GLOBAL TRENDS 2021

A changing world

November 2021

GAME CHANGERS

lpsos

After The Crisis How the New Normal Will Look Like the Old Normal

Covid didn't transform human nature, which means that the more some things have changed, the more they'll stay the same.

The Pandemic Really Has Changed The World Forever



Enrique Dans Senior Contributor © Leadership Strategy Teaching and consulting in the innovation field since 1990

Our cities may never look the ame again after the pandemic

Life will never be the same for people over 60

Covid-19 has changed everything. Now we need a revolution for a born-again world Simon Tisdall



PEW RESEARCH CENTER | FEBRUARY 18, 2021

0

Experts Say the 'New Normal' in S As global deman Will Be Far More Tech-Driven, truly radical age Presenting More Big Challenges

Pandemic-proofing: Insurance may never be the same again

The Pandemic Will Change Everything

America 2.0: Ready or not, here it comes. Five cognitive strategies can help.

VID-19 a 'boomer remover' — Why millennials are AILI WILL NEVER BE 1

SIGNALS OF A CHANGING WORLD

China ends funding for coal



Alphafold makes the case for Al



Soaring used car prices



AUKUS awkwardness



Global labour shortages



COVID's long tail in the developing world



China's tech crackdown



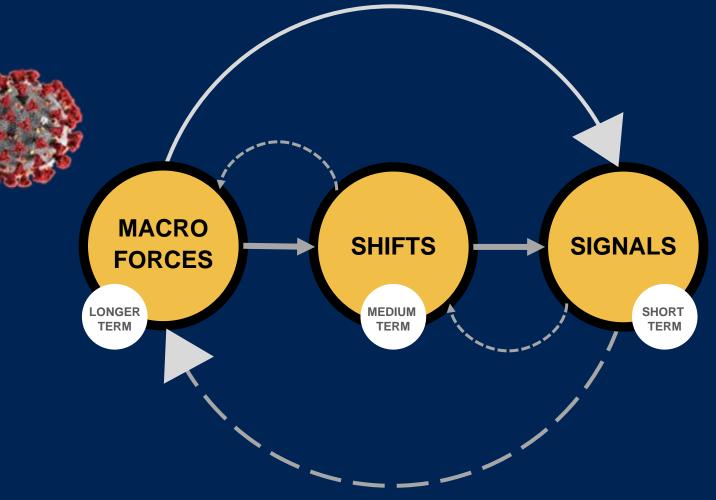
Social media challenges

🔿 Meta



OUR THEORY OF CHANGE:

After the initial shock, the impacts of COVID-19 echo through the system





THE MACRO FORCES REFLECT THE IMPACT OF COVID-19

Dynamic populations



Growing inequality and opportunity



Geopolitical tensions



Data world



Technology tipping points



Our fragile planet



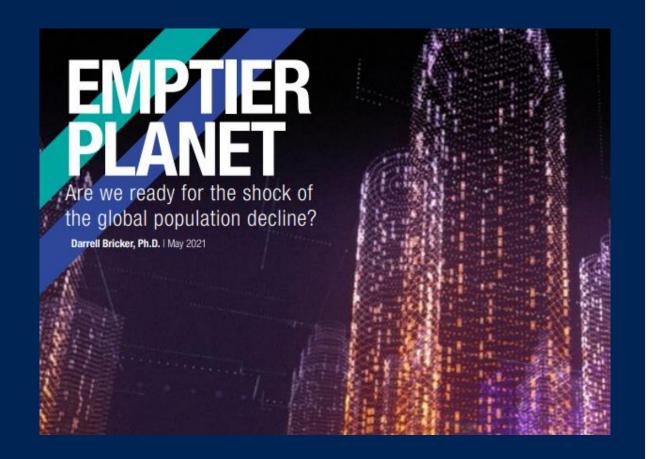


DYNAMIC POPULATIONS

A shifting world

Developed world birth rates have fallen under COVID – but greater economic disruption in emerging world means birth rates there likely to rise

But migration on the rise as travel is eased and likely to rise further in an era of extreme climate





OUR FRAGILE PLANET

Coping with extremes

The pandemic hit to carbon emissions was small – and total CO2 output is rising again

Global carbon emissions must peak by 2025 to meet the 1.5C target set in Paris





GEOPOLITICAL TENSIONS

Multipolarity and unilateralism

'Vaccine diplomacy' as rich countries provide jabs to others to burnish their credentials

Areas of contest shift; the US leaves Afghanistan and shuns France for Australia





GROWING INEQUALITY AND OPPORTUNITY

Winners and losers of COVID

Global income inequality fell under the pandemic as more advanced nations experienced bigger economic impacts

Yet signs within-country inequality has risen; recessions produce winners and losers – with younger people and those in weaker positions often on the losing end





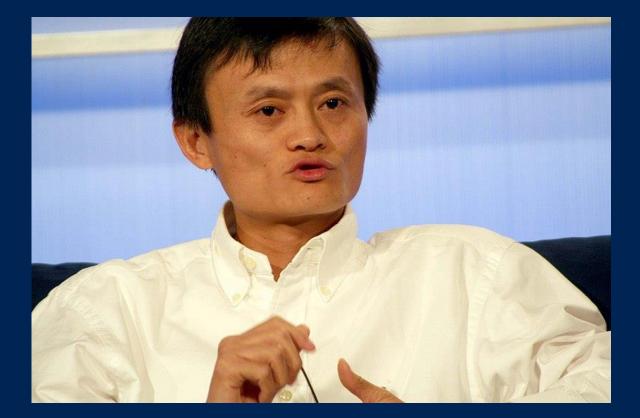
TECH TIPPING POINTS

A government techlash?

