A NEW WORLD DISORDER?

Navigating a Polycrisis

GLOBAL TRENDS
2023

February 2023

Welcome to Ipsos Global Trends

This is our broadest edition ever, covering 50 markets, 87% of the global economy and 70% of the global population. It reveals as much continuity as change.

Some of this year's key findings are:

- Concern about climate change rose consistently from 2013 through the COVID-19 pandemic until the inflation crisis. It has now plateaued while climate scepticism remains. People look to brands and business – more trusted than government in most markets – to act.
- With normal life resuming in most places after the pandemic, the appeal of global brands has returned to previous levels across much of the world, especially Asia and Africa.
- While concerns about data privacy and Big Tech remain strong, data apathy continues to grow, with citizens recognising that some loss of privacy is inevitable. This coincides with a rising proportion who think that technical progress is destroying our lives as the metaverse and generative AI burst onto the global scene.
- Despite the decline of populism and nativism, the underlying ingredients – stagnating real wages, the 'loss of the future' and the enduring appeal of nostalgia – continue to rise. Most people expect governments not to support them adequately in the years ahead.
- With the effects of the COVID-19 pandemic echoing around the world and putting even more pressure on healthcare systems (which are facing rising demand from ageing populations), our findings confirm the rise of mental health as a key issue – especially for the young. How brands and politicians show empathy – that they are on 'your side' – remains important.
- Despite war and geopolitical tensions, and reshoring or 'friendshoring' of supply chains, most people worldwide still believe that globalisation is good for their country – a trend that has not changed since 2013.
- Finally, while most people are pessimistic about the macro environment, they remain far more positive about their own and their families' prospects – especially in Asia. As we have found, there is more difference between markets than there is between generations, and the world remains divided on a wide range of issues.

Navigating through the 'Twitchy Twenties' means detail matters. In this report we discuss the Macro Forces that will shape the next decade, review how the trends we launched in 2020 are evolving, and suggest ways to react and build resilience. We hope you find it useful.

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

There is more difference between markets than there is between generations, and the world remains divided on a wide range of issues.

Contents

Ipsos Global Trends 2023 provides a toolkit to help you navigate the future.

If you only have a few minutes, read the Executive Summary.

If you want to know all the details, to inform your strategic planning and decision-making, then dive into Macro Forces and read how our Trends have evolved.

Want to go deeper? Contact the [Ipsos Global Trends and Foresight team]() to learn more about your policy area, market or category, and the relevant implications and opportunities.

Click on picture to be taken to relevant section of report

GLOBAL TRENDS 2023

EXECUTIVE SUMMARY

The world isn't in crisis. The world is in *crises*.

We're entering a 'new world disorder'. We can no longer afford to focus on the big issue at hand, because there are many interrelated issues at play.

As we enter 2023, we've emerged from a global pandemic only to find ourselves immersed in a looming financial crisis, a climate crisis, a war waged by Russia on Ukraine – which is causing an energy crisis – and long-standing inequalities blooming into geopolitical crises around the world.

The biggest concern: an economic crisis that is sharpening an economic divide and raising questions around the role of business. While this looks different in markets like Argentina, which has faced high inflation since the 1980s, overall, the world is most concerned about inflation (63%) and energy costs (49%). We are seeing a movement away from shareholder value at all costs, to a greater understanding of the human and environmental toll that capitalism takes. Yet we know that purpose-driven buying is often trumped by cost sensitivity, so what happens when cost and purpose are in even greater conflict?

Another shift we are seeing is a growing tension between global and local. To be clear, most people across the world believe that globalisation is good for them (64%). But while we appreciate globalisation and how it helps create cross-cultural understanding and increase the accessibility of goods, we see nationalism prevailing at a governmental level and defences being raised. Nationalism and populism remain powerful forces, and attractive to people who live in societies that are under pressure.

Meanwhile, climate change has become a visceral reality and existential threat: in 2022 we saw 10 climate-related disasters top $3bn each in damages[1]. There is rampant debate about how to address it: while some are putting the responsibility squarely on the shoulders of governments and systems, others – particularly younger people around the world – expect brands and governments to step up and solve systemic issues.

These crises will not go away any time soon. The world order that has lasted since the Second World War is splintering: dominant institutions are falling, populations are in conflict, and opposition groups are sowing discord.

It's a world of polycrisis…

> A polycrisis is not just a situation where you face multiple crises. It is a situation … where the whole is even more dangerous than the sum of the parts.

Adam Tooze, author & professor at Columbia University in New York City, New York

The good news may be yet to come.

Amid this backdrop of disorder, there are bright spots.

While the polycrisis impacts our overall optimism – only 31% are optimistic about the world in 2023 – **we remain happy and hopeful about ourselves and our personal lives, at least:** 58% of people say they're happy overall, and 59% are optimistic about their own futures.

People do have common values, interests and goals. In fact, 79% of the world's citizens think that brands can make money *and* support good causes. A growing proportion of people will pay more for brands that act responsibly (63%), and we're generally on the same page about the climate: 79% feel that we're heading for environmental disaster unless we change our habits.

Corporations, governments and individuals all have a role to play in solving these crises – and helping people to cope. But lack of trust is a barrier: 72% are worried that governments and public services won't look after citizens in the future, and 54% don't trust business leaders to tell the truth.

Three major challenges facing people, and how organisations can offer help:

1. An economic crisis hitting our wallets

There is an opportunity to rethink the structure and purpose of businesses and systems – to have a positive impact on society.

2. A tension between global and local

Global brands are in a unique position of power: they can bridge the gap between global and local by offering the best of both worlds.

3. A climate crisis we need to solve

Through their actions, brands can have an incalculable impact on the world – through the trust they've already earned from their consumers.

Our values are largely shared, though they also sometimes conflict either within ourselves or within our groups, nations and markets, which leads us to our final question: how can brands, governments and individuals work together to solve all these issues and build on the hope and optimism represented here?

MACRO FORCES

We’ve identified six Macro Forces that impact societies, markets and people.

Our six global Macro Forces and key themes

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

Societies in Flux

- Ageing populations
- Community migration
- Life stage evolutions
- Greater ethnic & religious diversity
- Identity fluidity

Tech-celeration

- Pervasive technology
- The immersive frontier
- AI advances & quantum computing
- Increased automation
- Toll of technology

Inequalities and Opportunities

- Rise & fall of middle classes
- Employee power shift
- Generational wealth disparities
- Impacts of inflation
- Alternative value structures

Environmental Emergencies

- Climate change
- A greener way of thinking
- Over-development

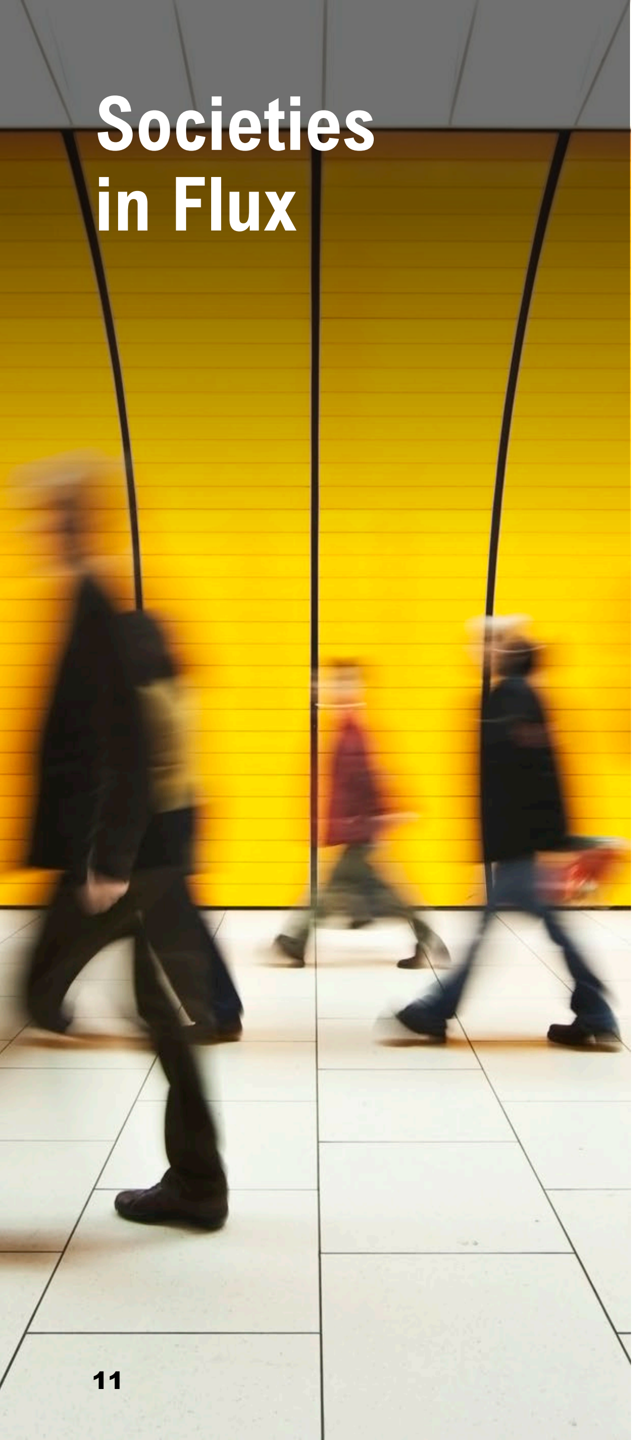
Political Splintering

- Plateau of globalisation
- Security dilemmas
- Rethinking institutions
- Increasing geopolitical conflicts
- Entrenched inequality

Well-rounded Well-being

- Growing mental health crisis
- Systemic health inequality
- Integration of health & technology

Societies in Flux



Ageing populations

The population is ageing in most countries, creating a brain drain for businesses and putting pressure on economies and social care programmes. The birth rate is below the replacement rate everywhere in the world, except Africa.

Community migration

A higher proportion of the population is living in urban areas. Meanwhile, people are migrating both within and between countries. Some are displaced by climate change, while others are moving due to political circumstances and affiliations.

Life stage evolutions

People are rethinking traditional life stages and definitions of success, such as career, money and family. People are marrying later and having fewer children.

Greater ethnic & religious diversity

Populations are becoming more racially and ethnically diverse in many countries. Religion and spirituality are becoming less tied to geography and more diverse within countries and regions.

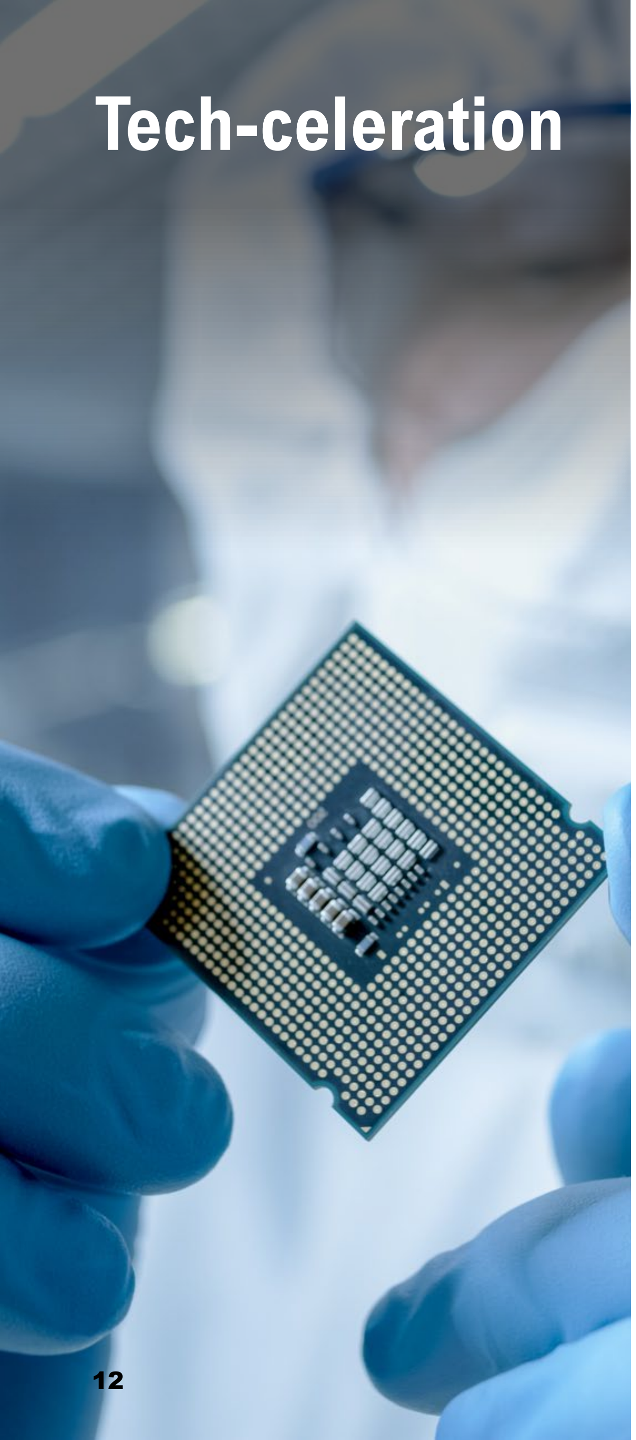
Identity fluidity

Traditional definitions of gender, sexuality, ethnicity and identity are becoming less restrictive and more inclusive. Technology has enabled different online/offline personalities, offering fluidity in how and when one identifies a particular way.

68%

of the world's population will be living in urban areas by 2050 (up from 47% in 2000)[1]

Tech-celeration



Pervasive technology

The pace of advances in technology is increasing, and its pervasiveness is causing concern. Six in ten have access to the internet globally, with the highest regional penetration rates occurring in North America and Europe.

The immersive frontier

From the metaverse to virtual reality (VR), there is a wave of innovation coming. On the front end are non-fungible tokens (NFTs), virtual real estate, VR haptic rigs and Web3 technologies, but consumers are already leveraging augmented reality while shopping to imagine potential purchases in their homes.

AI advances & quantum computing

Technologies like ChatGPT are reframing expectations around what advanced computing can do. Innovation in this space will enable new and more powerful capabilities and applications – but also increase expectations for governments, regulators and businesses.

Increased automation

Retailers and manufacturers are increasingly looking for ways that automation can support or replace employees. From kiosks at fast food restaurants to customer service bots, automation takes many forms and will continue to proliferate.

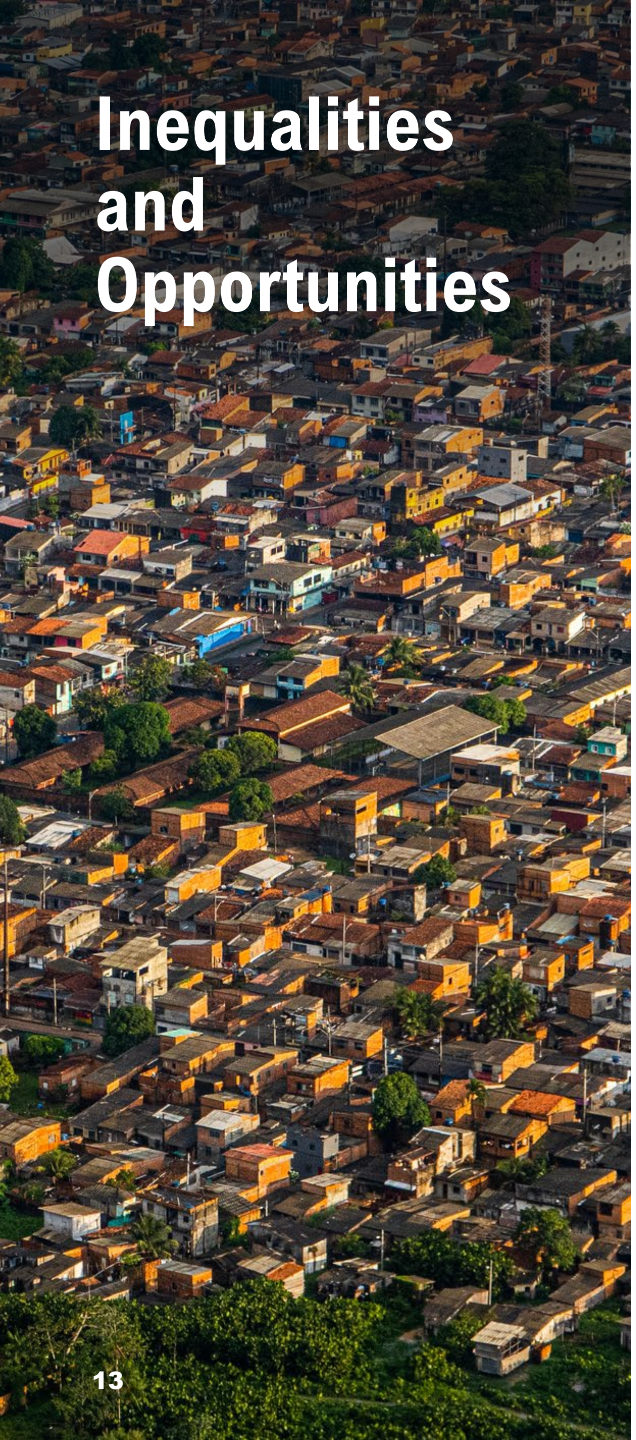
Toll of technology

Many are pushing back on technology: Gen Z are using social media less often than prior years, there are anti-tech actions, and information overload has reduced our collective attention span.

2x

The global ratio of robots to employees in manufacturing (141:10,000) has doubled since 2015[2]

Inequalities and Opportunities



Rise & fall of middle classes

Middle-class incomes are becoming less influential in advanced economies, while Asia-Pacific middle class will account for the majority of global middle-class spending. In many markets, there is growing wealth inequity.

Employee power shift

The employee/employer dynamic is shifting. Unionisation is on the rise in some countries, while globally, white-collar employees have been able to continue the hybrid work schedules they adopted during the COVID-19 pandemic, and push for more flexibility.

Generational wealth disparities

Millennials are likely to be poorer than Gen X and baby boomers were at the same age. Boomers represent a large portion of the world's economy, and their situation will shift as they navigate retirement and fixed incomes; they'll all be 65+ by 2030.

Impacts of inflation

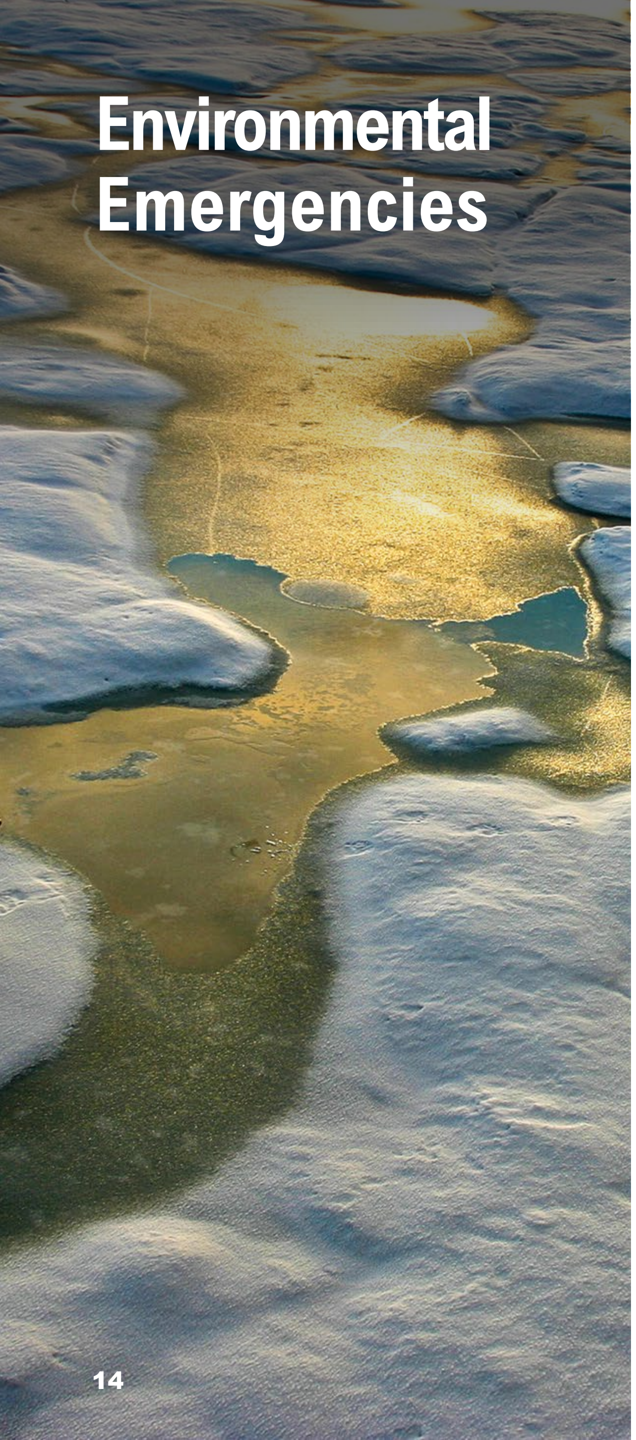
Inflation remains high in most countries as the threat of a global recession looms. This has been a shock particularly in the US and Eurozone. Global energy prices will continue to impact the economy and consumer spending.

Alternative value structures

New value exchange structures and models are emerging and gaining traction, including decentralised autonomous organisations, NFTs and cryptocurrencies, as well as regenerative capitalism, which takes planet and people into account in addition to shareholders.

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

Kristalina Georgieva, IMF's Managing Director, 1 January 2023[3]



Environmental Emergencies

Climate change

Humans are already feeling the impacts of flooding, loss of biodiversity and weather extremes related to climate change. Coming soon: increasing disputes over who controls dwindling resources like water, the need for more adaptation, and decarbonization and other new measures to combat this existential threat to life on the planet.

A greener way of thinking

Different countries are in different stages when it comes to decarbonisation and setting policies to limit environmental impact, even within the same geographic region. Yet governments and citizens are increasingly taking measures to protect natural resources and prevent further environmental damage.

Over-development

Over-population and over-development are existential threats to humans, who currently use 150% of the Earth's renewable ecological resources each year.With a population forecast to grow to 10 billion by 2100, the situation will get worse without further intervention[4].

28 July

Earth Overshoot Day in 2022: the date by which demand for natural resources had exhausted what the Earth can regenerate[5]

Political Splintering

Plateau of globalisation

Technology has helped people find others who think like them, creating a more insular worldview. Supply chain disruptions and the need for resilience have become common conversations among corporations and governments. However, access to global commerce and communication is still valued.

Security dilemmas

From the reach and invasive nature of Big Tech to the growing threat of global cyberattacks, ransomware and threats to financial institutions, data security is becoming both more sophisticated and more important than ever.

Rethinking institutions

Populations around the globe are showing dissatisfaction with current political systems (whether democratic, autocratic, or other). Misinformation poses a threat to democracy, while citizens in autocracies and authoritarian states are pushing back on their regimes.

Increasing geopolitical conflicts

Conflict and violence were on the rise even before Russia's war in Ukraine – the first war in Europe since the end of the Second World War – began. Ongoing political conflict such as civil wars, civil unrest and insurgencies disrupt the lives and safety of citizens in Myanmar, Ethiopia, Iran and elsewhere.

Entrenched inequalities

Global progress in reaching pay parity between men and women slowed down because of women dropping out of the labour force during/after the COVID-19 pandemic. Systemic racism has become more broadly acknowledged, and long-standing inequities are being surfaced and rectified.

$5m

the average estimated cost of a data breach incident in 2023[6]

Well-rounded Well-being

Growing mental health crisis

COVID-19 triggered a global increase in the prevalence of stress, anxiety and depression. After the pandemic, people are becoming increasingly worried, about topics such as climate anxiety, wellness anxiety and war anxiety.

Systemic health inequality

Many developing countries are closing the life expectancy gap, so life expectancy is increasing everywhere, but myriad inequalities exist that are continuing to determine life expectancy based on privilege, access to and availability of healthcare.

Integration of health & technology

From bionics to genomic therapy, wearables to passive home health monitoring, technology will continue to play a pivotal role in global health and wellness. At the forefront is regenerative medicine: this captures the body's ability to heal and applies it to a wide range of conditions.

1 in 8

people globally live with a mental health disorder[7]

OUR TRENDS IN 2023

At a glance: the Ipsos Global Trends

In 2019 we used advanced analytics and perspectives from our team of trends and foresight experts to analyse 370 questions across 36 markets, identifying 36 global values and 12 trends, which we have been tracking ever since.

Since then, our annual updates have highlighted how our 12 trends (which cover populism, brand-building, climate change, technology, data security, politics and social issues) have changed – or not changed – over time.

We are delighted to be able to share with you what they look like in 2023, blending our latest data, local signals, our updated Macro Forces and some thought-starter provocations on what they might mean for your organisation, whether it is a government department, a corporation or an NGO.

We hope you find these insights thought-provoking.

CLIMATE ANTAGONISM

Climate change has become a visceral reality, with the past year seeing the largest number of climate-related disasters in recorded history. But there is rampant debate about who is responsible for climate change and how to address it: some consumers are changing how they make purchasing decisions according to their environmental impact, while others (particularly Gen Z) are putting the responsibility squarely on the shoulders of government, systems and corporations.

Concern about the climate emergency is under pressure

What it's about today:

Eighty per cent agree that we are heading for environmental disaster unless we change our habits quickly.

There is, however, a vast difference across regions between who is concerned about climate change and who is not. And the countries where people are talking about it least may be the countries that are doing the most about it.

One of the challenges we face in mobilising action around climate change is that it is never people's number-one priority. There is always something – COVID-19 over the past few years, and the cost of living crisis right now – that individuals find more pressing.

There is, though, a growing understanding of a collective need for environmental justice. For example, people can't get flood insurance in vulnerable communities and the American Forests' Tree Equity Score has uncovered a historical lack of infrastructure and green spaces in marginalised communities which impacts the long-term health outcomes of residents.

Globally, there is also debate about development – should developing countries be allowed to grow in the same ways that developed countries previously did?

Brands can help consumers meet their individual needs around climate change. Many people want something that lasts, with less packaging.

But consumers are not always able to make the trade-offs. We can't expect consumers to shoulder the burden of sustainability, especially with rising inflation.

Above all, people want collaborative leadership from governments, corporations and NGOs on this issue.

80%

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

There is a great deal of innovation in sustainability, such as emissions reductions, lower resource usage and greater reuse of resources

Signals

In **Nigeria**, farmers and herders are in conflict for arable land, due to desertification and flooding [1]. (via BBC)

In the US territory of **Puerto Rico**, years of climate-change-driven hurricanes have eroded precious beaches [2]. (via the New York Times)

In **Australia**, new records have been set every year for solar roof installations. Almost one in three households has solar panels – the highest rate in the world[3].(via ABC)

In **Romania**, plans have been solidified to move away from coal to more sustainable forms of power with support from the European Commission[4].(via IEEFA)

The most impactful Macro Force themes affecting this trend

1 Climate change

2 Over-development

3 A greener way of thinking

4 Alternative value structures

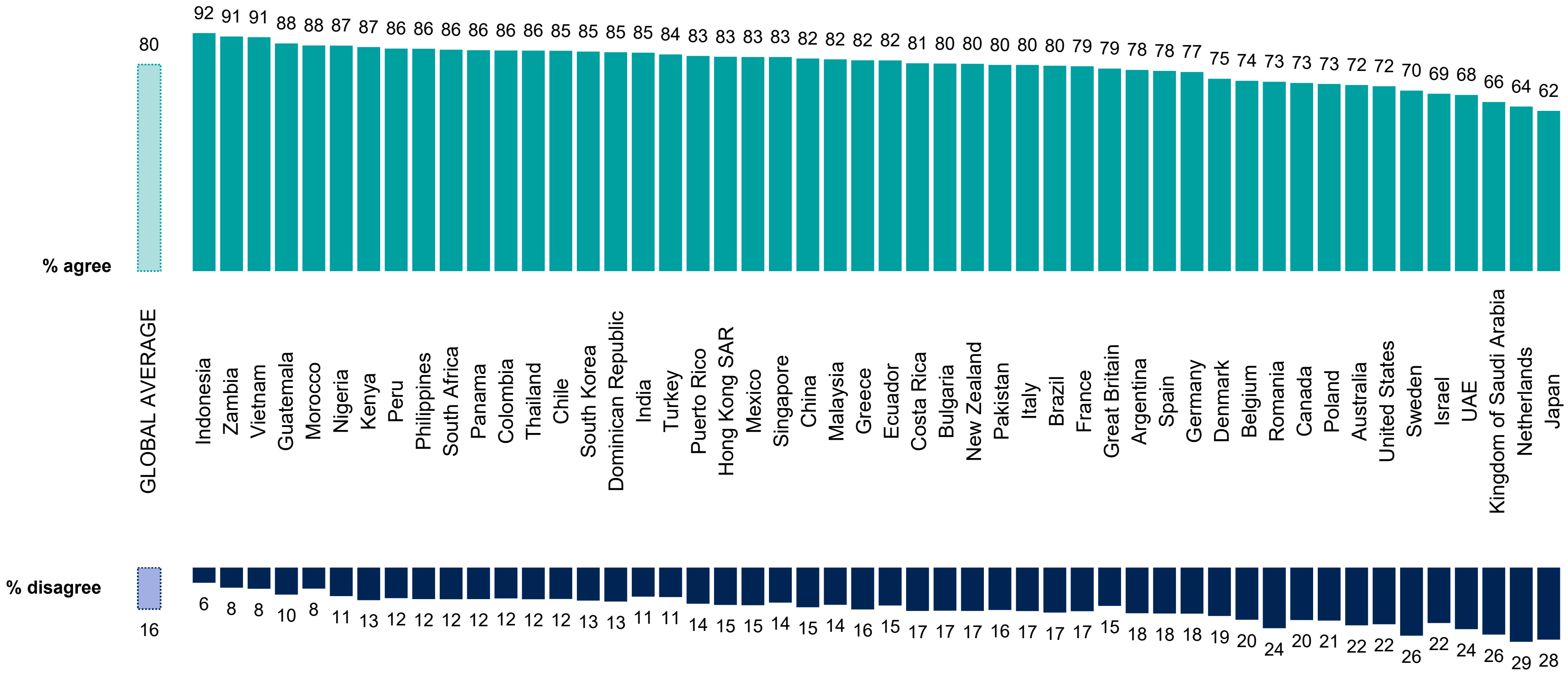
5 Plateau of globalisation

6 Rethinking institutions

Concern about the environmental emergency is ubiquitous across markets

To what extent do you agree or disagree with the following statement?
% agree

We are heading for environmental disaster unless we change our habits quickly.



