

SHAPING 2025 & BEYOND SUMMARY



Visioning the world of 2025:
Certainties, risks and longer-term implications

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GAME CHANGERS



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Introduction

Predicting and preparing for the next global challenges

At the beginning of 2021, many decision-makers are thinking pragmatically about what to do next. Where should resources be invested for the climb out of COVID-19? Which of the many disruptions we have seen will lead to continued change, and which will fade as we revert to a world more like 2019?

In Shaping 2025 and Beyond, we identify the next challenges facing the world, and the different ways we might turn to address them.

Ipsos has a structured approach to scenario planning. First, we set out the **longer-term certainties**; the trends we were already seeing, which will continue for the next five years and beyond. We then map the most **significant global uncertainties**. Next, we combine the two to tell a simple story – **our core vision for 2025**, the most likely pathway we see the world taking. Finally, we describe three **alternative trajectories** for the future.

Many months of collation, sifting and collaborative analysis lie behind this report. The four pathways we have set out are more than any one person's hypothesis – they are robust, defensible stories of possible, plausible futures.

These stories take us into the near future of 2025, but they should also act as signposts toward the world of 2030, and beyond. The different narratives should be read as scenarios; different, clear, challenging and plausible stories about the world of the future.

By definition, the future is uncertain. What are we likely to be blindsided by next, and what can we do to prepare for this?

Certainty and uncertainty to 2025

We can be certain of some aspects of the world of 2025. The macro forces shaping the world will continue to have an impact. Long-term trends which we could see before COVID-19 will continue. These include:

Planetary challenges

We must decarbonise, rescue and regenerate our fragile ecosystems; invent and roll out new economic models for a net-zero world; and deal with economic and environmental migration and population volatility throughout the world.

Trends in society

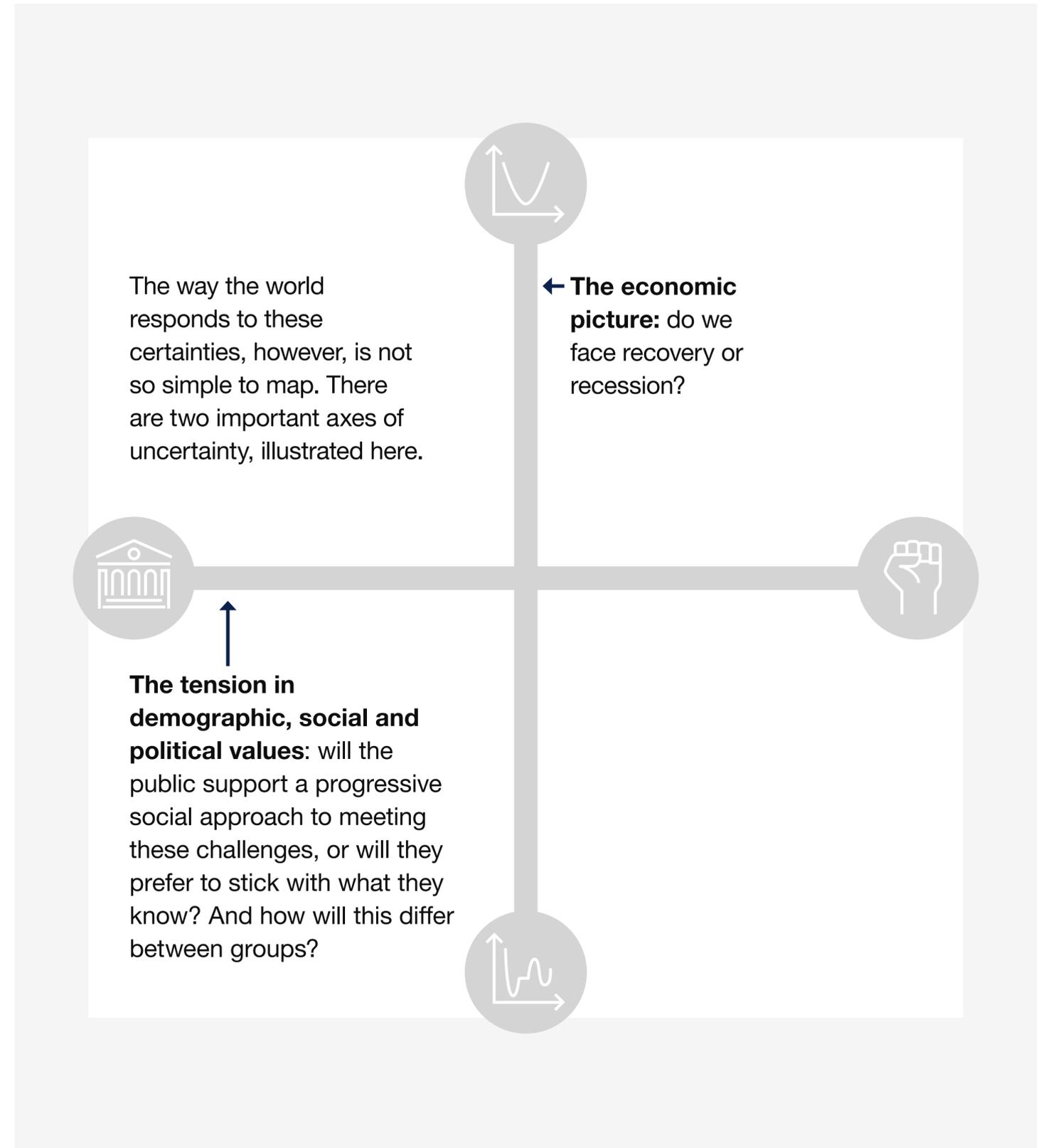
While education levels rise and we become more connected than ever digitally, inequality and global poverty are increasingly urgent challenges. In the west, we see conflict between social groups increase, and we must address a crisis in mental health underlined by COVID-19.