Shift to living online further empowered tech firms like Facebook, Tencent, Alibaba...

Yet many governments are now acting strongly against these firms – the cautionary tale of Jack Ma

OECD agreement on a minimum global corporate tax rate for big tech





DATA WORLD

Instant aggregation

Data sharing and analysis has underlined testing and vaccination efforts in many countries

Yet fake news can spread just as quickly – Covid has been an accelerant for conspiracies





ONE AND A FALEYEARSIN EMPEREDO PUBLIC VALUES STAND?

OUR TRENDS FROM 2019...





13 - © Ipsos | Global Trends 2021

OUR TRENDS FROM 2019



Views on the medical profession sit within this trend: faith in the advice of doctors on one side and a desire to take control of personal healthcare and seek second opinions on the other.



This trend reflects the values of those who are actively thinking about their health and also see good health as a wider concern for the planet as well as themselves.



Nostalgia and an imagined past offers a comfort to citizens in many countries – especially those who feel left behind by the pace and nature of change.



This trend explores the common responses to a world that feels dangerous and unequal: fear of the future, radical populism and a retreat to nationalism and tradition.



This trend looks at opposing forces in modern capitalism: those who seek greater redistribution of wealth and proponents of conspicuous consumption.



The divided world trend explores divides in personal values – individualism, support for democracy, attitudes to religion and spiritualism, as well as an emerging front around attitudes towards issues of sexuality.



OUR TRENDS FROM 2019



This trend speaks to the division between those who see dealing with climate change as the challenge of our time versus those who are more sceptical. 2021 has seen the balance tip decisively towards the former.



Seeking simplicity – and even seeking to be alone – is a trend in its own right, with many feeling that the world is increasingly loud and fast-moving and alarming.



This trend encapsulates the consumer view that brands need to appear authentic – whether that is in their values, the provenance of their goods, or how they are reviewed online.





Data dilemmas tracks the balance of different public responses to an increasingly data-hungry world: mostly we see anxiety and fatalism, but also a small but rising group who are actively comfortable sharing their data.

This trend examines the varying responses to technology – ranging from technophiles who demand the latest in everything, to those who want to unplug.



We examine evolving attitudes to globalisation, including interest in foreign products and content as well as how open people are to experiencing life in another part of the world.



BY SEPT 2020 WE SAW MORE CHANGE IN SOME AREAS

Healthcare, brands, climate, globalisation and reactions to inequality





2021 IS SIMILAR – EXISTING TRENDS CONTINUE

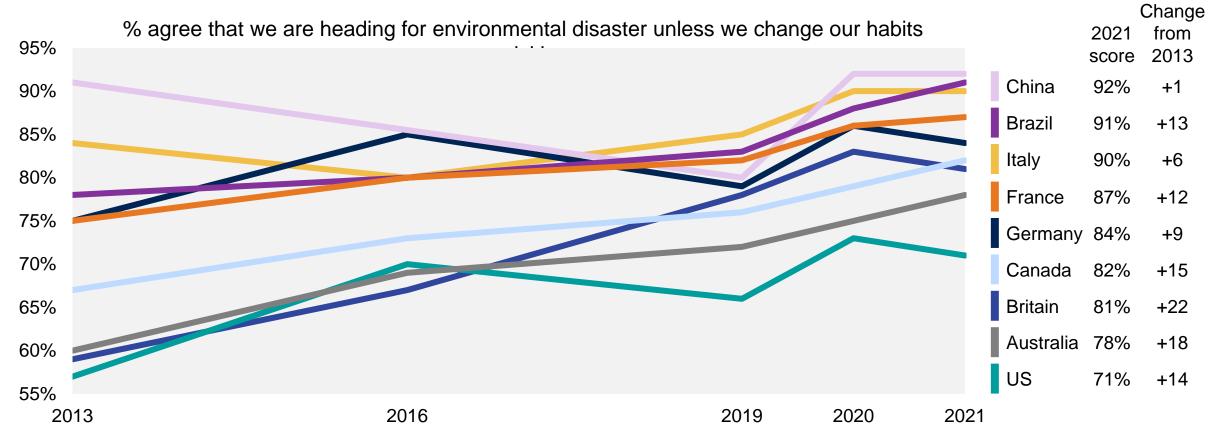
Continuity in trends on climate, purpose and health

Change for brands, globalisation and online/offline world



WHERE DO WESSE CONTINUTY NTRENDS?

CLIMATE CONCERN REMAINS KEY





IN FACT, IT TRUMPS MORE TRADITIONAL WORRIES

Which of the following, if either, is more important to you personally:

Companies paying the correct amount of tax?

Companies doing as much as they can to reduce harm to the environment?

Denmark	40%	54%
Great Britain	40%	
Australia	38%	
Italy	37%	
US		
Peru	36%	45%
Canada	35%	63%
Romania	32%	54%
	32%	62%
South Africa	32%	60%
France	31%	51%
Ireland	29%	61%
Germany	28%	64%
Chile	27%	70%
India	26%	61%
Kenya	26%	72%
Argentina	25%	70%
Indonesia	25%	66%
Nigeria	22%	69%
Philippines	22%	62%
Mexico	19%	77%
Thailand	17%	65%
Colombia	16%	82%
Singapore		74%
Brazil		78%
China		78%

Base: 24,332 adults aged 16-75 (18-75 in US and CA) in 25 markets interviewed August - September 2021



