# Ipsos Global Trends 2021

## Aftershocks and continuity

November 2021

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*

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

*Simon Tisdall*

As global deman
truly radical age
Coronavirus –

PEW RESEARCH CENTER | FEBRUARY 18, 2021

**Experts Say the 'New Normal' in 2 Will Be Far More Tech-Driven, Presenting More Big Challenges**

TURE Design

Our cities may never look the ame again after the pandemic

Pandemic-proofing: Insurance may never be the same again

**Life will never be the same for people over 60**

The Pandemic Will Change Everything

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

**WHY BALI WILL NEVER BE T GAIN AFTER COVID**

VID-19 a 'boomer remover' — Why millennials are rry and done with older generation

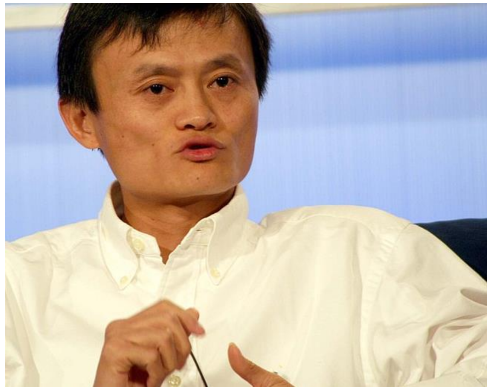
# Signals of a changing world

## China ends funding for coal

## Soaring used car prices

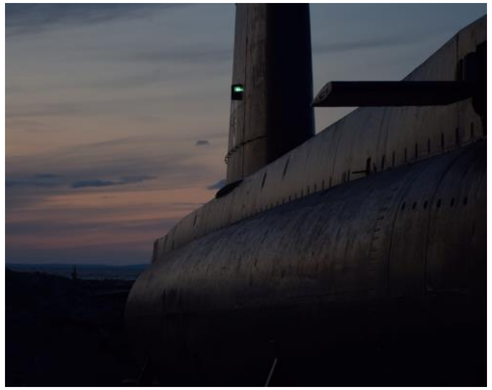
## Global labour shortages

## China’s tech crackdown



## Alphafold makes the case for AI

## AUKUS awkwardness

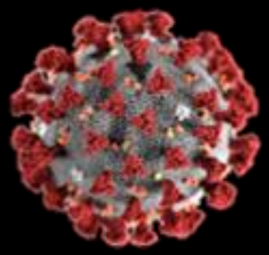


## COVID’s long tail in the developing world

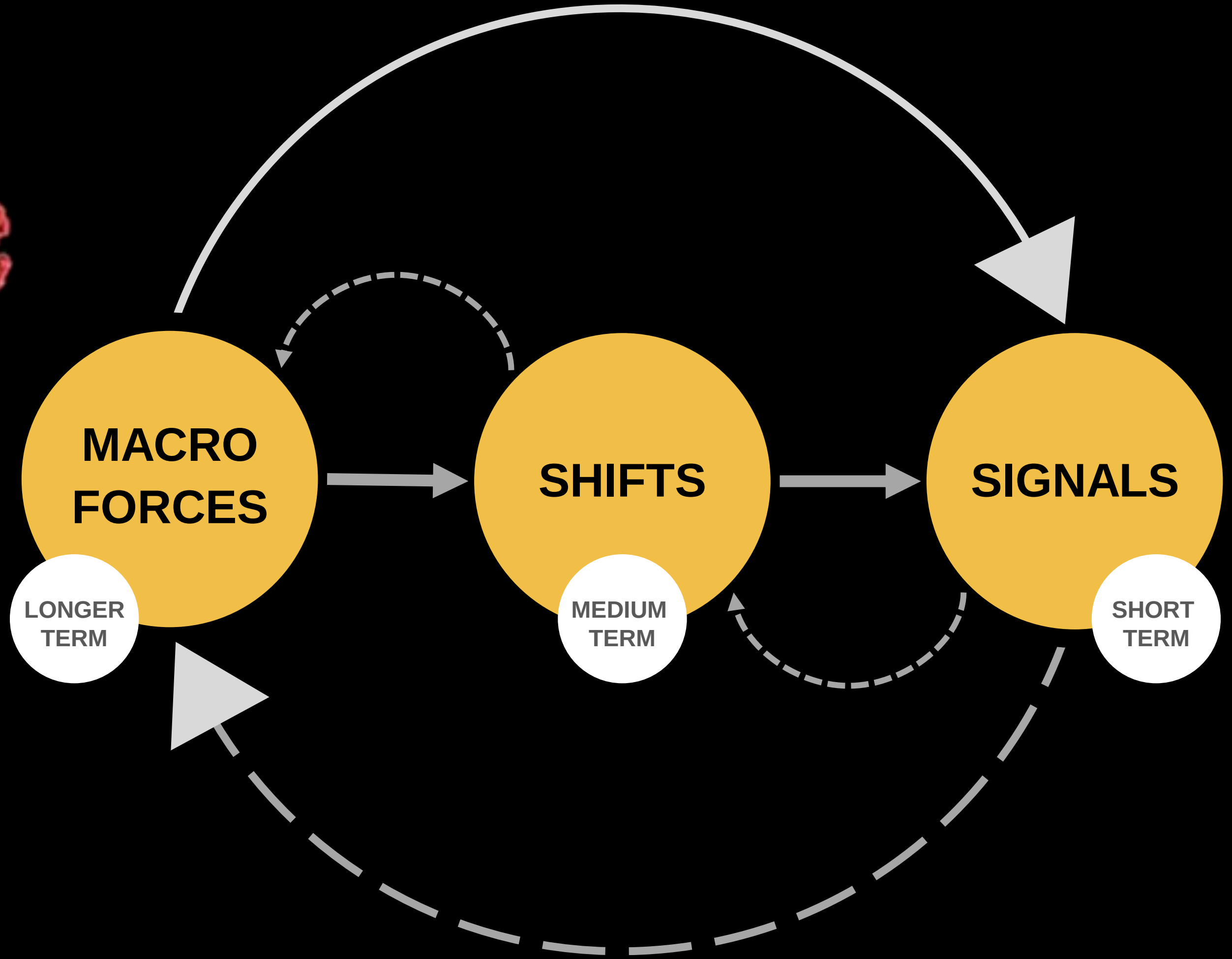
## Social media challenges

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

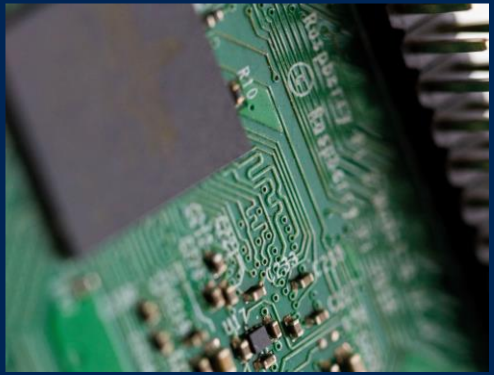
## Dynamic populations

## 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 $CO_2$ 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 half years in – where do public values stand?

# Our trends from 2019…

# Our trends from 2019

**CHOICES OVER HEALTHCARE**

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.

**CONSCIENTIOUS HEALTH**

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.

**THE ENDURING APPEAL OF NOSTALGIA**

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.

**REACTIONS TO UNCERTAINTY AND INEQUALITY**

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.

**CAPITALISM'S TURNING POINT**

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

**A DIVIDED WORLD?**

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

**CLIMATE ANTAGONISM**

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.

**SEARCH FOR SIMPLICITY AND MEANING**

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.

**AUTHENTICITY IS KING**

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**

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.

**THE TECH DIMENSION**

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

**PEAK GLOBALISATION?**

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

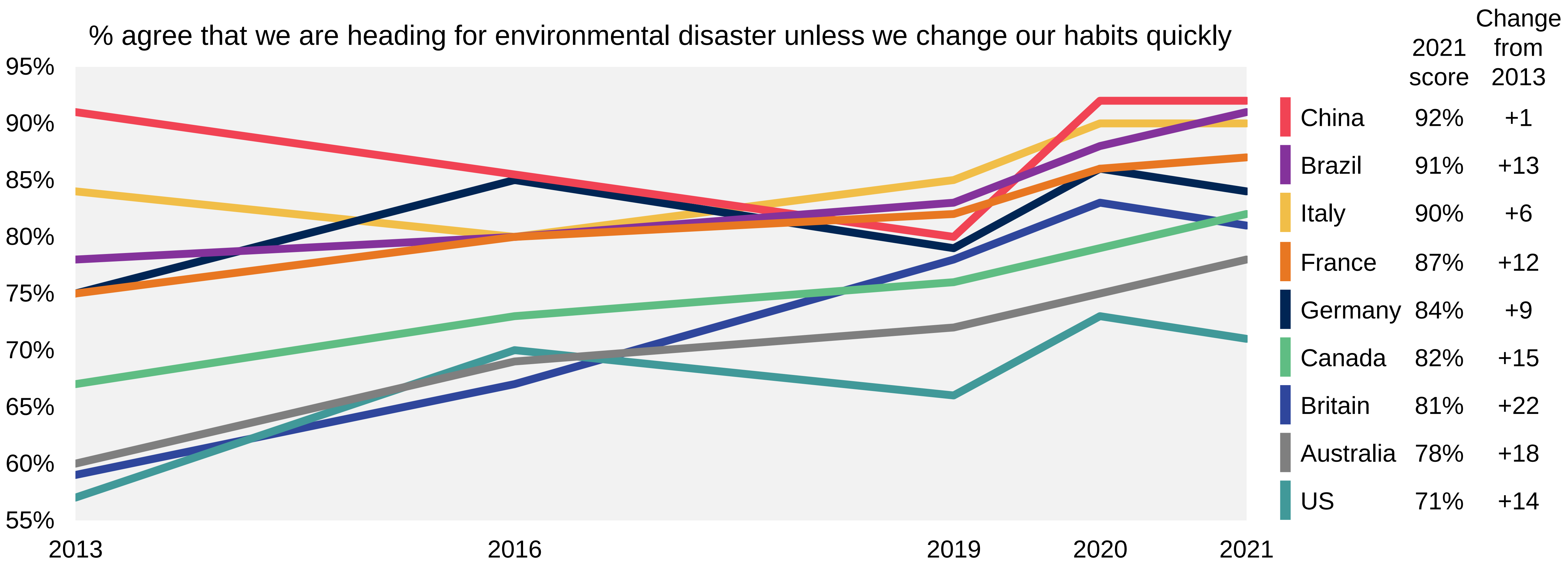
Continuity in trends on climate, purpose and health

Change for brands, globalisation and online/offline world

# Where do we see continuity in trends?

# Climate concern remains key



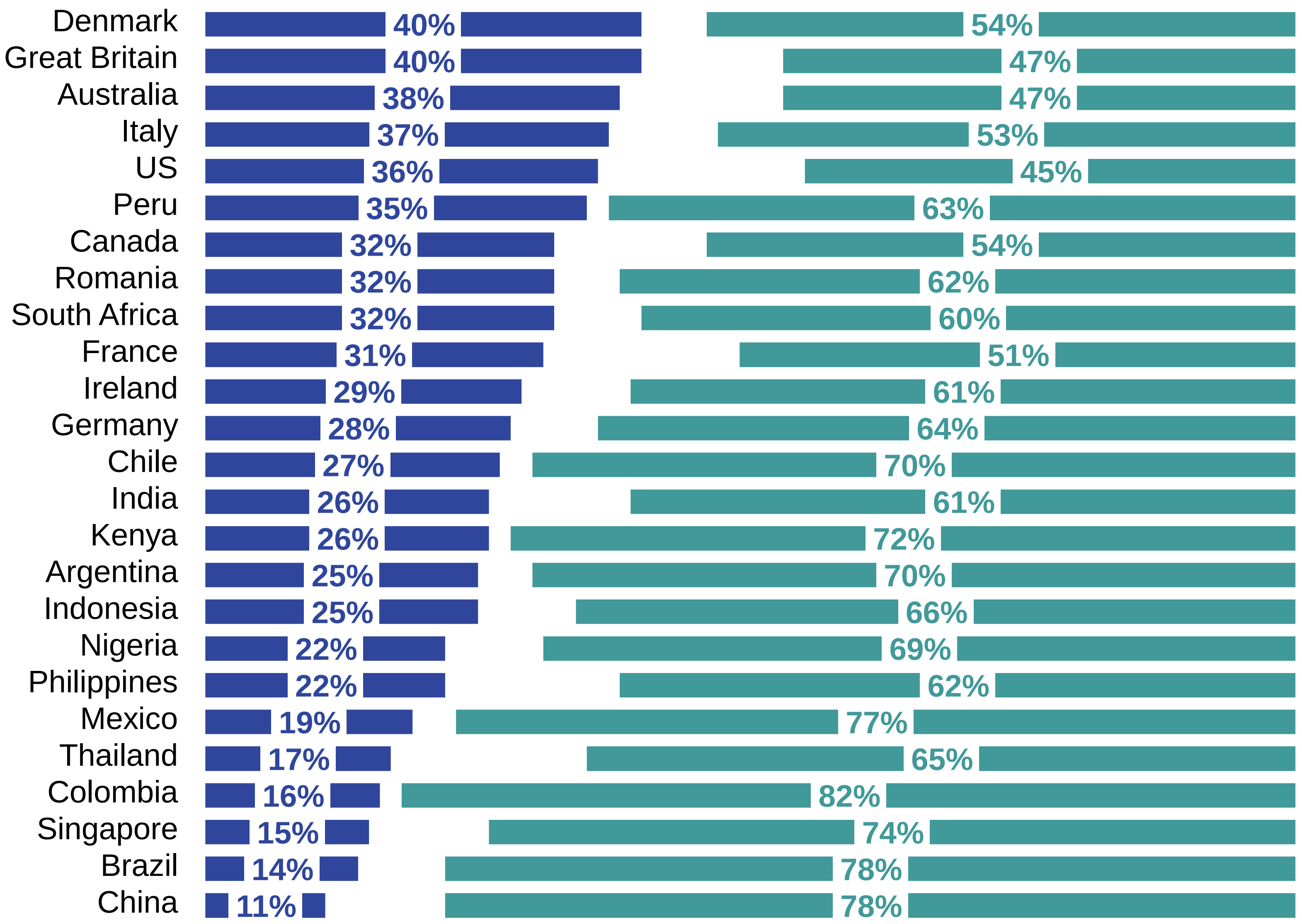

*Ipsos Global Trends Series: 500-1,000 adults aged 16-75 (18-75 in US and CA) per market per year*