The age of automation

In a world where data is power and systems are increasingly algorithmically driven and automated, humanity must find ways of creating equity and value. The COVID-19 pandemic has accelerated some trends in connectivity, and we see remote working continuing through the next few years.

System-level change

While the next five years will remain the age of the nation state, we see the potential for new power brokers to enter the arena in the form of corporations who act in the wider interests as well as to increase their bottom line. COVID-19, again, has made it imperative to think about the system-level connections between people, and the next five years will be focused on improving our systems to improve our resilience in every space; from health, to the economy, to the personal.





This world is less resilient than 2019, with high levels of debt which have been underwritten by central banks

It is a familiar world

The pandemic changed many things, but by 2025 much of the world looks superficially as it did in 2019.

But how sustainable is it?

This world is relatively stable; especially as climate change has not yet turned to widespread climate disaster, and there are no signs of further pandemics on the horizon. However, there are fractures under the surface. This world is less resilient than 2019, with high levels of debt which have been underwritten by central banks. There is growth and investors are confident, but there is also stalled social progress. Young people in particular are facing consumer debt and job insecurity, and there is inequality between ethnic groups, genders and social classes.

We avoided complete collapse, but have not ‘built back better’

The pandemic accelerated some innovations, such as digital transformation, the data-driven economy, a rise in automation and AI, investment in green energy, and some collaborative technology regulation. But the future of globalisation, growth, environmentalism, consumption patterns, technology and inequality is as unclear in this world as it was in 2019.

This world has not chosen to strengthen global institutions

The same international tensions remain, with no firm commitment to new ways of doing business or politics. There will be enough stability to plan and to develop budgets based on established markets and policies, albeit with limited funding. National and regional regulations are aimed at better preserving economic sovereignty, reducing dependency and cutting CO2 emissions; but there is no concerted global effort to reduce social tensions or radically decarbonise.

Nations and companies increasingly guard, trade and 'weaponise' their data

Standards of living continue to improve for consumers in the global middle classes

Younger and more radical groups grumble, feeling that we 'missed a chance' to accelerate social progress. At the same time, older people are pleased to get 'back to normal' – not least in order to buy the world some time to address the next crisis.

Brands continue to develop their social purpose

Responding to ethically minded consumers and the threats to their own supply chains posed by climate change, companies and citizens are getting closer to working towards the same future.

Global tech companies have capitalised on the post-pandemic digital economy

Citizens rely on them for recruitment, banking, travelling, communication and healthcare.