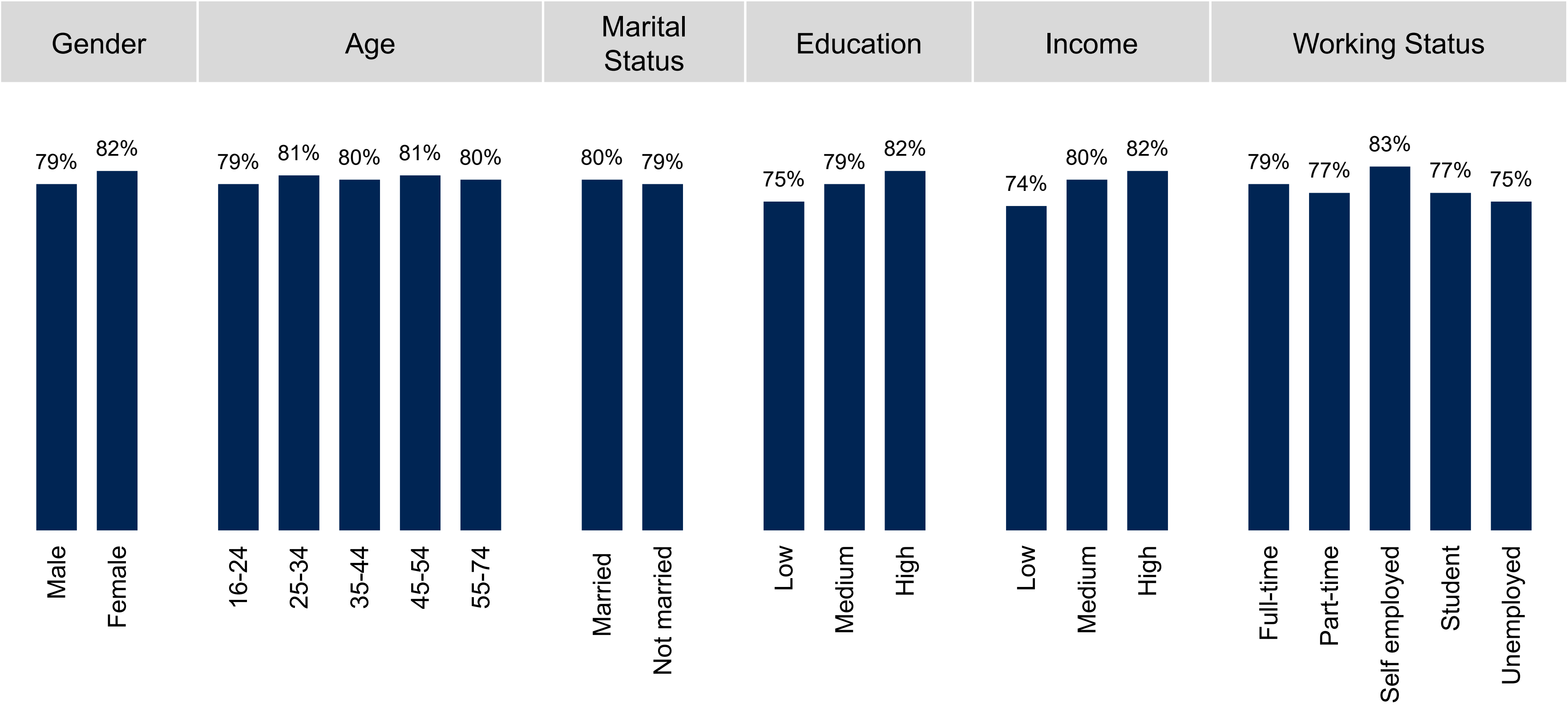
Base:
48,579 adults aged 16–75 across 50 markets, interviewed online between 23 September and 14 November 2022

Source:
Ipsos Global Trends 2023

Concern about the environmental emergency is ubiquitous across demographic groups

To what extent do you agree or disagree with the following statement?
% agree

We are heading for environmental disaster unless we change our habits quickly.



Base:
48,579 adults aged 16–75 across 50 markets, interviewed online between 23 September and 14 November 2022

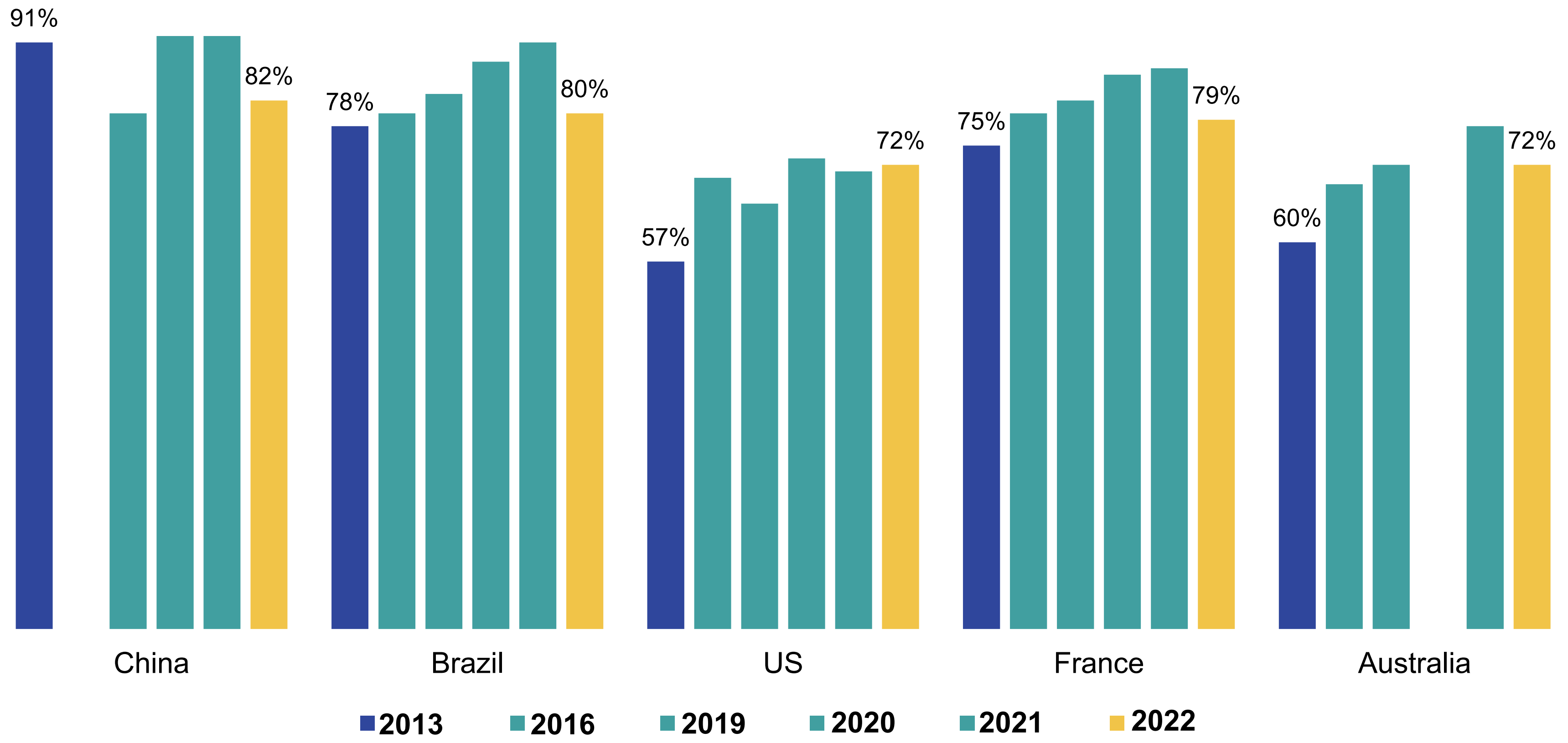
Source:
Ipsos Global Trends 2023

Climate change will impact us all, and this shared lived experience is borne out by the fact that across all ages, genders, levels of income and education, working and marital status, the levels of concern about the climate emergency are remarkably consistent. Such unanimity of feeling is rare, and gives those involved with this crucial issue a broad base with which to work.

But concern about the climate may be starting to wane in some markets

To what extent do you agree or disagree with the following statement?
% agree

We are heading for environmental disaster unless we change our habits quickly.



Base:
500–1,000 500–1,000 adults aged 16–75 (18–75 in US and Canada) per market per year

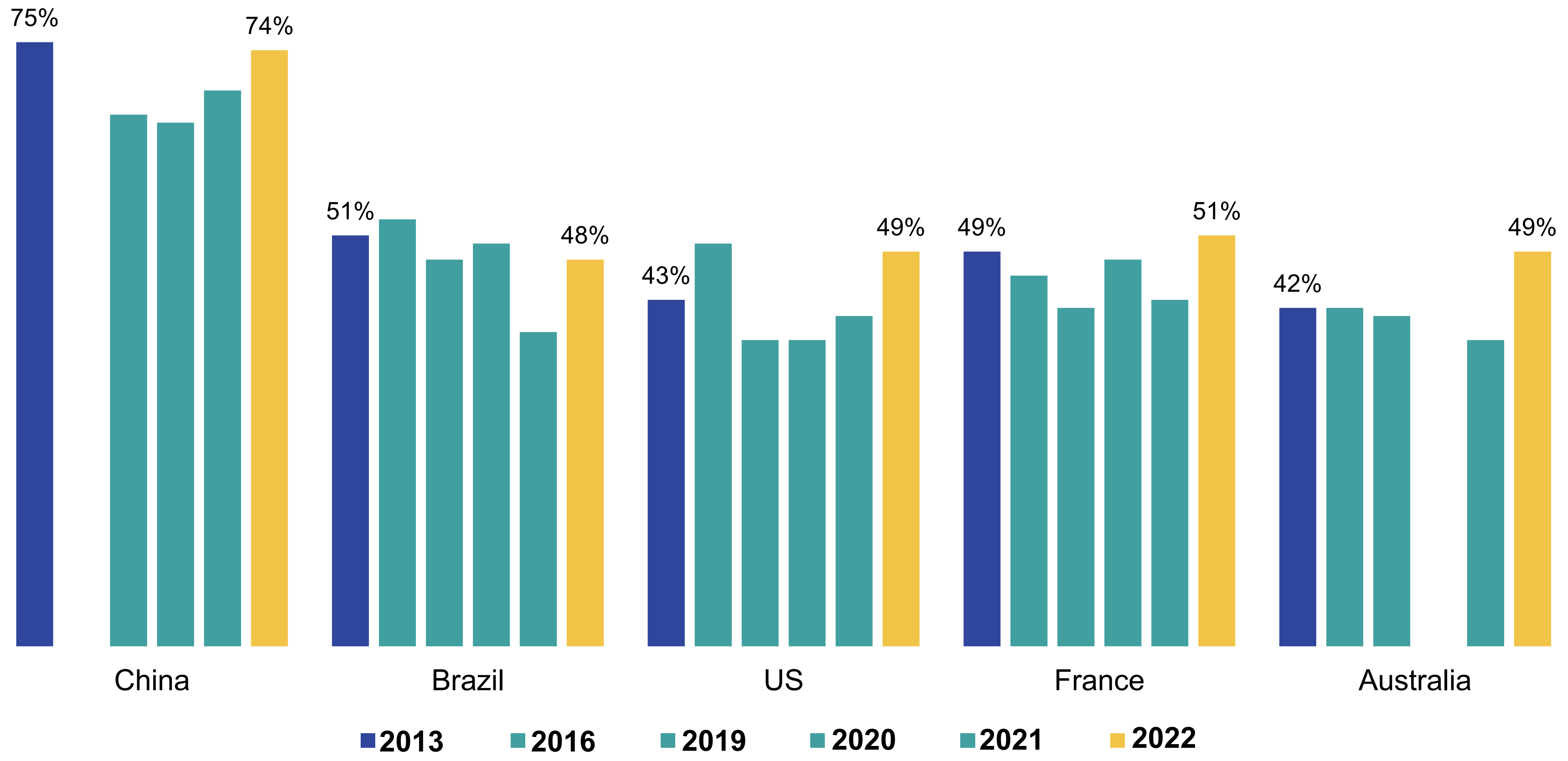
Source:
Ipsos Global Trends Series

In some markets, 2022 saw the reversal of years of growing concern about the climate. At a national level we often see immediate economic concerns being more of a pressing issue for the public than climate change.

And there are worrying signs of a potential pushback against the science

To what extent do you agree or disagree with the following statement?
% agree

Even the scientists don't really know what they are talking about on environmental issues



Base:
48,579 adults aged 16–75 across 50 markets, interviewed online between 23 September and 14 November 2022

Source:
Ipsos Global Trends 2023

Progress on climate will need concerted action from governments, corporations, NGOs and citizens

Thought Starters

Many still rely on goods and services that worsen climate change. Can you create better-quality products that won't soon end up in a landfill, at a price people are happy to pay?

Individual action is a drop in the bucket, while government pledges and corporate impact aren't enough. How can your organisation work with all these actors to effect change?

In a world whose existence is threatened and where the future is uncertain, does every business have the right to exist?

CONSCIENTIOUS HEALTH

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

Mental health is as much of a priority as physical health

What it's about today:

Health is no longer just about physical well-being. Mental, emotional, financial and other aspects of health are becoming part of the conversation, broadening our collective understanding of what it means to be 'in good health'.

At the same time, there is a growing realisation of how connected our health is to everything around us, including our local environment and the world at large. This goes beyond the microbiome of the gut or macro-biome of the home to examine health through three lenses: me, *my* world and *the* world. This drives a connection between sustainability and health.

However, this holistic, aspirational view of health is chiefly prevalent among wealthier consumers, regions and nations; countries and people who are less well-off economically usually have to focus on the effects of physical ill-health.

At the same time, closer examination of the structural impacts of people, government, societies and business reveals that there are many systemic impacts to health – for example, a shift to eating more processed food is leading to an increase in diabetes and heart disease. Chronic health conditions tied to environmental factors such as air quality and pollution are also being explored, with the findings often being that systemic inequities are driving negative outcomes for marginalised groups.

80%

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

86%

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

Brands are recognising opportunities to promote and support healthy lifestyles

Signals

In **Singapore**, there is a renewed focus on mental health, and more people are working out at gyms than before the pandemic[1].(via The Straits Times)

In **Belgium** and elsewhere around the world, businesses such as Danone are highlighting the fact that our food affects both our health and the planet's, and that it's increasingly important to connect those aspects[2].(via Danone)

In **France**, car adverts will now encourage readers to walk, not drive, thanks to a new law to promote alternative modes of transport[3].(via Capital)

New Zealand's economy relies heavily on meat exports, yet veganism is now twice as popular there as it was five years ago[4].(via NZ Herald)

The most impactful Macro Force themes affecting this trend

1 Systemic health inequality

2 Growing mental health crisis

3 Ageing populations

4 Pervasive technology

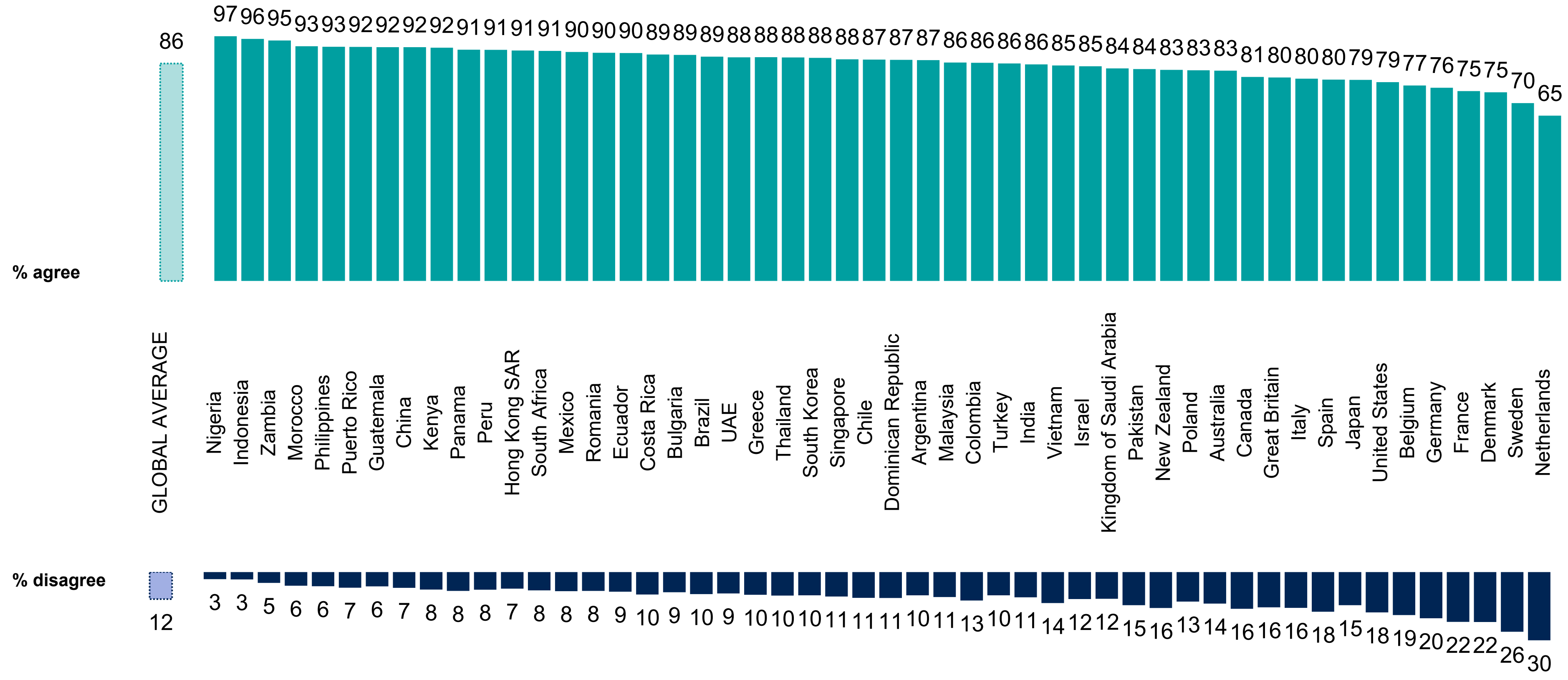
5 Advances in AI & quantum computing

6 Integration of health & technology

The drive to do more about our physical health is strong across all markets

To what extent do you agree or disagree with the following statement?

I need to do more to look after myself physically.



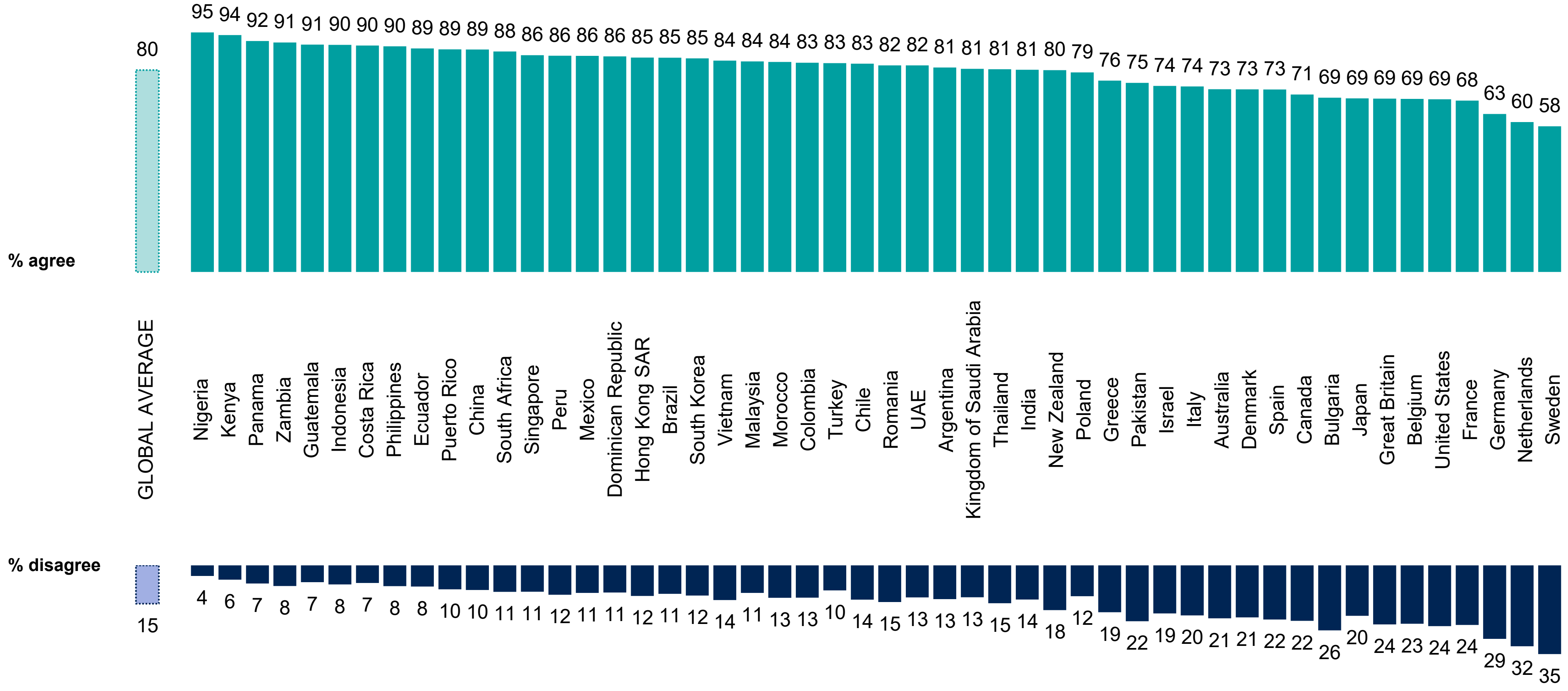
Base:
48,579 adults aged 16–75 across 50 markets, interviewed online between 23 September and 14 November 2022

Source:
Ipsos Global Trends 2023

Mental health is a similarly high priority for many

To what extent do you agree or disagree with the following statement?

I need to do more to look after my mental well-being.



Base:
48,579 adults aged 16–5 across 50 markets, interviewed online between 23 September and 14 November 2022

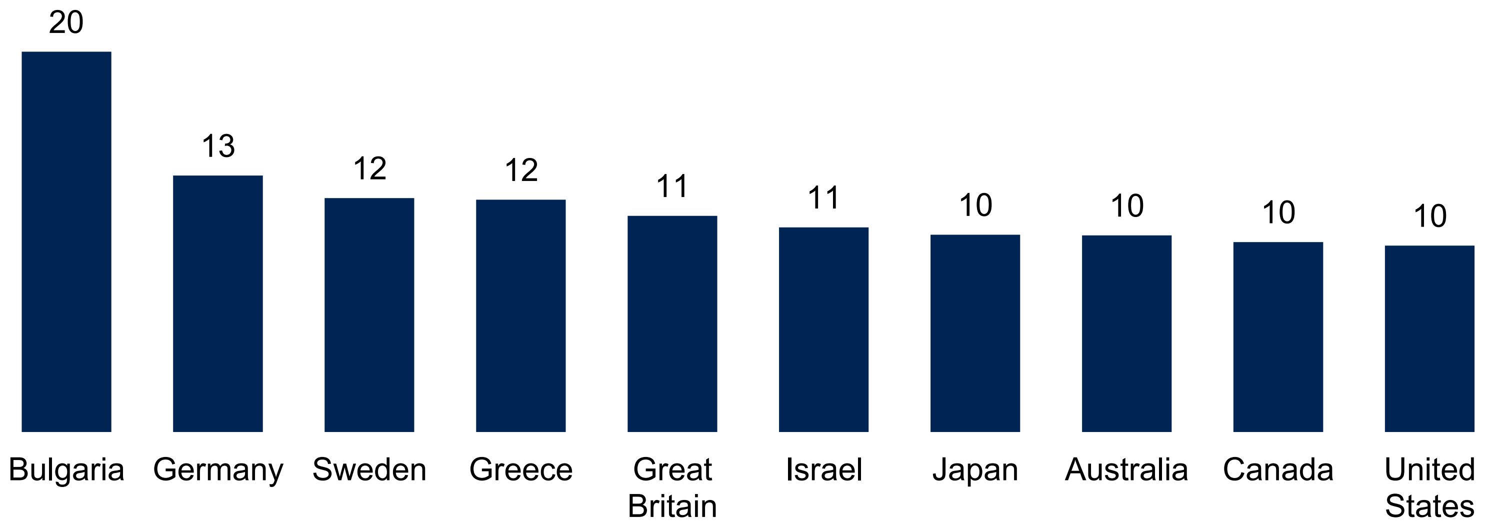
Source:
Ipsos Global Trends 2023

Physical health remains a greater priority than mental health in some markets

To what extent do you agree or disagree with the following statements?
% agree
Figures show the top ten countries with the biggest lead for physical over mental well-being

I need to do more to look after myself physically.

I need to do more to look after my mental well-being.



Base:
48,579 adults aged 16–75 across 50 markets, interviewed online between 23 September and 14 November 2022

Source:
Ipsos Global Trends 2023

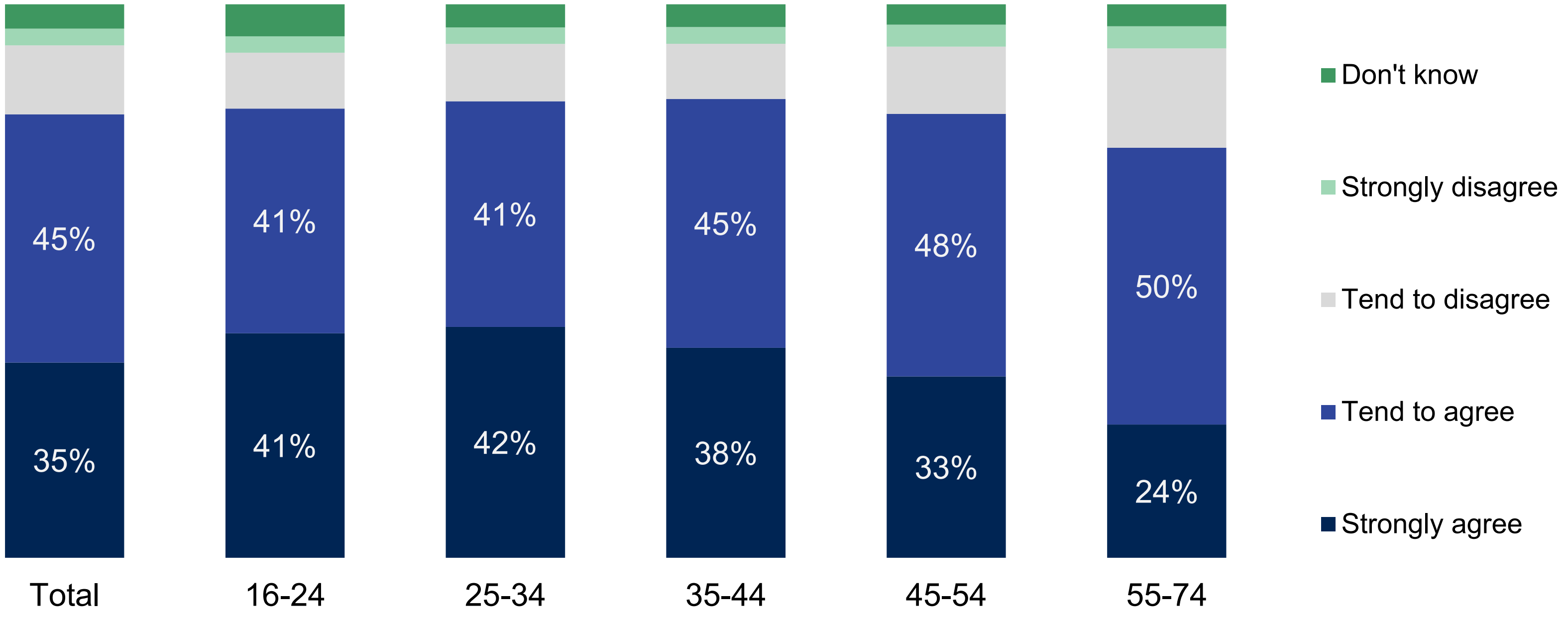
In most markets, physical health remains a greater priority than mental health. The markets shown here are those where the gap between physical and mental health is at least 10 percentage points. In other markets, the gap is much closer. These are the markets where the two concerns are closest:

Kenya:	Mental health = 94%, Physical health = 92%
Panama:	Mental health = 92%, Physical health = 91%
Costa Rica:	Mental health = 90%, Physical health = 89%

While mental health is a challenge for all ages, it is the young who feel this most acutely

To what extent do you agree or disagree with the following statement?
% agree

I need to do more to look after my mental well-being.



