quo, more likely to put their faith in doctors, and least likely to do their own medical research on the side.

This may be due to differing standards of medical care, but the pattern does not entirely support this theory; Britain bucks the trend of western Europe contentment. In Spain, for example, just one in three try and find out healthcare information by themselves, while in Britain nearly three-quarters feel the need to consult Doctor Google. America is similarly inclined to seek a second, digital opinion: 71% research independently. Education also plays into this dynamic. The highly educated are 8% more likely to want to find out information by themselves. As education levels

increase globally, this desire for multiple points of information will be something healthcare systems will need to facilitate.

A less deferent population can be challenging. While 73% believe in all recommended vaccines, 19% disagree that they are all beneficial. In some European countries, such as France and Sweden, less than two-thirds believe all recommended vaccines are beneficial; in China, the figure is as low as 54%. Despite the cultural myth of the anti-vaxx American, the US (and Britain) are in fact more likely than average to believe in the recommended vaccinations. More than eight in ten Americans endorse vaccines. This figure, however, becomes less positive when one considers that the optimum rate for ‘herd immunity’ is 95% for some diseases, such as measles. If this scepticism translates into action, or rather, inaction, we could see the re-emergence of ‘eradicated’ diseases. Indeed in 2018, the World Health Organization (WHO) took away the UN's measles elimination status, due to a significant increase in cases. In 2019, vaccine hesitancy was among the top ten global health threats identified by the WHO.

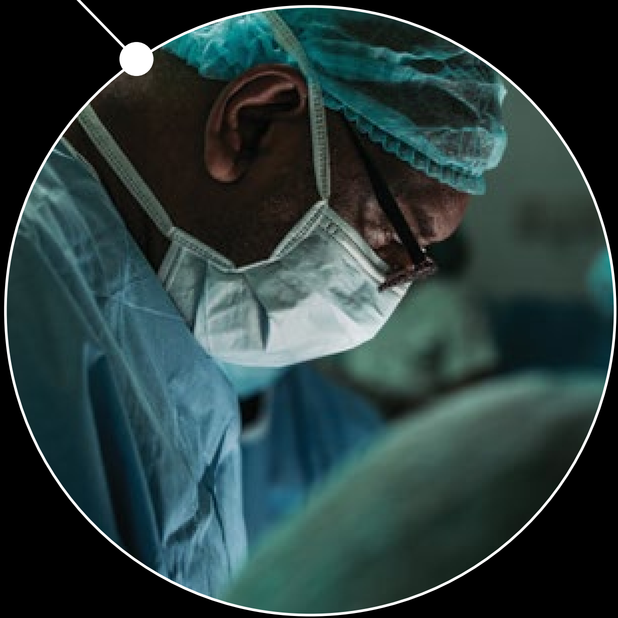
The future is here, and yet, we are not living in the sci-fi paradise many imagined; we still believe that science and medicine have limits. Despite the increase in global life expectancy, continuous medical research and advancements in biotech, half of us believe in *immortality through science*, where medical conditions and diseases will be curable in the future, and 32% expect to live to over 100.

Indeed, there is an almost inverse correlation between long life and optimism on this front. Japan, which has the highest life expectancy in the world, has the lowest number of people expecting to live to over 100. Most of Europe are equally pessimistic. In Britain, just one in five of us expect to live to be 100. Italy is home to Sardinia, one of five 'Blue Zones' in the world where residents are expected to live to over 90 years old – and yet less than a quarter expect human lives to pass the century mark.

Our relationship with medicine is complex, and likely to change further as we enter the 2020s. It is likely that the external pressures of technological progress, busy lives, overpopulated cities and scarce resources – married with the human desire for control and transparency – will continue to push us towards finding new solutions to medical care.

While the majority of us trust official medical advice, people increasingly challenge medical experts, and we cannot ignore the risk that this will lead to phenomena like vaccine avoidance to develop in other areas. As Ipsos has previously explored in the 'Global Trustworthiness Index', scientists and doctors are among the most trusted professions in society. We must ensure the fragile balance between trust, control and knowledge is maintained as technology expands its role in healthcare and people assert their right to choose. The Coronavirus epidemic highlights how despite medical progress, humanity faces plenty of threats from drug-resistent microbes, new epidemics in our megacities and more.

Doctors and scientists are the two most trusted professions in the world. Politicians are least trusted nearly everywhere[xii]



Source: Ipsos Global Trends
Base: 22,114 adults aged 16-74 across 32 countries, interviewed June – July 2019

I believe all recommended vaccines are beneficial for me and my family

	AGREE	DISAGREE
Total	**73%**	**19%**
Albania	86%	12%
Mexico	84%	12%
Argentina	83%	9%
GB	83%	9%
Spain	83%	9%
India	82%	14%
Indonesia	82%	12%
Australia	81%	11%
Colombia	81%	14%
Brazil	80%	15%
US	80%	13%
Poland	79%	14%
Canada	77%	15%
Denmark	77%	15%
Peru	77%	20%
Italy	76%	14%
Belgium	74%	16%
Chile	74%	21%
Germany	73%	19%
S Africa	71%	23%
Turkey	70%	26%
Saudi Arabia	69%	17%
Netherlands	69%	21%
Romania	69%	24%
Serbia	65%	22%
Sweden	64%	27%
France	63%	27%
S Korea	59%	30%
Montenegro	58%	34%
Russia	56%	30%
China	54%	31%
Japan	47%	24%

Reflections

Introduction

We have covered our 12 trends and 36 values for 2020. Our experts from around the world now discuss their reflections of our trends for 2020, for brands, business and society.