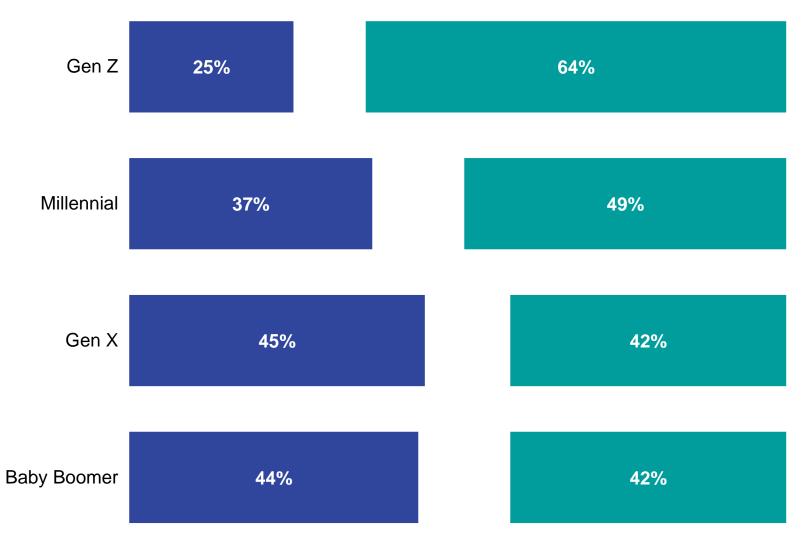
WITH A STRONG GENERATIONAL SKEW

Great Britain

Which of the following, if either, is more important to you personally:

Companies paying the correct amount of tax?

Companies doing as much as they can to reduce harm to the environment?

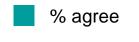


Base: 1,080 British adults aged 16-75, interviewed online 23 - 26 July 2021



OUR HEALTH REMAINS IMPORTANT

I will sacrifice convenience if it means getting healthier products



% disagree

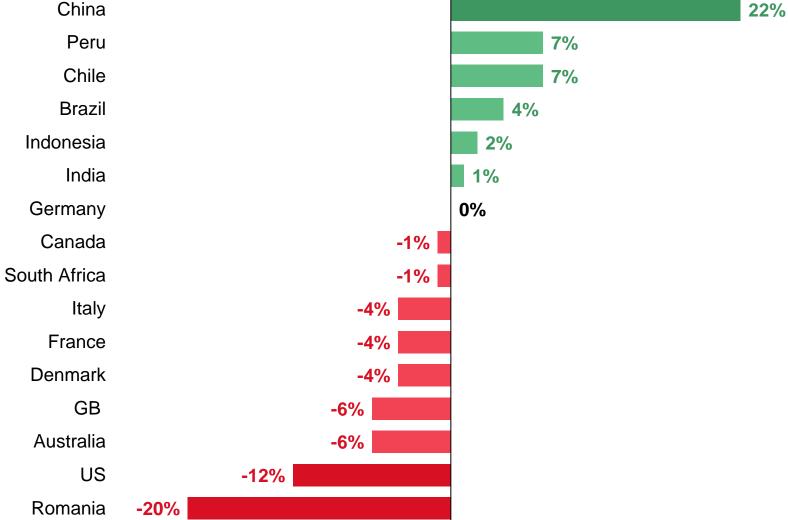
Nlierenie		
Nigeria	91%	9%
China	88%	10%
India	88%	9%
Philippines	88%	10%
Kenya	85%	15%
Indonesia	83%	16%
Thailand	83%	
Italy	81%	
South Africa	81%	16%
Romania	79%	16%
Brazil	78%	19%
Peru	78%	16%
Ireland	75%	20%
Singapore	75%	21%
Australia	72%	23%
Colombia	72%	21%
Mexico	71%	21%
Argentina	69%	21%
Canada	69%	24%
Chile	69%	22%
France	68%	25%
Germany	67%	29%
UŠ	67%	28%
Great Britain	66%	24%
Denmark	61%	30%
	Papas 24 222 adulta aread 16 75 (19 75 in LIS and CA) in 25 marks	ata interviewed August September 2021

Base: 24,332 adults aged 16-75 (18-75 in US and CA) in 25 markets interviewed August - September 2021



FAITH IN VACCINES FELL IN 2020 BUT HAS REBOUNDED FOR MOST China

I believe all recommended vaccines are beneficial for me and my family – % change in agree from 2019 to 2021