Base:
48,579 adults aged 16–75 across 50 markets, interviewed online between 23 September and 14 November 2022

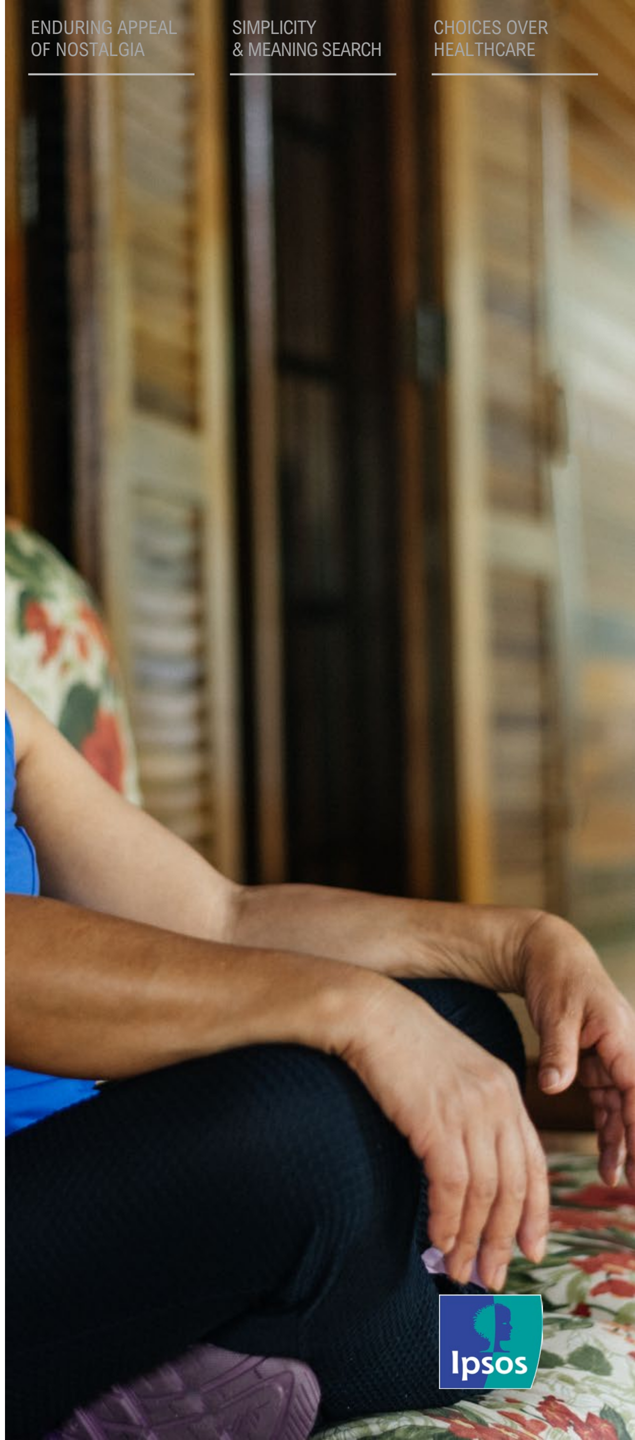
Source:
Ipsos Global Trends 2023

COVID-19 has put pressure on everyone. Even those not directly harmed by the most severe effects of the pandemic have had their thoughts dominated by the virus and how it, and its impact on the economy and society, might affect them and those they care about.

As well as the pandemic, negative factors over the past few years – such as economic uncertainty, the climate crisis, and global conflict zones – have added to people's worries.

Around eight in ten (from all age groups) agree that they need to do more to look after their mental well-being. The most acute need is among the young: while four in ten of under-35s strongly agree that they need to do more for their mental well-being, just a quarter of those aged 55–74 say the same.

Look for ways to support the public's physical and mental health



Thought Starters

How does your business or brand support a more holistic view of health beyond the physical – for your customers and your employees?

Do your innovations, strategic plans and growth opportunities take into account the systemic drivers of health and well-being?

Consumers often have to choose between 'good for me' and 'good for the planet': how can you help customers find the right balance?

AUTHENTICITY IS KING

The days when corporations could focus on providing good products at good prices and expect the marketplace to respond favourably are fading fast. Increasingly, these aspects are taken for granted and consumers are asking hard questions, such as: 'What issues do you care about? More than caring, what do you actually do about these issues? How do you treat your workforce? What is your ESG (environmental, social and governance) policy? How diverse is your workforce and how inclusive are your working practices?' and expecting robust answers. Increasingly, the answers to these questions will drive marketplace success.

Authenticity is a vital concept for brands to understand, but one that is increasingly complex to define

What it's about today:

Authenticity is an important, but increasingly complex, concept in the competitive, fast-changing global marketplace of 2022. It is also one that interacts with many of the other trends on our list. Successful brands need to blend elements of localness, naturalness, heritage, trust, empathy, consistency and purpose **at the same time as** offering good products at the right prices.

With modern customers increasingly adept at spotting fakery and insincerity, it is about more than simply shoehorning a topical cause into one's latest marketing campaign. Customers expect brands to pick issues that matter. They expect them to choose issues and support them. They expect this support to be about more than mere words; it should include actions, in the form of financial support, events and spokespersons. They want brands to choose the right issues – issues that mean most to their audience, and issues that have a natural, rather than a forced, association with the brand.

This discerning attitude to the activities of brands extends to channel choices too. With more and more people now familiar with online shopping, expectations are high and tolerance for missteps is low. Most people will only shop online while it offers genuine advantages of time and/or money, or ideally both.

52%

are willing to pay extra for a brand image that appeals to them

80%

feel it is possible for a brand to support good causes and make money at the same time

Corporations are responding to calls for fairness and support for key issues by making an effort to demonstrate their empathy

Signals

In **Chile**, WOM mobile phone advertising campaigns are famous for their 'defiant' stance. In one campaign, they say, 'We are a brand with balls, we speak clear and have no fear to give you the best service'[1].(via bienpensado)

In **France**, Monoprix offers a range of products from local producers via its Made in 'not very far' campaign[2].(via Monoprix Enterprise)

In **Panama**, the 'Live for More' tourism campaign takes a unique approach to promote Panama, focusing on Panamanians themselves and on stimulating and authentic experiences[3].(via Promtur Panama)

The most impactful Macro Force themes affecting this trend

1 Systemic health inequality

2 Rethinking institutions

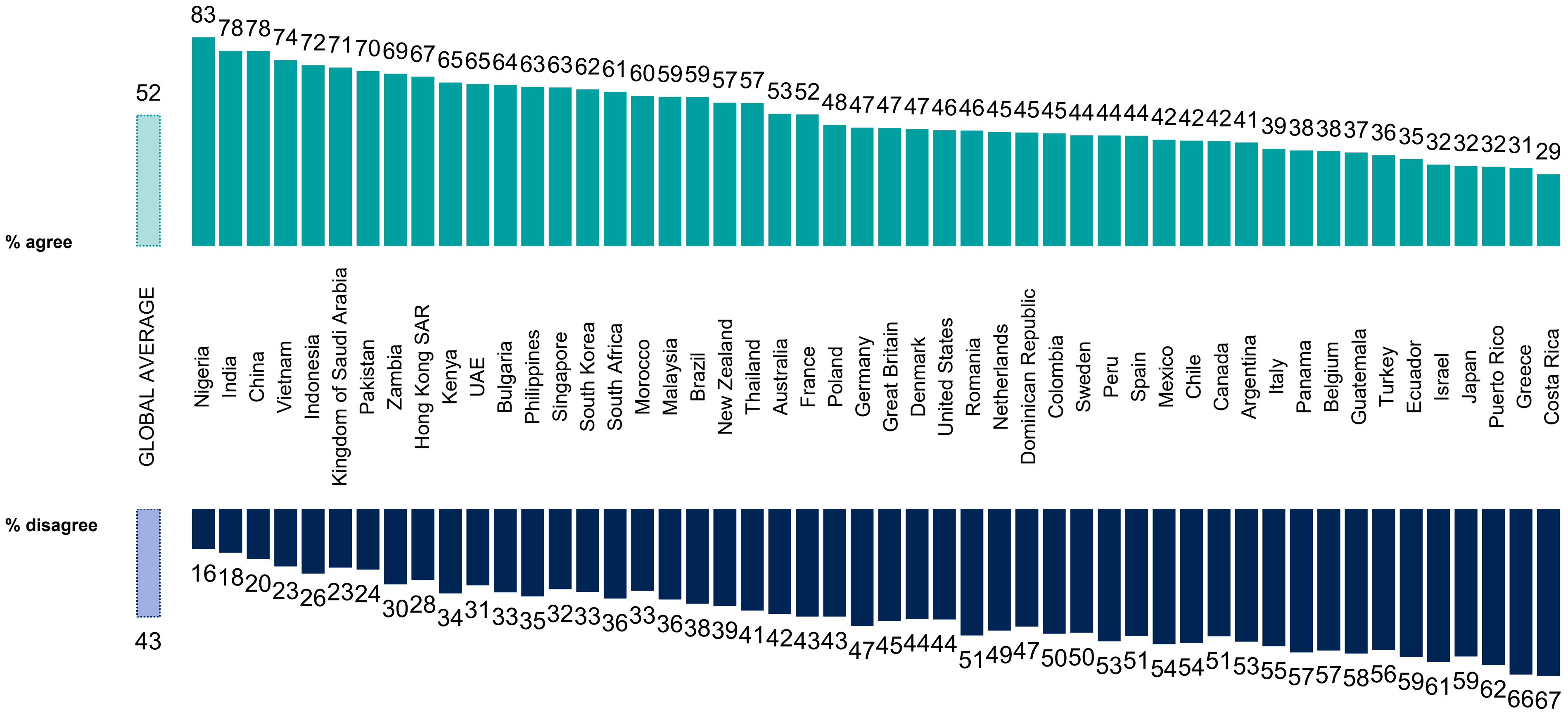
3 Climate change

4 Growing mental health crisis

Generally, people in Asia, the Middle East and Africa place the highest value on brand image

To what extent do you agree or disagree with the following statement?

I am generally willing to spend extra for a brand with an image that appeals to me



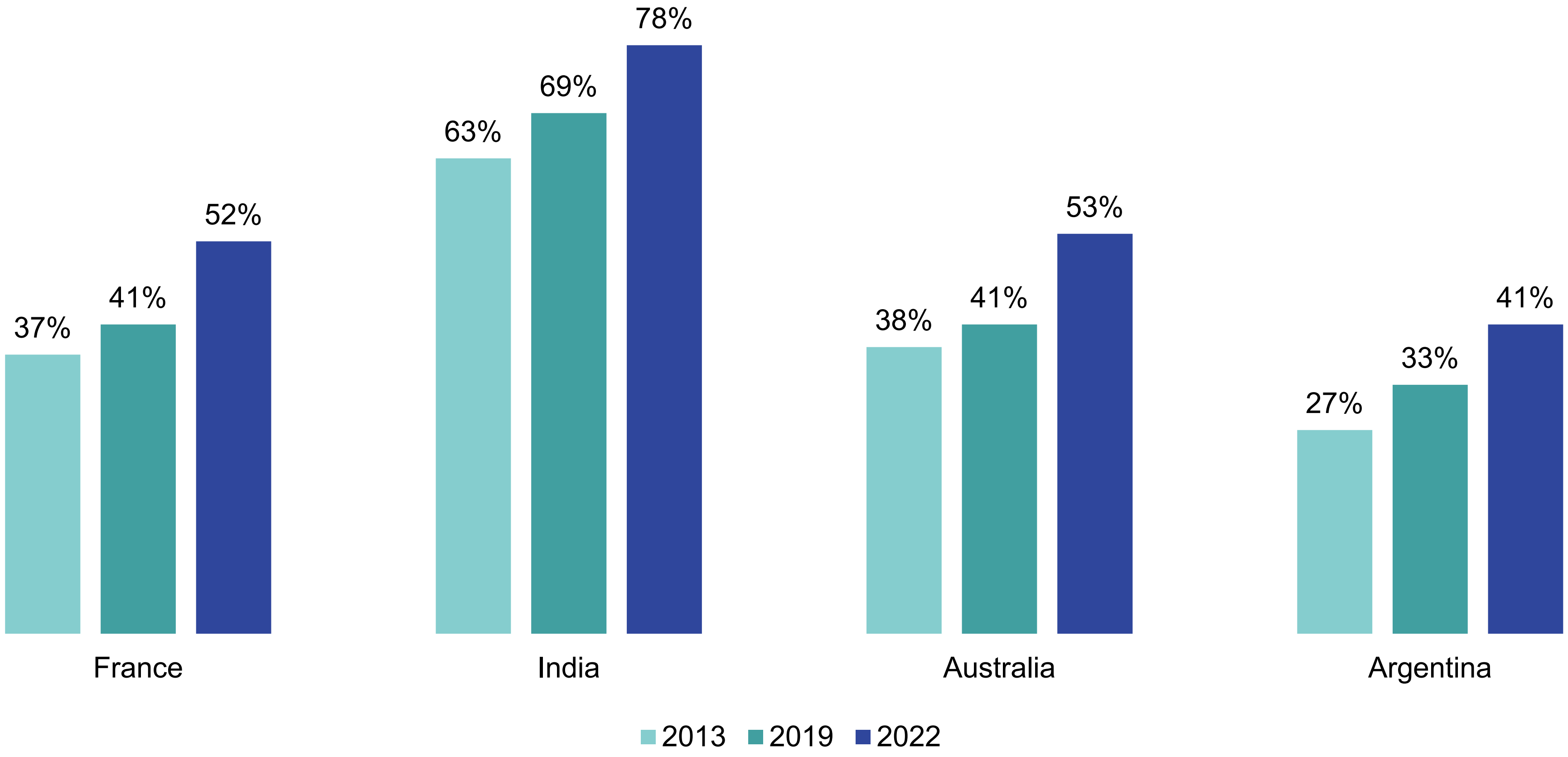
Base:
48,579 adults aged 16–75 across 50 markets, interviewed online between 23 September and 14 November 2022

Source:
Ipsos Global Trends 2023

The value that people place on brand image is rising in many markets around the world

To what extent do you agree or disagree with the following statement?
% agree

I am generally willing to spend extra for a brand with an image that appeals to me



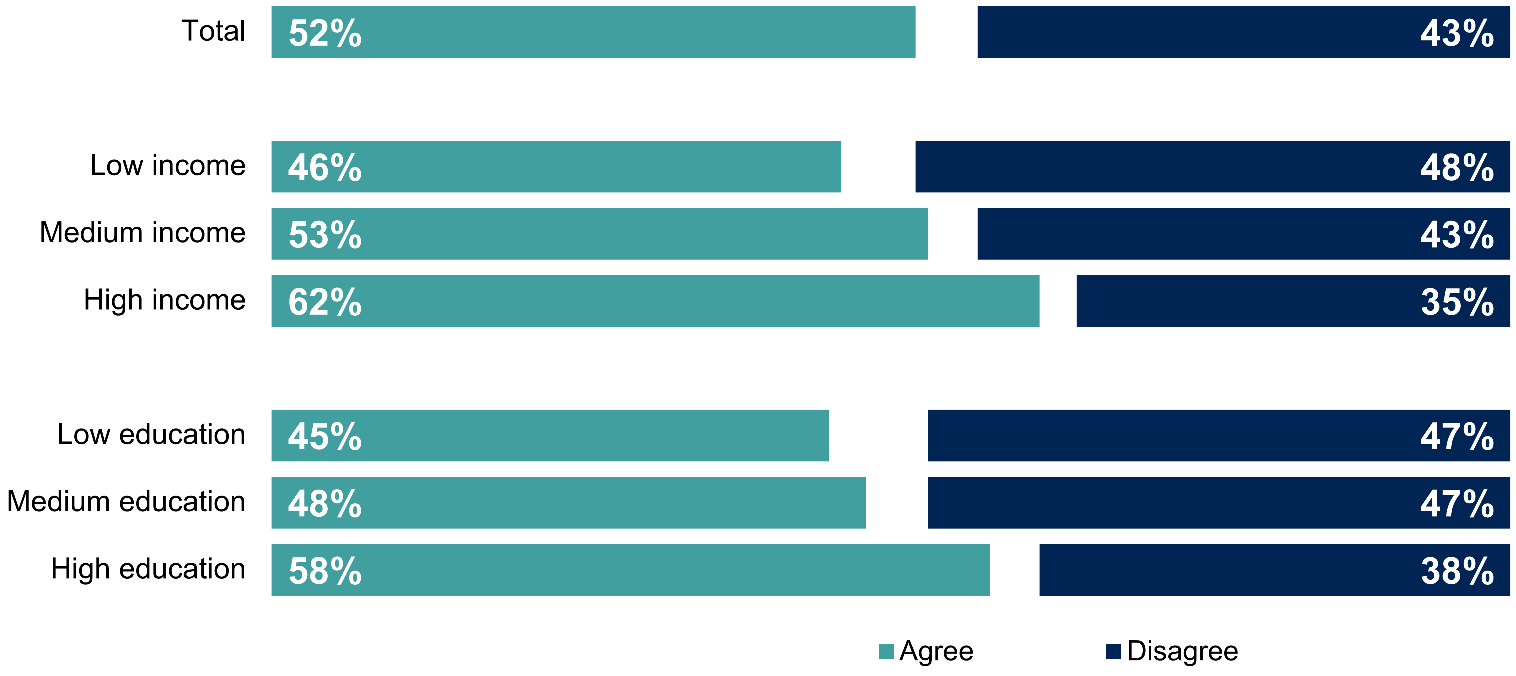
Base:
500–1,000 500–1,000 adults aged 16–75 (18–75 in US and Canada) per market per year

Source:
Ipsos Global Trends Series

But brand image is more important to people with higher incomes and higher levels of education

To what extent do you agree or disagree with the following statement?
% agree

I am generally willing to spend extra for a brand with an image that appeals to me.



Base:
48,579 adults aged 16–75 across 50 markets, interviewed online between 23 September and 14 November 2022

Source:
Ipsos Global Trends 2023

Concern about the authenticity of brands is not evenly distributed. The proportion of those willing to pay extra for the 'right' brand image is significantly higher among higher-income and/or higher-education individuals than those with more modest levels of these attributes. It is a pattern that has been repeated throughout recessions across the decades: so-called 'luxury' attributes such as brand purpose (applied to ethical production or environmental impact, for example) are often much more difficult for shoppers to justify when times are hard and money is scarce. Such a pattern suggests that there may be an economically driven back-to-basics mentality for a while, but this may mean that demanding customers will want goods with a high-price image, but at lower price points.

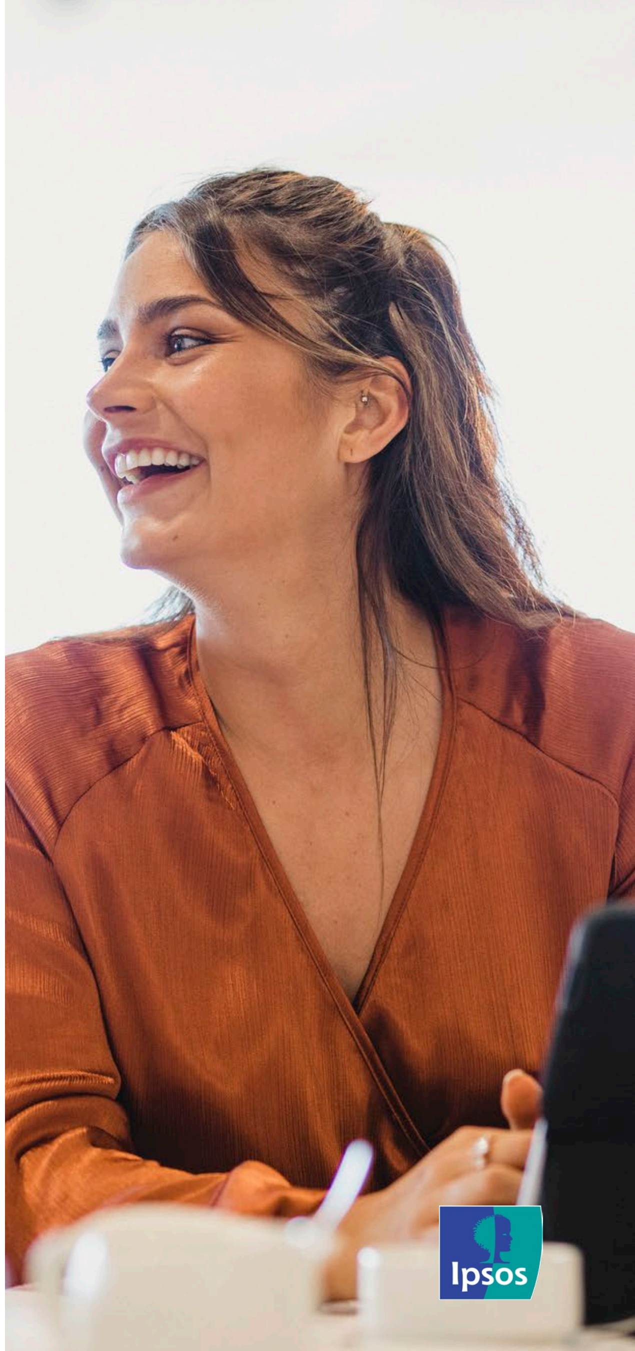
Build stronger, more authentic relationships with customers

Thought Starters

Do you understand which issues or causes matter most to your target audience, and which ones most naturally resonate with your brand identity and heritage?

Are you prepared to act on causes, rather just talk about them? People are increasingly looking for brands to do more than simply engage on an intellectual level. How can you invest in practical support for the causes you embrace, and how this will affect your budgets?

If you already have a strong brand purpose or want to step into this space, are you ready for the inevitable scrutiny and pushback that will follow?



GLOBAL TRENDS 2023

DATA DILEMMAS

Whether it’s that eerily accurate advert that pops up after you and your spouse have agreed to buy a new sofa, or your quick acceptance of the default cookie settings on a website so you can read an article a colleague just sent you, at times we all question who has our data and what they’re doing with it. But how much do people *really* care? And perhaps more importantly, are they willing to do something about it?

The public remain prepared to share their data, within limits

What it's about today:

Despite constant news of hacks, data breaches, scams and online manipulation, people have not really changed their habits around data privacy and security. The majority of people across the globe either know, or assume, that their data is being collected and used, but they don't know who has it, what is being done with it, and how they can prevent their data from being collected.

The alternative is not using social media platforms and services at all, but this leaves no middle ground for those who are privacy-minded. While requiring opt-in for certain functionality is becoming more common, brands such as Apple have begun pushing for enhanced data privacy in order to differentiate themselves and reassure customers.

Beyond the consumer landscape, there's increasing worry about the use of citizens' data by foreign governments and state actors, for uses from hacking to inciting social upheaval. Data has become the currency of a technological cold war. This has led to protectionist laws about where data can be stored and even which technology providers are allowed to do business.

With the recent proliferation of data protection initiatives worldwide, there is more transparency and choice around how consumers are tracked – but the picture is not yet complete. As we approach a cookie-less world, marketers and data companies will position and evolve their services to maintain business as usual.

81%

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

There is a growing conversation around data security and data as a personal asset

Signals

In the **United States**, a viral TikToker 'consensually doxxes' people to reveal their names and birthdates to draw attention to private information easily found on social media[1]. (via NBC News)

In **Spain**, a business and employment site called beBee claims to be the first social network to pay users for their data[2]. (via beBee)

In **Chile**, a new NGO called Fundación Datos Protegidos (Protected Data Foundation) focuses on data privacy and security. It has started a campaign called #NoDoyMiRUt (I don't give my ID number), which seeks to prevent businesses and companies from asking customers for their ID numbers, which are then sold to others[3]. (via Fundación Datos Protegidos)

The most impactful Macro Force themes affecting this trend

1 Pervasive technology

2 The immersive frontier

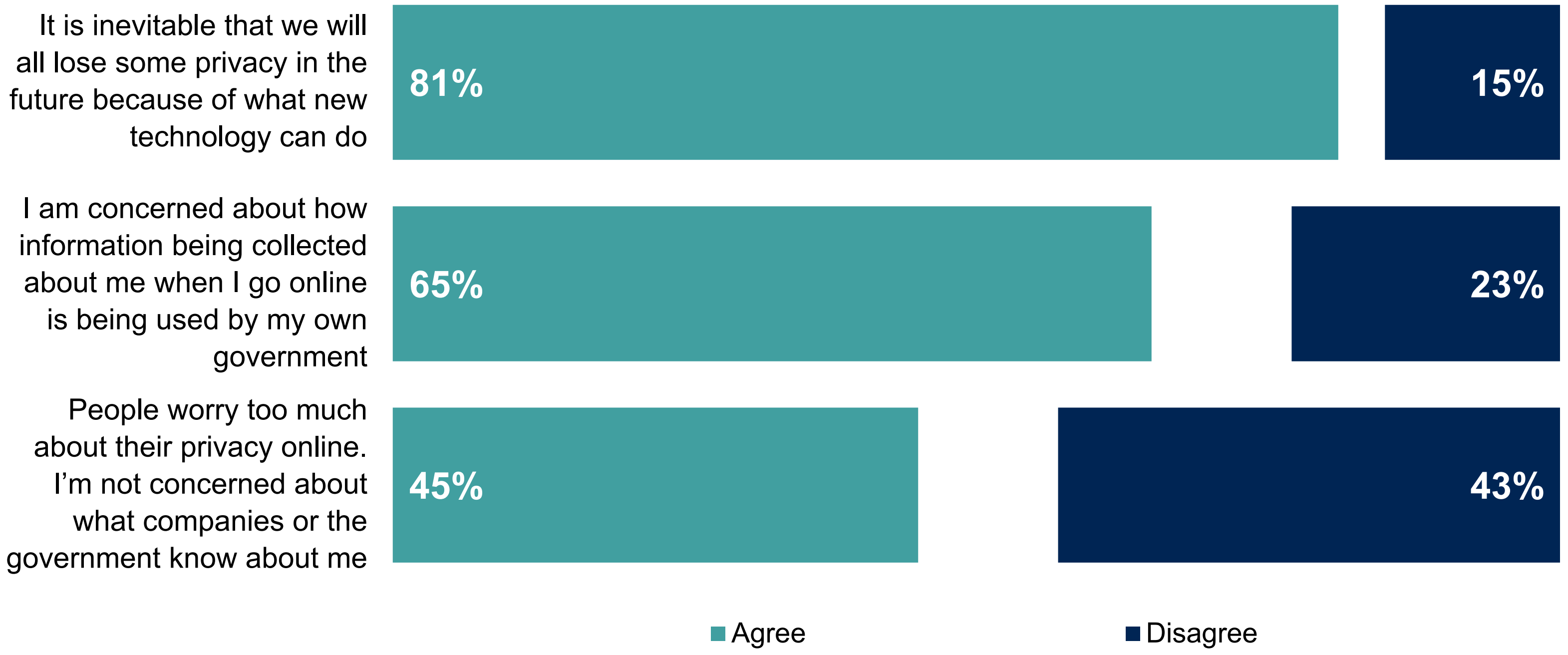
3 AI advances & quantum computing

4 Increased automation

5 Toll of technology

While there is concern about loss of privacy, most feel it is inevitable

To what extent do you agree or disagree with the following statements?
% agree



Base:
1. 48,579 adults aged 16–75 across 50 markets, interviewed online between 23 September and 14 November 2022
2&3. 48,580 adults aged 16–75 across 50 markets, interviewed online between 23 September and 14 November 2022

Source:
Ipsos Global Trends 2023

The sense that the erosion of personal privacy is inevitable is the prevalent public attitude in almost all of the markets covered in this study. In only Malaysia and South Korea does concern outweigh this feeling of inevitability:

Malaysia: Inevitable = 73%, Concern = 79%

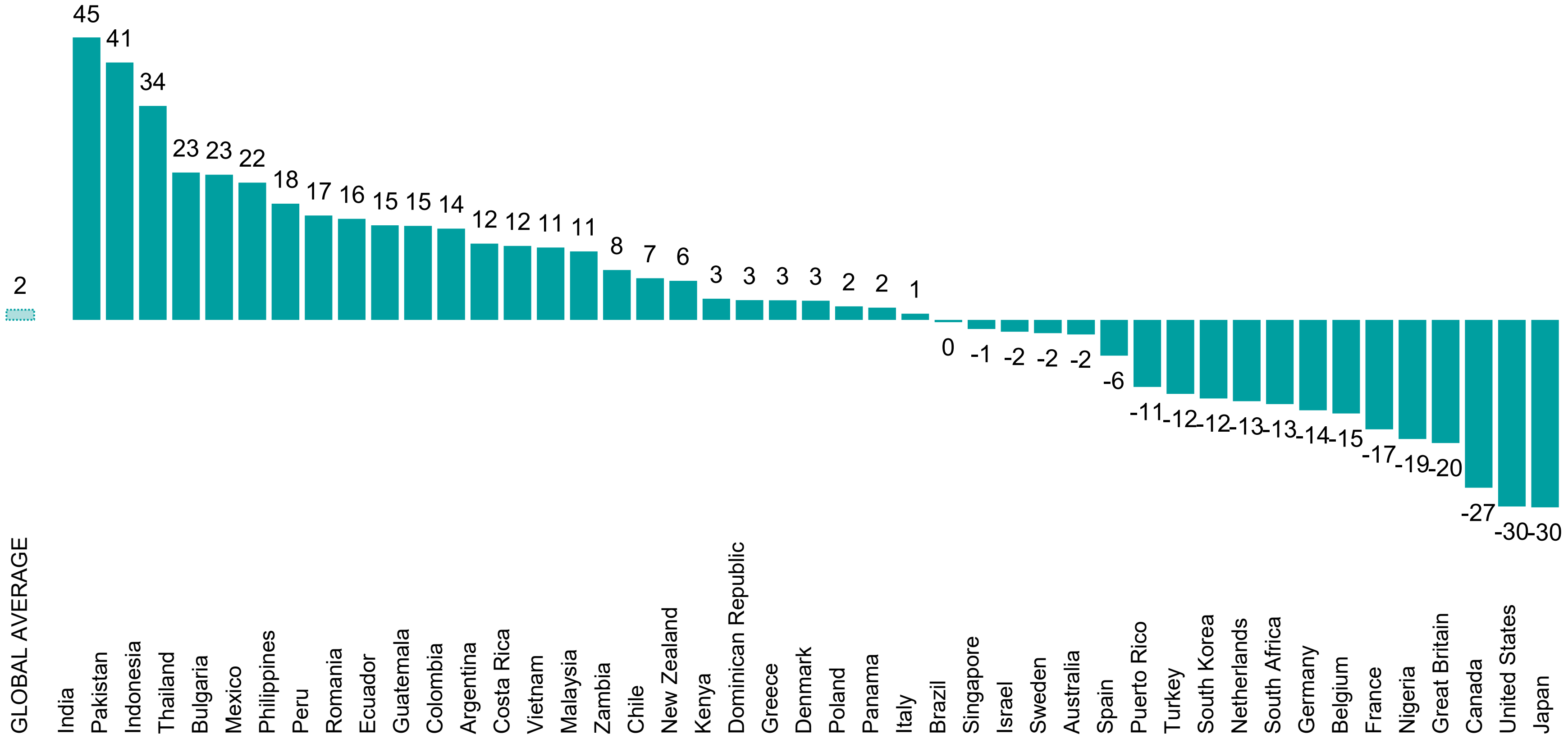
S. Korea: Inevitable = 67%, Concern = 73%

An implicit belief in the power of technology to do good and improve lives is part of the privacy trade-off.