Read on to hear how retailers can stop personalisation becoming too creepy, the challenges around joint responsibility for our fragile planet, the complex demands on the state, and much more.

Alone in the dark noise

Trends
Search for Simplicity and Meaning, The Tech Dimension

Values
Overwhelmed, Technophobia

One of the biggest challenges we now face is the 'loss' of the future. Across Global Trends 2020, we see most countries expect the next generation to be poorer than they are. The 2017 Central Intelligence Agency (CIA) report 'The World in 2035: Paradox of Progress' underlines that, for the first time, a worse future seems inevitable, "unless…". This is a massive shift from the last half-century of post-WW2 optimism.

Pessimism is increasingly common. The last Gallup Survey, covering 140 countries in 2019, reported a global feeling of anxiety, sadness and anger shared around the world. Whereas the global child mortality rate is constantly decreasing, in the US life expectancy has been declining for three years in a row, and it has started to decrease in some other western countries, too. Other paradoxes are striking. Urbanisation has brought more people together than ever, but loneliness is more likely to be felt within big cities; 93% of French people think they can more easily feel lonely in a city.[55] Digitally connected societies allow incredible access to knowledge and bring new opportunities, but more than one in three people globally feel that the way they live their life has become meaningless, and half (52%) of us often feel overwhelmed by all the choices we have about how to live our lives. The technology that empowers and connects us is double sided; scientists are beginning to link it to depression.[56]

We see our external environment increasingly as a threat, as well as an opportunity. Some 78% agree that 'we live in an increasingly dangerous world', and we think we are becoming more polarised – 77% agree that 'in my country, there is more and more conflict between people who don't share the same values'. Mental health is also a growing issue. The World Health Organization (WHO) warn that mental health problems are rising across the world, with one in six dealing with mental health issues. Experts expect depression,

“One in three people globally feel that the way they live their life has become meaningless, and half of us often feel overwhelmed by all the choices we have about how to live our lives”

addiction and severe stress-related diseases to join the top five health burdens by 2030. The difficulty of adjusting to an accelerated world is part of this; 79% think ‘the world today is changing too fast’.

Modern life feels overwhelming. More data has been generated in the last two years than in the whole of human history – and not all of it can be trusted.[57] Our information ecosystem can be toxic. ‘Fake news’, ‘alternative facts’ and deepfakes are challenging our cognitive capabilities. Are informed decisions possible when 81% think ‘there is so much contradictory information that it is hard to know who or what to trust’? In this context, technology appears as an ambiguous ally. Despite the power of technology to inform and connect us, 75% think that ‘social media companies have too much power’ and 74% feel that ‘global social media and technology companies need to be more closely regulated’.

This growing feeling of physical and mental pressure may require new ways of accessing stability and wellness through autonomy and disconnection. People need to dampen the noise. More than three-quarters (77%) of us say they try ‘to find time to switch off on a regular basis’, and more than half feel the need to retreat into themselves (56% agree that ‘increasingly, I feel the need to spend more time alone’). This desire for solitude is mirrored by a desire for freedom of thought and action; people want to reassess their individual values against the collective. Three-quarters ‘want to get more autonomy in their life’ and depend less and less on external authority – most (79%) feel that ‘it’s up to everybody to work out their own set of principles’. A darker, more pessimistic world is leading us to seek clarity from within.

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Spend, spend, spend – trouble on the financial horizon

Trends
Capitalism's Turning Point, The Tech Dimension, Authenticity is King

Values
Materialism and Achievement, Early Adoption, Technophilia, Instashopping

Faced with uncertainty about the future, hedonistic 'you only live once' lifestyles are growing in appeal. People want both experiences *and* stuff. Today, now. It's too easy to spend.

Contactless payments have surged and in Britain debit cards have overtaken cash as the most common form of payment.[58] Over half of Millennials and Gen Z globally admit they overspend because of their smartphone. Easy access to credit, low interest rates and clever marketing are feeding an addiction to cheap money, with personal debt rising in many economies – in Britain by 11% from 2016 to 2018, far exceeding rises in income.[59]

Despite countless warnings, the International Monetary Fund, haunted by the past, fears that history is about to repeat itself as another global crash looms. The former head of the Bank of England has said the world economy is sleepwalking into a new financial crisis.[60]

What does our *instashopping* value mean for society and financial providers in particular? How can providers help their customers?