# 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?**




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

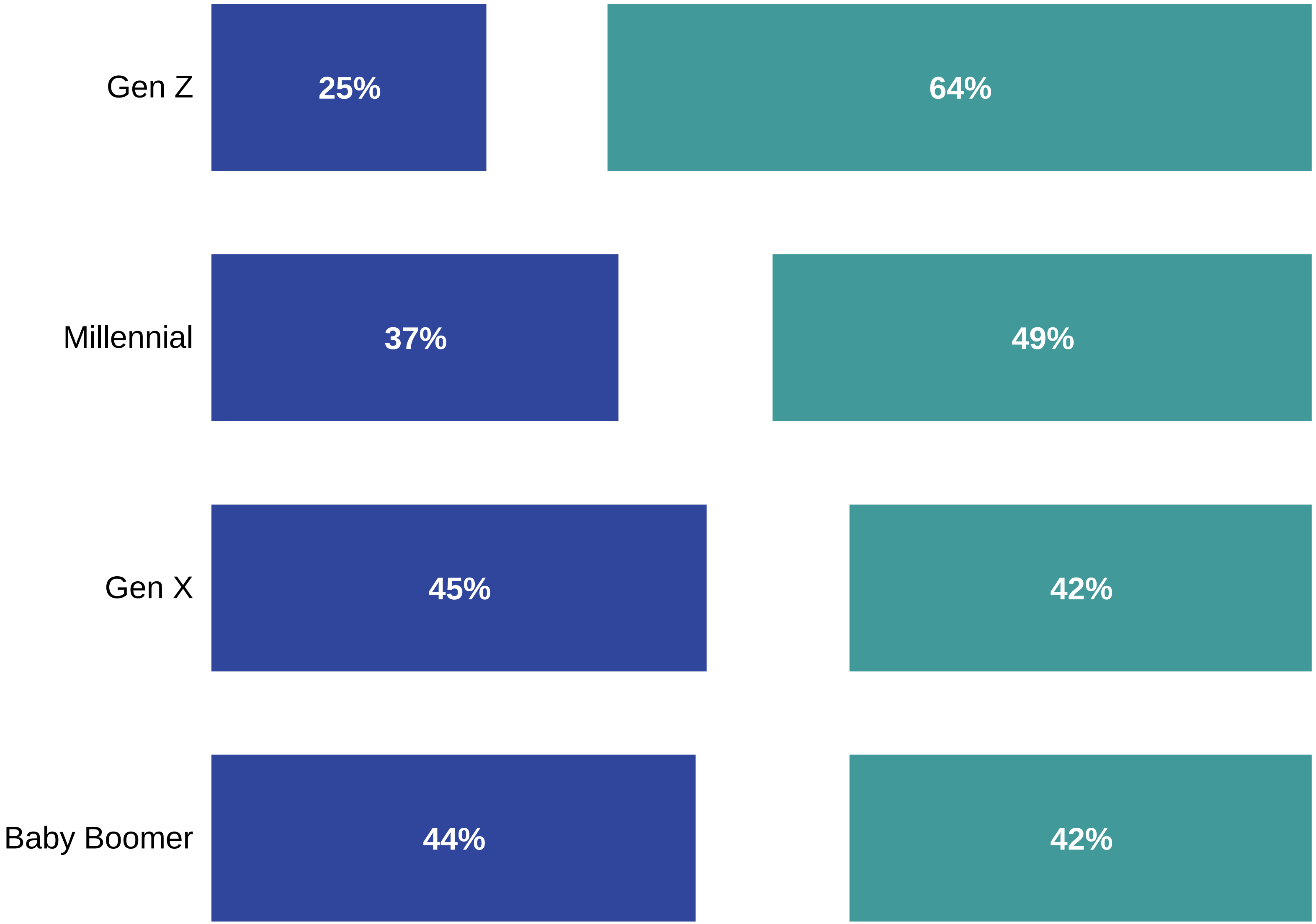
# With a strong generational skew

## Great Britain

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

**Companies paying the correct amount of tax?**

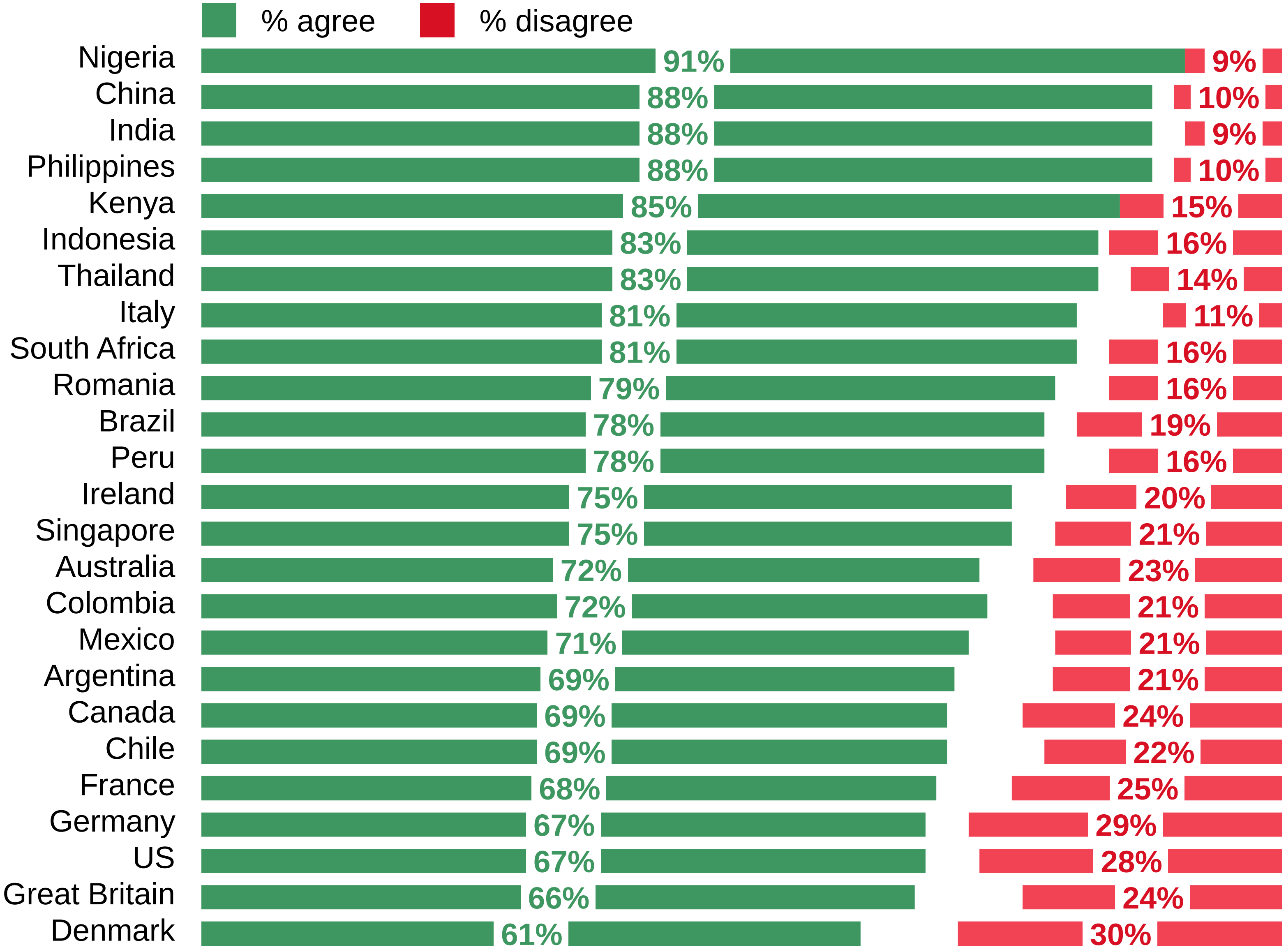
**Companies doing as much as they can to reduce harm to the environment?**




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

# Our health remains important

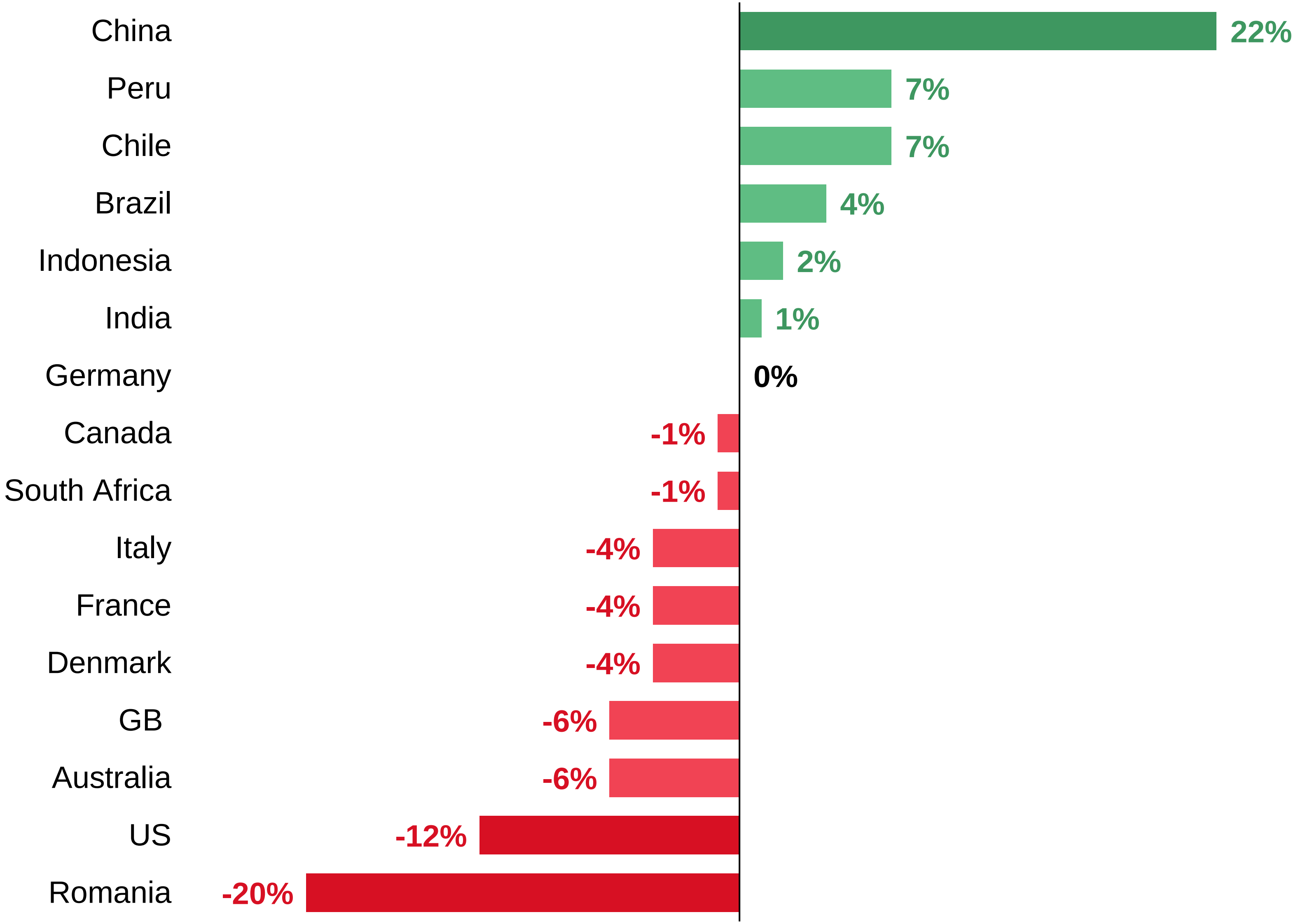
I will sacrifice convenience if it means getting healthier products