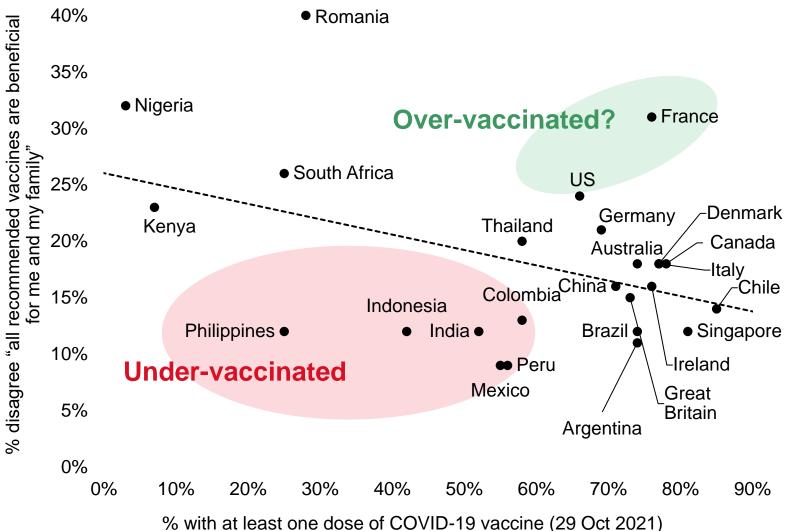


SCEPTICISM IS HIGHER IN LESS VACCINATED COUNTRIES

% received at least one dose of a COVID-19 vaccine

Х

% disagree that all recommended vaccines are beneficial



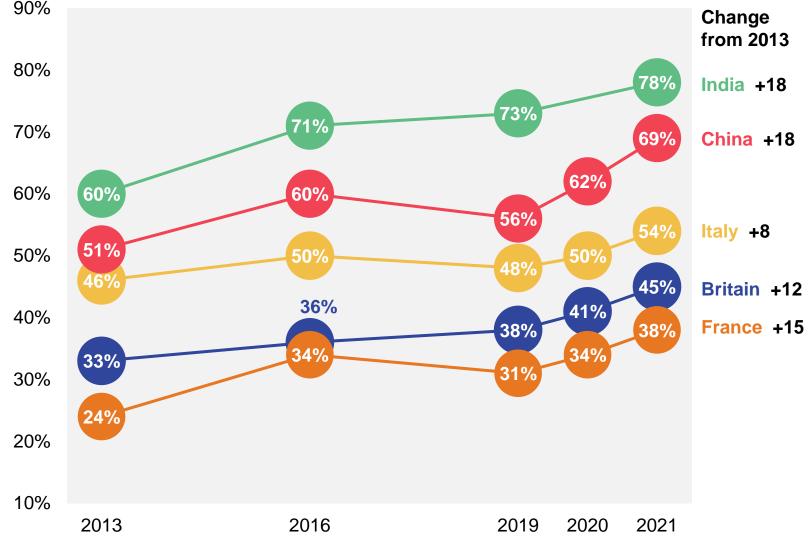
lpsos Global Trends Series: 500-1,000 adults aged 16-75 (18-75 in US and CA) per market per year

Vaccination statistics collected from Our World In data. Romania figure from 26 November 2021 and China figure from 18 September 2021



BUT OVERALL: RISING OPTIMISM IN THE POWER OF

% agree that eventually all medical conditions and diseases will be curable





FEELING OVERWHELMED HAS RISEN IN MANY MARKETS SINCE 2013

I wish I could slow down the pace of my life – % agree 90% Change 85% 2021 from 2013 80% score China 89% +16 75% India 70% 73% +24 65% Brazil 67% +17 60% Germany 66% +7 55% S Africa 63% +1 50% US 55% +7 45% Britain 59% +17 40% 2013 2016 2019 2021 2020



NOSTALGIA VARIES MARKEDLY

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

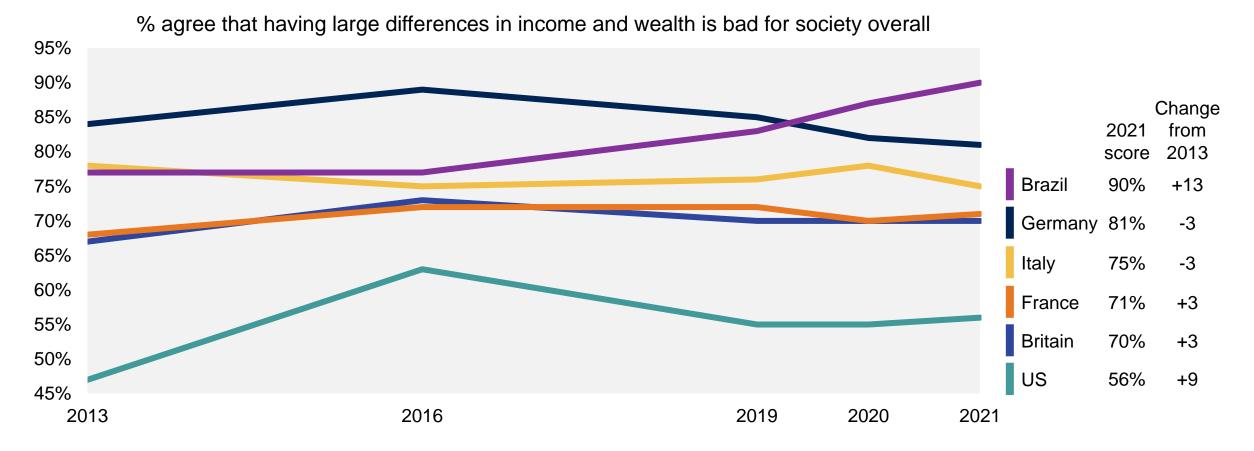
% agree
% disagree

Thailand	82%	15%
Nigeria	78%	21%
India	74%	20%
Philippines	68%	28%
Singapore	66%	26%
South Africa	64%	33%
Kenya	62%	37%
France	60%	30%
Indonesia	59%	37%
US	59%	29%
Romania	58%	36%
Denmark	54%	34%
Italy	54%	36%
Mexico	54%	37%
Australia	53%	34%
Brazil	51%	40%
Peru	51%	39%
Great Britain	50%	36%
Canada	49%	39%
Argentina	48%	32%
Germany	44%	46%
Chile	42%	47%
Colombia	42%	45%
Ireland	41%	49%
China	24%	71%

Base: 24,332 adults aged 16-75 (18-75 in US and CA) in 25 markets interviewed August - September 2021