Ultimately, to dodge this potential time bomb, people must take personal responsibility. But financial providers can help by educating and guiding customers, and not tempting them with short-term goals alone. Providers should act now. Avoid lecturing consumers, but offer support and systems to help them keep their spending in check, as well as planning for the future. Create products so people can modify, but not completely change their behaviour, and use reward systems that help consumers achieve the experiences they desire.

To attract customers to these new products and services, providers need to be speaking to them via the right channels. Providers should embrace this love of online, and use it as a platform to spread educational and product messages to their customers.

Talking in the right language, using the relevant channels and promoting services that help people enjoy life now, while also preparing for the future, could soften the blow. It might not be easy, but it might not be too late.

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31%

like to buy things they think will look good in photos they post online[xiii]

Everyone and no one: the question of environmental responsibility

Trends
Climate Antagonism, Authenticity is King

Values
Climate Emergency, Tired of Environmentalism, Discerning Consumption

The interplay between the measures needed to address the *climate emergency* and our personal values and actions – or lack of them – makes the implications for businesses and government fraught with contradictions. The challenge is that the public are very keen for government and businesses to act, but feel they personally cannot make much of an impact.

Everyone is waiting for someone to do something. We expect our government to show leadership to bring us back from the brink of disaster, but at the same time we value our independence and personal freedom to do what we like and go where we like more than ever. We expect businesses to do their bit, but we don't trust them to put the environment first.

International brands such as H&M, Volkswagen and Nestlé have been criticised for advertising that misleads consumers about the environmental merits of their products. We are prepared to change our own habits, but not always at the expense of convenience and 'living for the moment'. But therein lies the problem – this is the moment, this is our last chance, and we're currently squandering it. Running parallel to the mounting concern about the future of our planet, we have placed more value on pleasure-seeking and escapism.

When it comes to environmental responsibility, society will need to recognise that it's actually up to everyone and anyone, and quickly. Collaboration is key – working together towards a shared goal is particularly important when it comes to super wicked problems that require complex solutions.

The challenge will be trying to build a shared understanding of the issues. We know that where people are involved in developing solutions they are more inclined to accept decisions, and those decisions can better represent diverse groups of stakeholders. The challenge is how this can be achieved at a societal level over a relatively short timescale implied by net zero targets.

Many brands are competing to win the hearts and minds of consumers, but similarly government needs to encourage less overconsumption generally. This is not an easy ask, and may well fall on deaf ears for the millions of people *tired of environmentalism* around the world.

Moving forward will require integrity from businesses and consistent leadership from government. Meanwhile, consumers will have to be more honest with themselves about what they are willing to sacrifice for the greater good – or have choices forced on them.

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37% say they are 'tired of the fuss that is being made about the environment'[xiv]

The data paradox: authenticity will prevail

Trends
Data Dilemmas, The Tech Dimension, Authenticity is King

Values
Data Anxiety, Data Apathy, Data Sharing, Technophobia

Ransomware attacks, data breaches and data misuse scandals are becoming progressively commonplace. Naturally, consumers are increasingly anxious about their privacy. At the same time business is shifting online rapidly, and consumers' sharing of data continues to grow, despite their ambivalence.

Facebook is a high-profile case in point. The social media giant came under the spotlight for consumers, privacy advocates and legislators when reports brought to light that UK research firm Cambridge Analytica had obtained and profiled 87 million Facebook users before the 2016 US election. This data, it was argued, was then used to target voters with messaging to influence voting in both Trump's election campaign and the Brexit referendum. Yet the number of Facebook users continues to grow.

The amount of data brands hold about us grows daily. Chatbots and voice assistant tools are becoming ubiquitous. More than 2 billion people use Facebook Messenger, Google Assistant and Amazon Echo, allowing brands to communicate directly with them and serve them personalised content and offerings. Technically, the data each user provides to these chatbots can easily be combined with their search and browsing history, email information, media consumption, geolocation data, in-home security, and even facial recognition. This data can then be analysed to predict a user's personality, behaviour, tastes and interests.

Overwhelmed with technology and data collection they can't control, some people try to reclaim their online agency by deleting certain apps, opting out of social media or even banning usage of all Google products and services (easier said than done). But as our value *data apathy* shows, many others have checked out, admitting defeat.

So how can brands leverage data to deliver a personal experience, and maintain trust? The paradox remains. People, perhaps rightly, are wary of sharing data with organisations which may not use their data 'in the right way', but will happily share their innermost thoughts on Facebook, allow cookies for sites without blinking (and without reading the T&Cs) and have enough personal data available to allow one-click purchasing and next-day delivery. This is the trade-off. If the *data sharing* is deemed to be necessary – and not excessive – consumers will continue to share their data and digital businesses will continue to thrive. But if *data anxiety* continues to grow, the digital economy could slow.