The level of concern about privacy varies hugely from market to market

To what extent do you agree or disagree with the following statement?
Net agreement [% agree, % disagree]

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

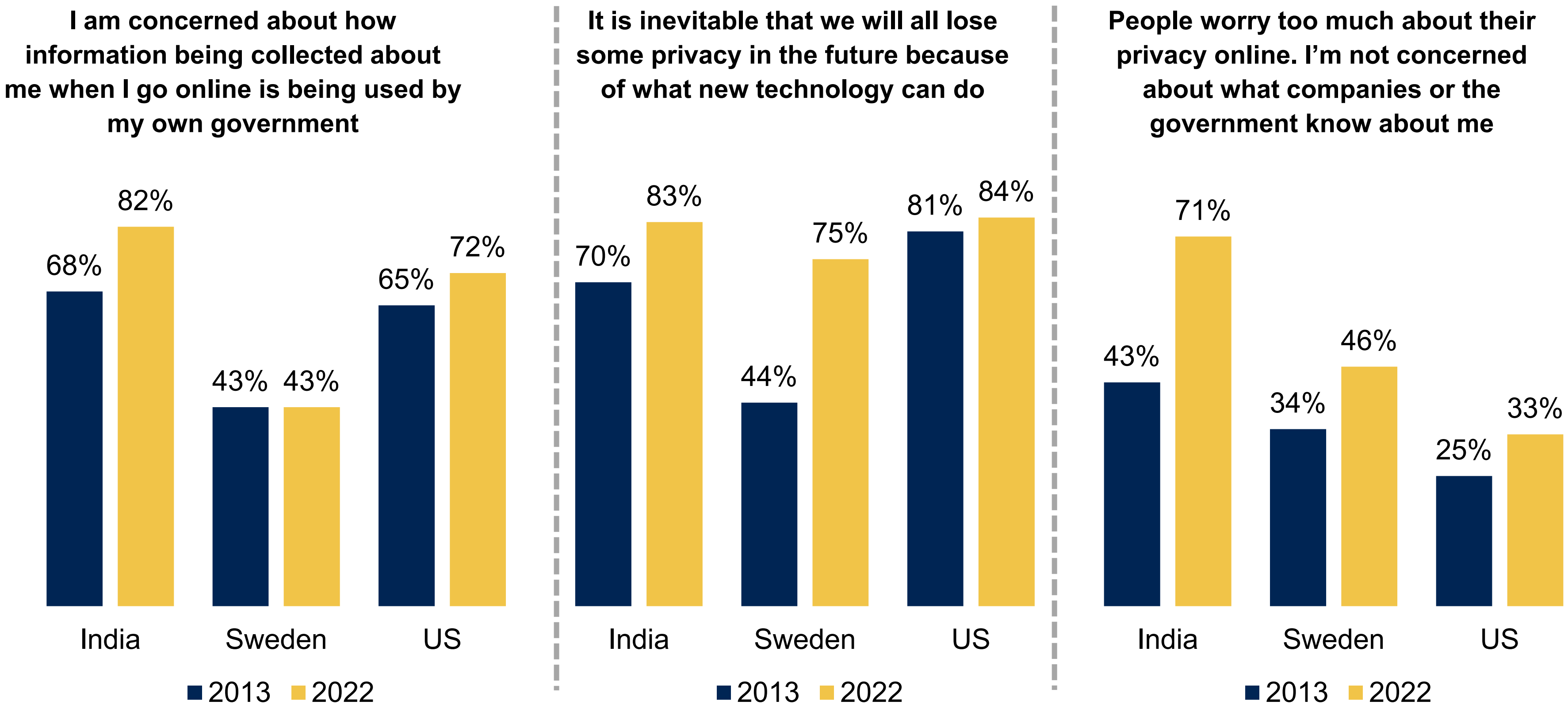


Base:
48,580 adults aged 16–75 across 50 markets, interviewed online between 23 September and 14 November 2022

Source:
Ipsos Global Trends 2023

And the direction of change varies too

To what extent do you agree or disagree with the following statements?
% agree



Base:
500–1,000 500–1,000 adults aged 16–75 (18–75 in US and Canada) per market per year

Source:
Ipsos Global Trends Series

While concern about data collection and misuse is growing in India and, to a lesser extent in the US, this has remained stable in Sweden. The feeling that a loss of privacy is inevitable is growing in most markets, but most quickly in markets like Sweden, where it has historically been much lower than in other markets. More apathetic views towards data sharing have grown considerably in India.

Businesses cannot take access to private data for granted

Thought Starters

What's the return on investment for customers who share their data? And how can you communicate this simply and effectively?

If transparency in data practices continues, are you ready to let your customers see how your organisation works?

Is it possible to create products and services that operate without customers having to opt in, or that handle data anonymously and retain it temporarily?

THE TECH DIMENSION

The rapid pace of technological change and disruption over the past few decades cannot be understated. However, years on, many people are wondering whether the promises made by Big Tech have been kept, and what we need to do collectively to harness the potential of tech – and mitigate its risks.

People need to be persuaded that new technologies will improve their lives rather than adopting them without question

What it's about today:

Even though technology may seem pervasive in our everyday lives, there's still considerable digitisation of industries and systems to be done. For example, interactions with government websites rarely feel technically optimal.

Now that technology is embedded in our daily lives and routines, many people are asking the question: 'Has it made our lives better or worse?' The answer is, it depends. It depends on who you ask, where they live, and what specific technology you're asking about.

Has digital technology made good on the promises it made of greater efficiency and better connection and collaboration? Social media in particular has been questioned. Many users are now choosing a 'digital detox', with some claiming that the end of Instagram is near, as it becomes more heavily monetised and vies for user attention by replicating other apps versus innovating on its own.

Speaking of monetisation, after years of growth, Big Tech is pulling back. Massive layoffs and reductions in spending have hit an industry that has seen little hardship to date. But is this enough to stave off greater calls for accountability and regulation? Among government detractors, concerns of national security as it relates to foreign technology are commonplace. Will the internet may eventually fracture between east and west?

Last, we would be remiss not to mention the metaverse and generative artificial intelligence, which has captured the world's attention, even though we don't quite know what it is. Is it here already? Is it a PR pivot? Or will it be the next big thing for societies, markets and people?

71%

can't imagine life without the internet

Technology is increasingly ubiquitous in people's lives

Signals

In **Sweden**, open finance services such as Insurely, which accesses your financial data to provide personalised offers powered by AI[1].(via Insurely)

In the **United States**, the KitchenPal app makes it easy for users to keep an inventory of their food cupboards, then syncs this with a grocery list to minimise food waste or overbuying. Using barcode scanning, it also performs product comparisons and suggests recipe ideas[2].(via KitchenPal)

In **Spain**, the national postal company now offers at home many of the services and products it provides in its offices, such as paying electricity, gas and telephone bills, and paying in and withdrawing money in cash, via its 6,011 rural postal workers[3].(via YouTube)

The most impactful Macro Force themes affecting this trend

1 Pervasive technology

2 The immersive frontier

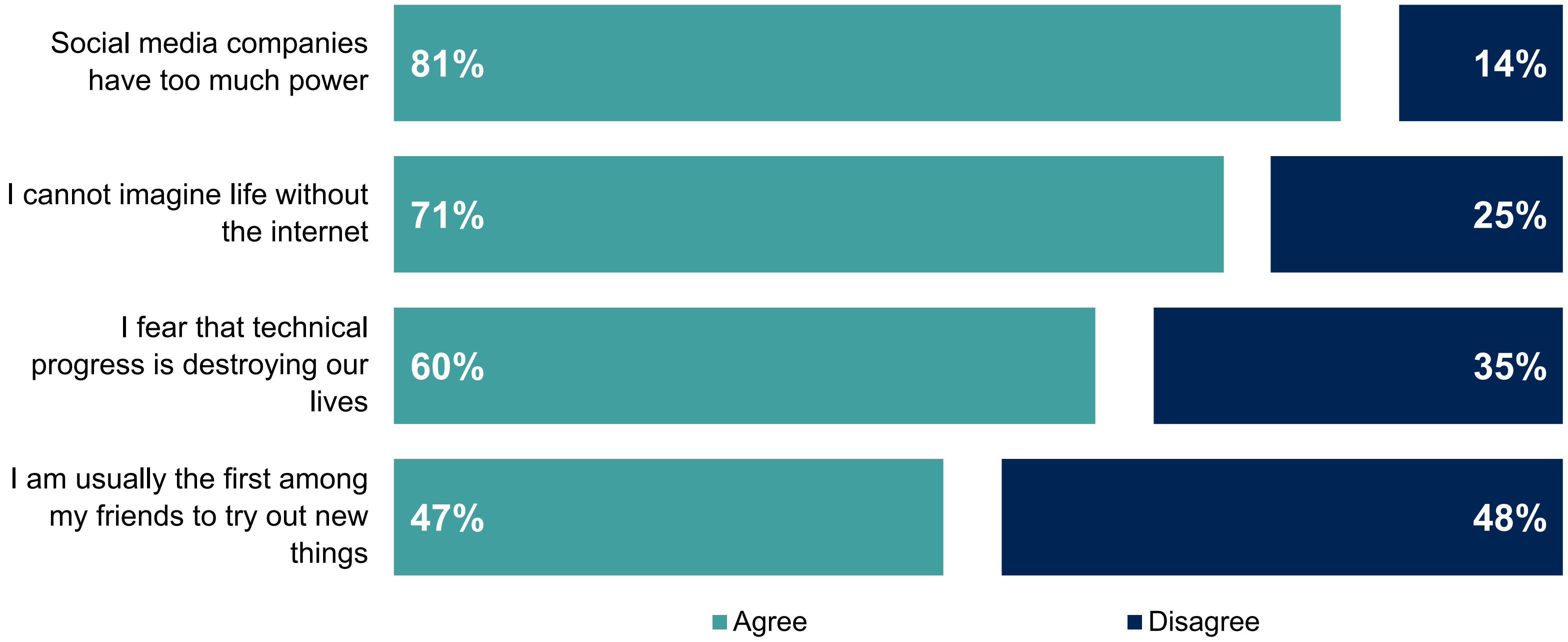
3 AI advances & quantum computing

4 Increased automation

5 Toll of technology

The global public remains undecided about tech

To what extent do you agree or disagree with the following statements?
% agree



Base:
48,579 adults aged 16–75 across 50 markets, interviewed online between 23 September and 14 November 2022

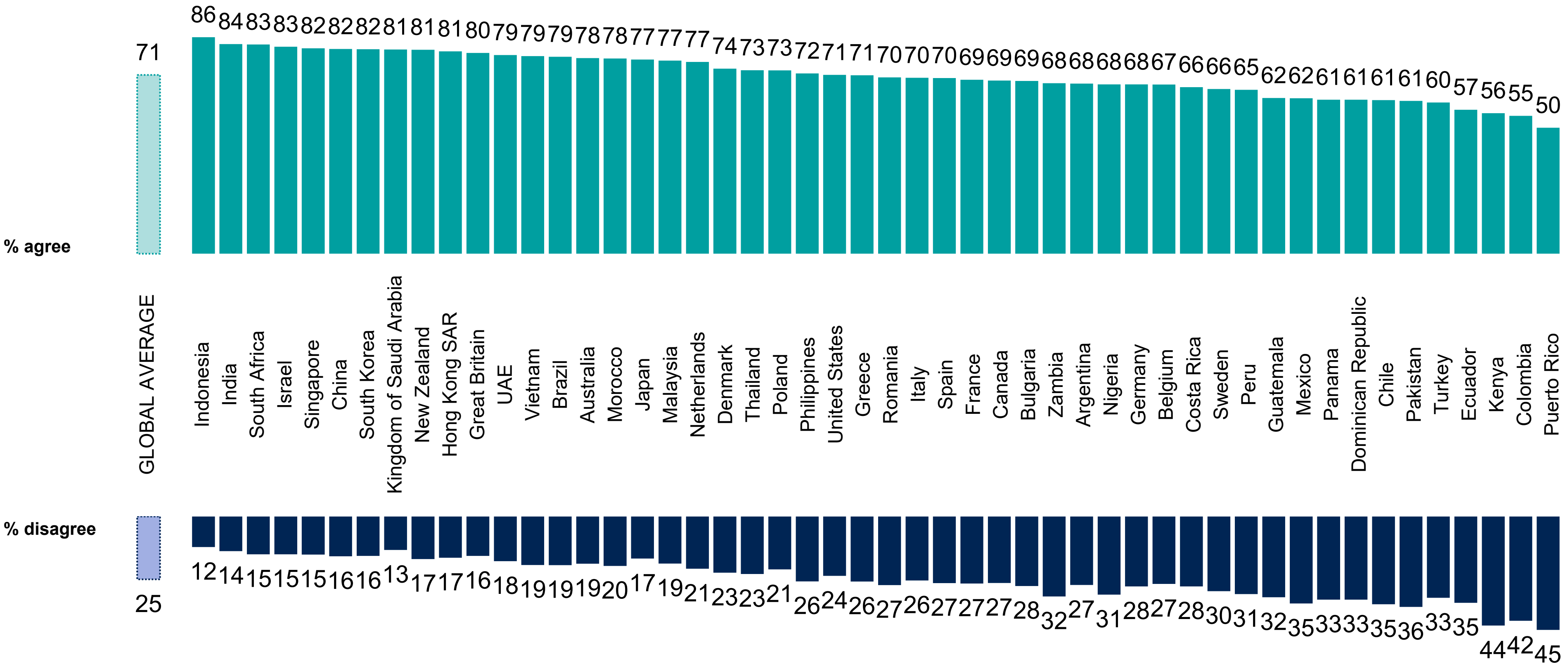
Source:
Ipsos Global Trends 2023

While the role of technology in everyday life is undeniable, many people feel that social media companies have too much power and that technological progress is destroying their lives.

Most people in all markets recognise the central role of technology in their lives

To what extent do you agree or disagree with the following statement?

I cannot imagine life without the internet



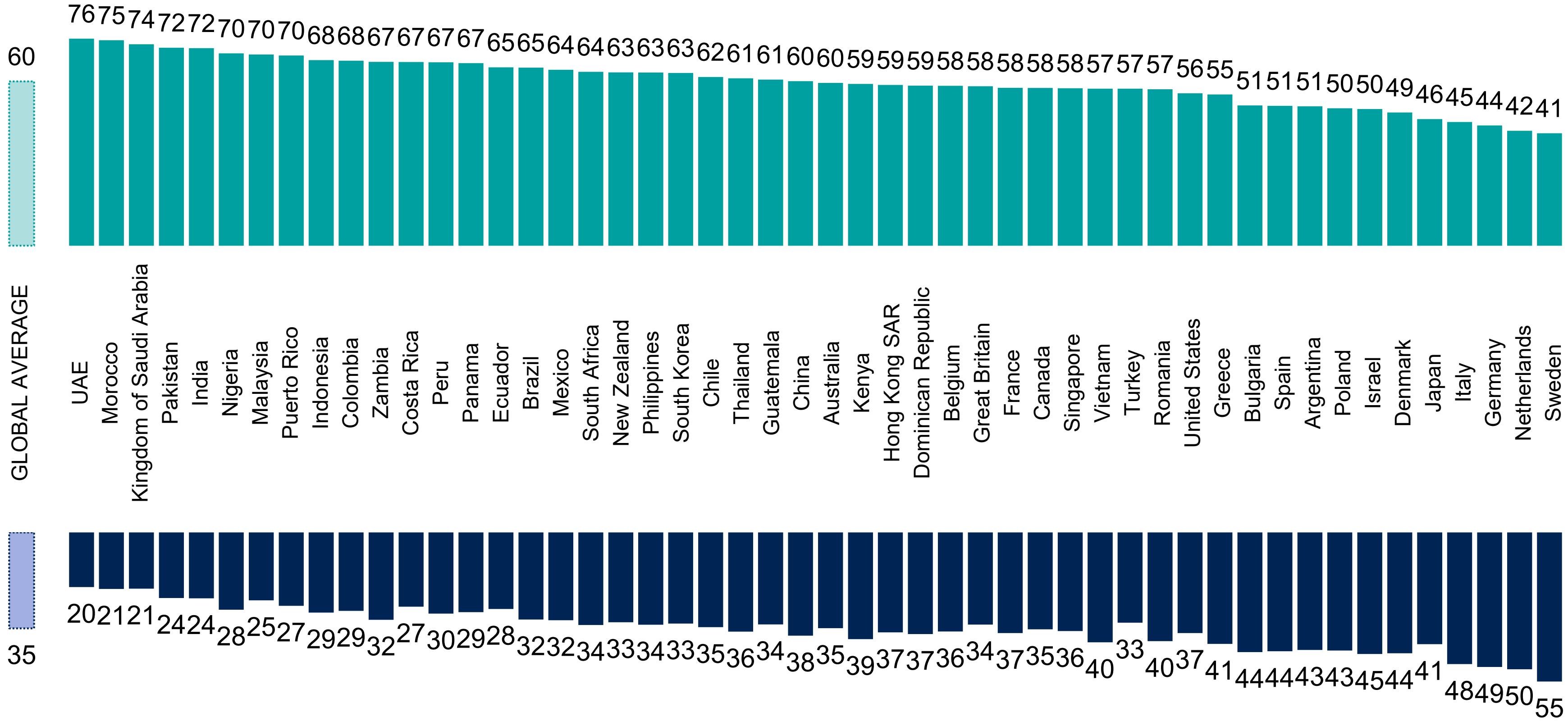
Base:
48,579 adults aged 16–75 across 50 markets, interviewed online between 23 September and 14 November 2022

Source:
Ipsos Global Trends 2023

But most people in nearly all markets are also worried about technology

To what extent do you agree or disagree with the following statement?

I fear that technical progress is destroying our lives

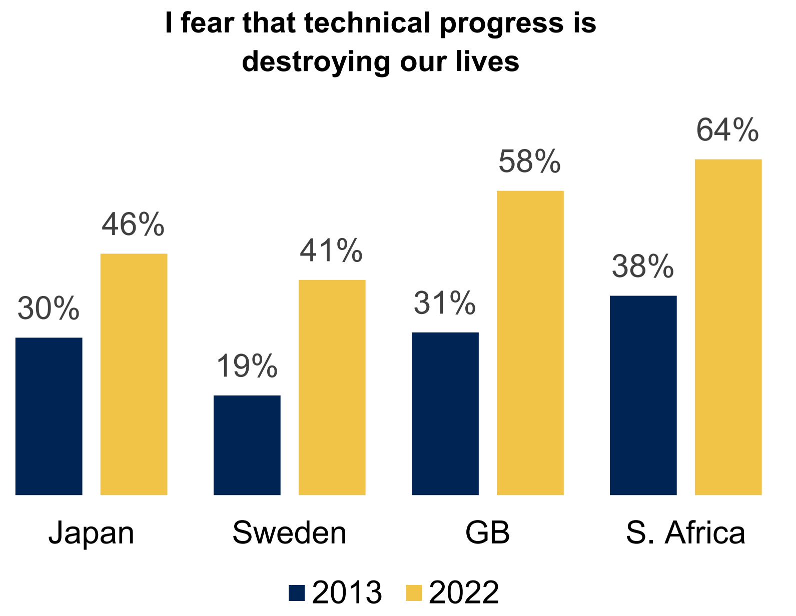


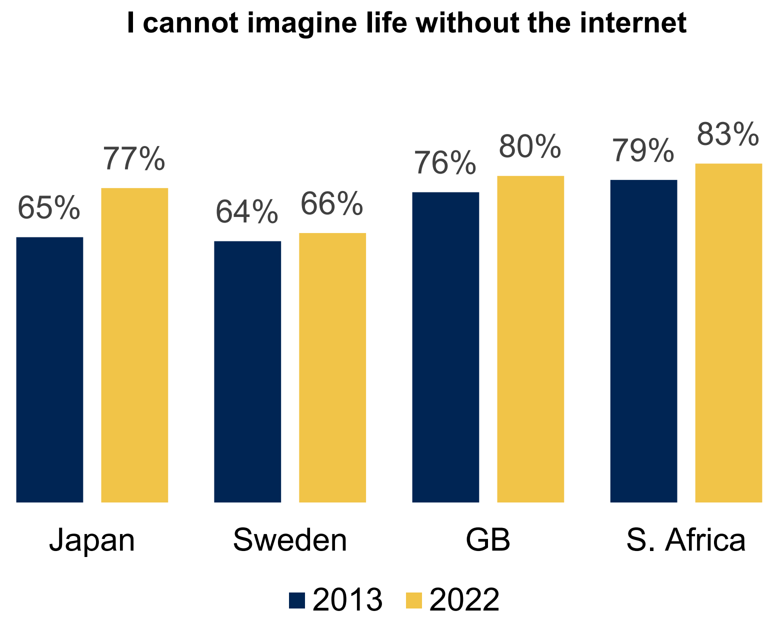
Base:
48,579 adults aged 16–75 across 50 markets, interviewed online between 23 September and 14 November 2022

Source:
Ipsos Global Trends 2023

There has been a significant growth of public disquiet about the march of technology

To what extent do you agree or disagree with the following statements?
% agree





Base:
500–1,000 500–1,000 adults aged 16–75 (18–75 in US and Canada) per market per year

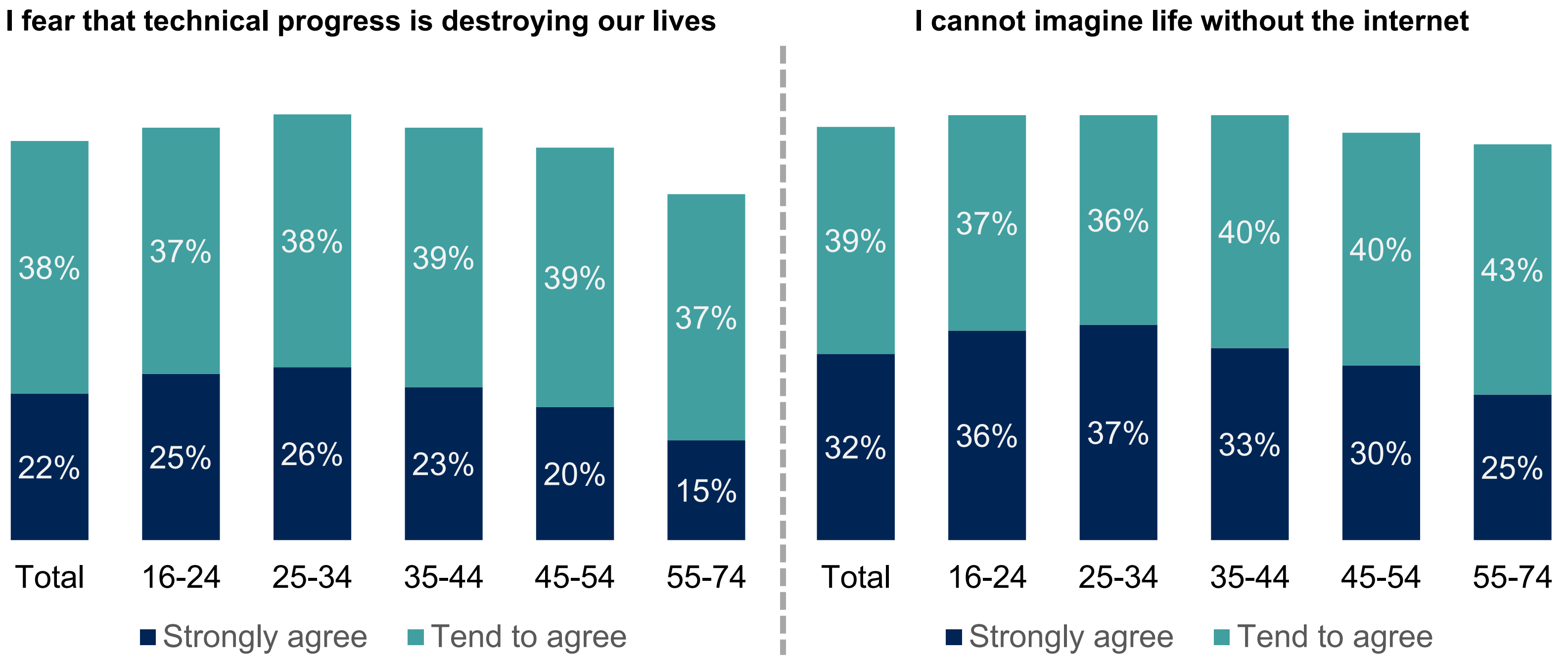
Source:
Ipsos Global Trends Series

It is clear that most people around the world recognise the vital role that technology, such as the internet, plays in their daily lives. The proportion who are unable to imagine life without the internet has remained high over the lifetime of Global Trends, and has even edged up slightly in some markets.

However, over the same period there has been a significant increase in people who feel that we have lost something along the way, that technology, while hugely powerful, is undermining our way of life to some extent.

Disquiet about technology is somewhat more prevalent among younger people

To what extent do you agree or disagree with the following statements?
% agree



Base:
48,541 adults aged 16–75 across 50 markets, interviewed online between 23 September and 14 November 2022

Source:
Ipsos Global Trends 2023

While it is tempting to think that it is the older members of society who are most wary of the impact of technology, in fact the reverse is true: one quarter of people aged 25–34 strongly agree that technological progress is destroying their lives, compared with just 15% of those aged 55–74. The role of social media in spreading negative information, causing alienation, depression, anxiety and lowering users' self-esteem has been the subject of considerable research and may be one of the drivers behind this pattern.

Make sure that tech innovations bring real-world benefits

Thought Starters

Take stock of what tech might be good for, and what it is not. Just because we can use tech for something, this doesn't mean we should.

What role can you and should your organisation play in the next evolution of the web? Could the web become more accountable, equitable and secure?

How might you integrate technology in such a way that the focus is on the value or experience created for customers, not on the tech itself?

PEAK GLOBALISATION

The world remains divided on the benefits of globalisation. Increasing travel, greater cultural exchange and the rise of cheap products (facilitated by low labour costs and developed international supply chains) represent significant benefits to many. However, the dilution of local cultures, perceived lifestyle homogenisation, increased consumerism, rising emissions and faster habitat loss are all among the significant impacts of globalisation.