*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

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



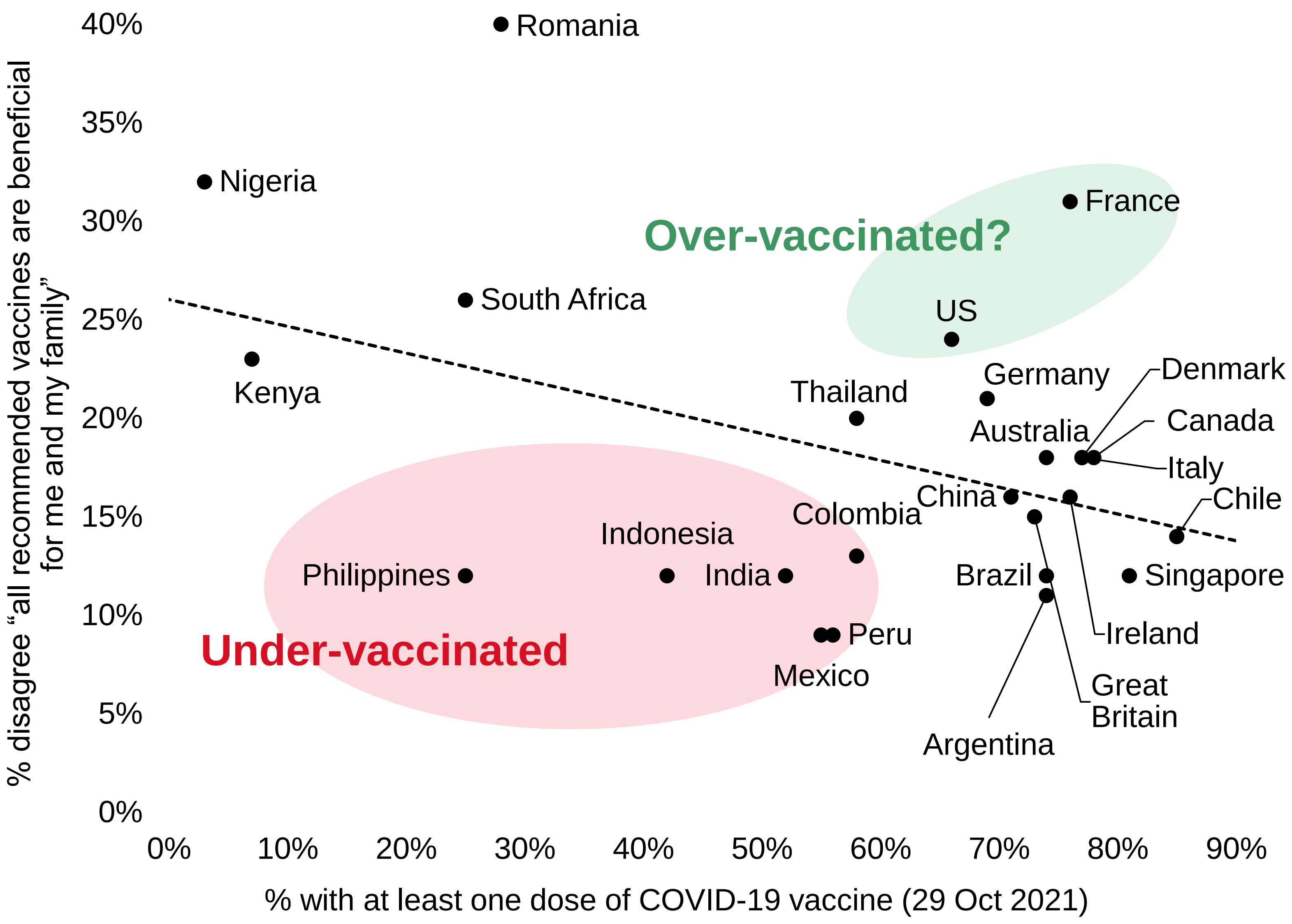

*Ipsos Global Trends Series: 500-1,000 adults aged 16-75 (18-75 in US and CA) per market per year*

# Scepticism is higher in less vaccinated countries

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

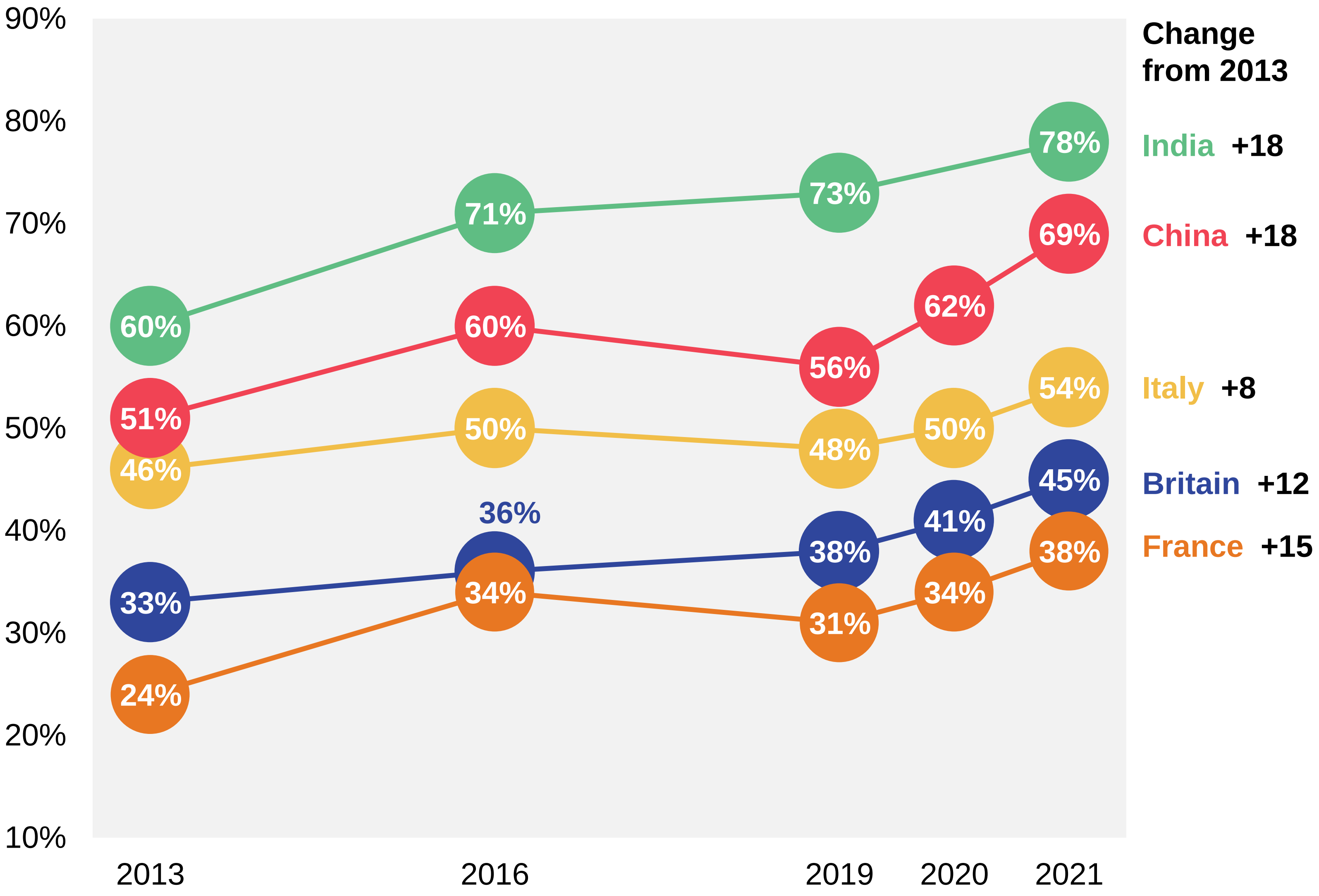
X

% disagree that all recommended vaccines are beneficial




*Ipsos 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*

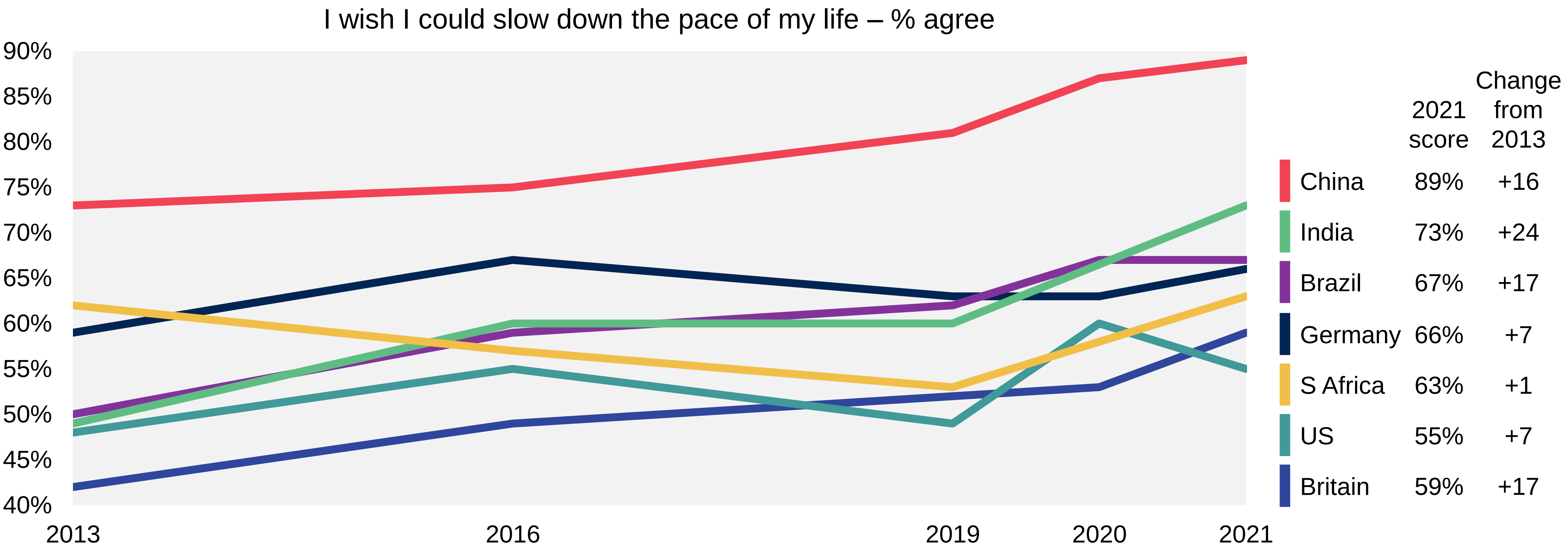
# But overall: rising optimism in the power of science




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

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

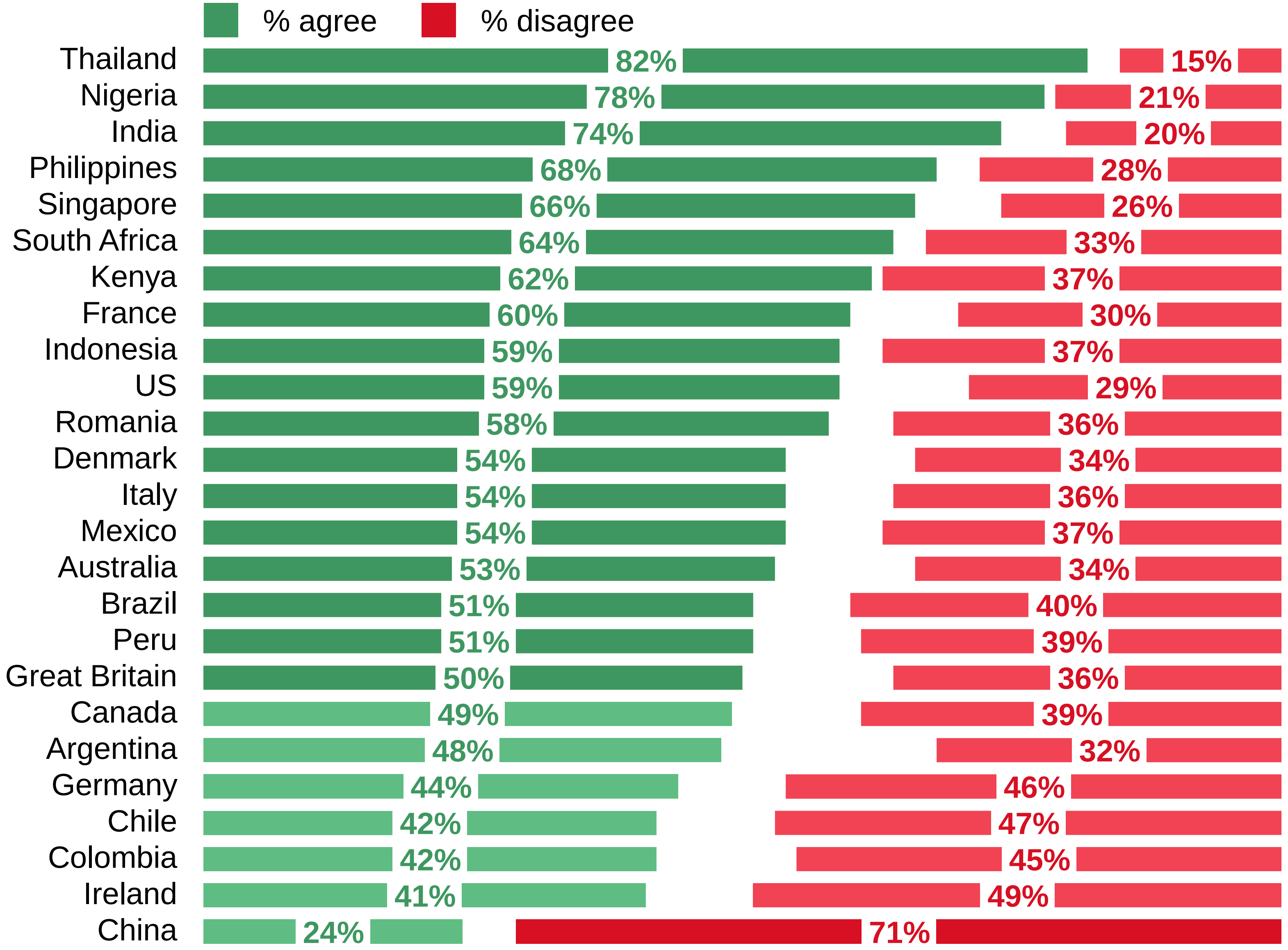
# Feeling overwhelmed has risen in many markets since 2013