However, there is an opportunity for brands here too. The data collected, if done so legitimately and transparently, can be used to create a more intimate relationship with their customers. By giving consumers more agency and being transparent about what data is being kept and why, brands can minimise *data anxiety* and increase trust, encouraging a personalised, loyal and profitable relationship for both parties. The golden rule: *authenticity is king*.

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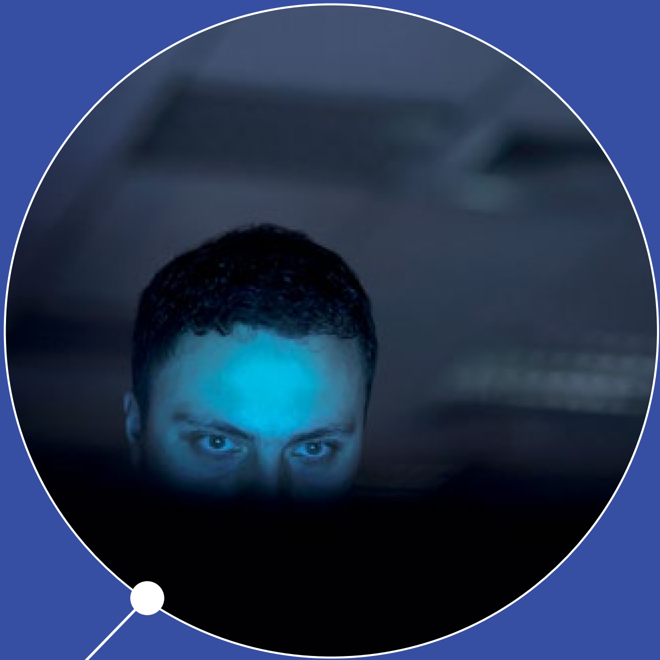

Around 7 in 10 are concerned with how governments and businesses are using their online data[xv]

Can technology ever help trust?

Trends
The Tech Dimension, Data Dilemmas

Values
Regulate Big Tech, Technophilia, Technophobia, Data Apathy, Data Sharing

As technology and the behemoth-like firms behind it take an ever-increasing share of our time, income and attention, permeating every moment of our daily lives – even when we ring a doorbell – the very essence of what technology means to individuals is changing across the world.

Perhaps because of this, views of technology as the enabler of progress are now polarising, even for its most overt supporters.

Since 2013, we have seen juxtaposed tensions in our global trends – values around both *data apathy* and *data sharing* are on the rise, as are *technophilia* and *technophobia*. It seems the more we are exposed to technology, the stronger our feelings become – one way or another.

In this sense, our use of the internet and related technologies is the subject of intense debate about the economic, social, political and psychological consequences, and while we are feeling the changes and benefits of connected life, we often seem lost in dealing with some of the unfolding effects of these new phenomena. Every year new studies reveal the negative consequences of over-use of the internet and social media.

This tension is felt by tech companies, too – the last ten years have witnessed the rapid growth of technology corporations, now the richest and most influential in the world. But while their products and services are desired and help people access more and more varied services, their practices have come under increased scrutiny by governments and citizens alike, and there is widespread demand for more state regulation.

> **“To many in the west, China’s surge in technophilia resembles a new form of control, both personal and from the state”**

But what does this mean for boards and governments?

In emerging economies, whether they came out of the post-war 1950s in Europe or are part of the current crop of fast-growing Asian or Latin-American nations, technology equals progress.

At first glance, China’s all-out push for technology and record-breaking scale offers a counterpoint. It is the only non-western nation to have produced global and increasingly dominant platforms. To many in the west, China’s surge in *technophilia* resembles a new form of control, both personal and from the state. For instance, WeChat, the single catch-all app which offers an incredible array of services, from payment to chat to m-commerce – has become a one-stop shop for all aspects of online life. From an Asian mindset, however, technology now equals normal life. This is illustrated by Japan’s very high level of acceptance of robots as daily assistants to common tasks.

For governments around the world, the race is to grasp major opportunities for all citizens, not just a small elite.

But in light of societal ambivalence about technology, even with widespread adoption, convincing citizen and consumers of the authenticity of their motivations will be a major challenge for tech companies and governments alike and, in turn, a decisive strategic and competitive advantage for those getting it right. Demonstrating that technology can equal trust may become a decisive factor to drive growth.

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Can governments ever tell a compelling story?

Trends
Reactions to Uncertainty and Inequality, The Enduring Appeal of Nostalgia

Values
Fear of the Future, Populist Revolution, Traditional Nationalism, Left Behind

Some of the key clashes of values in global trends concern globalisation and the role of the state. While on average most citizens see globalisation as a benefit to both their country and themselves, there are vast variations in attitudes around the world.

We often feel deeply divided: many say that, in their country, there is increasing friction between people who don't share the same values, although they are united by dissatisfaction with their government and elites.