AS DO VIEWS ON THE IMPACT OF INCOME DISPARITIES



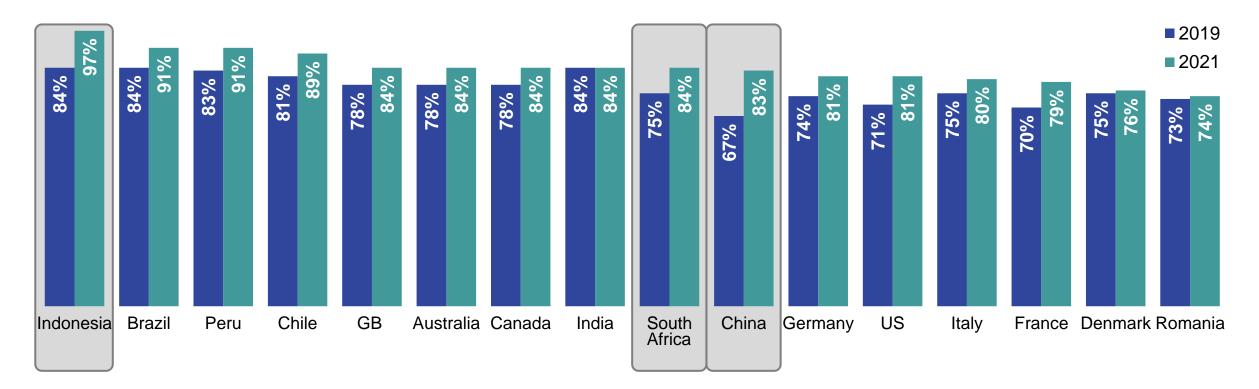
Ipsos Global Trends Series: 500-1,000 adults aged 16-75 (18-75 in US and CA) per market per year

28 - © Ipsos | Global Trends 2021



SOCIAL MEDIA FIRMS STILL HAVE 'TOO MUCH POWER' – MORE NOTABLE GROWTH IN SOME EMERGING MARKETS

Social media firms have too much power - % agree 2019 and 2021



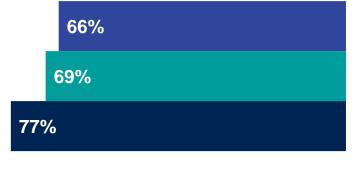


YET ANXIETY AND APATHY REMAIN THE KEY REACTIONS TO THE DATA DILEMMA

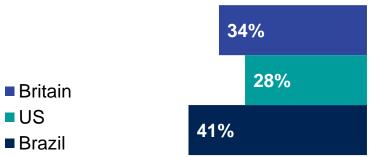
% agree with data values statements in 2021



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



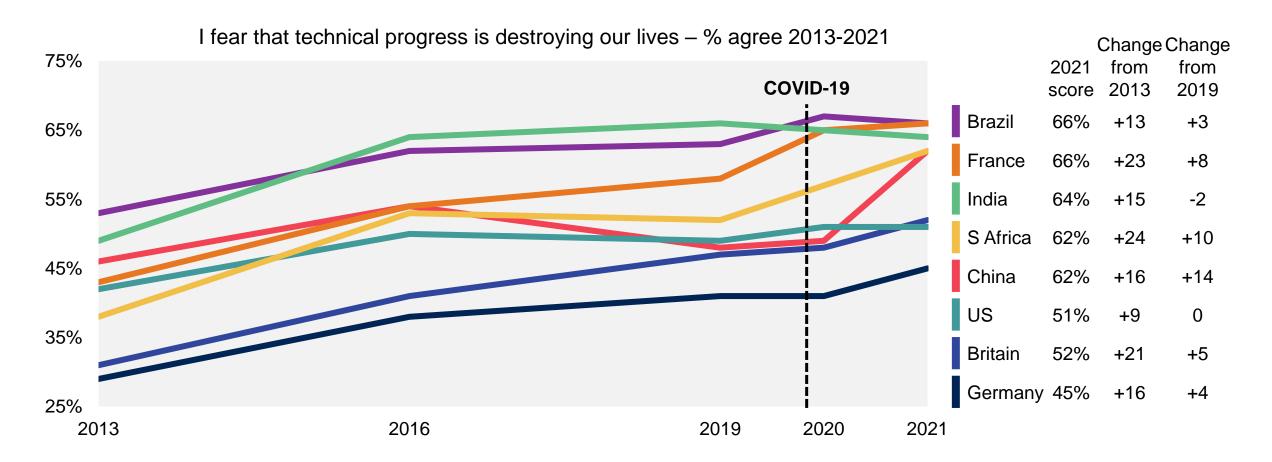
I am concerned about how information being collected about me when I go online is being used by my own government