Russia and China have created different internets, with different regulatory frameworks

In the west, there has been no dramatic changes to regulation of media or internet. Consumers increasingly feel that large tech companies are too big and unresponsive, while nations and companies guard, trade and 'weaponise' their data.



Divergent pathways: three alternative futures

Three further pathways explore what would happen if the economic situation changes, and if the tensions in values and in society play out in different ways. They may appear less probable from today's standpoint, but they are all well within the realms of plausibility.





Divergent pathways: three alternative futures

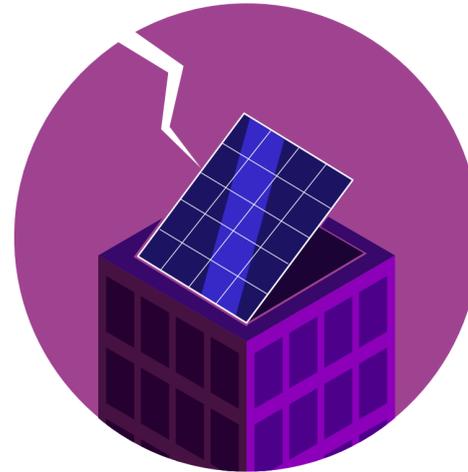


LOCAL POWER: Protecting our communities

In a slower economic climate, citizens focus on regional economies, products and services.

Supply chains are shorter, reconfigured to be more resilient and frugal, and innovation in this space thrives.

There is for many a sense of relief, contentment and comfort, as we focus on what is near to us. However, immigration, social media and the aspirations of youth make it hard to ignore our global connections, so there are real tensions in this world.

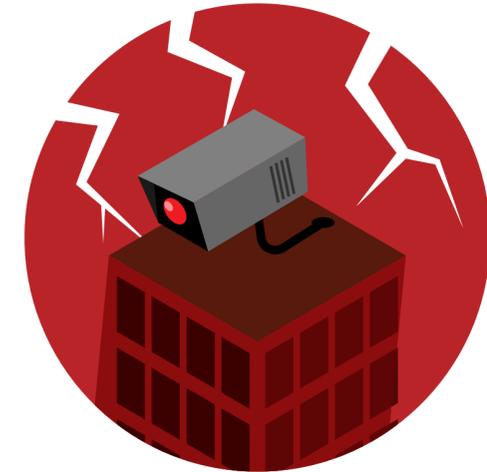


TRANSFORMING POWER: Metamorphosis of society

A swift economic recovery and continued climate emergencies have pushed the world in another direction. In this future, people and organisations focus on making our economies longer-term, valuing the climate and changing economics for the 21st century.

Businesses collaborate to compete for the wallets of consumers, more of whom are actively choosing ethical companies.

Big tech and big states have a lot of power in this world, and some groups protest shrinking personal freedoms.



FRACTURED POWER: Increasingly fragile states

A slow economy and the complete collapse of several countries' ecosystems is creating a world of extremes.

Starvation drives climate migration, infectious diseases affect the poor, and even the powerful economies of China and India struggle to contain civil protest. At the same time, a consumer economy and tech-driven innovation are still present in richer cities and nations, and borders are sealed.

Vaccine refusal and supply issues mean that the COVID-19 disease continues to break out around the world, sending markets into chaos.

What's actually going to happen?

Familiar Power: indicators which show this world emerging

The world of 2025 (and beyond) may be based on the core pathway we have laid out, but it will also contain elements of all the others, and more. To find out what will happen, we can monitor the development of key events in the world. These events indicate which pathways are emerging and how the world will look.

What do these futures mean for me?

Harness the power of foresight with Ipsos experts. We offer advisory services to inspire constructive discussion upstream of key issues, helping you set your direction, and course-correct when it matters.

We would welcome a discussion with you about how your organisation can address the uncertainties which lie ahead of us.



Power balance

New power brokers Power rests with states in markets



Economy

Low-touch economy remains High-touch economy returns



Change

Desire for change Nostalgia for stability



Tech

Regulated, fragmented tech markets Big tech are winners



Innovation

Frugal regional innovation Personalised yet global brands



Institutions

Strengthened global institutions Weakened global institutions



Climate

Coherent, proactive global action Regional reaction to climate shocks



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