Around the world we see the tone of societal debates hardening. Populist sentiment remains high in the majority of European countries, and 2019 saw a global wave of *populist revolution*, with people from Hong Kong to Chile, France to Lebanon, gathering on the streets to voice their dissent. These public demands for state action are not limited to economic measures such as inequality or stagnation but also over greater democracy, immigration, or more action to tackle climate change.

It is worth remembering that dissatisfaction with governments and a feeling of fragmentation are not new. These feelings aren't getting worse, which may be some comfort to those leading our societies. What we are dealing with is an innate human talent for 'rosy retrospection', meaning that everything looks better in the rear-view mirror,[61] combined of course, with our current widespread pessimism about the future – which we have explored in our trend, *the enduring appeal of nostalgia*.

In established markets, where citizens are beset by pessimism for their future, governments have attempted to accommodate popular demands for cultural and economic protection from the impact of globalisation on migration and trade. It is a political tightrope – previous approaches by leaders before the 2008 crash are now tarnished in the eyes of many young people as the unconditional acceptance of the free market and neoliberalism.

Whereas at the start of the century, liberal capitalism seemed the only game in town, now values of *climate emergency, regulate big tech* and *wealth redistribution* all appear in our analysis of the top ten shared global values. This reflects the growing demand for a more protective and assertive state in many countries. Questions about why, when and – most importantly – how the state should act, are back at the centre of public debate.

At a time in history where many things are genuinely getting better, the challenge for political and business leaders is to tell a compelling story to challenge the default public narrative of everything getting worse.

4 in 10 (43%) people report feeling like a stranger in their own country or feel left behind by the progress and changes happening in their country (40%)[xvi]

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Climate change, food and sustainable behaviours

Trends
Climate Antagonism, Authenticity is King, Conscientious Health

Values
Climate Emergency, Discerning Consumption, Conscious Eating

Climate change is putting pressure on brands to appear sustainable, but also creating massive opportunities for them.

A focus on sustainability is leading more people worldwide to embrace a ‘flexitarian’, vegetarian, or even a vegan diet. For most people this is about choosing food that is good for both their body and the planet.

For example, where plant-based food used to be niche a few years ago, today we see big players such as Danone, Nestlé and Unilever competing in this space. Even if people today are often sceptical about big companies getting involved in fighting climate change or promoting plant-based diets, there is a growing expectation for big companies to act.

Brands now need to make sure their offer contributes to personal health as well as community well-being and the planet’s long-term future. This could include linking products to the planetary health diet, recently launched by the EAT-Lancet Commission, where nutrition, health and climate are considered equally important.

There is of course a difference between people’s stated intentions and how they actually behave. Even where people are concerned about the impact of their food and drink choices, many purchasing decisions are still more automatic than thought through. Making the right thing easy and attractive to do, while understanding the implicit cues that signal to consumers that the products they buy are in line with their values, will be important. Labels and logos are an obvious option for signalling to consumers the intrinsic sustainability of a food product, for instance via well-known food labels (Vegan, Rainforest Alliance, etc), green packaging, or natural shapes and objects.

This is a more challenging exercise than you might expect. Sometimes these cues can reduce sales – for example, household cleaners are perceived as less effective when they are described as sustainable. Labelling a product ‘vegan’ can cause sales to drop by up to 70%. This explains why we have seen an up-take in the use of ‘plant-based' to describe meat and dairy-free alternatives.[62]

'Good-for-you' products with an organic claim communicated by a logo are perceived as having a higher quality than conventional 'good-for-you' products, but the same logo can have a negative impact on the perceived quality of 'vice products' such as alcohol.[63]

As pressures on manufacturers and consumers increase in the 2020s, expect much more attention to packaging and manufacturing, and increasing consumer sophistication.

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Between 2016-19, the US saw the biggest drop in the proportion of people who think climate change is man-made[xvii]

Act like a shopkeeper, not a stalker

Trends
Data Dilemmas, Authenticity is King

Values
Data Anxiety, Data Sharing, Instashopping

Today, *data anxiety* and online shopping co-exist slightly uncomfortably. Should this be of concern to retailers? If people are concerned about *data sharing* but still shopping online, can their concerns about privacy be ignored on the basis that it isn't influencing their behaviour? It's a question of balance, transparency and consistency.

When customers can order almost anything to anywhere via one tap on their smartphone, assisted by AI-generated recommendations, chatbots and digital assistants, resisting that level of frictionless convenience is hard. But as businesses actively employ new technology to nudge customers to digitally self-serve, removing the human element from the customer experience, how can a business craft a personal relationship with a customer in an increasingly digital landscape?

While the human touch may have become a luxury, its impact remains undeniable.[64] Customers often choose brands because of the quality of their customer service. Emerging markets give much more weight to customer service, whereas brand choice seems more nuanced in established markets.

Organisations have used personalisation to increase sales and customer loyalty for generations. It has come full circle. At the dawn of retail, the degree to which a shopper received a personalised service was a key driver of sales. Successful shopkeepers built personal relationships with their customers. Chain retail stores then disrupted and depersonalised these relationships, but digital now offers the chance to rebuild them.