Many commentators feel that we have already reached peak globalisation and are moving to a world where protectionist policies, shorter, more secure supply chains, and a greater focus on nationality and local community will create a smaller, less globalised landscape. We at Ipsos are less sure.

Globalisation may be enjoying increased popularity after the COVID-19 pandemic focused people on their local areas

What it's about today:

Over the 1990s and 2000s, cheap labour in Asia coupled with relatively inexpensive, reliable global shipping drove consumerism and fuelled the march of globalisation. The growth of the middle classes in China drove up labour costs, governments focused on more lucrative industrial sectors, and manufacturers switched to other offshore markets. COVID-19 and global conflicts put huge pressure on global supply chains and forced manufacturers and retailers to prioritise resilience and agility of supply through tactics like nearshoring and friendshoring.

Having found more stable supply chains out of necessity, many people have come to appreciate the benefits of these (their reliability, lower cost, shorter lead times and lower environmental impact) and consumers have started to adopt a more local-first attitude.

It is clear, though, that attitudes to globalisation are strongly linked to the economic development of nations and the living standards of their populations: of the top 20 countries ranked in terms of how much they feel that globalisation is 'good for my country', ten are in Asia, six in Latin America and three in Middle East/Africa. Only one (New Zealand) falls outside these emerging regions.

For corporations, the issue is complicated by the need to balance lower production costs with unstable supply chains: the outcome is an effort to stabilise supply via nearshoring, often presented as an effort to support local communities.

66%

think globalisation is 'good for my country'

62%

think globalisation is 'good for me personally'

Industry still seeking the right balance between global and local

Signals

Globally, Danone restructured its business to become a 'local-first' company. Its 'local-first' project seeks to be as close to the customers and fields as possible, translating into €1bn cost savings expected by 2023, including through 20% reduction in overhead costs.(via FoodNavigator)

Apple shifts some iPhone 14 production from **China** to **India**[2].(via The Guardian)

Under Armour mapped out a plan to reduce its reliance on manufacturing in **China** in favour of countries such as **Vietnam, Jordan, the Philippines and Indonesia**[3].(via LoveMoney)

Hasbro CEO says moving out of **China** has 'gone very well for us'[4].(via CNBC)

The most impactful Macro Force themes affecting this trend

1 Plateau of globalisation

2 Security dilemmas

3 Rethinking institutions

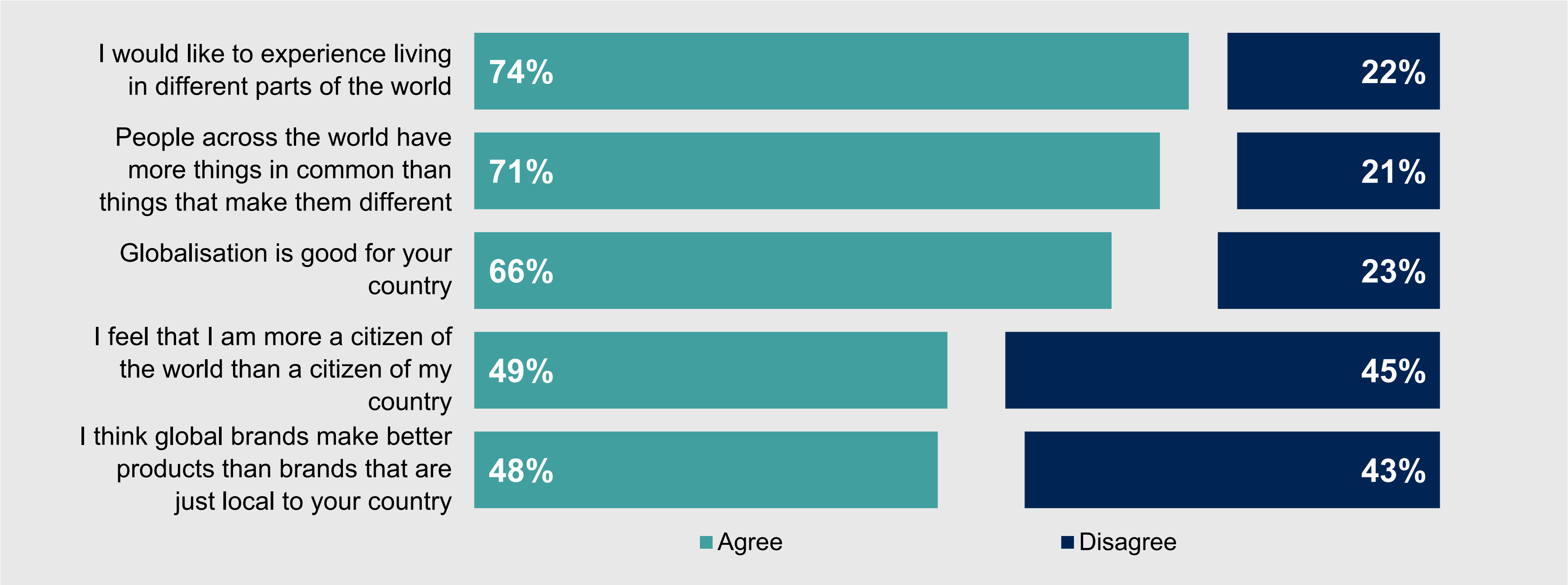
4 Rise & fall of middle classes

5 Impacts of inflation

6 Community migration

People around the world feel they are part of a greater whole

To what extent do you agree or disagree with the following statements?
% agree



Base:
48,579 adults aged 16–75 across 50 markets, interviewed online between 23 September and 14 November 2022

Source:
Ipsos Global Trends 2023

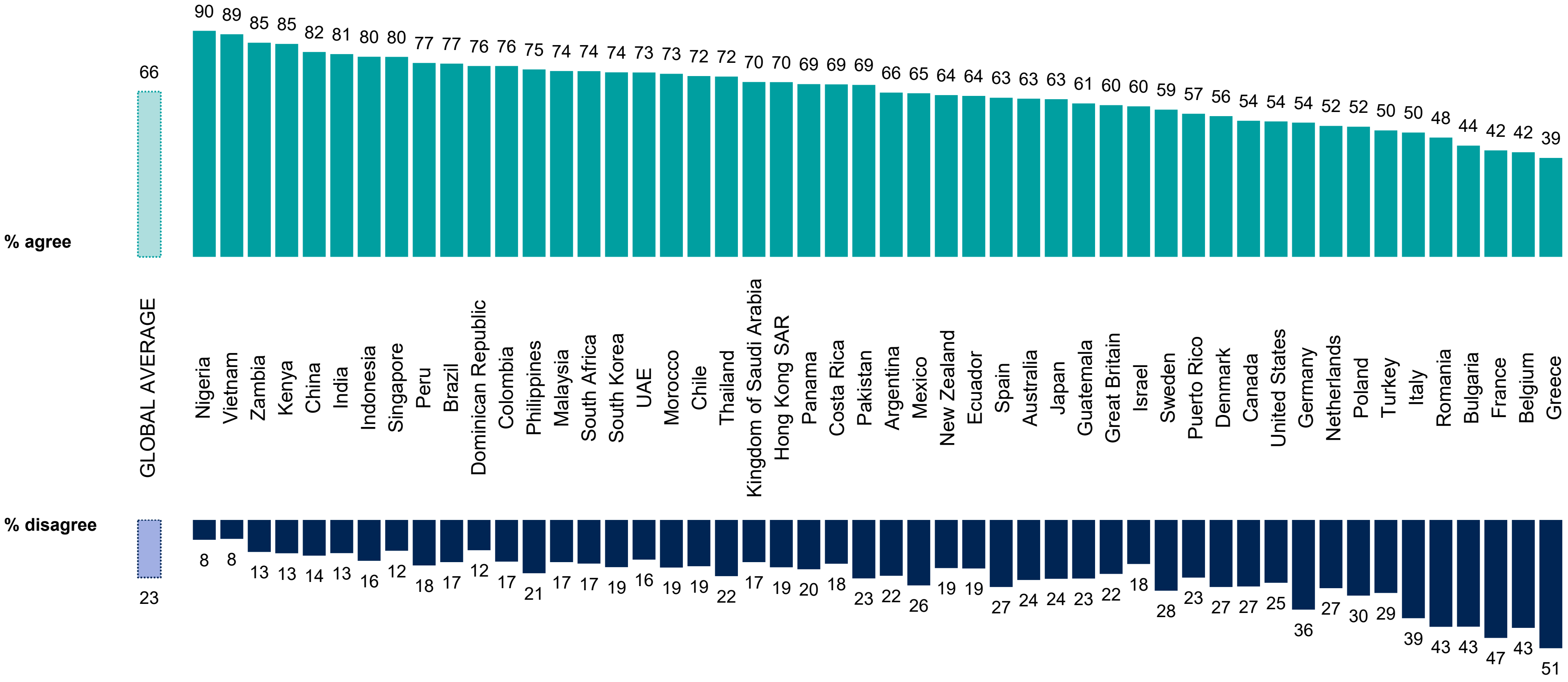
On balance, people around the world think positively about the idea of greater commonality, greater global mobility and exploration, and globalisation in general. There is a little more ambivalence when it comes to international commerce, with the advocates and the rejectors almost exactly balancing each other out, at a global level at least. Countries such as Vietnam, China, Indonesia and India, which constitute some of the key outsourcing markets for global manufacturing, are, perhaps unsurprisingly, the most net positive towards globalisation, but only in three markets do those who are negative to it outweigh those who are positive. These are:

France	42% positive	47% negative
Belgium	42% positive	43% negative
Greece	39% positive	51% negative

In all but five markets, a majority feel that globalisation is a force for good

To what extent do you agree or disagree with the following statement?

Globalisation is good for my country



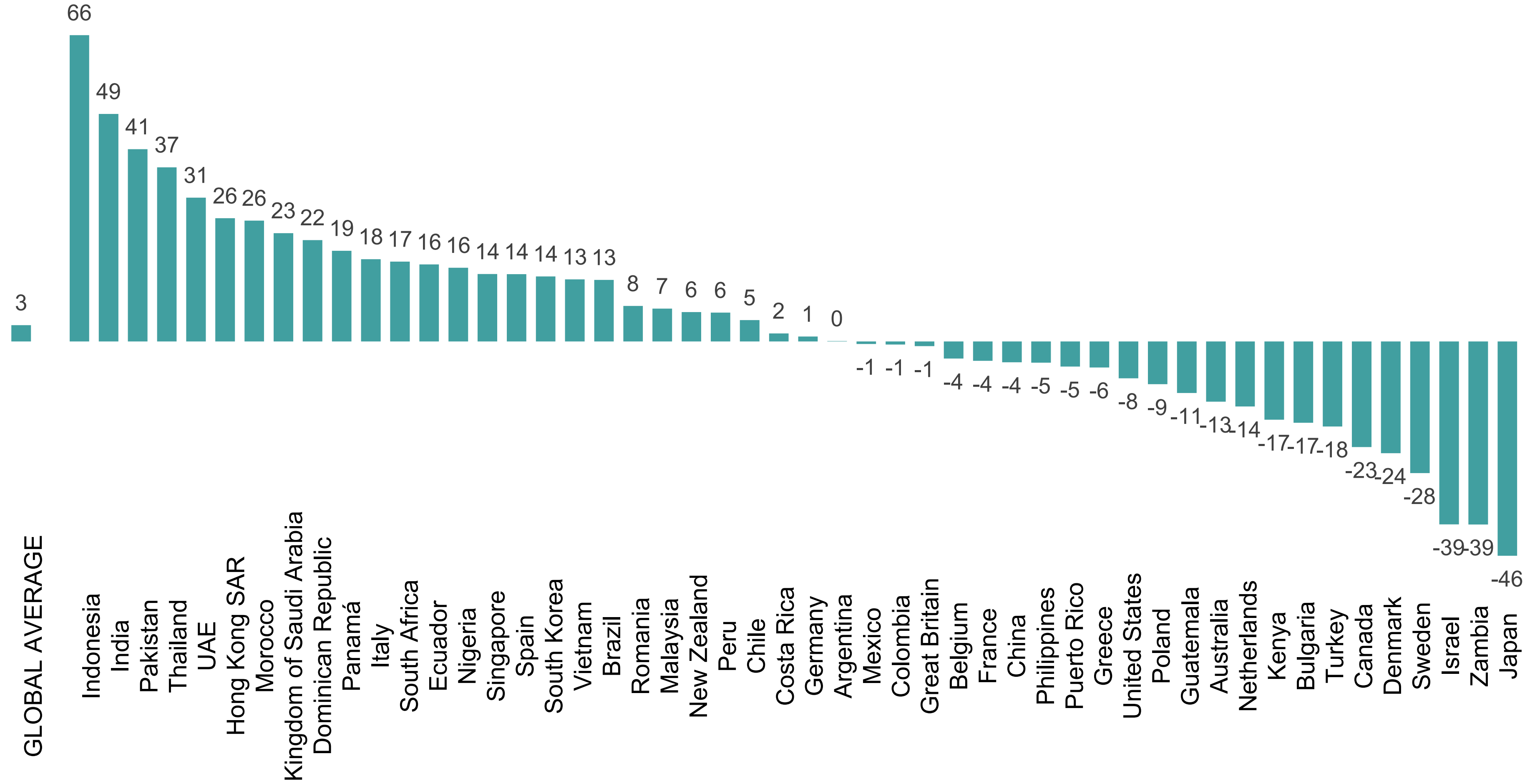
Base:
48,579 adults aged 16–75 across 50 markets, interviewed online between 23 September and 14 November 2022

Source:
Ipsos Global Trends 2023

In roughly half the markets, particularly emerging ones, a majority feel they are global citizens but there are plenty where the reverse is true

To what extent do you agree or disagree with the following statement? NET Agree [Agree – disagree]

I am more of a citizen of the world



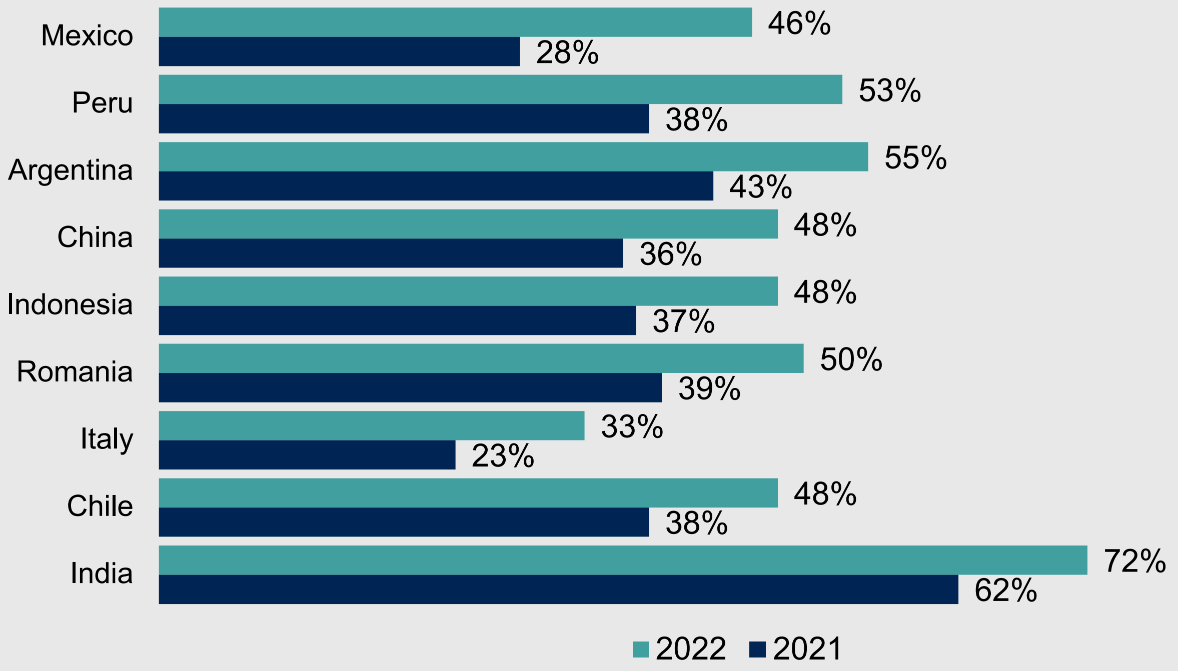
Base:
48,579 adults aged 16–75 across 50 markets, interviewed online 23 September–14 November 2022

Source:
Ipsos Global Trends 2023

Over the past year, there has been a marked return to global brands

To what extent do you agree or disagree with the following statement?
% agree

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



Change: 2021 to 2022
+18%
+15%
+12%
+12%
+11%
+11%
+10%
+10%
+10%

Base:
500–1,000 500–1,000 adults aged 16–75 (18–75 in US and Canada) per market per year

Source:
Ipsos Global Trends Series

The past year has seen an upsurge in appreciation for the benefits of global brands, particularly in Asian and Latin American markets. In no market do we see the opposite tendency.

It may be that the reduced availability of certain international brands (because of COVID-19 and conflict-based pressures on global supply chains) forced people to reluctantly do without certain types of products or to use local brand alternatives that they did not perceive to be of the same quality.

Finding a balance between global and local

Thought Starters

Where does your organisation sit along the global-to-local continuum, and can, or should, this positioning be flexed?

Is your supply chain optimised to stay agile in the short term and resilient in the longer term?

Do you have the right balance between offshoring, nearshoring and friendshoring?

Have you adopted multisourcing practices to safeguard your supply of raw materials?

Do you truly know what your consumers value more – the sustainability and reliability/speed of supply that come with local production, or the lower costs of a more global approach?

A DIVIDED WORLD

The pandemic was (we hope) a rare event. It could have united the world against a common enemy. Instead, forces worked to drive and expand wedges between people in many nations about precautions and vaccines.

The global Black Lives Matter movement also exposed rifts and divisions in a push for equality, a value we as global society mostly share. Nations taking sides in the war in Ukraine, coupled with tensions between the US and China, point to a new world disorder, with power shifting and new literal and metaphorical battlegrounds emerging.

We share so many of the same values, but feelings of division persist

What it's about today:

The polycrisis is both a driver and a result of our new world disorder. The existence of disagreements on multiple fronts – from the climate to human rights, immigration to fiscal policy, gender fluidity to data privacy, and around the ethics of artificial intelligence and synthetic biology – means that it's hard to build a coalition to solve any of them.

Sometimes the fault lines are clear. Sometimes new factions align in non-traditional ways on one issue while warring on others.

The technology and tools that connect us are also able to drive us apart. Headlines highlight divisions between us every time we log on.

At the same time, people are looking to brands to play a role in solving these crises, and to help them reach their individual goals on issues like sustainability. They want brands that share their values. But many of the issues that brands could take a stand on are fraught with danger, so it's hard for brands to make the meaningful changes their customers want – because not all of their customers want the same things.

Yet, fundamentally, we share so many values. We see that in the data, again and again. We get caught up in the expression and implementation of those values, but that leaves room for hope that the forces dividing our world could also help to bring it together.

83%

agree that it is up to everyone to work out their own set of principles to guide their decisions

Divisions can be created by inequalities and rising diversity, but they also create fertile territory where brands can have a voice

Signals

The **Netherlands** barred COVID-19 vaccine conspiracy theorist David Icke from entering country after he was invited by far-right political party FvD[1]. (via BBC)

In **Poland**, Yes, a Polish jewellery brand, actively supporting women's rights and inclusivity had its Christmas 2021 campaign banned by Polish Public Television – but its impactful creative work won a Grand Prix Effie Award[2]. (via YouTube)

The most impactful Macro Force themes affecting this trend

1 Increasing geopolitical conflicts

2 Community migration

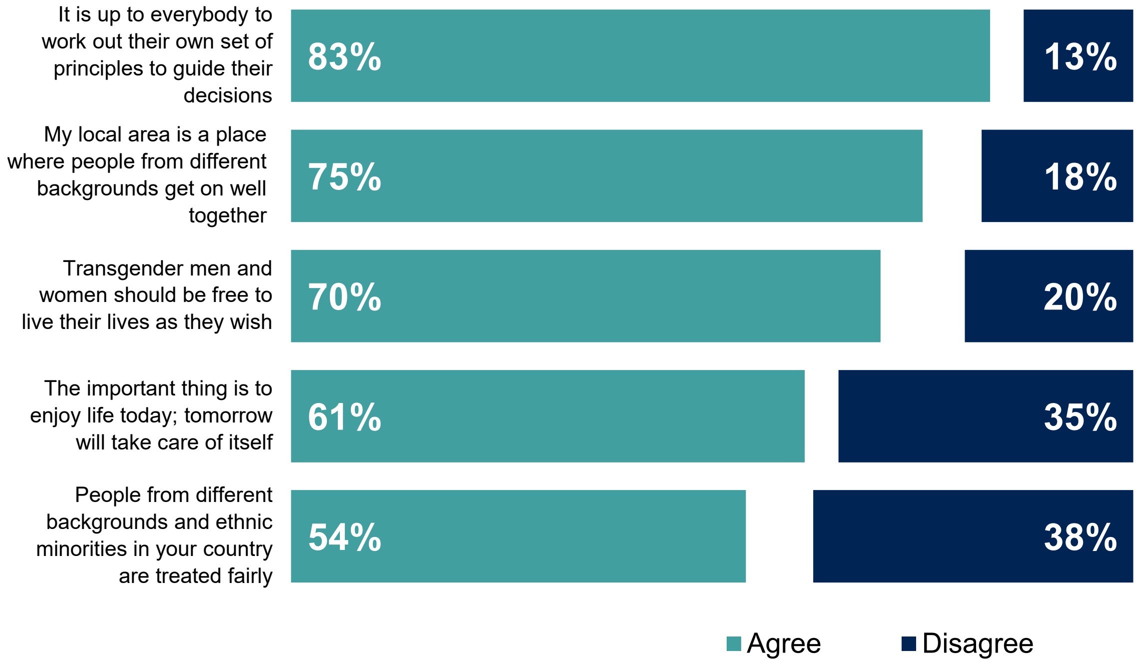
3 Rethinking institutions

4 Greater ethnic & religious diversity

5 Rise & fall of middle classes

While most people believe in 'live and let live', it is clear that such an approach can create tensions and divisions

To what extent do you agree or disagree with the following statements?



HIGHEST IN:	LOWEST IN:
Vietnam, Indonesia 92% Philippines, Nigeria 91%	Germany 69% Japan, Morocco 70%
Indonesia 93% Nigeria 90% Kenya 89% China 87%	Japan 50% France 57%
Vietnam 89% New Zealand 88% India 86% Thailand, Spain 86%	Morocco 30% Nigeria 31% Turkey 45%
Denmark 85% Vietnam 79% India 79% Hong Kong 78%	Zambia 33% Turkey 38% Israel 41%
China 85% Vietnam 83% UAE 80% Indonesia, India 78%	Guatemala 26% Japan 34% Puerto Rico 35%

Base:
48,580 adults aged 16–75 across 50 markets, interviewed online between 23 September and 14 November 2022

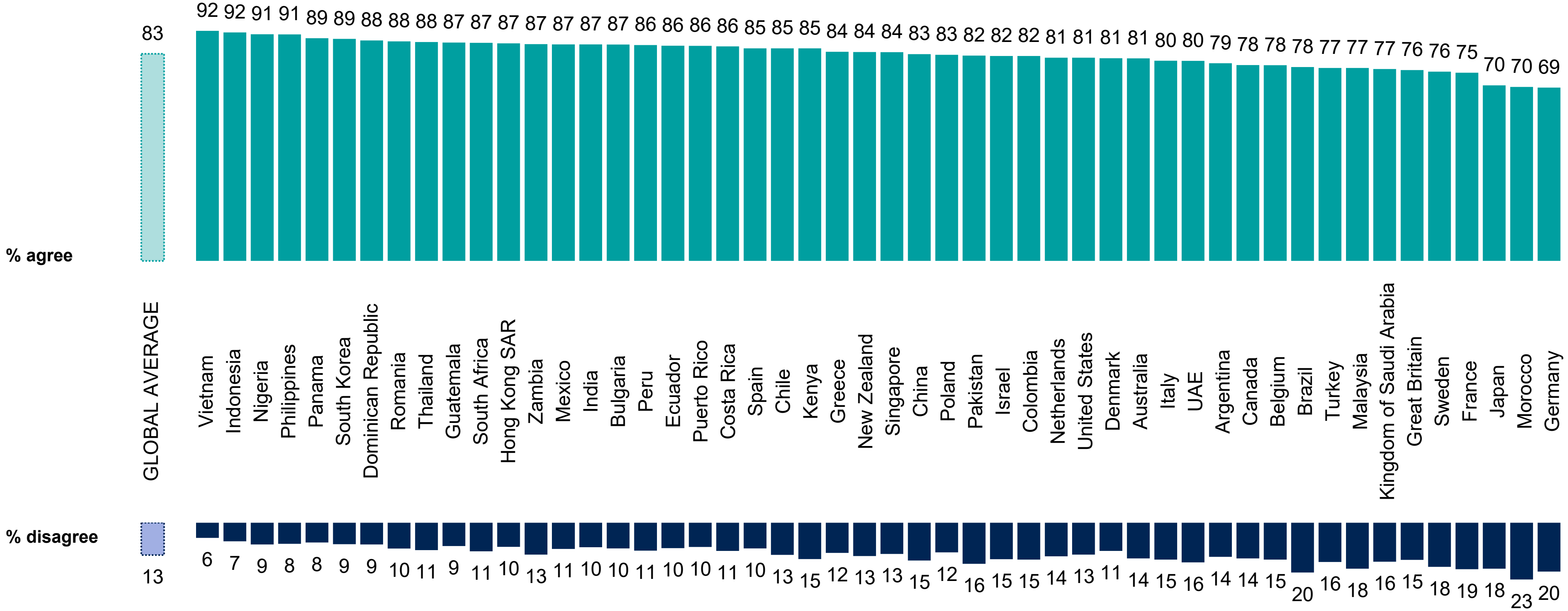
Source:
Ipsos Global Trends 2023

The dominant point of view regarding identity and values across the 50 markets covered is that everyone has the right (and moral duty) to work out their own set of principles to live by. Largely, people feel that there is tolerance of those with different backgrounds and identities, though there are some markets where this is less certain.

There is global consensus over the right to self-determination

To what extent do you agree or disagree with the following statement?

It is up to everybody to work out their own set of principles to guide their decisions



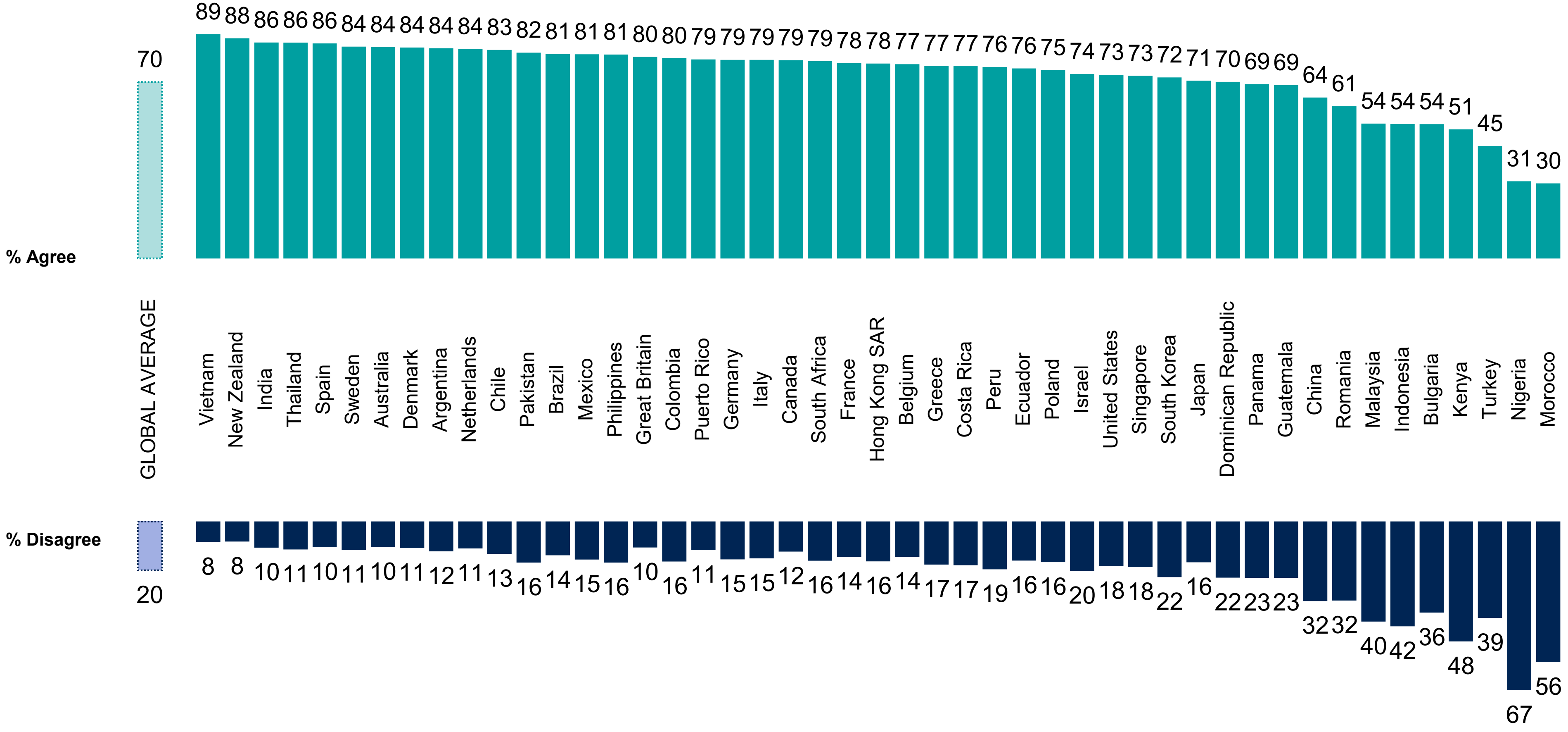
Base:
48,579 adults aged 16–75 across 50 markets, interviewed online between 23 September and 14 November 2022

Source:
Ipsos Global Trends 2023

Large cultural differences still exist when it comes to transgender rights and freedoms

To what extent do you agree or disagree with the following statement?