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

# Nostalgia varies markedly

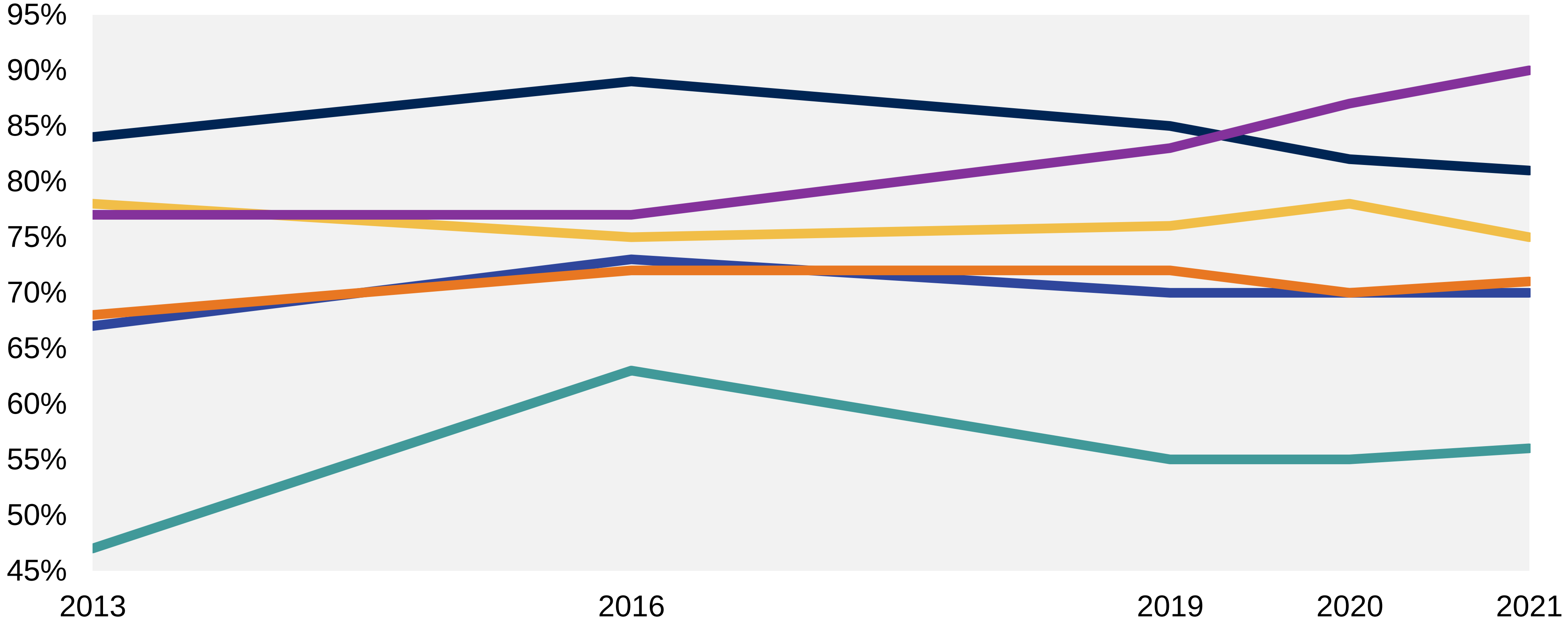
I would like my country to be the way it used to be




*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

% agree that having large differences in income and wealth is bad for society overall



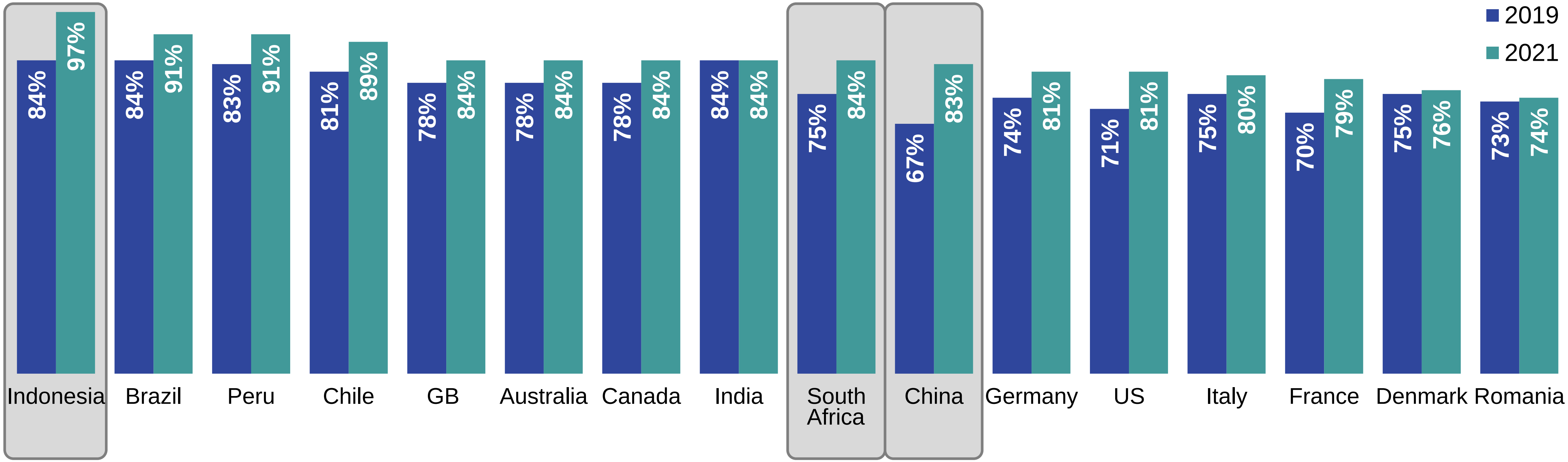

| | 2021 score | Change from 2013 |
|---|---|---|
| Brazil | 90% | +13 |
| Germany | 81% | -3 |
| Italy | 75% | -3 |
| France | 71% | +3 |
| Britain | 70% | +3 |
| US | 56% | +9 |

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

# 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

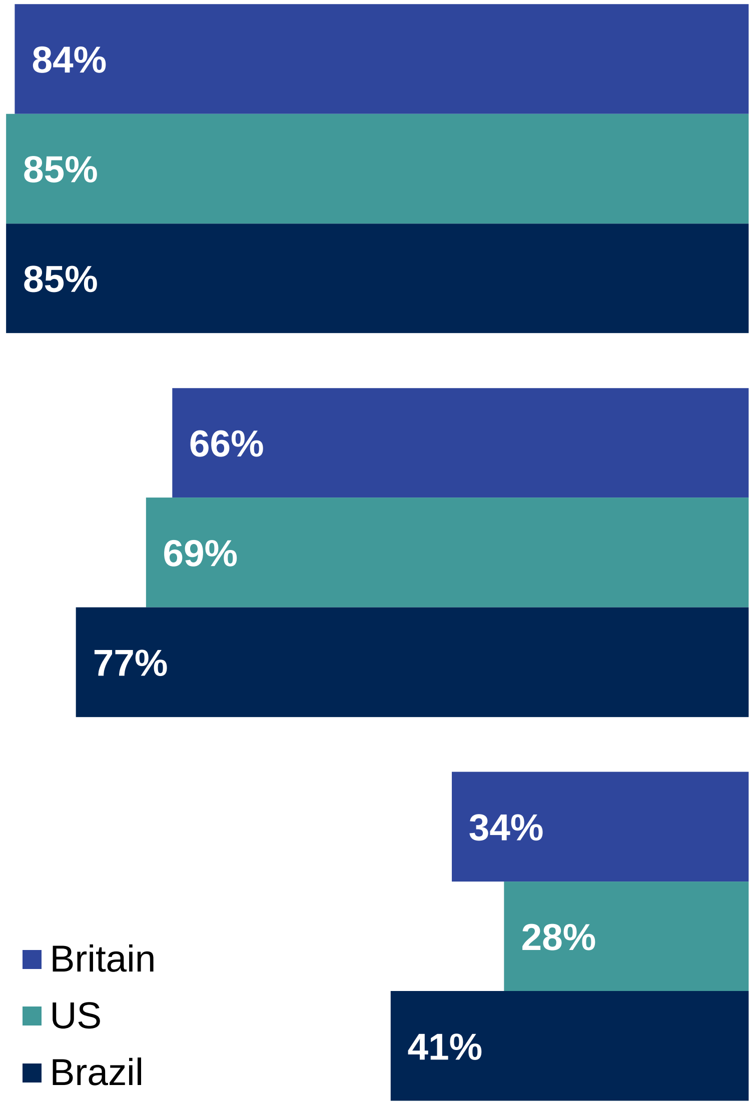



*Ipsos Global Trends Series: 500-1,000 adults aged 16-75 (18-75 in US and CA) per market per year*

# Yet anxiety and apathy remain the key reactions to the data dilemma

% agree with data values statements in 2021




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

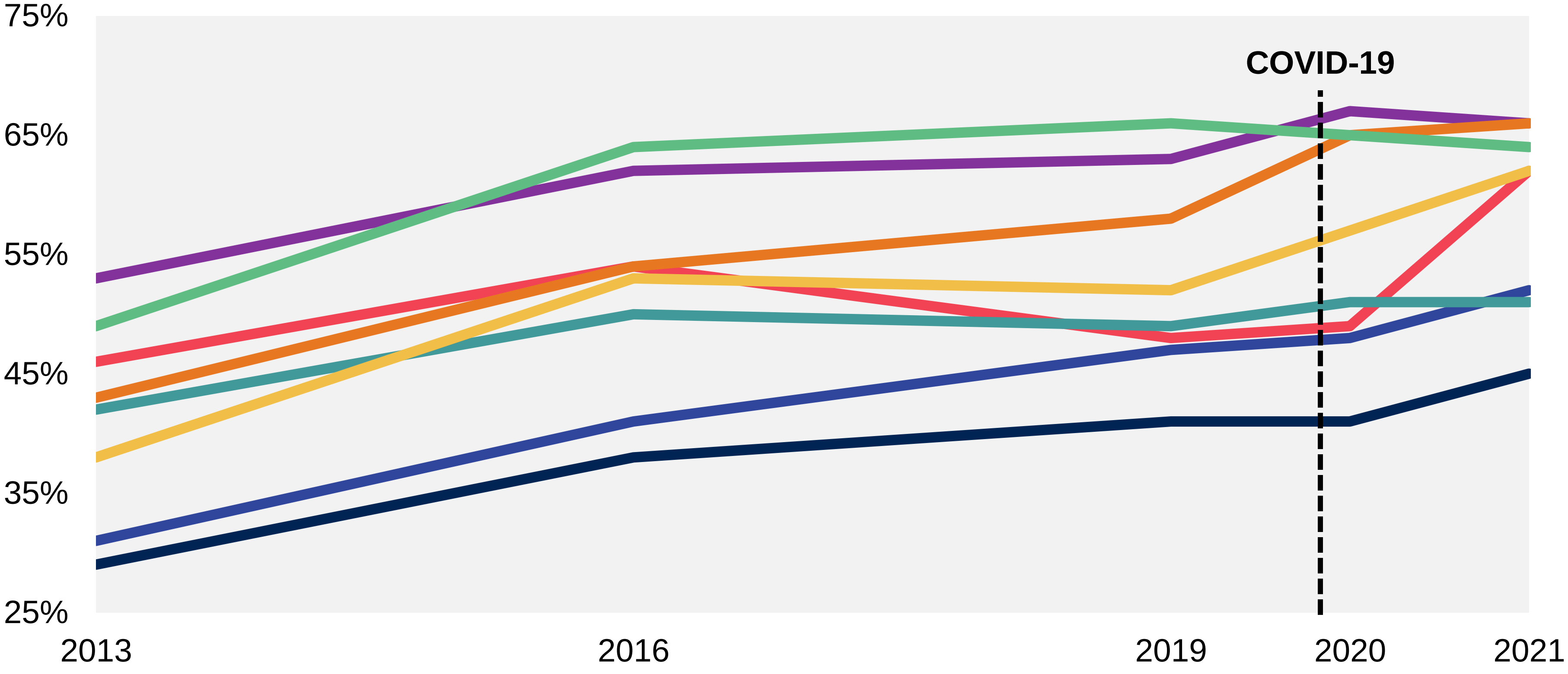
**Data anxiety:**
I am concerned about how information being collected about me when I go online is being used by my own government