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



CONCERN ABOUT TECH ROSE MORE PRE-COVID FOR DEVELOPED MARKETS

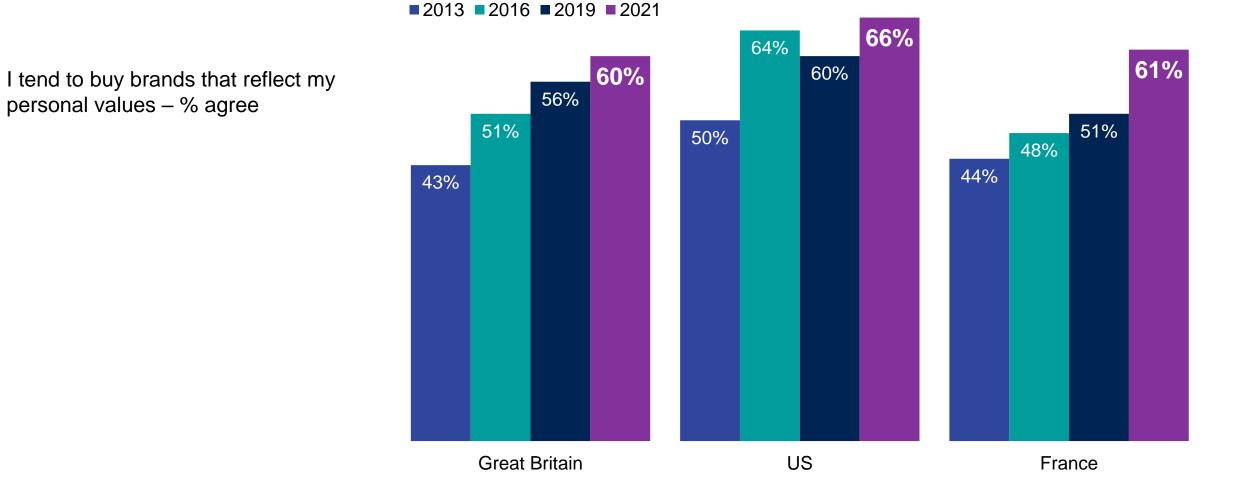




AND WHERE IS THERE EMERGING CHANGE?



THE RISE AND RISE OF BRAND PURPOSE



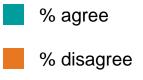
lpsos Global Trends Series: 1,000 adults aged 16-75 (18-75 in US and CA) per market per year

33 – © Ipsos | Global Trends 2021

lpsos

MANY SEE A ROLE FOR BUSINESS IN SOCIAL ISSUES

Business leaders have a responsibility to speak out on social and political issues affecting my country



Nigeria	87%	12%
Philippines	85%	12%
Singapore	85%	10%
India	84%	11%
Kenya	84%	16%
South Africa	84%	14%
Romania	77%	13%
Thailand	77%	15%
Colombia	75%	18%
Peru	75%	17%
Ireland	74%	16%
Australia	71%	21%
Brazil	70%	23%
Canada	68%	22%
Chile	67%	24%
Great Britain	67%	20%
Germany	66%	22%
Indonesia	64%	26%
Mexico	62%	27%
Argentina	60%	23%
Italy	53%	29%
Denmark	52%	32%
France	51%	36%
US	51%	39%

Base: 24,332 adults aged 16-75 (18-75 in US and CA) in 25 markets interviewed August - September 2021

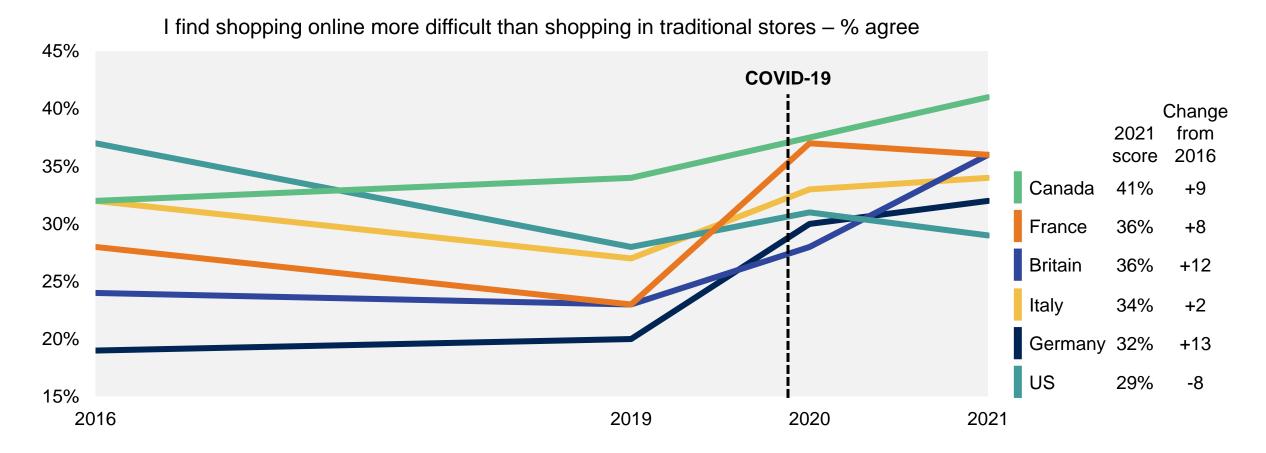




Base: 24,332 adults aged 16-75 (18-75 in US and CA) in 25 markets interviewed August - September 2021



ONLINE FRICTION HAS RISEN SINCE COVID-19

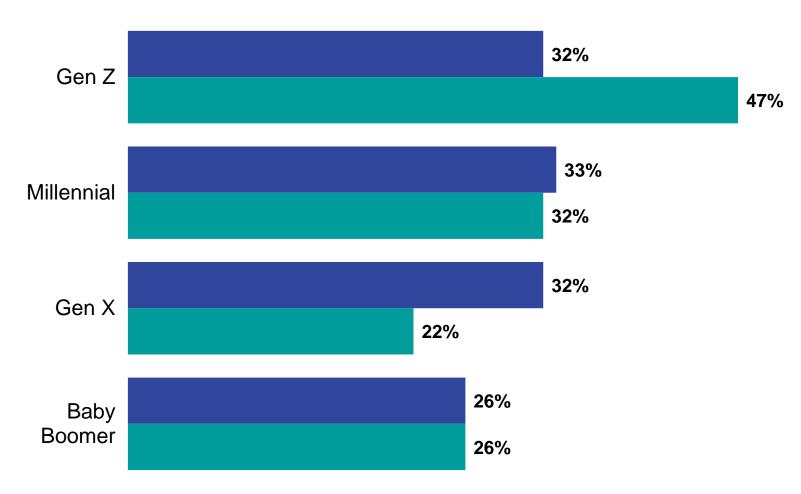




BUT WHO IS EXPERIENCING THE MOST FRICTION?