Transgender men and women should be free to live their lives as they wish

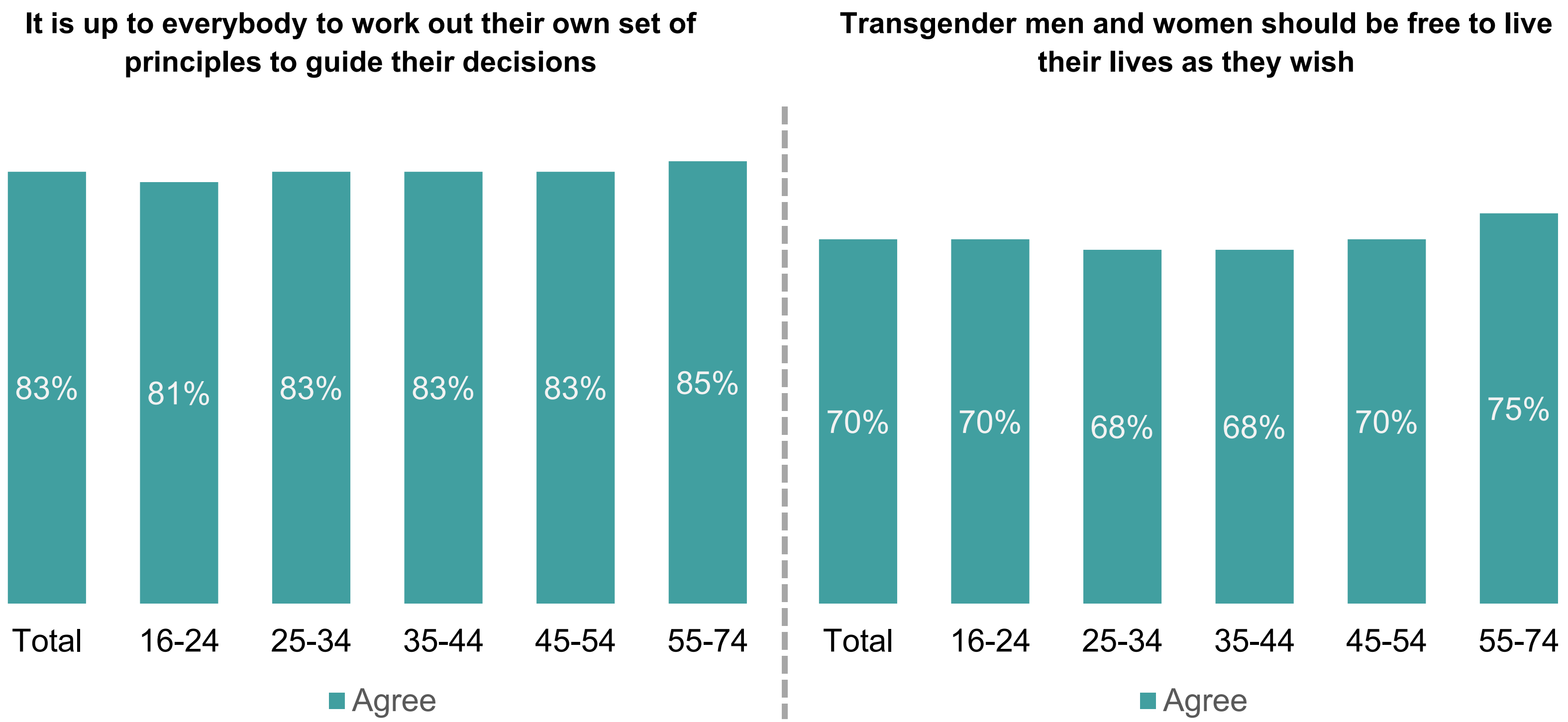


Base:
48,579 adults aged 16–75 across 50 markets, interviewed online between 23 September and 14 November 2022

Source:
Ipsos Global Trends 2023

Attitudes towards identity are very evenly distributed by age

To what extent do you agree or disagree with the following statements?
% agree



Base:
48,580 adults aged 16–75 across 50 markets, interviewed online between 23 September and 14 November 2022

Source:
Ipsos Global Trends 2023

While it is tempting to think that it is the youngest members of society who care the most about people being able to define their own identity, these beliefs are actually fairly consistent across the age groups.

We saw earlier that large differences remain between markets when it comes to transgender rights. Within countries those of different ages tend to think somewhat similarly, suggesting, perhaps, that, without the driving force of youthful energy, these beliefs may not change too much over the coming years.

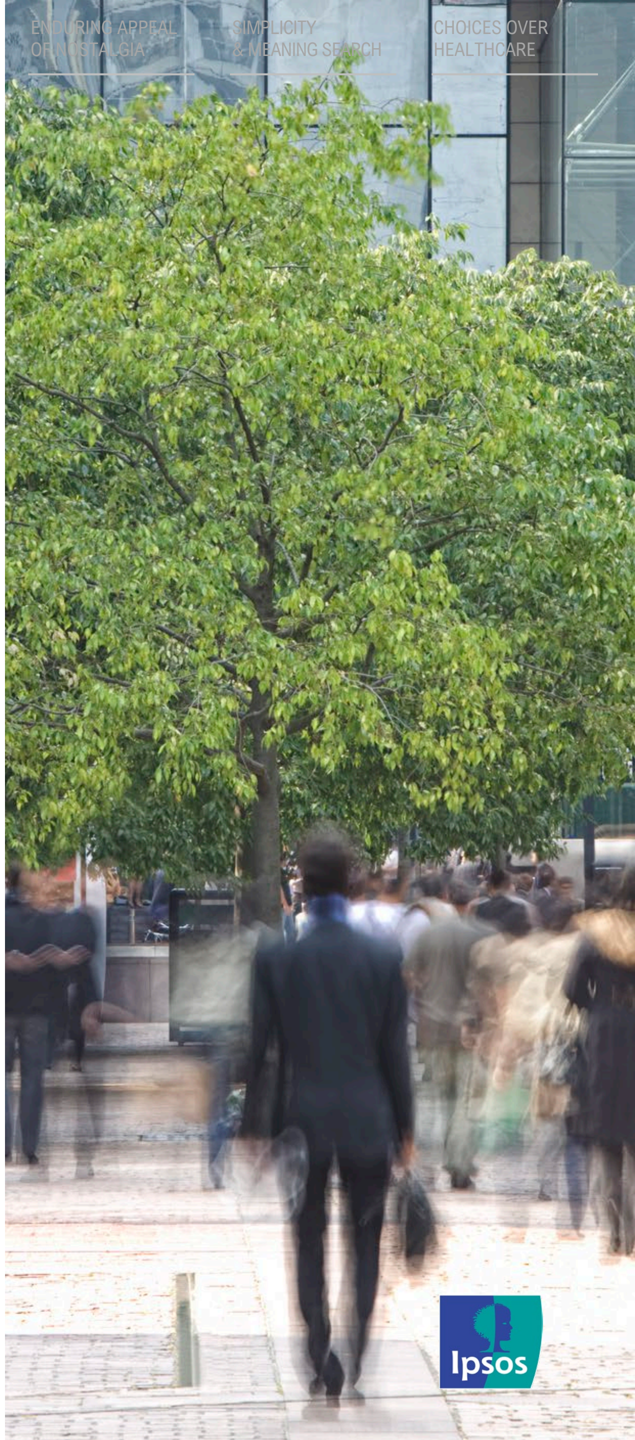
Consumers want brands to take a stand and help to heal divisions

Thought Starters

Does your brand or organisation have a role to play in relieving some of the tensions in our society, where government cannot?

How do you continue to take a stand and align your organisation's values with your customers' values? How do you respond to potential backlashes?

Do you have a role in keeping the peace, enabling a mature, calm debate among those with differing points of view?



GLOBAL TRENDS 2023

CAPITALISM'S TURNING POINT

We are seeing a movement away from shareholder value at all costs to a more holistic understanding of the human and environmental impacts of capitalism.

The combined effects of the pandemic, the climate emergency and the cost of living crisis may be driving a reassessment of individual goals and priorities.

New ways of thinking are emerging about the role of businesses, economics and institutions

What it's about today:

In the past, capitalism was all about growth. Indeed, it has always been couched in the narrative that it allows for greater competition and greater innovation, which in turn lead to lower prices and higher wages overall. It has often been coupled with democracy as well, the assumption being that free people and markets will benefit the largest number of people, but those ideals are now being decoupled and closely examined.

New ways of thinking about the role of businesses, economics and institutions are prompting a re-examination of capitalism and an exploration of alternative models that consider the needs and well-being of multiple stakeholders rather than simply maximising profits for owners.

While activists may hope for an end to capitalism, a more accurate prediction may be that we're entering a new era of capitalism that questions the way business is conducted and the toll it takes on people and the planet.

There has been a growing realisation of the ecological toll of capitalism and the human impact of inequality within and across markets.

We are now considering the impact of capitalism, exploring investor-friendly economics, and coming up with better alternatives, such as Triple Bottom Line, which realigns businesses' goals against ESG metrics.

74%

of global citizens feel their government and public services will do too little to help people in the years ahead

Pressures are prompting a rethink of how the world works – and technology may provide some of the answers

Signals

The Long-Term Stock Exchange requires companies to share their long-term strategies and practices, considering a broad group of stakeholders[1].(via LTSE)

In **Belgium**, far-left parties like PVDA/PTB have become more popular by advocating for a greater redistribution of wealth[2].(via PVDA)

In **France**, a cooperative called 'Who is the boss?' allows members to choose the products it markets and creates, while guaranteeing producers a fair remuneration[3].(via C'est qui le patron)

In the **USA**, wealth inequality is substantially higher than in other developed nations, and Universal Basic Income is being debated to combat historical and systemic inequities[4]. (via Washington Post)

The most impactful Macro Force themes affecting this trend

1 Climate change

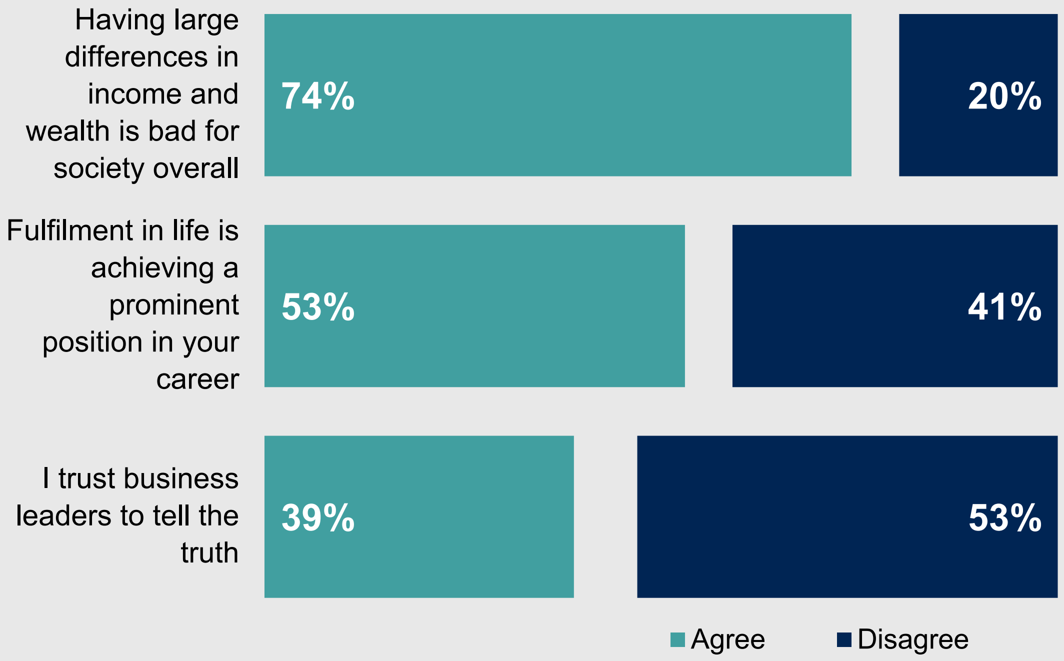
2 Rethinking institutions

3 Pervasive technology

4 Employee power shift

There are signs of a reset when it comes to attitudes to wealth, money and status

To what extent do you agree or disagree with the following statements?



HIGHEST IN:	LOWEST IN:
Indonesia 90% S. Korea 87% Thailand 86%	Zambia 59% Nigeria 60% US, Ecuador 62%
Nigeria 86% Pakistan 83% India 80%	Netherlands 13% Japan, Sweden 29%
India 78% Indonesia 71% Nigeria, Kingdom of Saudi Arabia 70%	Bulgaria 17% Panama, Greece 19% Puerto Rico 21%

Large numbers of people around the world feel that having large differences in income and wealth is bad for society overall. Additionally, relatively few people trust business leaders to tell them the truth. While those in some emerging markets do feel this way, in most markets a majority feel quite the opposite.

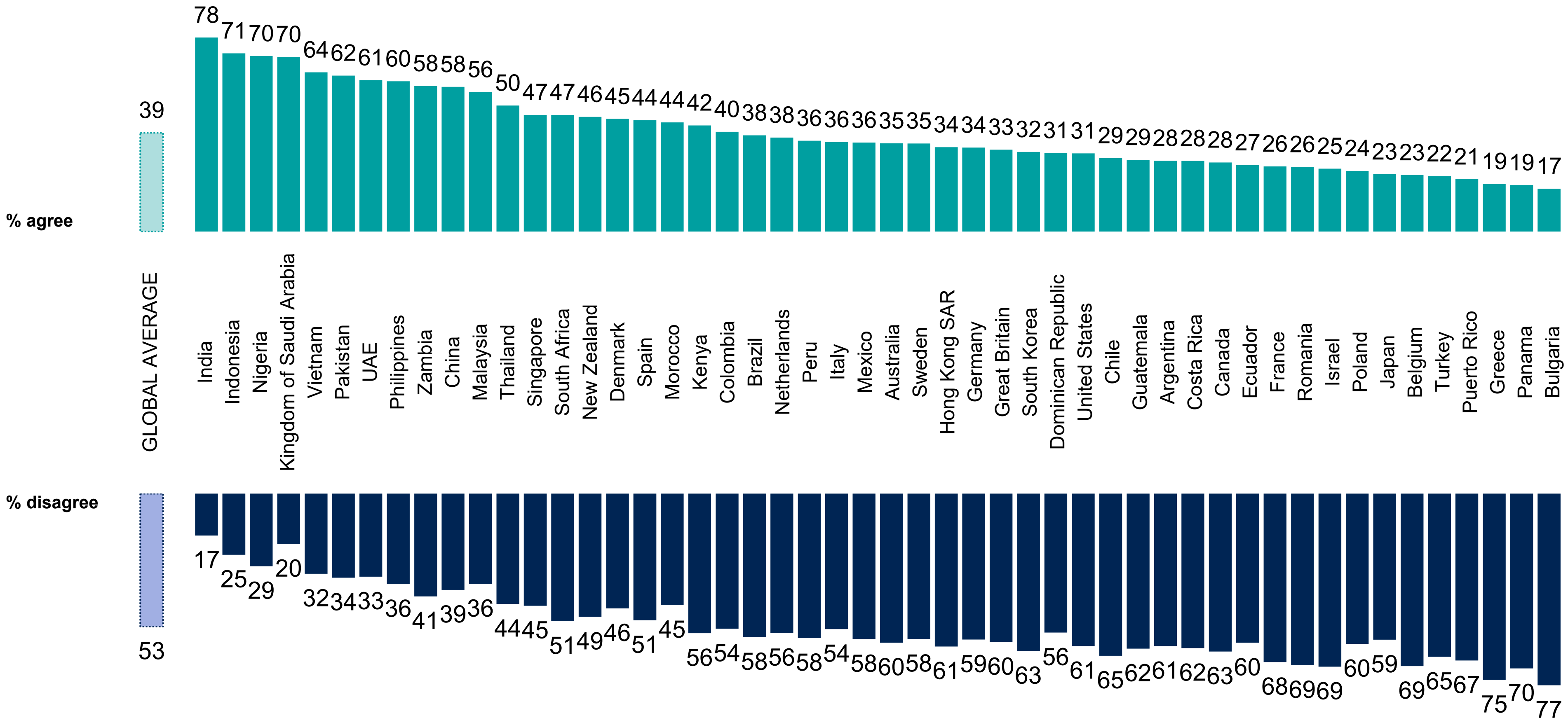
Base:
48,579 adults aged 16–75 across 50 markets, interviewed online between 23 September and 14 November 2022

Source:
Ipsos Global Trends 2023

Trust in business leaders is much higher in emerging markets

To what extent do you agree or disagree with the following statement?

I trust business leaders to tell the truth

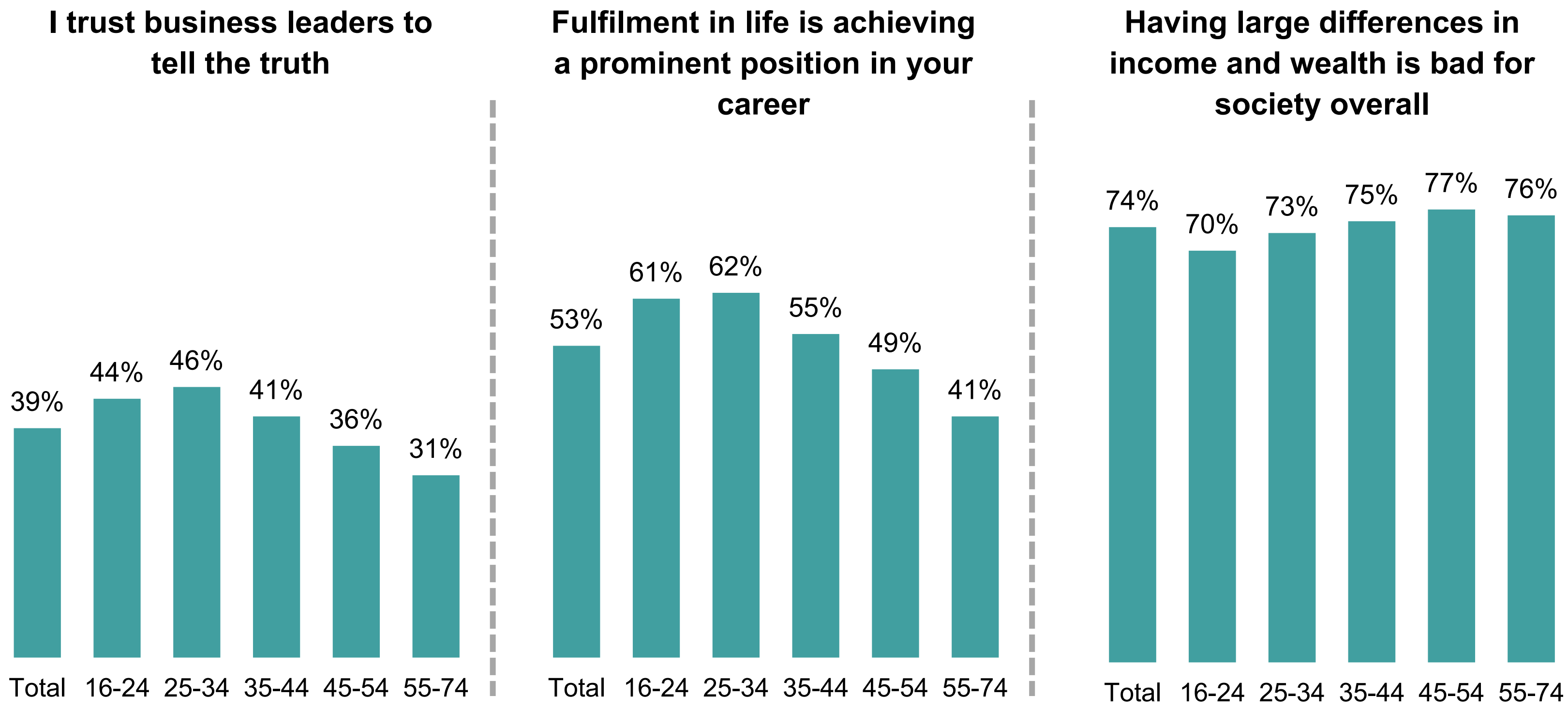


Base:
48,579 adults aged 16–75 across 50 markets, interviewed online between 23 September and 14 November 2022

Source:
Ipsos Global Trends 2023

The young are more trusting of business leaders and more focused on their careers

To what extent do you agree or disagree with the following statements?
% agree



Base:
48,579 adults aged 16–75 across 50 markets, interviewed online between 23 September and 14 November 2022

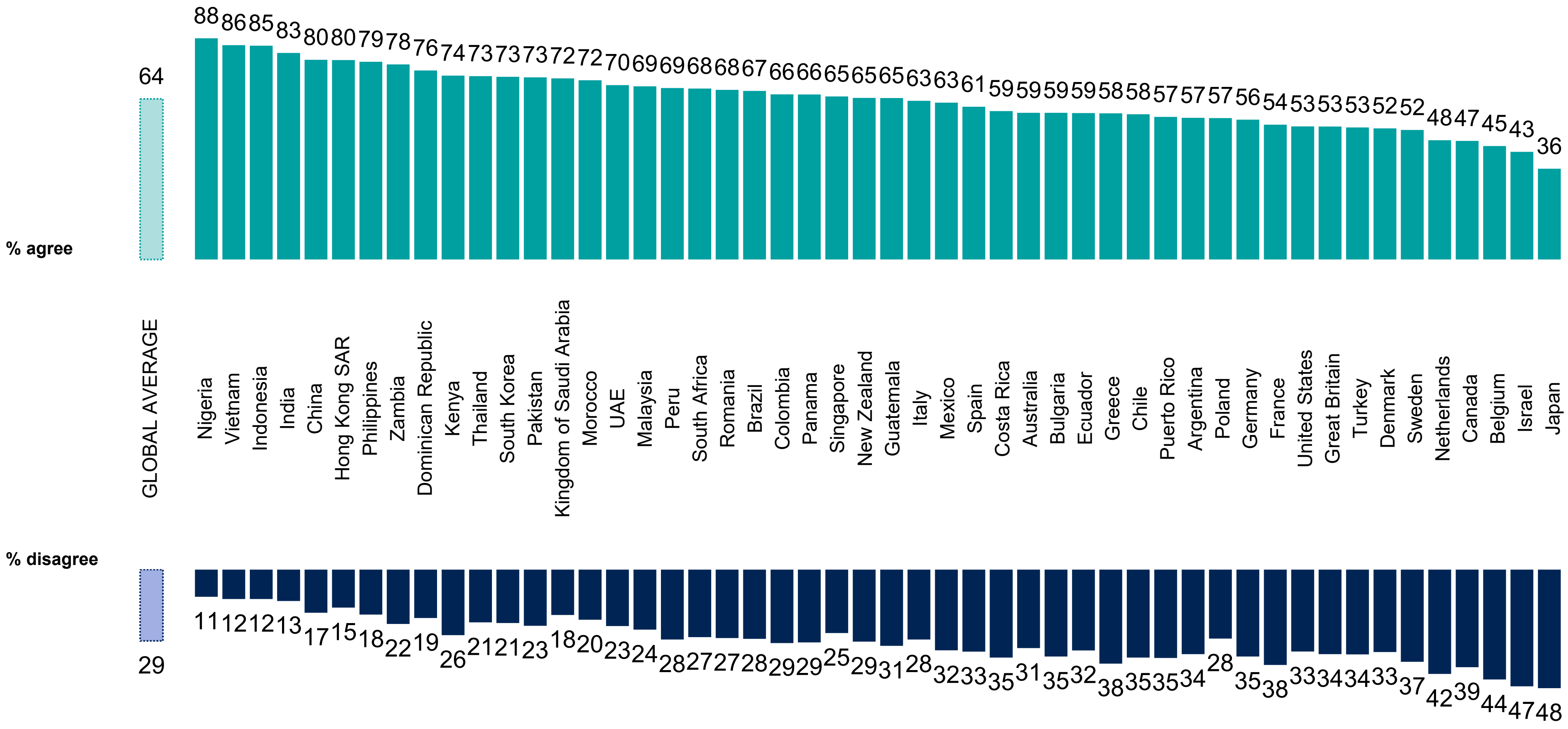
Source:
Ipsos Global Trends 2023

People of all ages agree that having large differences in income and wealth is bad for society overall. Yet, we see age disparities between younger and older people's views on trust in business leaders and the belief that progress at work is the route to life fulfilment; here the young are more positive than the older cohorts.

Many people want brands to help society, and consumers claim to be prepared to pay more to support them

To what extent do you agree or disagree with the following statement?

I try to buy products from brands that act responsibly, even if it means spending more



Base:
48,579 adults aged 16–75 across 50 markets, interviewed online between 23 September and 14 November 2022

Source:
Ipsos Global Trends 2023

How do brands thrive with a new model of doing business?

Thought Starters

Do you truly know what your consumers value – and does that trump what your shareholders value?

Does your business model really serve stakeholders, or society? How can you incorporate ESG impacts?

Is your business defined by its next-quarter returns instead of long-term growth? If so, how can you transition to a more sustainable business model?

REACTIONS TO UNCERTAINTY AND INEQUALITY

Uncertainty has become the only certainty. People in many markets are facing economic instability as currencies shift in value, inflation rises, supply chains continue to be disrupted, and governments change. Financial inequality, already a driver of change, worsened in the pandemic. In every corner of the globe, struggles to achieve parity based on gender, race, ethnicity and religion dominated headlines. Where can people turn to find confidence, and how can they hedge their bets in an uncertain climate?

Uncertainty makes future planning very difficult for people and businesses

What it's about today:

The wealth gap had increased before the pandemic in many countries and has widened as inflation and interest rates hit record levels in 2022[1]. But now the economy seems to be in better shape in many markets. Meanwhile, there is ongoing uncertainty for people living from month to month, and the prospect of a recession is causing additional anxiety.

Further inequalities abound, from the continuing mistreatment of ethnic and religious minorities around the globe, to gender inequality and systemic racism. Geopolitical conflicts such as Russia's war on Ukraine, and the resulting energy crisis, have added to the uncertainty, as have worsening climate-related disasters. And despite collective efforts to eradicate COVID-19, it continues to spread throughout the world.

Since the COVID-19 pandemic, interventionist governments have returned. Countries worldwide are looking to build and defend local champions in strategic industries such as batteries, solar panels and semiconductors.

Citizens are grappling with these inequalities and uncertainties, both short-term and longer-term, in myriad ways. It's hard to make big decisions when there is little clarity about what tomorrow might bring, and people crave certainty and safety in such an environment.