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

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

# Concern about tech rose more pre-COVID for developed markets

I fear that technical progress is destroying our lives – % agree 2013-2021

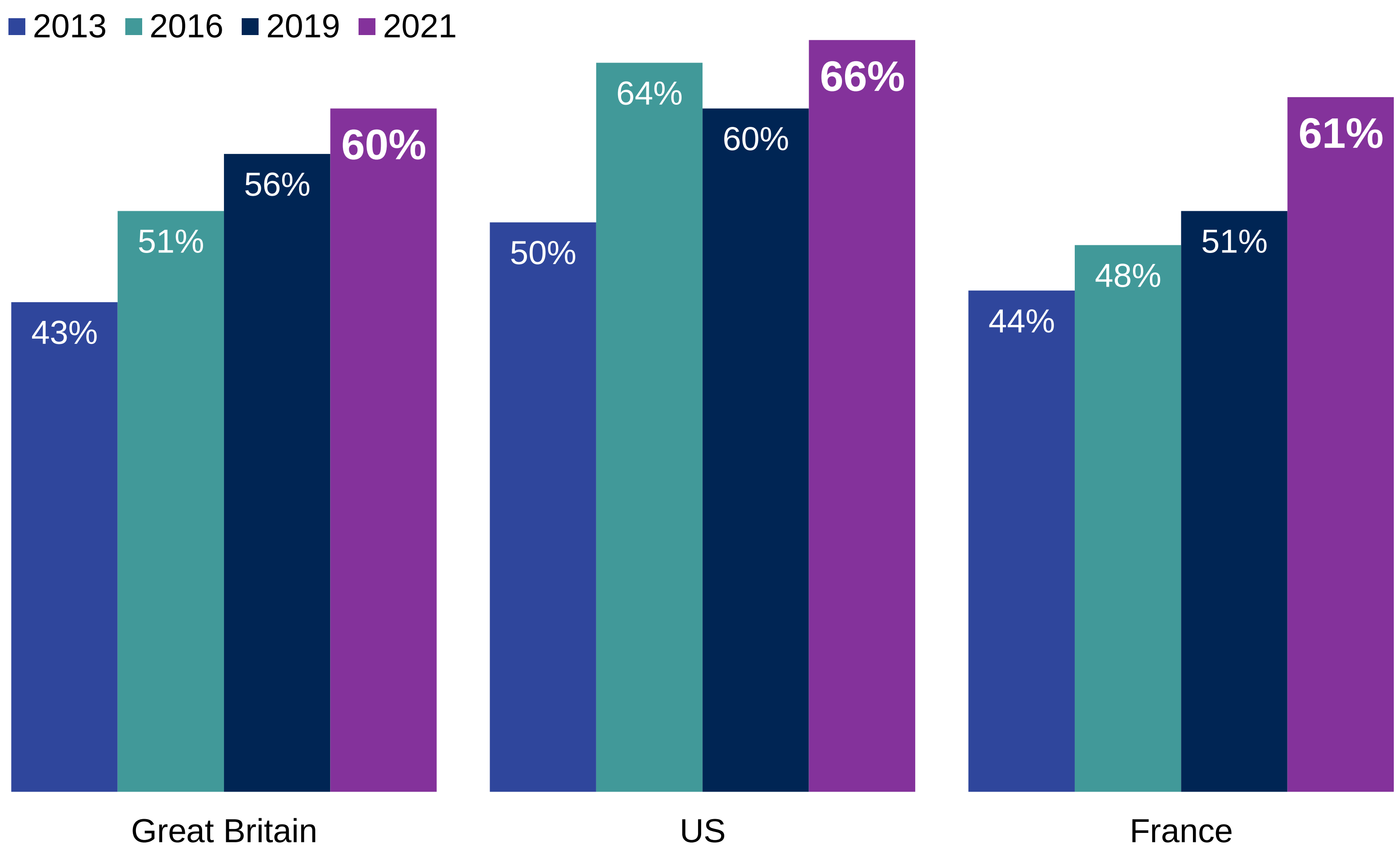



| | 2021 score | Change from 2013 | Change from 2019 |
|---|---|---|---|
| Brazil | 66% | +13 | +3 |
| France | 66% | +23 | +8 |
| India | 64% | +15 | -2 |
| S Africa | 62% | +24 | +10 |
| China | 62% | +16 | +14 |
| US | 51% | +9 | 0 |
| Britain | 52% | +21 | +5 |
| Germany | 45% | +16 | +4 |

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

# And where is there emerging change?

# The rise and rise of brand purpose

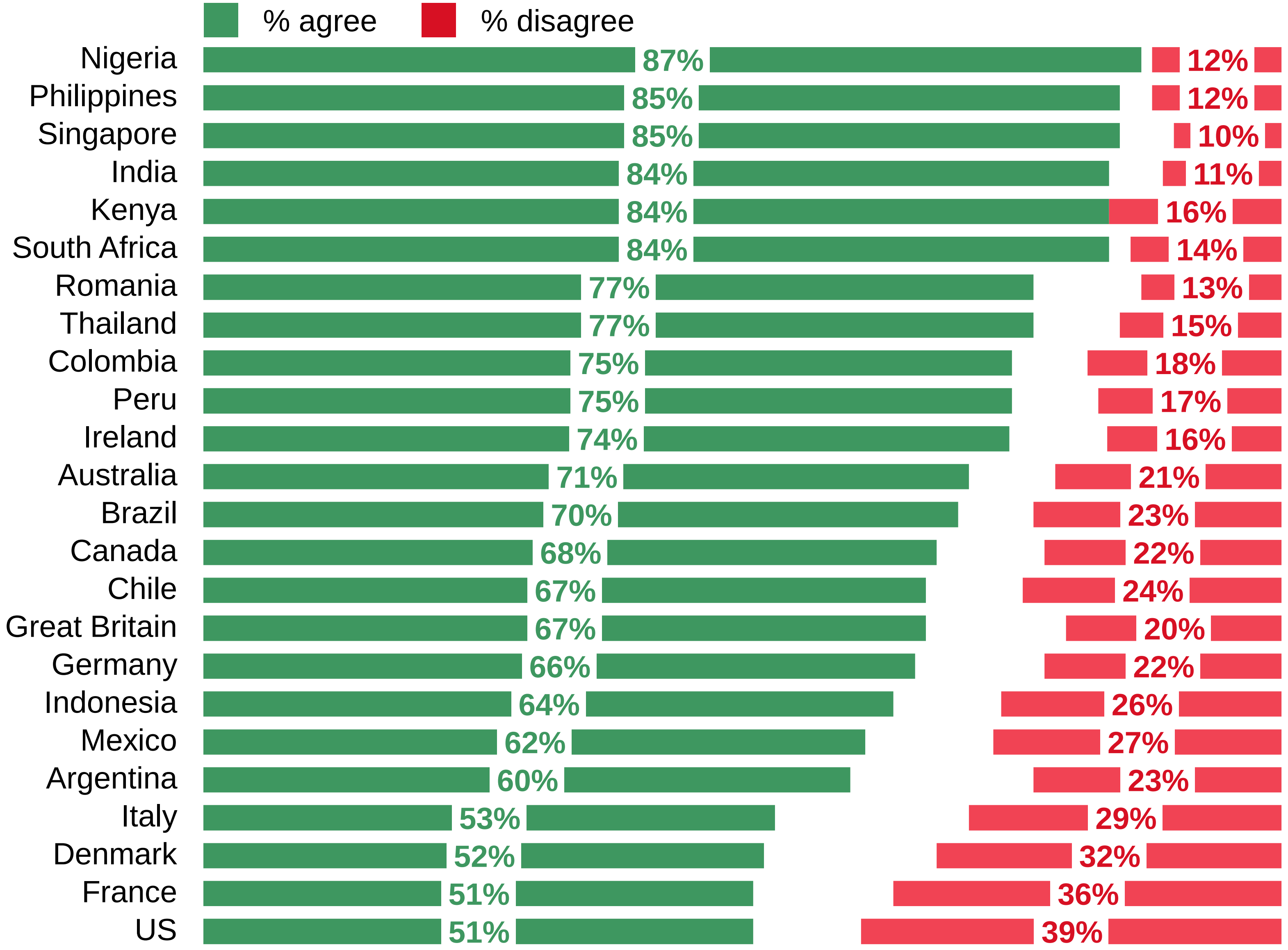



*Ipsos Global Trends Series: 1,000 adults aged 16-75 (18-75 in US and CA) per market per year*

I tend to buy brands that reflect my personal values – % agree

# Many see a role for business in social issues

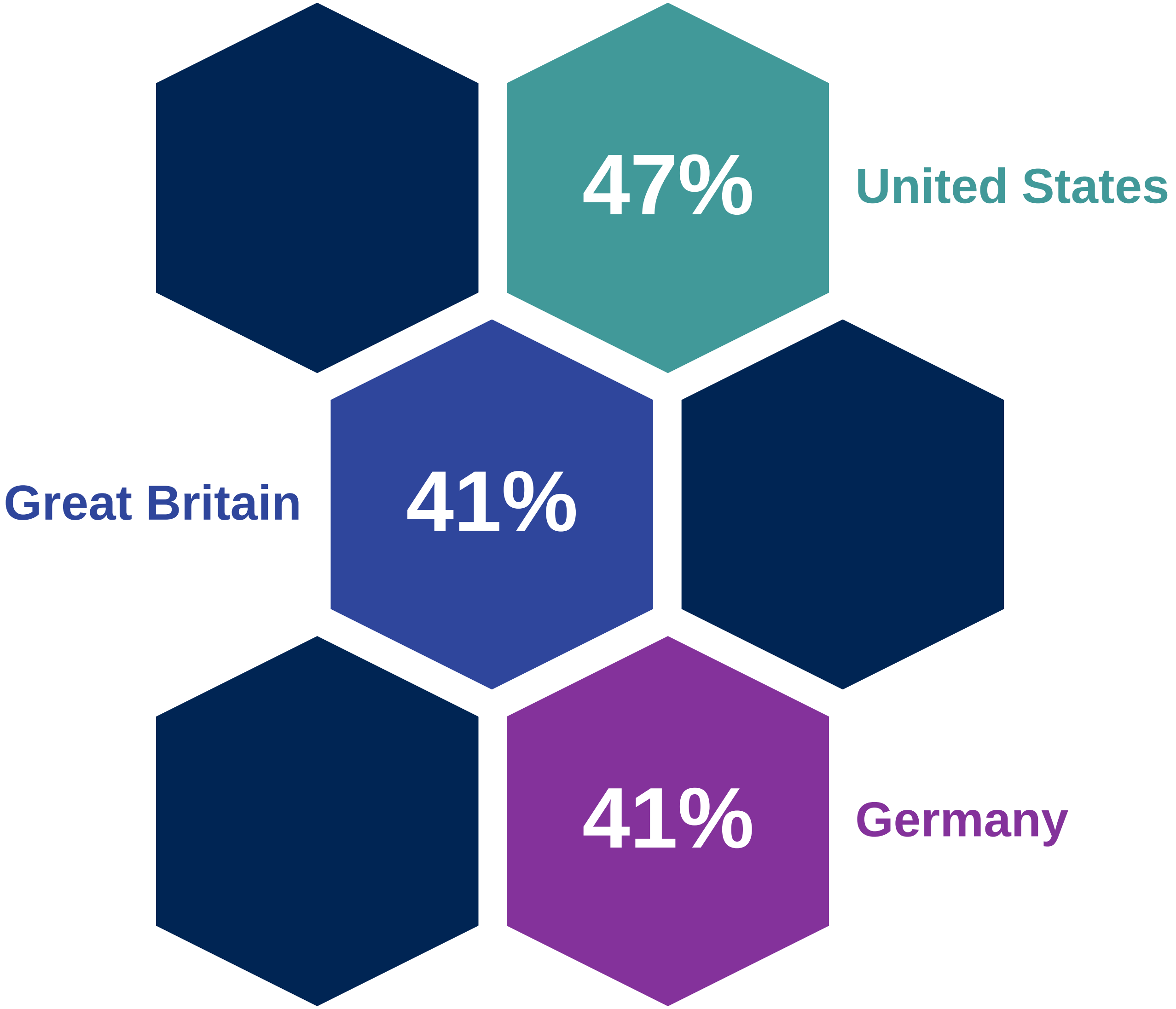
Business leaders have a responsibility to speak out on social and political issues affecting my country