United States

I find shopping online more difficult than shopping in traditional stores – % agree



Ipsos Global Trends Series: c.1,000 US adults aged 18-75 interviewed per wave



IT REMAINS EASIER FOR MOST HOWEVER

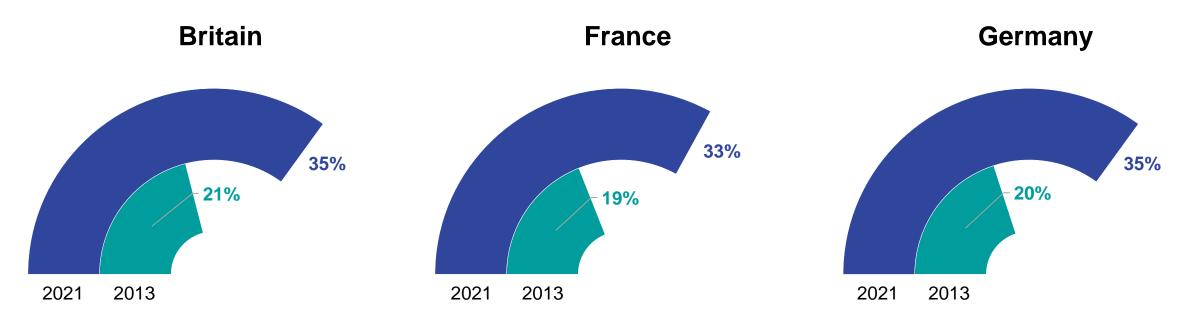
I find shopping online more difficult than shopping in traditional stores

US 29% 67% Brazil 33% 66% Romania 31% 65% Thailand 35% 63% Thailand 35% 63% Germany 32% 63% France 36% 62% Singapore 37% 61% China 35% 61% Italy 34% 61% Great Britain 36% 60% Philippines 40% 58% Chile 39% 58% Colombia 39% 58% Colombia 39% 56% Vagree Canada 41% 56% Denmark 38% 56% 56% Vagree Peru 43% 54% 56% Mexico 44% 49% 52% 54% Mexico 44% 49% 38% 56% South Africa 59% 38% 36% 36% Kenya 60% 36% 36% 36%		Indonesia	24%	73%
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Chile 39% 58% Ireland 38% 58% Colombia 39% 57% % agree Canada 41% 56% Denmark 38% 56% % disagree Peru 43% 54% India 42% 54% Argentina 42% 52% Australia 45% 51% Mexico 44% 49% South Africa 59% 38% Kenya 60% 36%			36%	60%
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Kenya 60% 36% Nigeria 65% 32%				
Nigeria 65% 32%				
•		-		
Page: 24.222 adults aread 16.75 (19.75 in LIS and CA) in 25 markets interviewed August September 2021		Nigeria		



AND WE ALSO SEE SOME GROWTH IN COMFORT WITH SHARING DATA

People worry too much about their privacy online - I'm not concerned about what companies or the government know about me - % agree

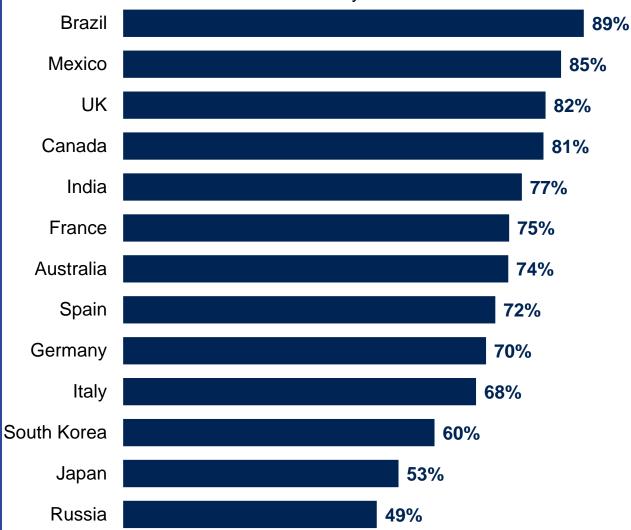




BLACK LIVES MATTER HAS ALSO CHANGED THE NARRATIVE

To what extent if at all do you think that racism and other forms of intolerance which is the base of the protests in the United States is present in your country?

% who think racism is **very** / **somewhat** present in their country



Ipsos Global Advisor: 15,908 adults aged 16-75/18-75 in 13 countries, interviewed online June 2020



WHILE MOST THINK THEY LIVE IN COHESIVE NEIGHBOUR-

My local area is a place where people from different backgrounds get on well together – % agree

Indonesia	93%	
Nigeria	92%	
Philippines	87%	
China	86%	
India	86%	
Kenya	85%	
Singapore	84%	
Thailand	83%	
Canada	82%	
South Africa	81%	
Ireland	81%	
Australia	79%	
Romania	75%	
US	75%	
Peru	74%	
Brazil	71%	
Great Britain	70%	
Colombia	69%	
Denmark	67%	
Italy	67%	
Mexico	67%	
Chile	66%	
France	66%	
Germany	65%	
Argentina	63%	



THEY AGREE LESS ON HOW MINORITIES ARE TREATED

"People from different backgrounds and ethnic minorities in my country are treated fairly"