60%

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

Uncertainty and inequality provide significant opportunities for political gain and corporate innovation

Signals

In Costa Rica, ongoing inequality helped drive a populist economist and political newcomer to the presidency[2]. (via El Pais)

In Panama, relief organisation UNICEF has been dealing with a growing humanitarian crisis as migrants pass through the nation on their way to countries in the North[3]. (via UNICEF)

In Poland, a new high school textbook produced under the auspices of Poland's conservative government has provoked criticism for what many see as its attempt to indoctrinate young people[4]. (via the Brussels Times)

The most impactful Macro Force themes affecting this trend

1 Rethinking institutions

2 Systemic health inequality

3 Increase in geopolitical conflicts

4 Greater ethnic & religious diversity

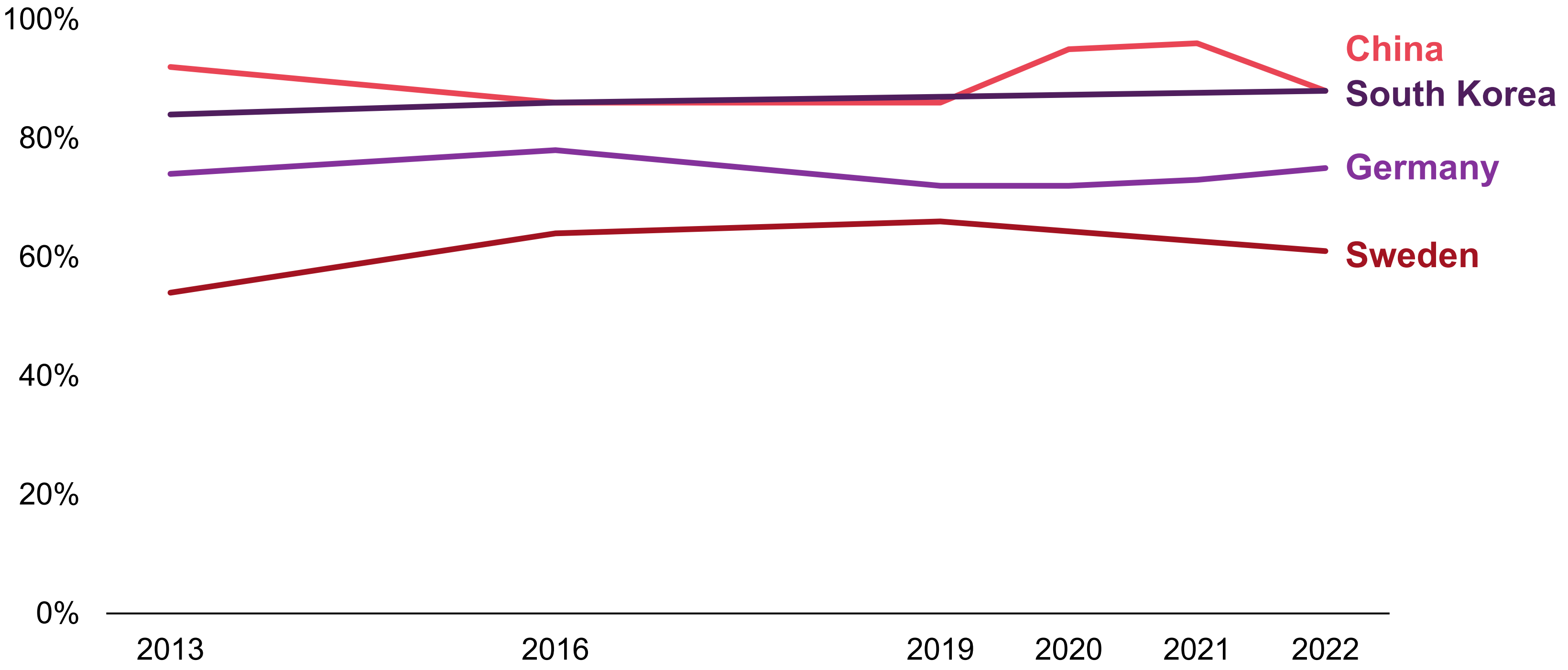
5 Rise & fall of middle classes

6 Entrenched inequality

People perceive that the world is still changing too fast

To what extent do you agree or disagree with the following statement?
% agree

The world today is changing too fast



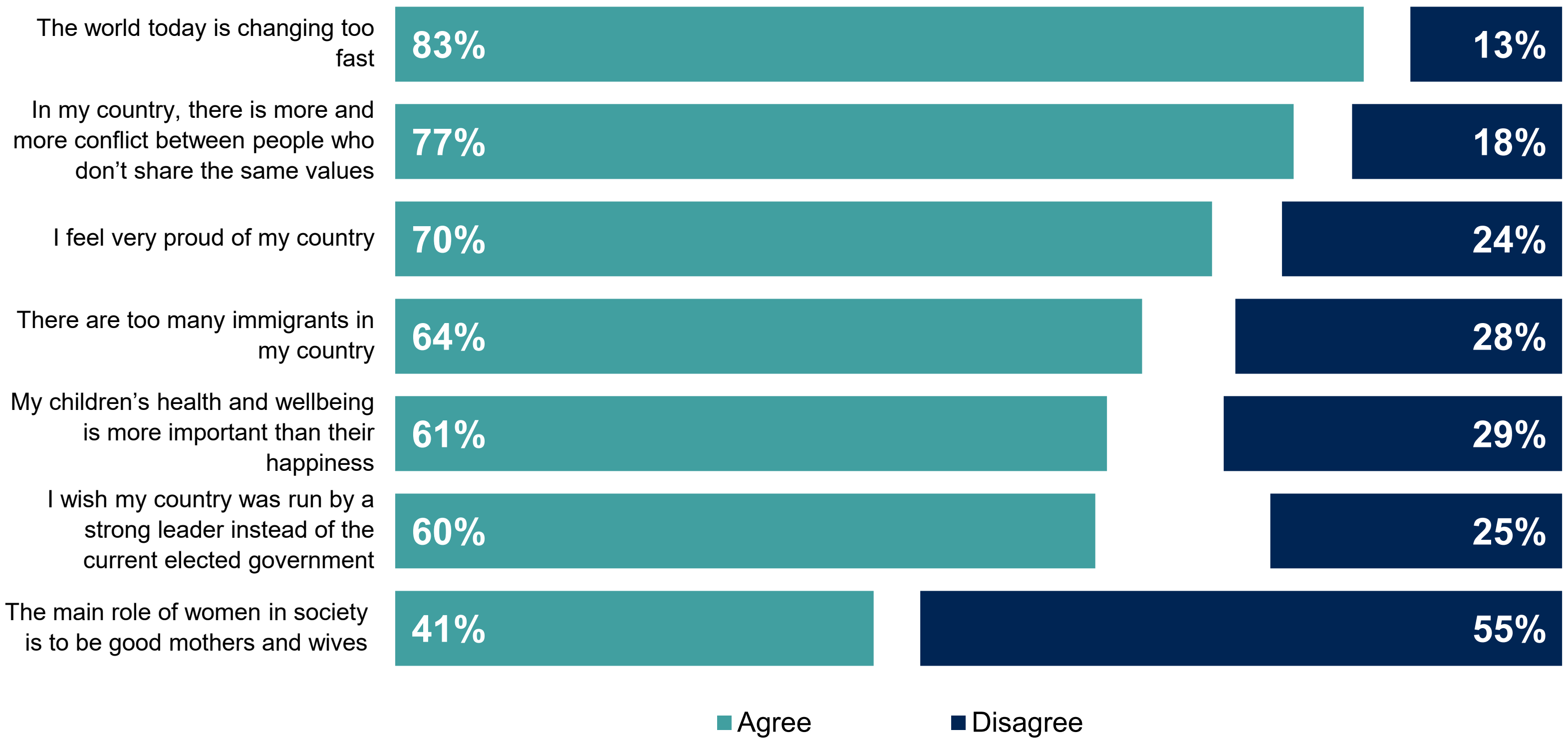
Base:
500–1,000 500–1,000 adults aged 16–75 (18–75 in US and Canada) per market per year

Source:
Ipsos Global Trends Series

There is some evidence that, after the last couple of years of rapid change, things are now settling down to pre-pandemic levels. Most people, in most markets, agree that the world is changing too fast. But despite the rapid pace of change between 2019 and today, the level of agreement hasn't increased significantly. For instance, in 2019 84% of South Koreans agreed with this; now 88% do. In Germany it was 74%; now it is 75%. Some countries have even seen a slight decline: in 2019 66% of Swedes agreed the world was changing too fast; now 61% do.

Perceptions of a society changing too fast are often linked to concerns over values conflict, immigration and weak leadership

To what extent do you agree or disagree with the following statements?



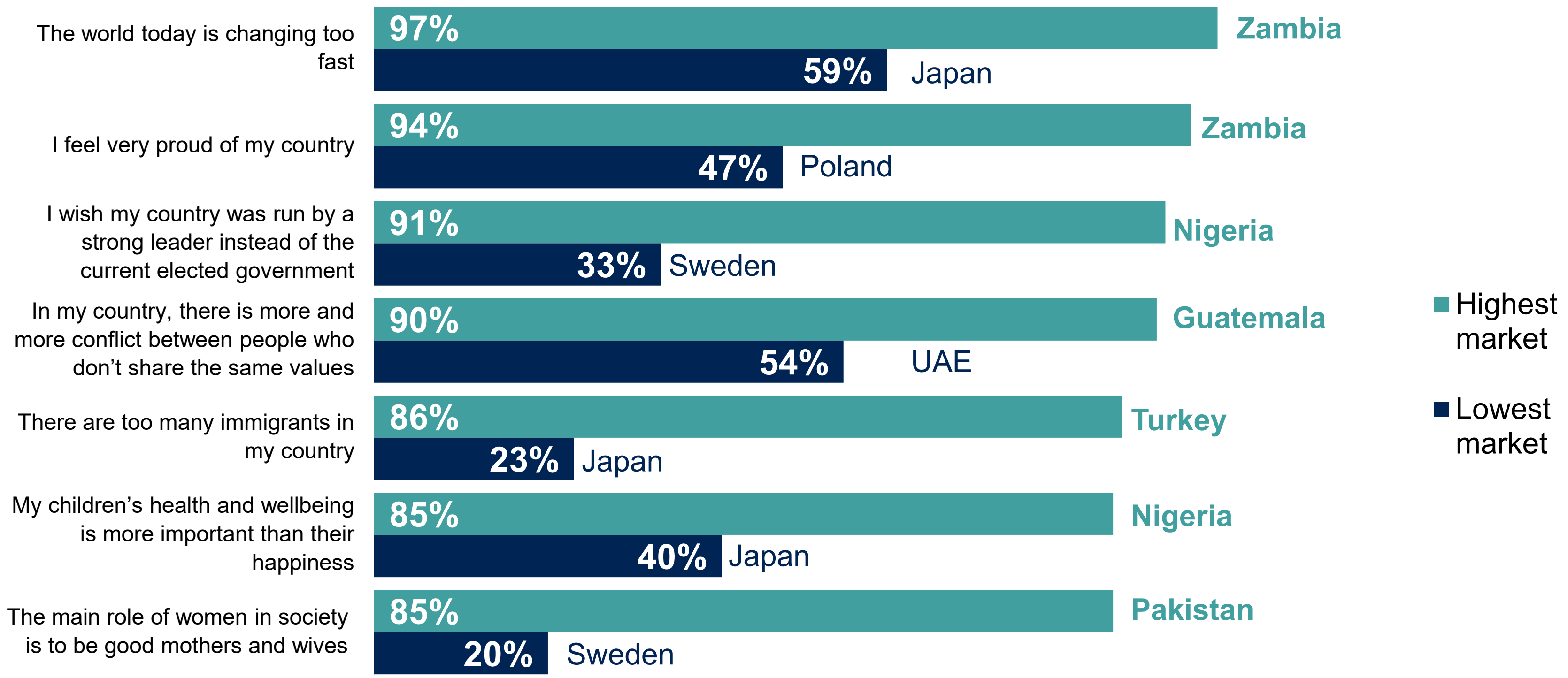
Base:
48,079–48,579 adults aged 16–75 across 50 markets, interviewed online between 23 September and 14 November 2022

Source:
Ipsos Global Trends 2023

Large numbers of people around the world feel that the world is changing too fast for their liking. As the next page shows, this perception is not growing but remains very common. While levels of national pride are high, there is clearly a great deal of concern – many feel there are too many immigrants in their country, or that those with different values in their society are finding it harder and harder to live quietly together.

Perceptions of societal change are an area where we still see significant variation across the world

To what extent do you agree or disagree with the following statements?



Base:
48,079–48,579 adults aged 16–75 across 50 markets, interviewed online between 23 September and 14 November 2022

Source:
Ipsos Global Trends 2023

While this report has described many examples of the global convergence of attitudes, values and behaviours, when it comes to social change, we still see significant local variations. The chart opposite shows the figures for markets where certain attitudes are most, and least, prevalent, in an attempt to convey the levels of variation that still exist when it comes to issues such as immigration, values-based division, nationalism and immigration. Markets such as Japan and Sweden commonly reject the idea of traditional gender roles and that there are too many immigrants in their country, while people in markets including Pakistan, Nigeria and Zambia clearly feel the world is changing too fast for their personal tastes.

Helping people feel stable and valued helps them to deal with uncertainty and inequality

Thought Starters

Trust in institutions is still high, but it has been damaged.

Where will people turn for certainty and truth? How do you make sure you and your communications are trusted?

How do you deliver consistency to your customers and citizens in the face of labour and supply chain issues and market uncertainty?

Will rising inequality tip over into political action?

How can you support those striving for equality and equity in a polarised and inflationary world?

THE ENDURING APPEAL OF NOSTALGIA

When the here and now is unrelentingly grim, people are faced with two means of escape: look back to when times were happier, and simpler; or try to look ahead to when times will get better. Right now, the second of these routes is made all but impossible by the highly uncertain pathway to the future, which is beset by profound and potentially existential economic, environmental and geopolitical challenges. No wonder, then, that people all over the world, and of all ages, are finding solace in the past. While this is a constant feature of being human, it increases at times of uncertainty, like now.

When the here and now is grim, people look to the past for comfort

What it's about today:

The upheavals in the world economy, the threats of COVID-19 and climate change, and the perceived international threats posed by conflicts between nations all create a very challenging present day. For some, there are also other perceptions that life is not what it used to be: the more globalised the world we live in, the more technology intrudes in our lives, changing the way children experience childhood. Some people may want to turn the clock back, but others view these changes as signs of developmental progress.

There's also a vast difference across regions between those who feel nostalgic and those who don't. But it is clearly not just about geography. Nostalgic feelings seem higher in some Asian markets (India and Hong Kong, for example) but are very low in others (such as South Korea, China, Vietnam and Japan).

A nostalgic mindset can take many forms. For some, it can simply mean revisiting one's own memories; for others, the TV shows and music of yesteryear serve as reminders of happier times.

Nostalgia can also take on more significant forms: sometimes the contrast between the current situation in a country with what the collective memory suggests it was like in the past can be the basis for political change.

Corporations, particularly those with a long history, can leverage nostalgia through feel-good messaging, but also by resurrecting product formations/recipes from the past.

60%

want their country to be the way it 'used to be'

The rosy retrospection of nostalgia provides fertile territory for brand activations

Signals

In **France**, food business Sodebo's latest advertising campaign leverages nostalgia for the past, using this as the brand's vision for the future[1].(via Packshotmag)

In **Chile**, there was a public outcry for discontinued soap opera *Betty, la fea*, from 1999, to be re-broadcast[2].(via latercera)

In **Malaysia**, food delivery company Foodpanda enables home chefs to celebrate Malaysia Day by combining food and nostalgia[3].(via Minimeinsights)

A new vinyl pressing plant has opened in **Belgium** to take advantage of the surge in people wanting to buy records instead of downloading music[4].(via VRT)

The most impactful Macro Force themes affecting this trend

1 Security dilemmas

2 Increasing geo-political conflicts

3 Over-develop-ment

4 Pervasive technology

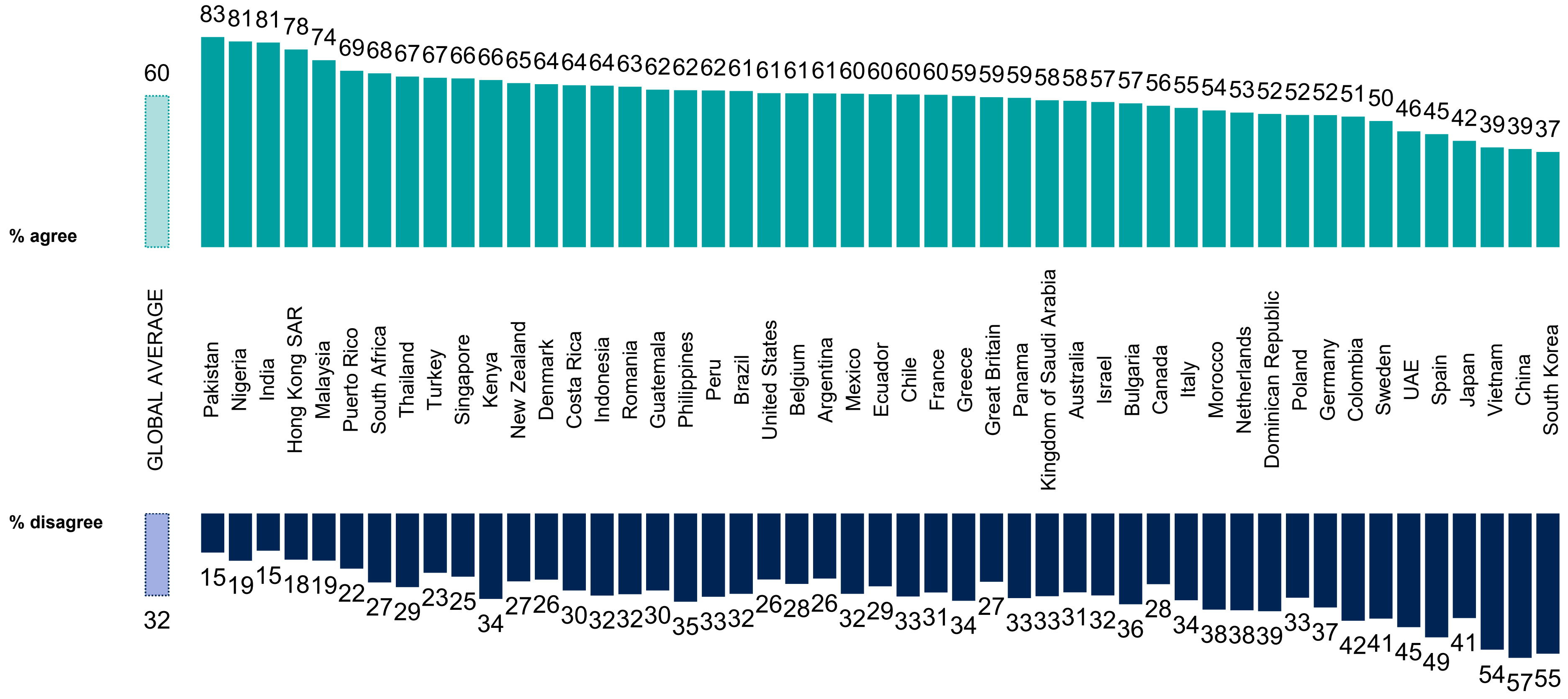
5 Genera-tional wealth disparities

6 Impacts of inflation

Feelings of nostalgia are highest in Asia and Africa

To what extent do you agree or disagree with the following statement?

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



Base:
48,579 adults aged 16–75 across 50 markets, interviewed online between 23 September and 14 November 2022

Source:
Ipsos Global Trends 2023

Nostalgia is up year on year, but not everywhere

To what extent do you agree or disagree with the following statement?

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

Base:
48,541 adults aged 16–75 across 50 markets, interviewed online between 23 September and 14 November 2022

Source:
Ipsos Global Trends 2023

YEAR ON YEAR CHANGE 2022 VS 2021

LARGE INCREASES IN:		MODERATE INCREASES IN:		STABLE/ NO CHANGE IN:		DECREASES IN:	
Chile	+18%	Colombia	+9%	United States	+2%	Philippines	-6%
China	+15%	GB	+9%	Italy	+1%	Turkey	-9%
Argentina	+13%	Germany	+8%	Singapore	0%	Thailand	-15%
Peru	+11%	Canada	+7%	France	0%		
Brazil	+11%	India	+7%				
Denmark	+10%	Mexico	+6%				
		Romania	+5%				
		Indonesia	+5%				
		Australia	+5%				
		S Africa	+5%				

The adoption of nostalgia is not universal: perhaps some countries are happier to remember their past than others. Globally, the numbers expressing an affection for the past are up three percentage points from 55% last year to 58% this year. The phenomenon seems to be especially prevalent in Latin America, with marked rises in nostalgia in Chile, Argentina, Peru and Brazil. Overall, nostalgia is up in 16 of our markets (markedly in six of them), flat or stable in four, and it has fallen in two Asian markets – the Philippines, where it has fallen from 68% last year to 62% this year and even more so in Thailand (down from 82% to 67%).

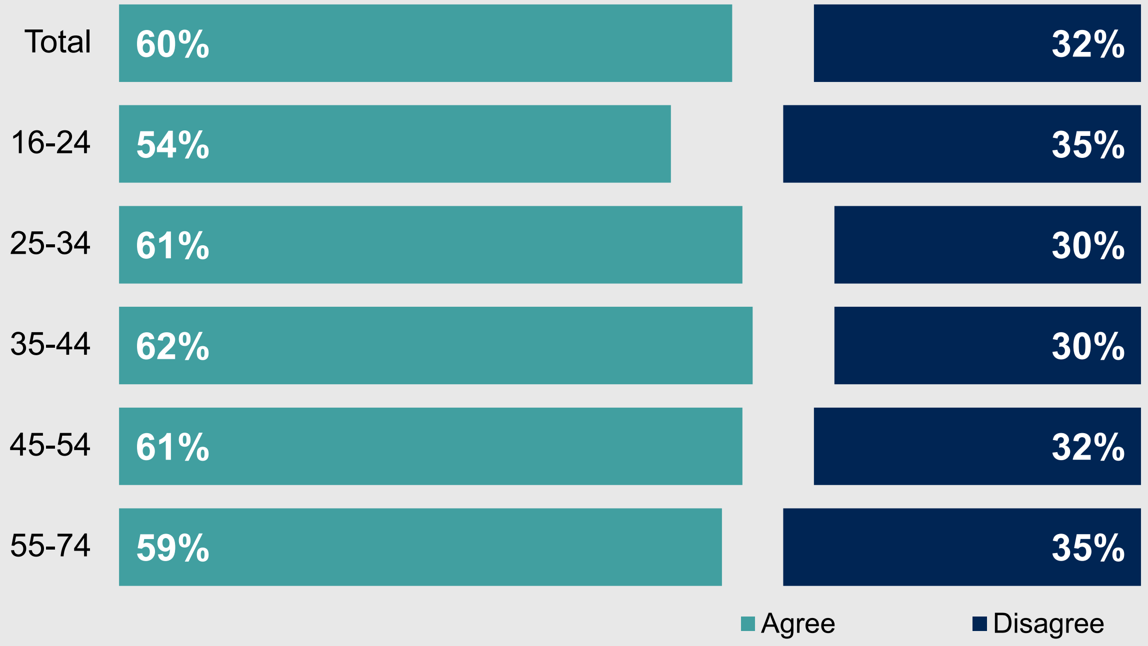
Nostalgia affects everyone

To what extent do you agree or disagree with the following statement?

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

Base:
48,541 adults aged 16–75 across 50 markets, interviewed online between 23 September and 14 November 2022

Source:
Ipsos Global Trends 2023



When today's world is depressing, people of all ages can find comfort by thinking about happier times. Older people simply have more 'past' to be nostalgic about.

The data backs this up: levels of nostalgia, as evidenced by agreeing with the statement **'I would like my country to be the way it used to be'** vary by only 8 percentage points from top to bottom. It's virtually identical for those in their mid/late 20s all the way up to those in their mid-70s. It is only teenagers and those in their early 20s who lag, and even there, some 52% yearn for happier times.

Help customers to find the feel-good factor in their past

Thought Starters

Can you leverage your history and/or heritage to tell a story that mentally transports your customers back to better times?

Have you retired any products, services or marketing and communications campaigns that you can dust off and reuse today?

Don’t reject nostalgia as a tool just because your target audience are Millennials or Gen Z. They are just as likely to have a recent past that they feel nostalgic about.

SEARCH FOR SIMPLICITY AND MEANING

COVID-19 resulted in an enforced shrinking of people's worlds. Gone were the daily commute, the hectic social life and the frantic juggling of commitments.

But just as society seemed set to pick up where it had left off, it was rocked by the twin forces of a cost of living crisis and an undeniable climate emergency. Many people are now coming to re-evaluate their life, their hopes and ambitions, and their spending patterns, and redefining their life as smaller, yet more fulfilling, than it was before.

Busy, stressful lives mean that people need time out

What it's about today:

Busy lifestyles and social mobility bring both opportunity and threat. The desire for simplicity seems to be an inevitable by-product of societal advancement, the rapid growth of the middle class, aspirations to personal development and the acquisition of material goods, resulting in cultures with longer working hours. The top eight markets that agree with the wish that 'my life could be more simple' are all in Asia, while many markets where this desire is least prevalent are developed Western nations, particularly those in Europe.

By many objective measures, life is busier today than ever. Sleep has become the new well-being aspiration and stress is talked of in terms more usually associated with viral or bacteriological epidemics.

The pace and complexity of life and our collective inability to tune out are spawning a huge spin-off industry: hotels that boast of poor Wi-Fi connectivity as a benefit, and meditation and mindfulness apps are just some of the ways that the challenges of busy lives are being turned into commercial opportunities.

At the beginning of lockdown, in many countries commentators began to speculate about the enforcement of a 'smaller life' that would prove a moment of global epiphany that could shift the world's priorities away from consumerism and a continual focus on 'more'. As lockdowns eased, many people have wanted to make up for all the time they lost, but once that knee-jerk, back-to-the-big-life thrill fades, brands will have an opportunity to remind the world that it once seemed to be on the verge of taking a different path.

73%

wish they could slow down the pace of their life

Brands recognise the public appetite for downtime, calm, quiet and minimalism

Signals

In **Poland**, Mudita produces minimalist cell phones and clocks with functions that support mental well-being, promote good sleep, and deal with information overload[1].(via Mudita)

The solo traveller trend is growing in **Indonesia** as people now prefer to avoid places that are crowded with visitors[2].(via Viva)

In **Australia**, the 'Cuppa Time' movement is about a more measured, slowed-down approach to socialising with friends, family and colleagues[3].(via Cuppa Time)

In **Belgium**, Waerbeke VZM wants to reintroduce 'silence' in as many aspects of society as possible with its Stilte Werkt (Silence Works) proposition[4].(via Waerbeke)

The most impactful Macro Force themes affecting this trend

1 Community migration

2 Alternative value structures

3 Over-development

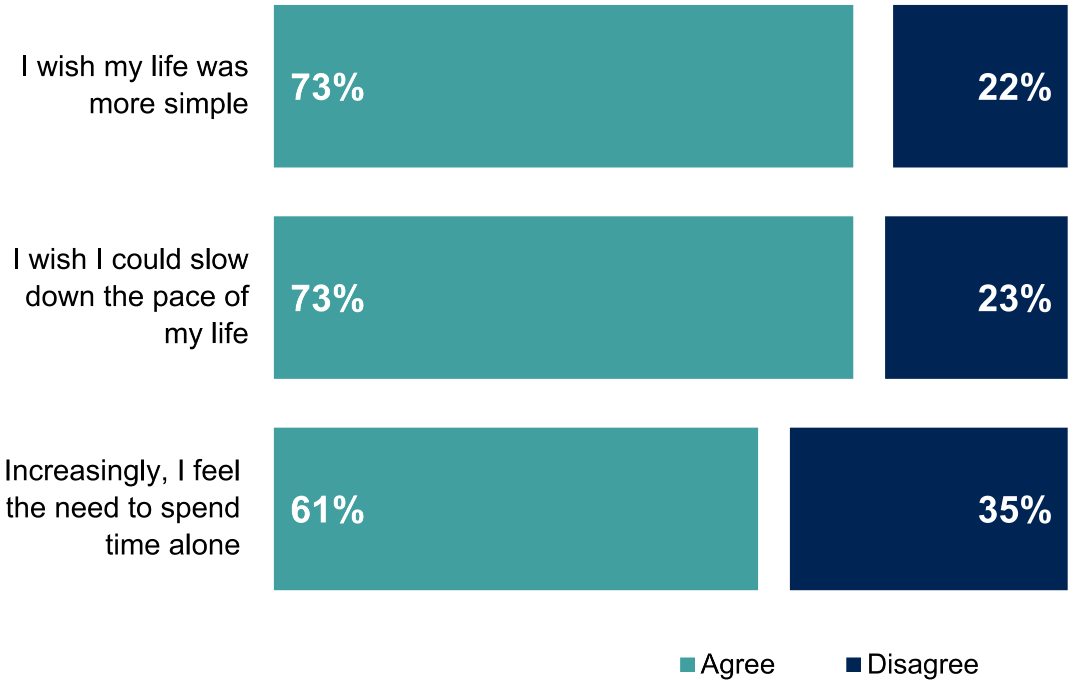
4 Pervasive technology

5 A greener way of thinking

6 Increasing geopolitical conflicts

Simplicity is highly sought after in Asia and Latin America

To what extent do you agree or disagree with the following statements?