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

# Although not everyone agrees this is a priority…

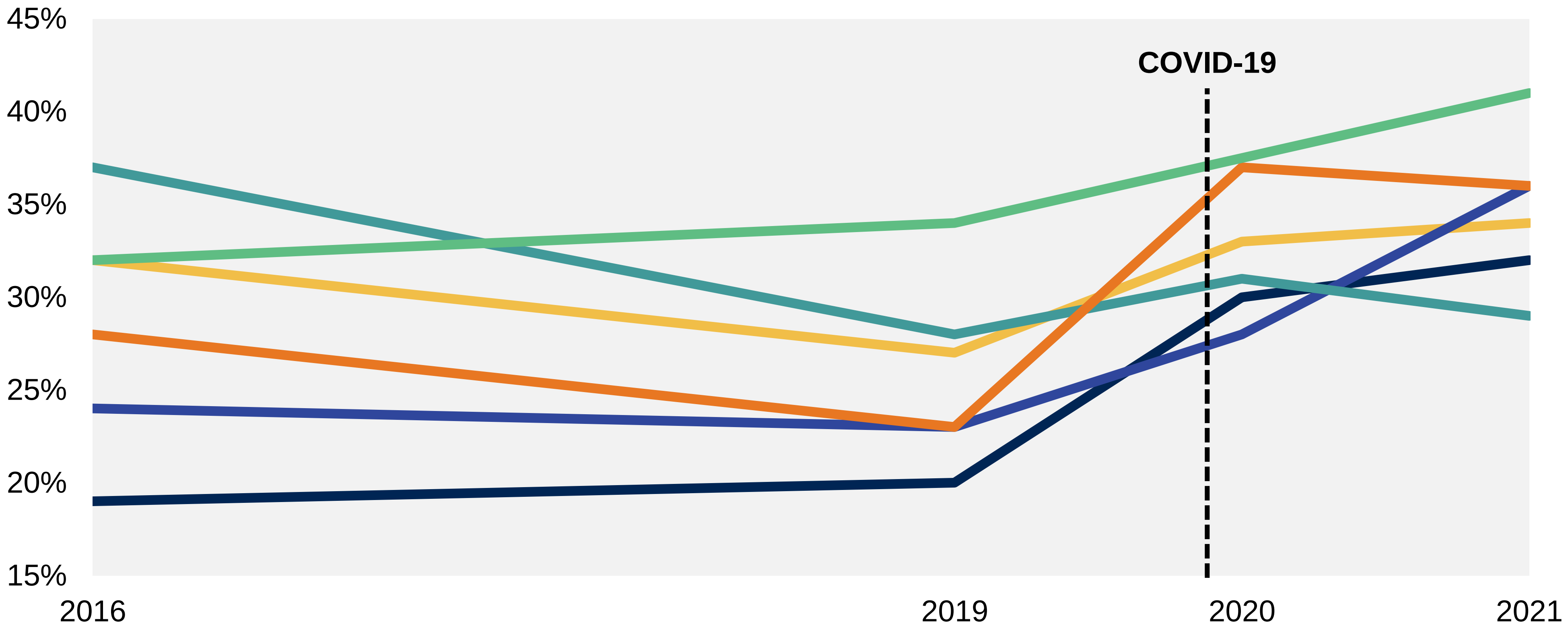
I don't care if a brand is ethically or socially responsible, I just want them to make good products – % agree




*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

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

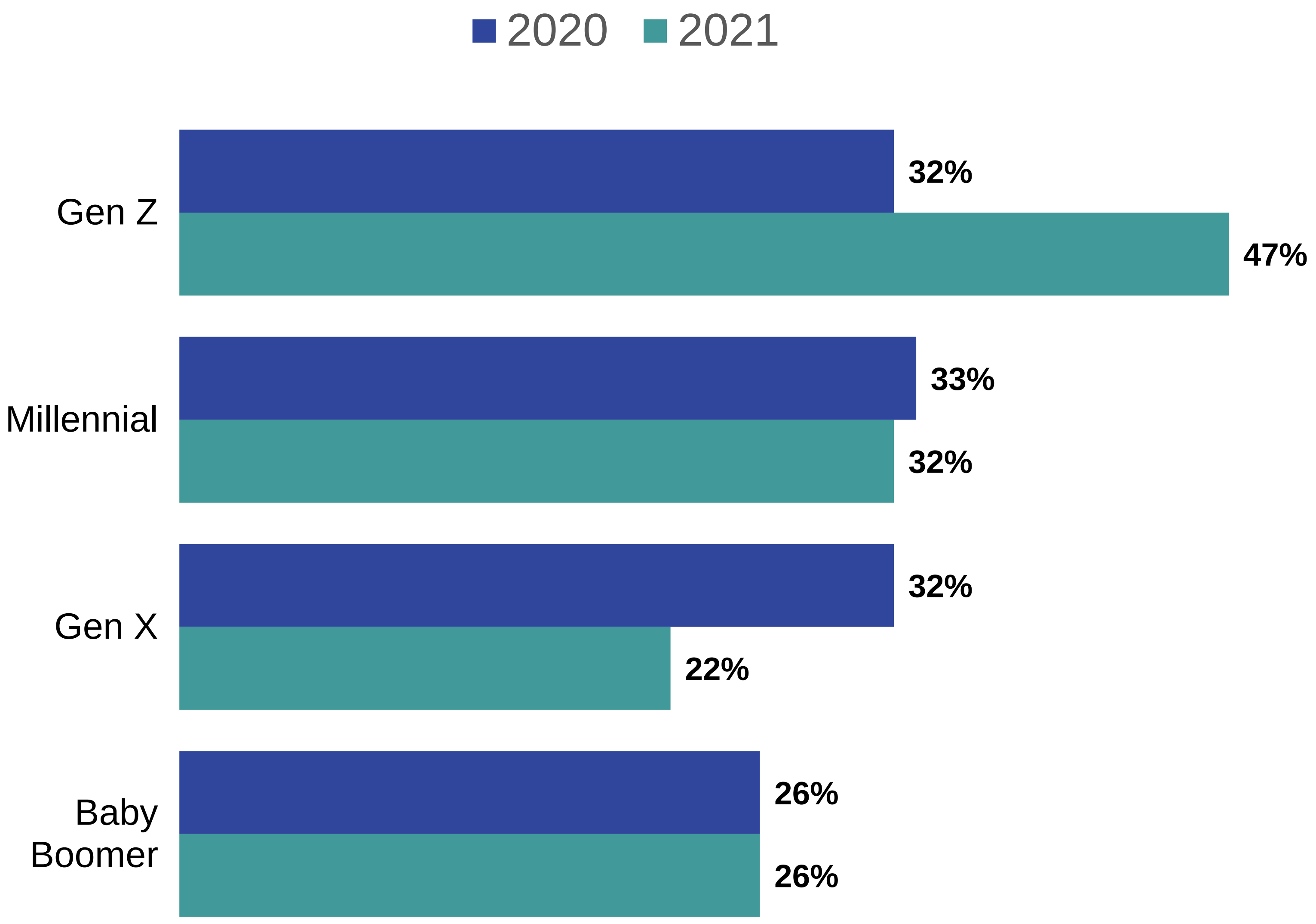



| | 2021 score | Change from 2016 |
|---|---|---|
| Canada | 41% | +9 |
| France | 36% | +8 |
| Britain | 36% | +12 |
| Italy | 34% | +2 |
| Germany | 32% | +13 |
| US | 29% | -8 |

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

# But who is experiencing the most friction?




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

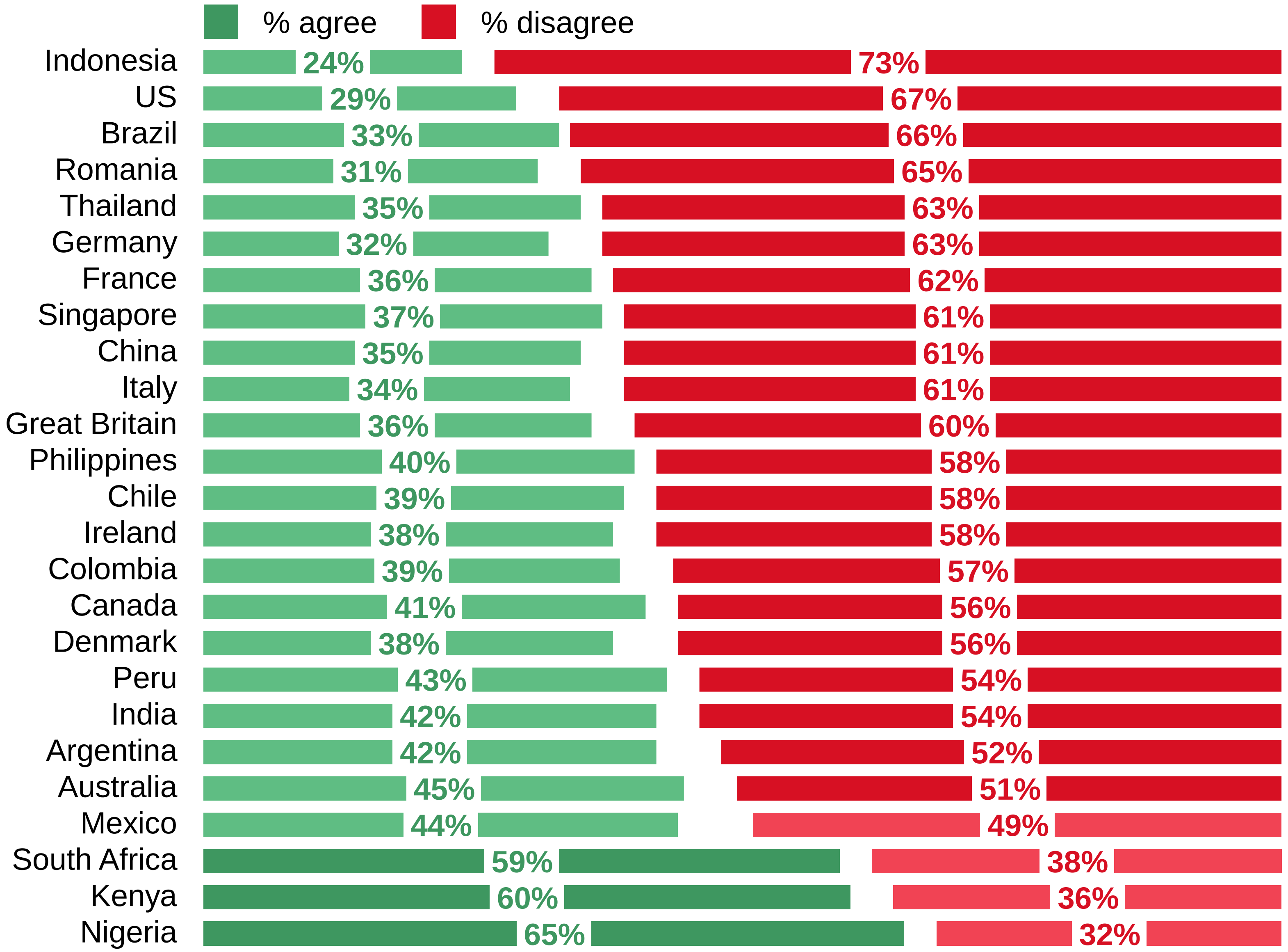
**United States**

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

# It remains easier for most however

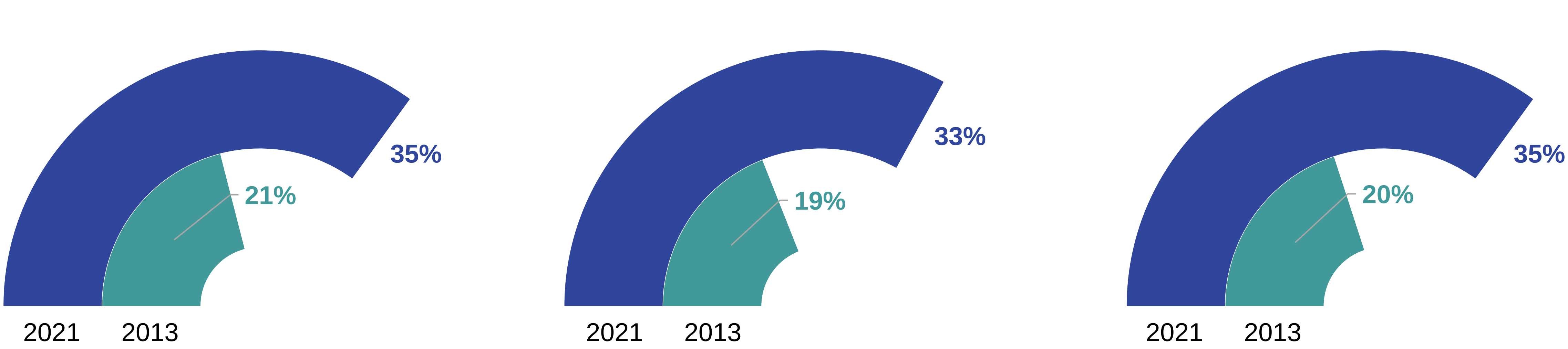
I find shopping online more difficult than shopping in traditional stores