The best personalisation is targeted, intelligent and saves people time. The worst is the opposite. We see this in blanket emails from retailers, washed with a tacky veneer of personalisation through a light peppering of your first name. This form of communication is outdated, and can be damaging.

Brands therefore cannot rely on the use of a first name in the way a shopkeeper may have done. It's a hollow gesture when it comes from an algorithm, and people know it. New personalisation needs to be nuanced, authentic and work for the benefit of both customer and retailer. The question is not whether retailers should use shopper data to inform their marketing, but how.

Whether it is in-store, a message on social media, a telephone call from a real person or a chatbot, customers expect to receive the same level and quality of service they have received before or elsewhere. But with interactions that are enriched by AI going forward,[65] there is a risk that the human touch is overshadowed by technology and the relationship will lack emotional connection,[66] a key component of trustworthiness.[67]

This means a delicate balancing act between providing a cost-effective digital customer service, but also judging when the human touch is indispensable to the experience. It should not matter how, where or to whom customers come into contact with your organisation, you now need to deliver a reliable customer experience across channels, however challenging that is. The key is to remain authentic – and consistent.

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New personalisation needs to be nuanced, authentic and work for the benefit of both customer and retailer

Good for me and good for we

Trends
Authenticity is King

Values
Brand Worship, Discerning Consumption, Instashopping, Provenance Matters, Real-world Shopping, Review-based Consumption

Consumers today recognise that we all have a role to play in creating a world we want to live in – brands cannot afford to ignore the implications of the *discerning consumption* value. In the 2020s more than ever, consumers will be much more discriminating about the brands they choose to engage with and the purchases they make.

Provenance matters too – consumers are not just going to be challenging brands to do real good in the world, but will interrogate supply chains to make sure brand values aren't based on rocky foundations. It's not enough to get people to simply buy a product or service 'in the moment', brands need to ensure that consumers feel good about the experience well beyond that moment, as they reflect on what they bought.

There are brands that get this. Think of Adidas' collaboration with Parley for the Oceans to make running shoes made from recycled ocean plastic. Or Carlsberg's recent ditching of plastic rings for six packs, replacing them with glue dots on a new Snap Pack.

In France, Avallen who make Calvados, have challenged every aspect of the supply chain and are completely transparent about the provenance of their raw ingredients. They explain how their processes help to conserve the wild bee population – essential to the survival of our food chain. Actions such as these may contribute to the fact that the vast majority, globally, believe it's possible for a brand to support a good cause and make money at the same time.

Even though many companies have demonstrated that purpose and profit can go hand-in-hand, far too few brands are there yet.

Brands will need to think much more holistically about their consumers and think about them as citizens as well, considering a much more expansive consumer needs. Needs which range from those that impact 'me', to those that impact 'my world', to those that impact 'the world'. Brands then need to both innovate and communicate with their consumers based on this understanding – ultimately leading them to feel annoyingly good about their purchase decisions.

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70%

are more likely to buy products that are locally grown than those that are grown elsewhere[xviii]

The changing faces of healthcare

Trends
Choices Over Healthcare, Conscientious Health

Values
Health Self-reliance, Immortality Through Science, Trust in Medicine, Aspiring to Health, Conscious Eating

With rapid IT and bio-tech developments, healthcare is changing rapidly. We see a trend towards patients wanting and having more control over their own healthcare, and with it, the emergence of peer-to-peer medicine as an alternative to traditional healthcare.[68]

Meanwhile, globally, mental health is finally being recognised as part of a much-needed debate and reform. With growing and changing populations increasingly complex challenges and rising cost, will our formal healthcare systems be ready?

The health sector will need to respond to the implications of *choices over healthcare* by offering patients greater autonomy – and perhaps reconsidering the role of the doctor itself. Technology may well assist with this, albeit in a slow and steady manner. The arrival of 5G could potentially increase diversity, making video conference doctor appointments more feasible.[69] In the future, it may help further develop our smartphones as medical devices, able to monitor vital signs or even conduct medical scans.

Several startups are already looking to expand wearable technology beyond physical monitoring. They aim to empower people with the data they need to achieve health beyond physical fitness. Mental health is a key area of focus; the same mechanisms that have proved popular when tracking food intake or steps can be actively applied to mood shifts and their triggers.

Despite the potential merits of greater *health self-reliance*, healthcare professionals remain hesitant about a changing dynamic between doctor and patient. In the UK, for example, we have been talking about moving the National Health Service from an illness to a wellness service for decades. Progress has been slow. It therefore looks as though we will drift rather than shift into a world of technology-enabled *health self-reliance*.

Stakeholders within the sector, both historic and new entrants, will have to evolve their health management offerings to fit the future ‘beyond the pill’ landscape. However, with 73% globally holding the view that their doctor knows best, even with increased health democratisation, it doesn’t appear doctors will be out of a job just yet.