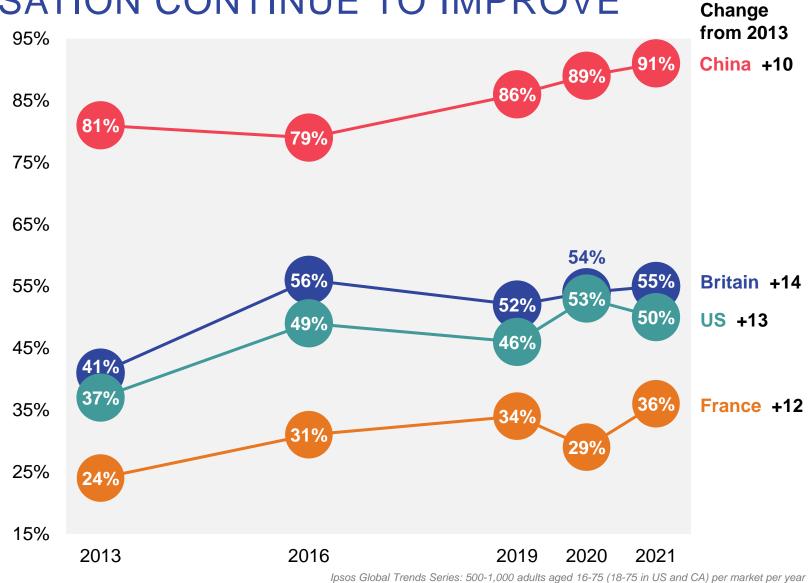
	Indonesia	73%	23%
	Nigeria	72%	28%
	India	71%	23%
	Thailand	66%	28%
	Singapore	65%	28%
ounds	Philippines	60%	34%
untry	Australia	58%	35%
, see a second sec	Denmark	55%	34%
	Kenya	55%	45%
	Romania	54%	35%
	South Africa	50%	47%
	Germany	49%	38%
	Ireland	46%	44%
	Great Britain	45%	43%
% agree	Canada	42%	48%
	Argentina	41%	44%
% disagree	US	41%	52%
, a diodgi oo	France	37%	53%
	Italy	37%	49%
	Mexico	36%	56%
	Peru	36%	57%
	Colombia	35%	60%
	Brazil	34%	60% 60%
	Chile	33%	62%





VIEWS OF GLOBALISATION CONTINUE TO IMPROVE

Globalisation is good for my country – % agree





YET MANY SHOW A PREFERENCE FOR LOCAL / NATIONAL Nigeria Kenya

I think global brands make better products than brands that are just local to my country

	Nigeria		
	Kenya	67%	32%
	India 🛽	62%	32%
	Thailand	58%	37%
	Singapore	55%	39%
etter	South Africa	53%	44%
	Brazil	49%	46%
e just	Philippines	47%	49%
	Argentina	43%	45%
	Romania	39%	53%
	Chile	38%	54%
	Peru	38%	55%
	Indonesia	37%	59%
	China	36%	57%
	Australia	34%	55%
% agree	Colombia	33%	60%
	Ireland	33%	56%
% disagree	Great Britain	32%	45%
	US	31%	48%
	Germany	30%	57%
	Denmark	29%	54%
	Canada	28%	59%
	Mexico	28%	63%
	Italy	23%	62%
	France	20%	71%



AND FEEL A CLOSER AFFINITY TO THE NATION

I feel that I more a citizen of the world than a citizen of my country

	India	67%	28%
	Thailand	63%	32%
	South Africa	58%	40%
	Nigeria	55%	43%
	Chile	53%	41%
he world than	n Brazil	51%	43%
	' Colombia	51%	44%
	Italy	51%	40%
	Singapore	51%	43%
	Peru	50%	44%
	Philippines	50%	45%
	Argentina	45%	43%
	Germany	45%	47%
	Kenya	44%	56%
	Romania	43%	51%
% agree	Great Britain	42%	47%
	Mexico	42%	50%
% disagree	Australia	41%	51%
	France	41%	51%
	Ireland	40%	51%
	Indonesia	39%	57%
	Canada	36%	56%
	Denmark	36%	57%
	China	35%	61%
	US	35%	55%



VALUES REMAIN MOSTLY UNCHANGED 1.5 YEARS IN

Still more continuity than change

Climate concern was not interrupted by COVID-19

Link between brand and values/purpose

But we see potential for evolution in some areas

Attitudes to data and online/offline world

Rebalancing between global and local





BUT WHETHER WE SEE IT OR NOT, THE WORLD IS CHANGING FAST



Multipolar world **Bipolar world**

Climate concern Climate action

Online and offline

Political leaders > Social leaders



POST PANDEMIC, THE CAPACITY FOR CHANGE IS THERE...

The COVID-19 pandemic has shown how Indone quickly people can change their behaviour _{Saudi Ara} in a crisis – % agree Mex

South Africa	87%	
Turkey	83%	
China	82%	
India	81%	
Indonesia	81%	
^r Saudi Arabia	81%	
Mexico	80%	
Argentina	79%	
Australia	78%	
Brazil	77%	
Canada	76%	
Great Britain	75%	
France	73%	
US	70%	
South Korea	70%	
Germany	68%	l
Italy	67%	
Russia	67%	
Japan	50%	

Ipsos / Global Commons Alliance: 19,735 adults aged 16-75 in G20 countries, interviewed online April-May 2021



THE QUESTION FOR 2022 IS...

How will our slow-changing values clash with our changed world?

And who will lead the public to help them adapt?





ABOUT IPSOS

Ipsos is the third largest market research company in the world, present in 90 markets and employing more than 18,000 people.

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"Game Changers" – our tagline – summarises our ambition to help our 5,000 clients to navigate more easily our deeply changing world.

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GAME CHANGERS

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

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

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder. Ultimately, success comes down to a simple truth: **You act better when you are sure.**