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

# 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

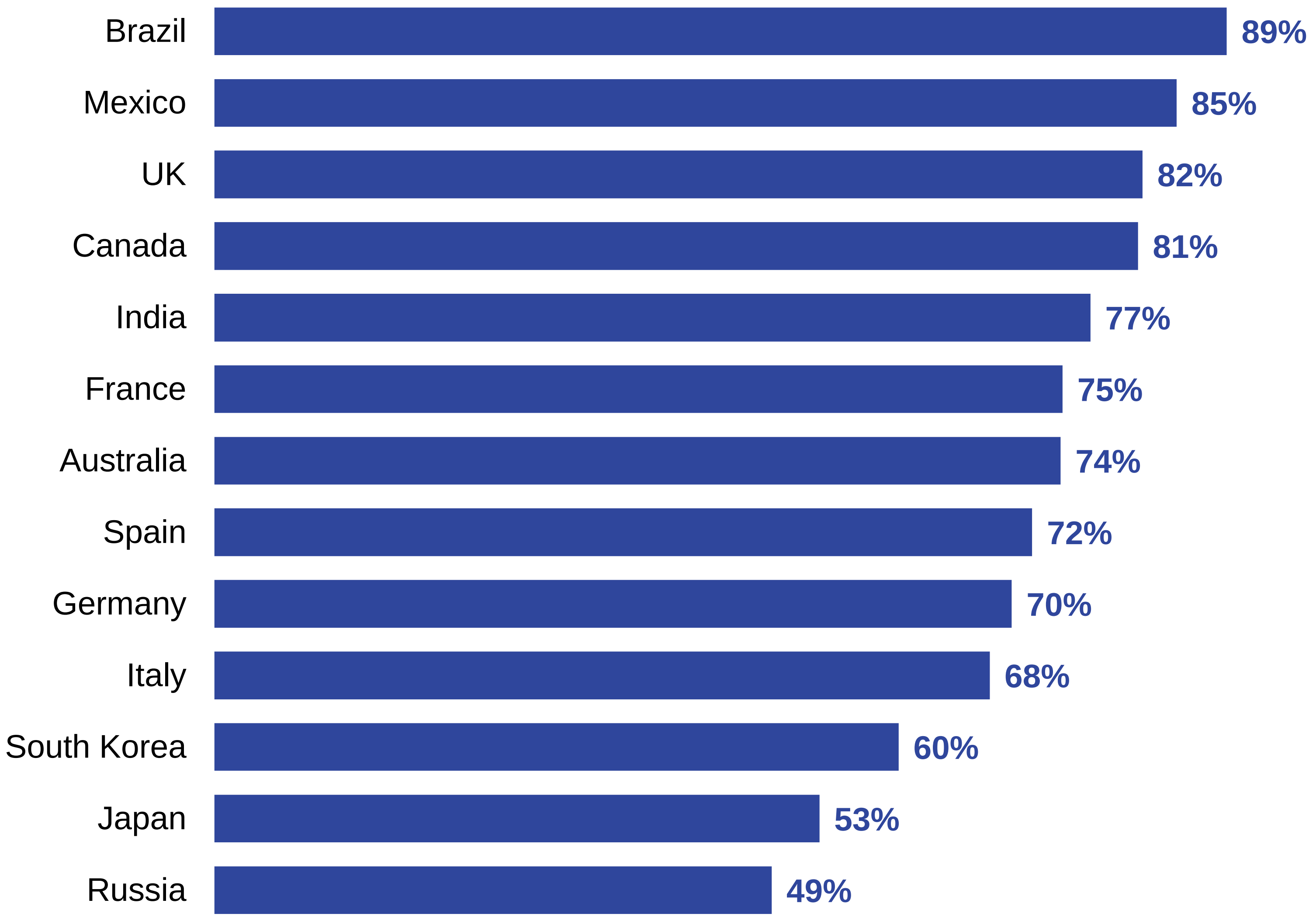



*Base: 24,332 adults aged 16-75 (18-75 in US and CA) in 25 markets interviewed August - September 2021*

# Black Lives Matter has also changed the narrative

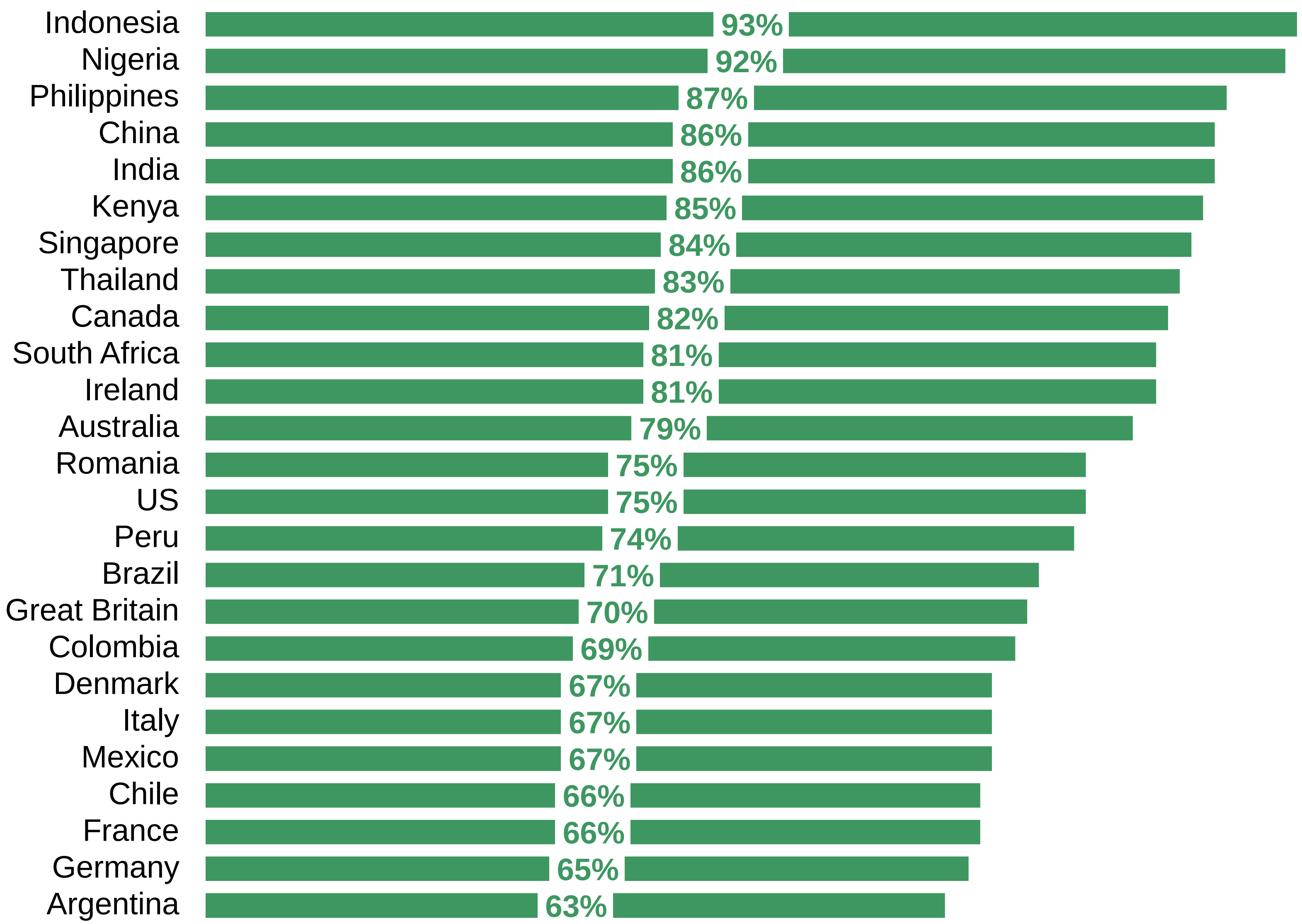
To what extent if at all do you think that racism and other forms of intolerance which is the base of the protests in the United States is present in your country?

% 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-hoods

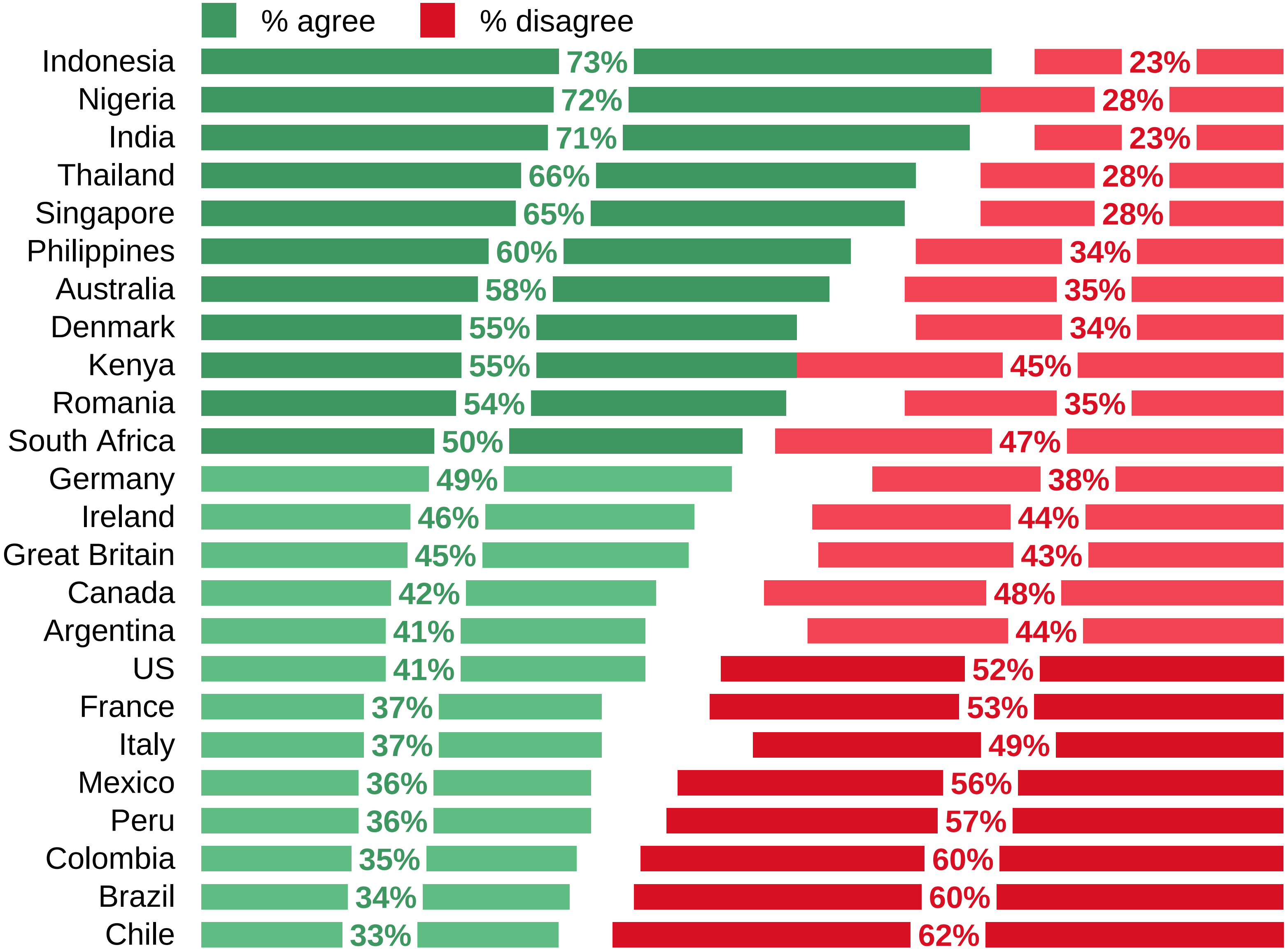



My local area is a place where people from different backgrounds get on well together – % agree

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

# They agree less on how minorities are treated

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

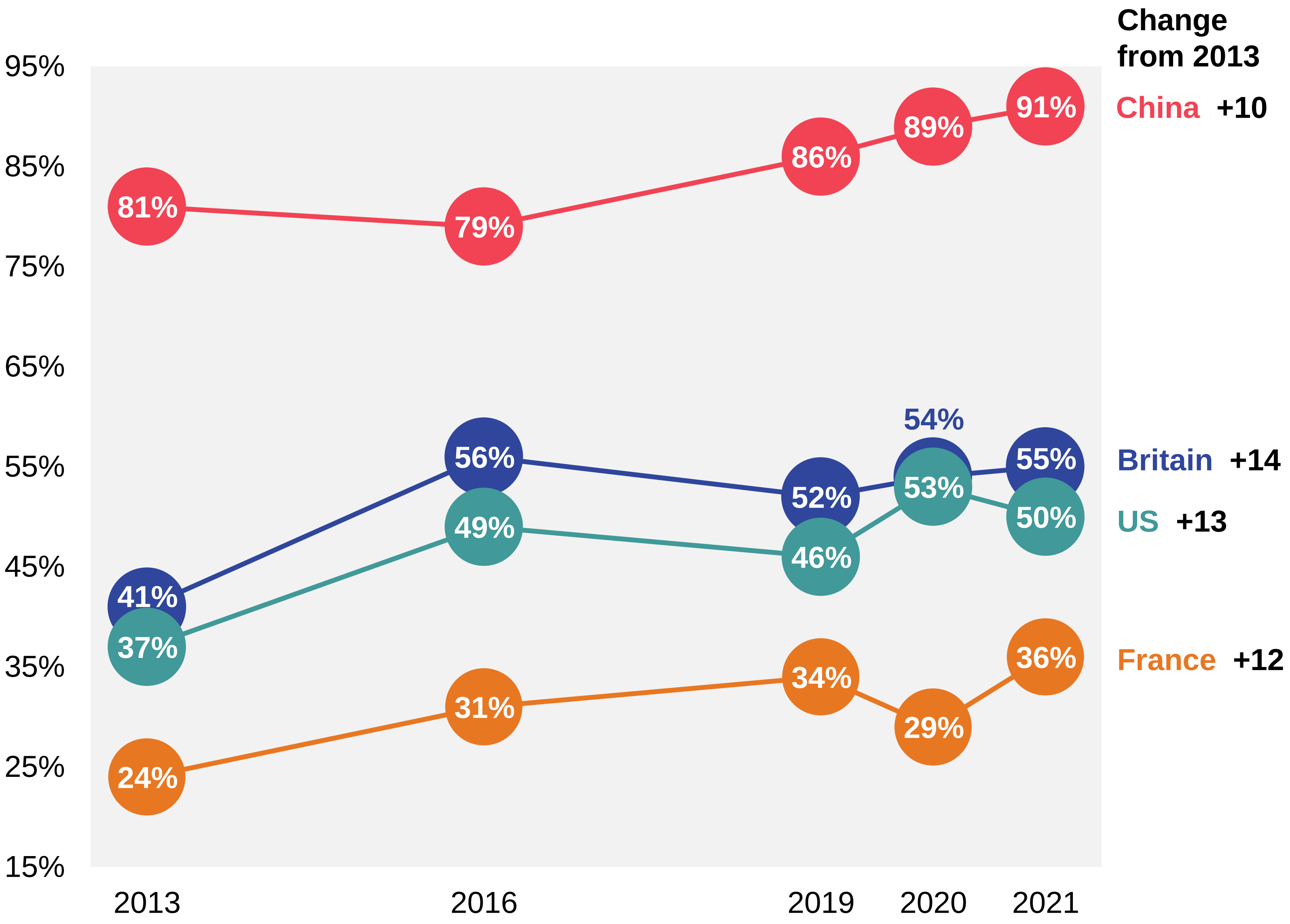



*Base: 24,332 adults aged 16-75 (18-75 in US and CA) in 25 markets interviewed August - September 2021*