Whatever happens, as key figures of trust, doctors will remain gatekeepers to patients. We cannot underestimate their importance and influence in ensuring adoption of new and patient-centred healthcare solutions, whether face-to-face or digitally, which in turn may improve outcomes and cut costs.

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In Japan, the rate of trust in medicine is 48 points below the average[xix]

Lonely, alienated and young

Trends
Search for Simplicity and Meaning, The Enduring Appeal of Nostalgia

Values
Overwhelmed, Left Behind

In a world that is more digitally connected than ever, nearly half of people globally feel lonely, and are struggling in ways that should concern us all. Many say they are overwhelmed by life's choices, and they are also more likely to say they believe their lives have become meaningless.

However, many who purport to be lonely, also feel they need to spend time alone. The concept of being lonely by choice is explored in Olivia Laing's book 'The Lonely City' where she describes how loneliness can in itself promote the avoidance of others and fear of rejection. This creates a vicious circle, and can prompt hostility towards those who try and connect.

Lonely people are also likely to value *populist revolution* – a desire to revolt against elites who are thought to be conspiring to hide the truth. Individuals associated with this value are also looking for someone to set an example of how they should live their lives – but look online for this support, rather than in their own communities. Indeed, the world's loneliest people spend the most time on social media.

Previously it was elderly people who were most likely to feel lonely and would face the health risks associated with this, but now the young – and the heaviest users of social media – are most likely to report being lonely.

This suggests that the young, who are increasingly spending more time on screens, may be the most alienated. As the technology is so new we can't yet see if this is simply a life stage the first internet natives will grow out of, or a sign of how future generations will feel permanently; if it is the former we will hear a lot more about the alienated Gen Z as they reach adulthood. Japan offers some alarming early signals here. There are now an estimated 500,000 Hikikomori, people who have become modern hermits and have withdrawn themselves from the pressures of modern life.[70] While similar behaviours have also been observed in South Korea.

This has significant implications for governments and society. For example, a study by Julianne Holt-Lunstad of Brigham Young

University found that 'being disconnected is just as dangerous to good health as smoking 15 cigarettes a day'[71] – so the healthcare costs created by cohorts of lonely young people could be staggering. In contrast, for business there are likely to be increasing opportunities to find ways and create new technologies to connect people in real life. In our increasingly fragmented world, social media has the power to bring marginalised groups together.

Ultimately, the very technology that may have been a contributing cause to loneliness – social media – may help solve the issue. Whatever the future holds, however, loneliness seems likely to remain a problem for governments and society to grapple with. The technology may be new, but the need for human beings to have real and genuine connections is as old as time.

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6 in 10 of Gen Z feel overwhelmed by the choices they have to make about their life[xx]

Are you talking to me…?

Trends
A Divided World?, Reactions to Uncertainty and Inequality

Values
Beyond Binary, Traditional Gender Roles

Gender roles and identity are becoming less rigid across the world, and at the same time our populations are ageing. The proportion of women in employment globally has dramatically increased over the last century,[72] along with a trend towards having fewer children.[73] By 2050, the world is predicted to have reached two billion people aged 60 and over (one in five people globally).[74] But are brands truly reflecting these trends?

Depictions of older people in advertising remain stubbornly stereotypical, and often negative. Older people have higher disposable incomes than the young in countries such as the US, the UK, Germany, France, Italy and Australia.[75] Yet they are frequently marginalised by mainstream brands. There are, of course, some generational differences, but older people's views broadly reflect wider societal attitudes. The over-60s are no more likely to say they feel 'left behind by progress and changes in their country' than young people. Many older people are still ambitious, and are just as likely to agree with modern liberal values. We also see brands continuing to reflect now-outdated traditional gender roles and stereotypes, when only a minority these days think that the role of women is to be good mothers and wives.

Does any of this really matter? Well, across the world there is a growing trend for people to say they tend to buy brands that reflect their personal values. In addition, only half of consumers prefer to buy products specific to their gender, and this is even less likely among women. Governments have started to regulate against sexist advertising (to a greater or lesser extent) in a growing number of countries, including Sweden, Belgium, France, Finland, Greece, Norway, South Africa, India and, most recently, the UK.[76] There are also movements such as Unstereotype Alliance, which seeks to eliminate harmful gender stereotypes in the media.

This is to be welcomed, but stereotypical campaigns are a function of something deeper within the consciousness of marketers and product developers. While so much product design and market research is still focused on the default 'mums' or 'under-65s', people may struggle to see beyond these mainstream stereotypes. Assumptions about consumers have already been made, before a new product or brand opportunity is even tested. All of us need to step outside of these outdated norms.

If brands truly put today's consumers front and centre of their strategies, the likelihood of ending up with stereotypical products and advertising will be greatly reduced. Businesses avoiding stereotypes will outperform their competitors.

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68%

agree that we have more things in common than things that make us different[xxi]

The Ipsos Global Trends team

Our dedicated Trends and Futures team brings together our expertise in public affairs and policy with our private sector focus, allowing us to look at challenges through the eyes of the consumer, society and the wider world.

As a company we have a long pedigree in global foresight practice. As far back as 2006, we led the UK Government's Horizon Scanning Centre, Sigma and Delta scans; designing and writing papers on future trends in science and technology, with related scenario planning. We work with global boards to look at emerging issues, and conduct strategic planning projects for companies in sectors ranging from the future of food, to travel and technology, regulation and governance.

If you would like more detail on our trends or you would like more information on this rich data set, please contact UKTrendsandFutures@ipsos.com

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Thank you for reading Ipsos Global Trends 2020: Understanding Complexity. We have deliberately not tried to cover all 370 questions, but we hope you have been inspired to look deeper into our data. Please contact us to discuss how we can work with you to leverage the power of this work in helping you make better decisions.

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We offer

Our services include scenario planning, horizon scanning, trendspotting, trends framework building and more, designed to help today's governments, businesses and brands become tomorrow's leaders. We provide you with:

- a structured way of looking at how change is happening, through macro forces, trends and signals of the future.
- in-depth analysis into the values that unite or divide us around the world – and how they are likely to change.
- cost-effective activation packages via presentations and workshops, to help you and your teams understand the trends that are likely to affect your organisation.
- the ability to interrogate our trends via our Data Portal – focus on your markets of interest, and the populations you serve by seeing how our trends differ across 33 markets and a range of demographics.

Behind our trends and this report is a huge data set – and many more questions – that can be analysed in almost infinite ways. Alongside consultancy, this can provide in-depth and bespoke analysis for your organisation. We have already started to use the power of Ipsos Global Trends 2020 to help organisations facing strategic challenges or developing their annual strategies to make better, informed decisions.

Please contact us via UKTrendsandFutures@ipsos.com to discuss your challenge directly with the team.

Technical details

Markets

Three Waves: Argentina, Australia, Belgium, Brazil, Canada, China*, France, Germany, Great Britain, India, Italy, Japan, Poland, Russia, South Africa, South Korea, Spain, Sweden, Turkey, United States.

Two Waves: Indonesia, Mexico, Peru.

One Wave: Albania, Chile, Colombia, Denmark, Saudi Arabia*, Montenegro, Netherlands, New Zealand*, Romania, Serbia.

**Truncated set of questions asked.*

Method

The survey for the 2020 edition was carried out online using the Ipsos Online Panel, and face-to-face interviewing in Albania, Montenegro and Serbia. The results are weighted to ensure that the sample's composition reflects that of the adult population according to the most recent country census data. Total global data has not been weighted by population size, but are simply a country average.

In established markets with a higher level of internet penetration (more than 60% online), the results can be taken as representative of the general working-age population.

In markets where internet penetration is lower, the results should be viewed as representative of a more urban, affluent and 'connected' population. Our trends are based on 36 values which have been derived on a Factor Analysis of 170 questions.

The fieldwork for this edition was carried out among adults aged 16-74 (except in South Africa, Canada, Turkey, United States and New Zealand where we interviewed adults aged 18-74).

Fieldwork dates

- 2020 edition (June-July 2019)
- 2017 edition (September-October 2016)
- 2014 edition (September-October 2013)

Global value intensity scores

Throughout this edition we refer to 'value intensities'. While all 36 values represent significant relationships within the data, this score allows us to assess how powerful a given value is compared with others.

It is calculated using the averaged agreement or disagreement scores for each of the questions within the value. This gives a broad measure of the relative strength of each value.

Here we rank all values by their value intensity score.

Rank	Value	Intensity Score
01	Climate Emergency	**77**
02	Trust in Medicine	**76**
03	Regulate Big Tech	**75**
04	Aspiring to Health	**74**
05	Fear of the Future	**73**
06	Individualism	**72**
07	Data Apathy	**72**
08	Discerning Consumption	**70**
09	Data Anxiety	**70**
10	Wealth Redistribution	**70**
11	Health Self-reliance	**69**
12	Technophilia	**66**
13	Conscious Eating	**66**
14	Review-based Consumption	**65**
15	Provenance Matters	**63**
16	Hedonism	**60**
17	Beyond Binary	**59**
18	Nostalgia	**59**
19	Populist Revolution	**58**
20	Technophobia	**58**
21	Traditional Nationalism	**58**
22	Pro-globalism	**55**
23	Nomadic Aspirations	**54**
24	Overwhelmed	**53**
25	Brand Worship	**52**
26	Traditional Gender Roles	**52**
27	Early Adoption	**51**
28	Left Behind	**50**
29	Xenophilia	**50**
30	Real-world Shopping	**48**
31	Materialism and Achievement	**47**
32	Data Sharing	**47**
33	Faith in Capitalism	**45**
34	Tired of Environmentalism	**43**
35	Immortality Through Science	**41**
36	Instashopping	**38**

End notes

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