# A globalisation paradox

# Views of globalisation continue to improve

Globalisation is good for my country – % agree

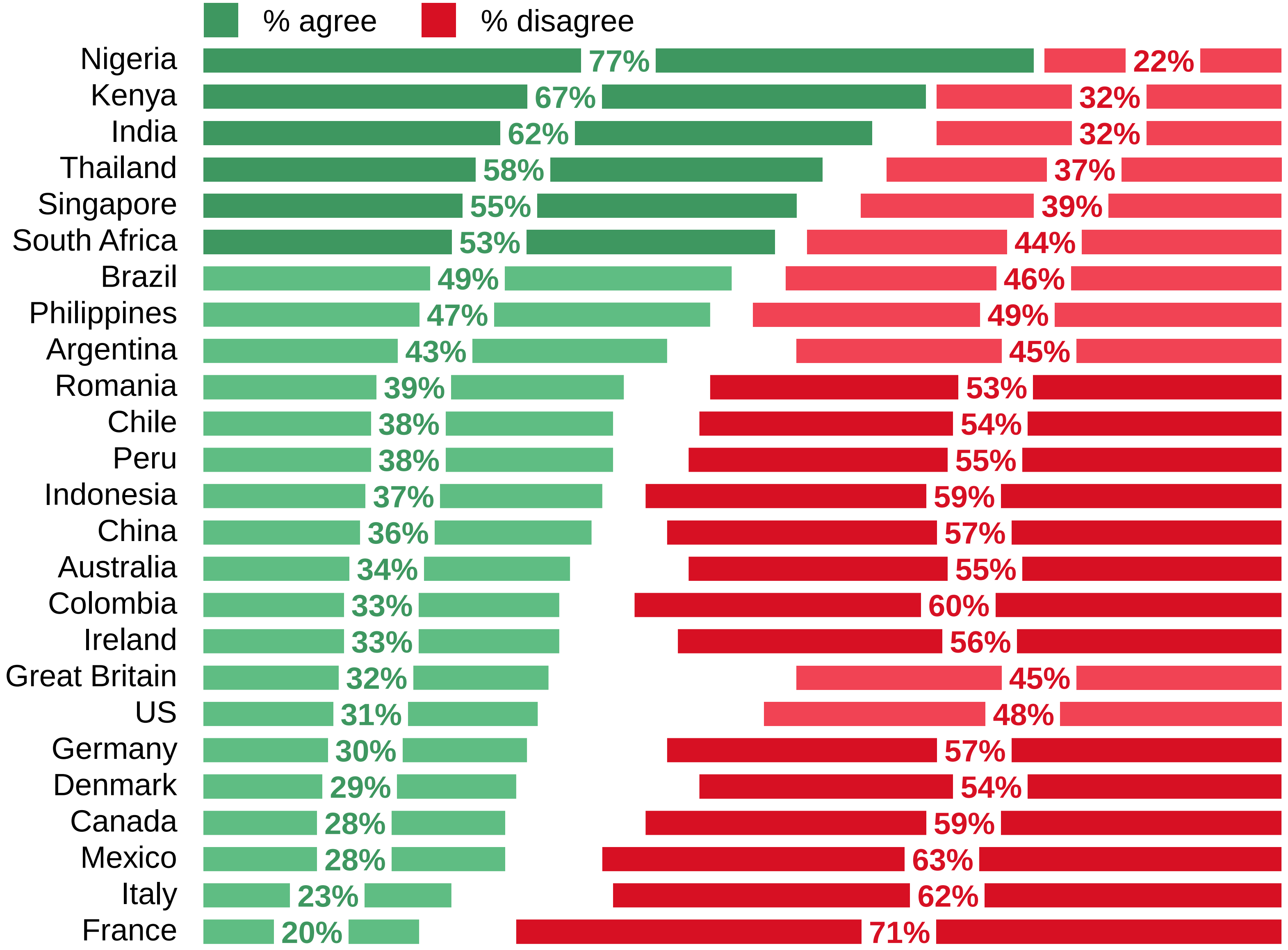



*Ipsos Global Trends Series: 500-1,000 adults aged 16-75 (18-75 in US and CA) per market per year*

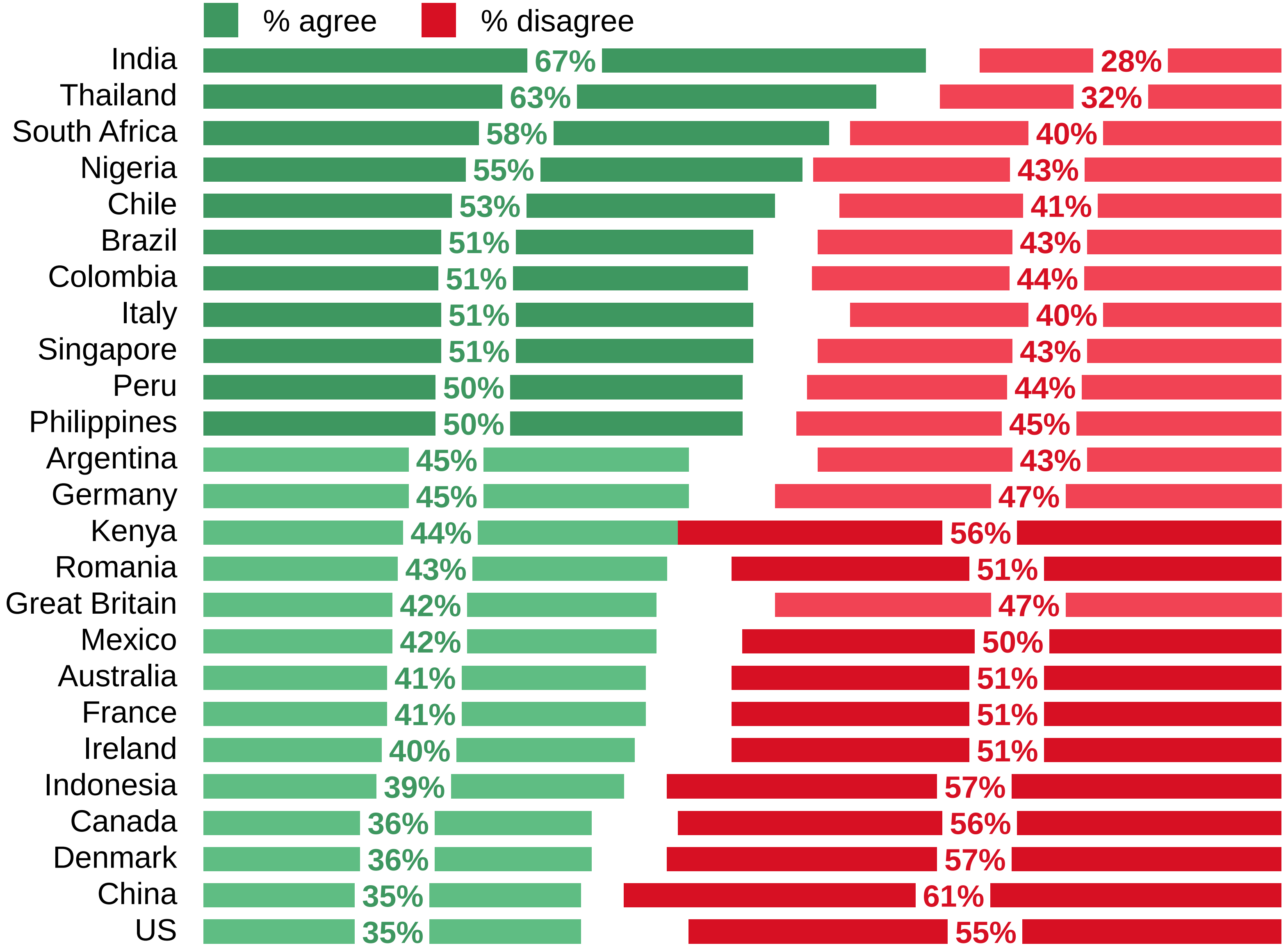
# Yet many show a preference for local / national brands

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




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

# And feel a closer affinity to the nation




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

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

# 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

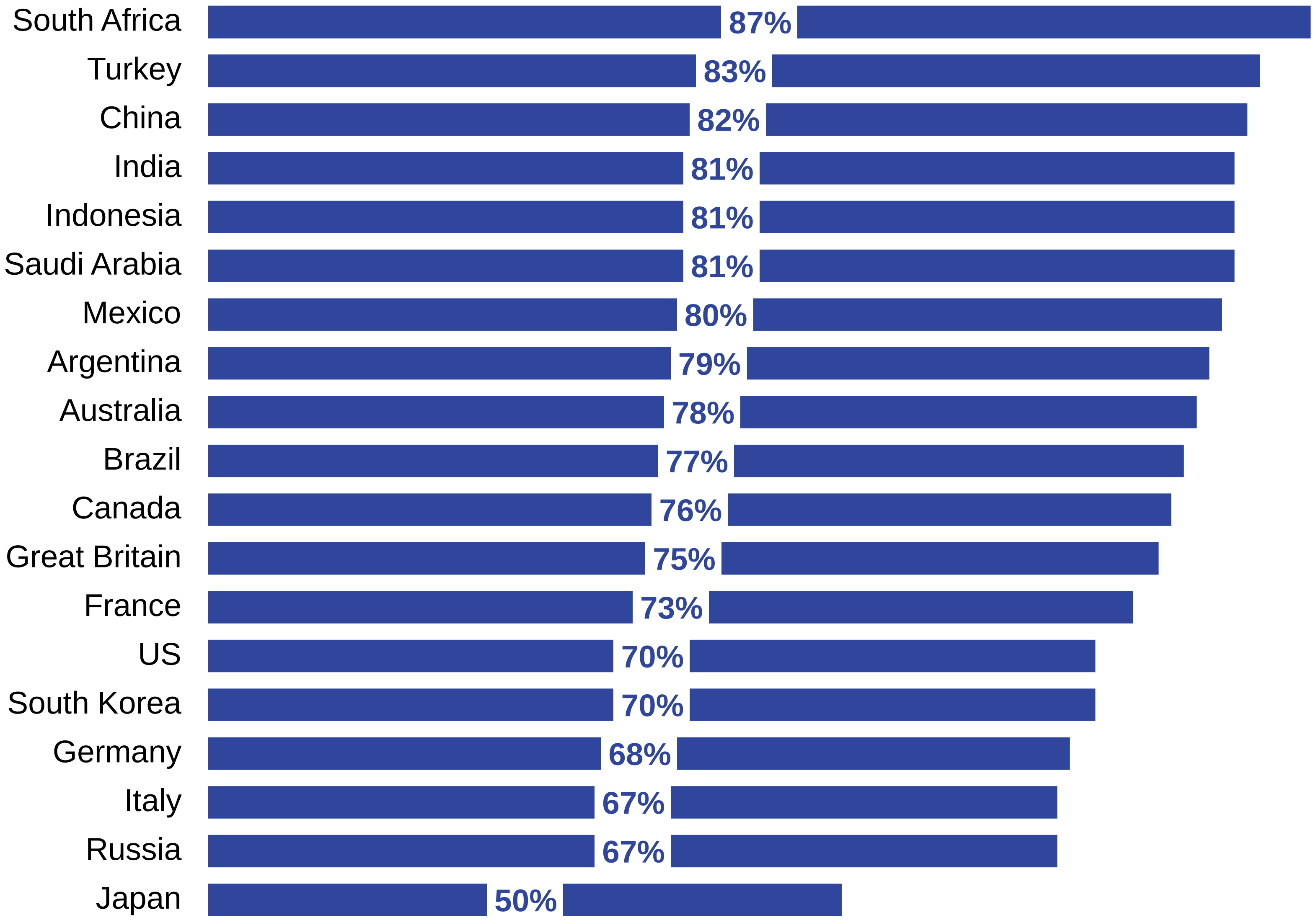
Rebalancing between global and local

# BUT whether we see it or not, the world is changing fast

| | | |
|---|---|---|
| Multipolar world | ⟷ | Bipolar world |
| Climate concern | ⟷ | Climate action |
| Online and offline | ⟷ | Blended reality |
| Political leaders | ⟷ | Social leaders |

# Post pandemic, the capacity for change is there…

The COVID-19 pandemic has shown how quickly people can change their behaviour in a crisis – % agree




*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?