HIGHEST IN:	LOWEST IN:
Nigeria 92% Kenya 88% Hong Kong 87% Thailand 87%	Denmark 56% Netherlands 59% Brazil, Sweden 62%
Guatemala 91% Costa Rica 90% Ecuador, Panama, Puerto Rico 89%	Indonesia 44% Zambia 47% Denmark 58%
Malaysia 79% Singapore 79% China 78% India 77%	Kenya 43% Bulgaria 45% Germany 47%

Base:
48,579 adults aged 16–75 across 50 markets, interviewed online between 23 September and 14 November 2022

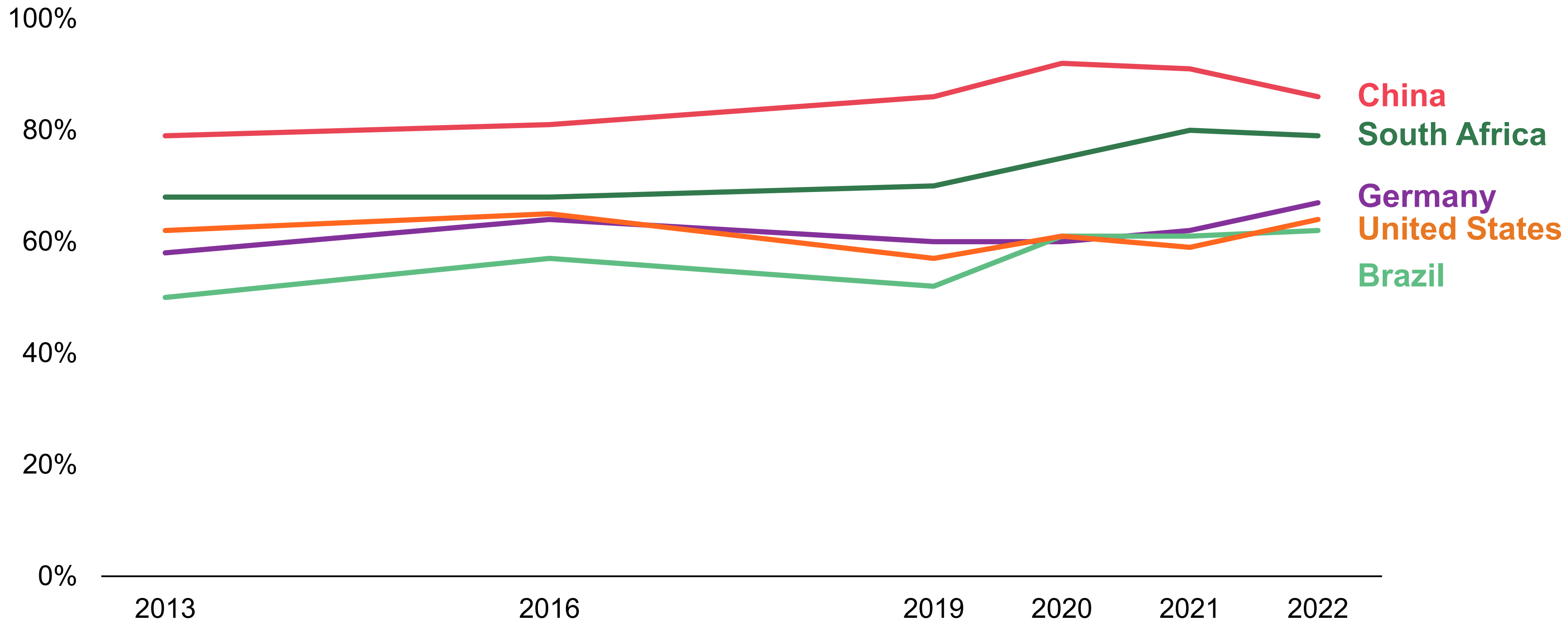
Source:
Ipsos Global Trends 2023

The difficult past few years have made people around the world feel that life is busy and out of control. While COVID-19 forced people back into their homes and allowed them to spend time with family, it also cut down on time alone. Even a commute offers significant headspace and time for contemplation. And, while lockdown reduced the need for people to move quickly from place to place, it clearly didn't diminish the sense of time poverty many people felt, as working from home led to a blurring of boundaries between home and work, making it difficult for people to switch off. Across the markets covered in both our 2022 and 2021 surveys, these three indicators of a desire for simplicity showed very little change.

Simplicity remains important

To what extent do you agree or disagree with the following statement? (% agree)

I wish my life was more simple

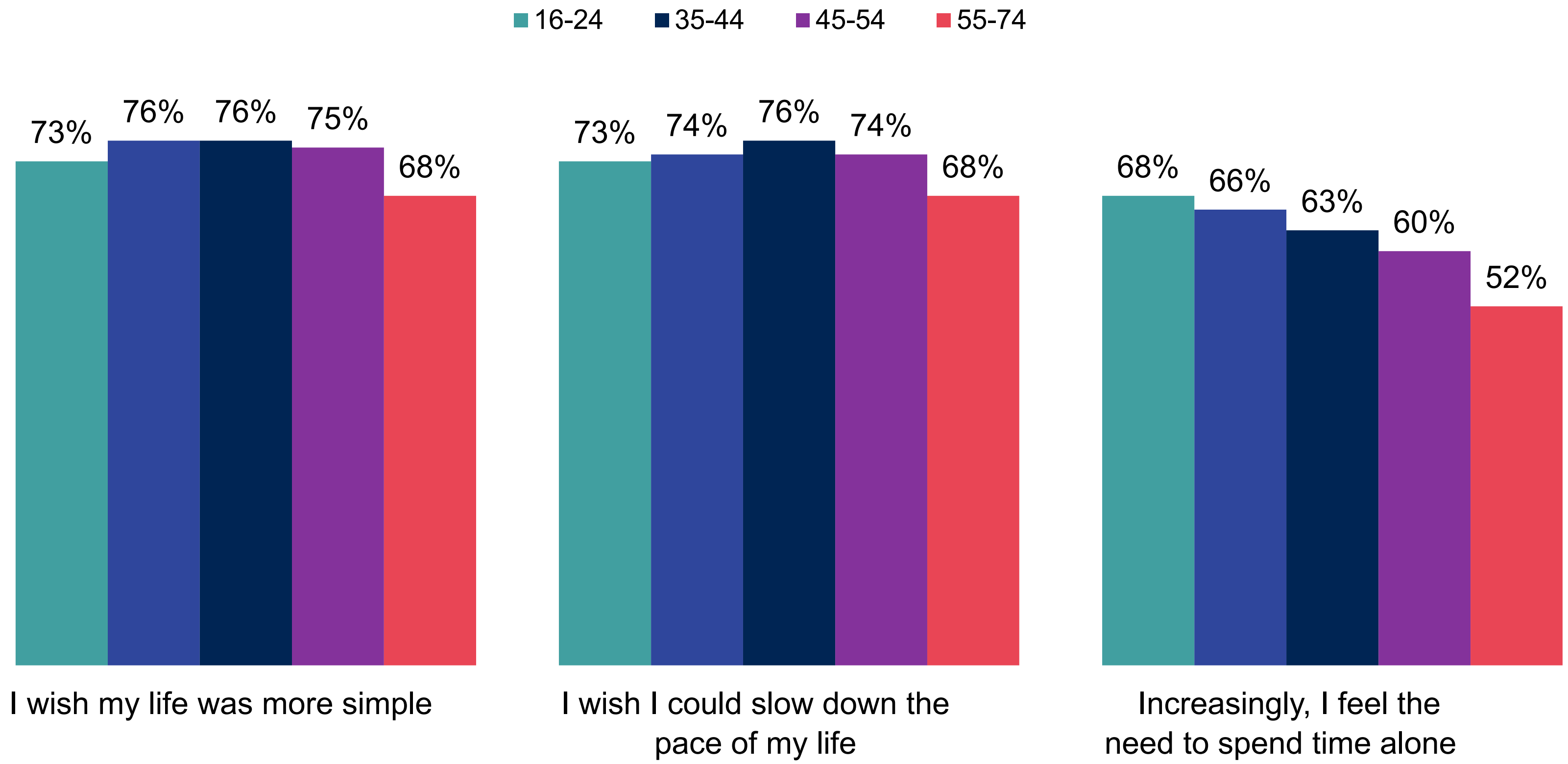


Base:
500–1,000 500–1,000 adults aged 16–75 (18–75 in US and Canada) per market per year

Source:
Ipsos Global Trends Series

Simplicity is important to everyone, though the desire for solitude declines with age

To what extent do you agree or disagree with the following statements?



Base:
48,579 adults aged 16–75 across 50 markets, interviewed online between 23 September and 14 November 2022

Source:
Ipsos Global Trends 2023

People of all ages feel that their life is too complicated and fast-paced. In both cases, the feeling is slightly less pronounced in people aged 55 years and over. Similarly, most people in all age groups place a high value on moments of solitude, though this perception is noticeably lower for older people – who, of course, *are* more often alone.

Avoid the temptation to complicate things

Thought Starters

Are your services, products, purchasing and content channels as friction-free as possible, or do they require significant mental resources from your audience?

How do you balance the need to offer your employees a good work–life balance with the need to reduce costs and maintain productivity?

How do you maximise the effectiveness of your marketing outreach while still respecting your audience's right to headspace and downtime?

CHOICES OVER HEALTHCARE

While the pandemic understandably required governmental-level oversight, legislation and enforcement, the longer-term trend has been for people to want more direct access to healthcare and more control over their solutions and outcomes.

Consumers continue to want more access to providers and specialists, regardless of their location, and more control over their well-being. Medical professionals have been weathering the pandemic and demand fair compensation and treatment.

People continue to want control over their own health outcomes

What it's about today:

The pandemic led to many changes in healthcare, which will be felt for decades to come, particularly in developed markets. Chief among these was speeding up the availability of virtual visits, allowing patients to consult with specialists and physicians around the world. This democratisation has increased competition in the market by removing some of the physical boundaries of care.

Post-pandemic, ageing populations and longer waiting lists, along with a rising demand for health services, are challenges that healthcare systems are struggling to meet. For example, in 2023 the National Health Service is once again the biggest issue in Britain, according to the general public[1].

COVID-19 highlighted how critical doctors, nurses and support staff are to our collective health, and how little they are recognised. In much the same way that we've seen a shifting power balance in other workplaces, healthcare workers are organising to lobby and strike for better working conditions and compensation.

As populations continue to age, this will place more stress on healthcare systems and providers. Governments will urgently need to debate how healthcare should be monitored, paid for and delivered. And as technology continues to pervade everyday life, we'll see greater advances in remote biometrics and AI-enabled early detection of diseases – which will be especially important with over-worked providers and a greater population of patients with serious illnesses.

83%

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

Brands and governments recognise the importance of keeping people healthy

Signals

Belle lets patients upload pictures of their skin for a licensed **US** physician to review and give advice on, giving people more control over their health[2].(via Belle.ai)

In the **Dominican Republic** medical tourism is on the rise, and there is evidence of a greater interest in both physical and mental health[3]. (via ADT)

New Zealand has established a new Māori Health Authority that will have the power to commission health services, monitor the state of Māori health, and develop policies to improve it[4]. (via Beehive)

In **South Korea,** there is debate about bodily autonomy in relation to the issuing of passes that mean the holder can avoid quarantine; previous abortion legislation confirmed women's right to self-determination of the body as a basic right[5]. (via YNA)

Spain's Ehumanife start-up lets patients from all over the world get second opinions from specialists remotely[6].(via e27)

The most impactful Macro Force themes affecting this trend

1 Ageing populations

2 Rethinking institutions

3 Pervasive technology

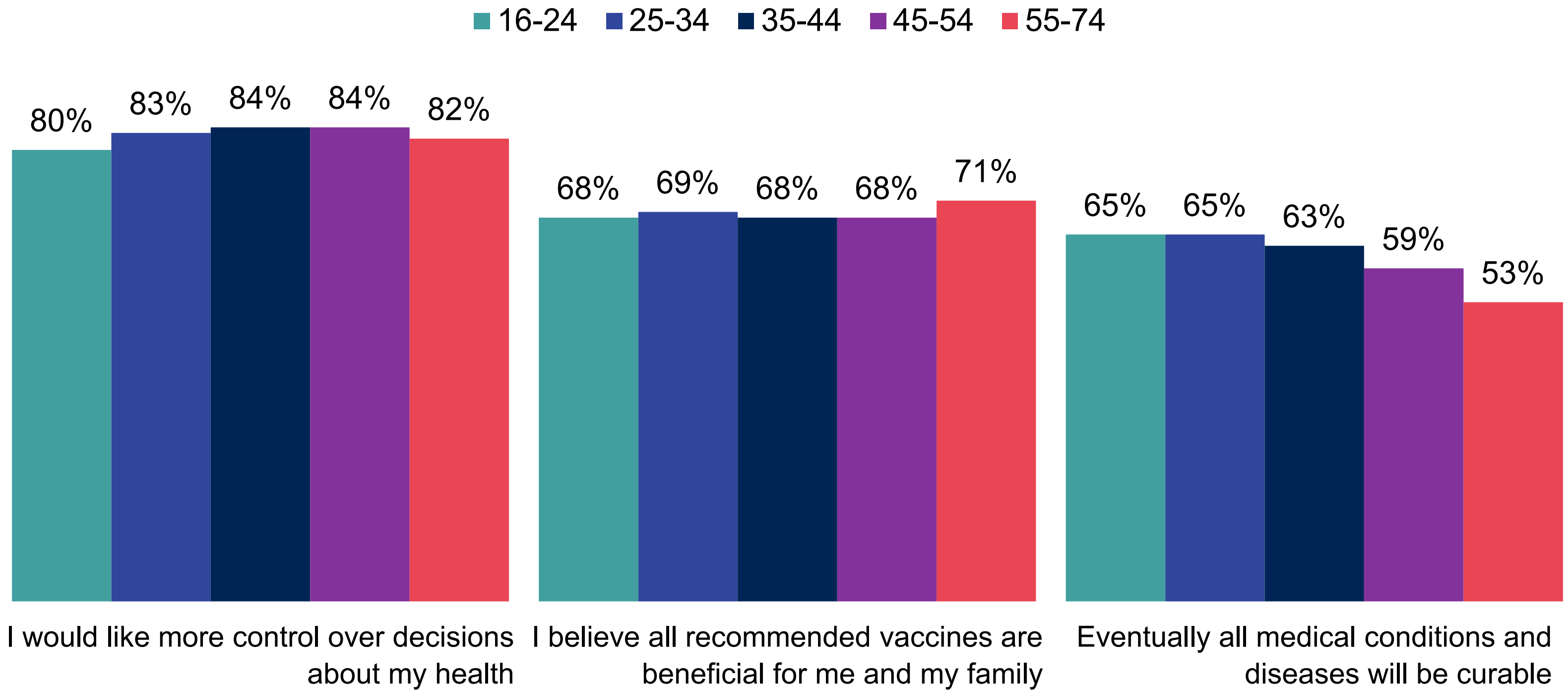
4 Advances in AI & quantum computing

5 Employee power shift

6 Integration of health & technology

While there is a widespread belief in the power of science to solve major health problems, people still want to retain control

To what extent do you agree or disagree with the following statements?



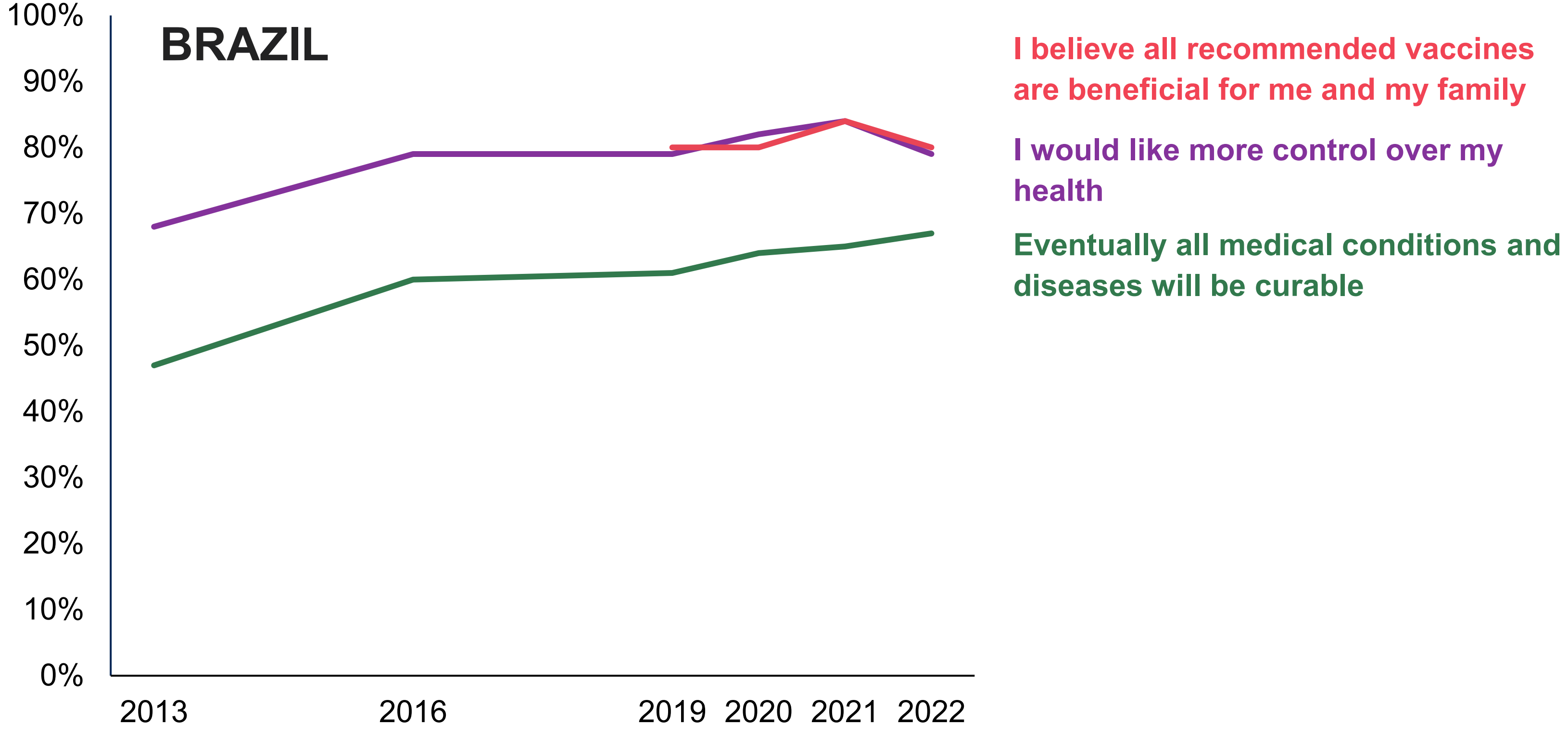
Base:
48,579 adults aged 16–75 across 50 markets, interviewed online between 23 September and 14 November 2022

Source:
Ipsos Global Trends 2023

The vast majority of people of all ages around the world want more control over decisions about their health, despite the COVID-19 pandemic arguably showing that there are occasions where state intervention in health outcomes is necessary. Most people also continue to feel that all recommended vaccines are beneficial for them and their family ,and that eventually all medical conditions and diseases will be curable). Again, these attitudes are remarkably consistent across age groups.

While there is a widespread belief in the power of science to solve major health problems, people want to retain control

To what extent do you agree or disagree with the following statements?



Base:
500–1,000 500–1,000 adults aged 16–75 (18–75 in US and Canada) per market per year

Source:
Ipsos Global Trends Series

In Brazil, for example, between 2013 and 2016 there was a large swing towards wanting more control over health and feeling that diseases will be curable. This has largely been maintained since. Pro-vaccine attitudes have remained consistently high since the beginning of the pandemic – though, of course, it is important to recognise that not everyone feels the same.

Control over one's own health is a shared global desire

To what extent do you agree or disagree with the following statement?

I would like more control over decisions about my health

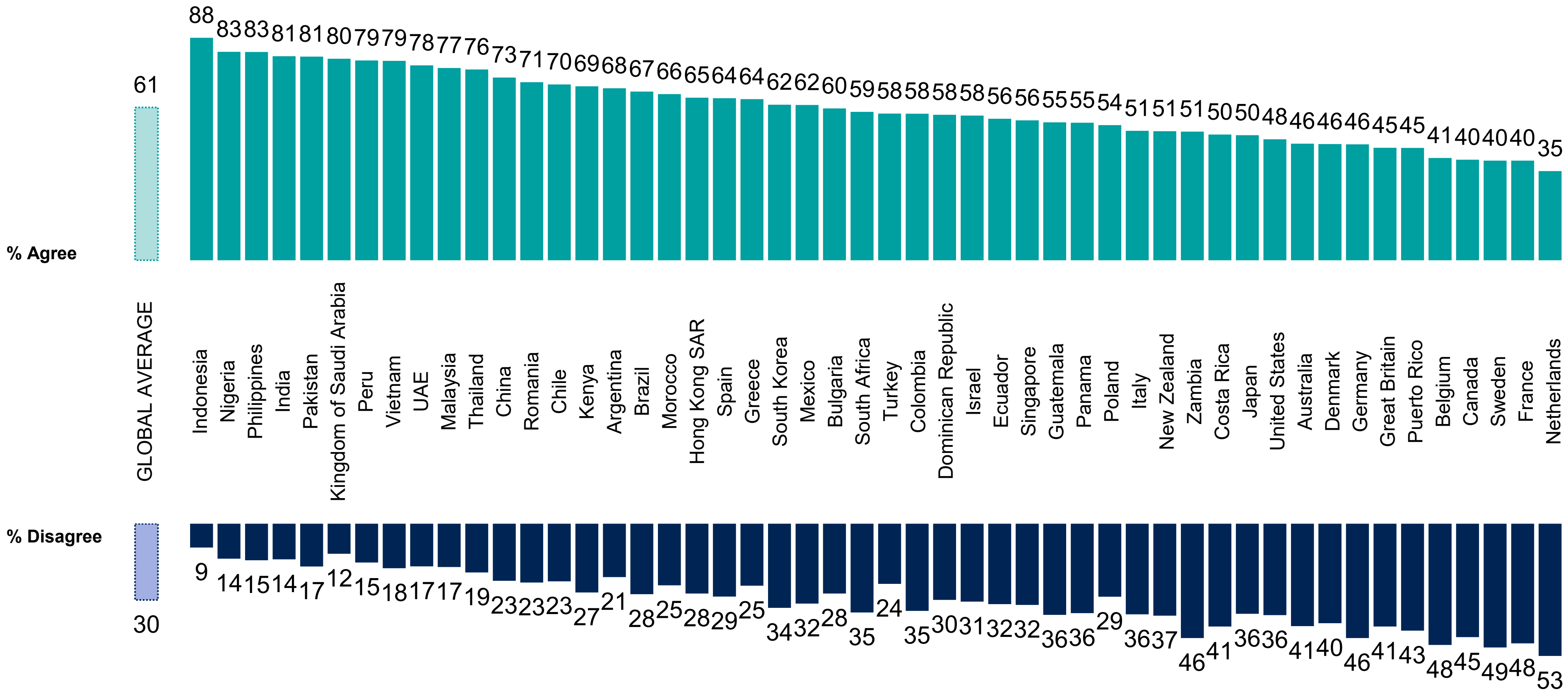
Base:
48,579 adults aged 16–75 across 50 markets, interviewed online between 23 September and 14 November 2022

Source:
Ipsos Global Trends 2023

There is considerable variation in belief in the power of science: some Europeans are more sceptical (or realistic)

To what extent do you agree or disagree with the following statement?

Eventually all medical conditions and diseases will be curable



Base:
48,579 adults aged 16–75 across 50 markets, interviewed online between 23 September and 14 November 2022

Source:
Ipsos Global Trends 2023

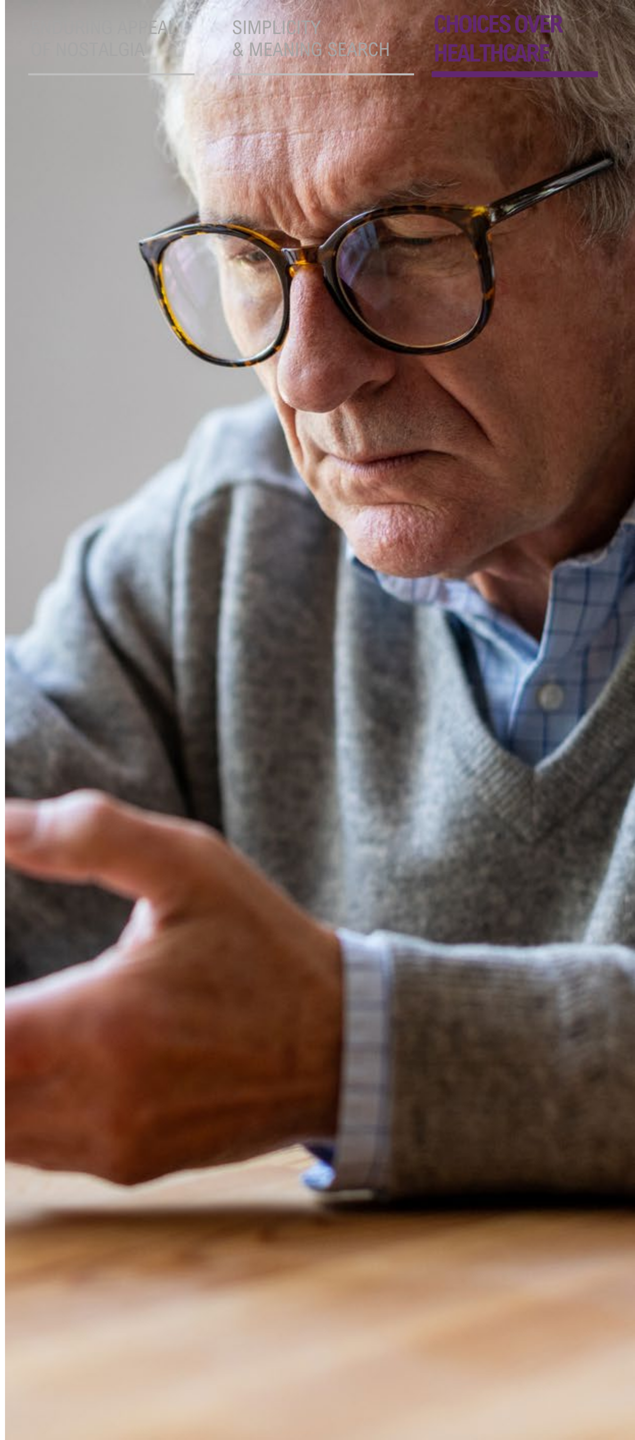
How can your brand help in the healthcare battleground?

Thought Starters

The boundaries of health and wellness have blurred; how can your organisation help from outside the healthcare industry?

Will your industry be impacted in the same way that healthcare has been disrupted by advances in systemic and personal technology?

How can your brand help deliver on emerging needs in healthcare – for both patients and providers?



GLOBAL TRENDS 2023

FINAL THOUGHTS

There will be more crises to come, and more anxiety about them

Following a very challenging couple of years (2020 and 2021), many people around the world feel that 2022 has been a little better. However, uncertainty about both short- and longer-term futures prevails. Global citizens are struggling to be optimistic about 2023; most express concern about the state of the economy, the environment and world security.

In what is now a decade-old annual tradition, Ipsos recently asked more than 24,000 citizens of 36 countries to reflect on the year gone by and the year ahead.

The answers suggest that the public mood for 2023 is not great: there are widespread expectations of fresh challenges for the economy, the climate and the role of technology, and a pervading concern about world security.

ECONOMY

Expectations are for the economy to worsen in 2023. Large numbers expect the following to rise

79%	75%	74%	68%
Prices	Inflation	Interest rates	Unemployment

WORLD SECURITY

48% think it is likely that nuclear weapons will be used in a conflict somewhere in the world in 2023 (up from 34% last year) .

This feeling has increased by more than 10 percentage points in

25 of 31 countries

OUTLOOK FOR 2023

Not surprisingly, given all this...

Optimism that next year will be a better year than this year has fallen from

77% to **65%**

and is at a 10-year low.

Optimism that the global economy will be stronger next year than it was this year has fallen from

61% to **46%**

and is at a 10-year low.

ENVIRONMENT

65% expect more extreme weather events next year than this year

57% think 2023 will be the hottest year on record in their country

45% expect a natural disaster to hit a major city in their country

SOCIETY

60% think it is likely that there will be no further COVID-19 lockdowns in their country

This ranges from **82%** in Indonesia to **43%** in China

TECHNOLOGY

47% expect a space rocket to be launched to Mars in 2023

39% expect space tourism service moon trips to launch in 2023

27% expect a brain implant to restore lost memories to be possible in 2023

Source: Ipsos Global Predictions 2023 study[1]

‘These crises require organisations to plan better for the future and anticipate and plan for both positive and negative outcomes in order to survive. We can’t predict the future, but we can help you prepare for it.’

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

Every crisis can be an opportunity to improve your organisation, and people's lives

We can help you leverage the trends:

Beyond this public report, get in touch with the The Global Trends and Foresight Team to discuss:

- **In-depth analysis** of the trends or a specific market's attitudes – and how they will change
- **A custom presentation** tailored with data & signals for your organisation and key countries
- **Workshops & activations** to apply the trends to your strategic planning processes
- **Data access** through your Ipsos team, or directly via our Portal for up to 50 markets
- **Macro Forces** with supporting data, to feed into your own foresight processes
- **Market-specific highlights** to inform your global footprint and strategy

We can help you shape the future:

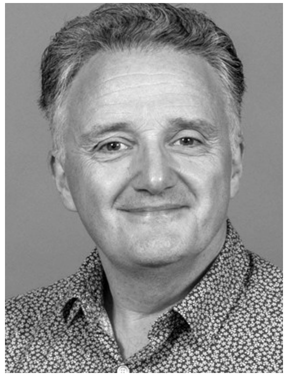
Beyond the trends, our advisory services in trends and foresight consulting include:

- **'Future of...'** foresight consulting to prepare for the obstacles and opportunities ahead
- **Trend Tracking** to monitor trend evolution and scale
- **Custom trends frameworks**, inspired by Ipsos Global Trends but customised for your organisation
- **Scenario building** and horizon scanning to consult with your organisation on preparation
- **Innovation sprints** to turn the trends into platforms for growth and to develop concepts

The Ipsos Global Trends Team

Matt Carmichael

Jennifer Bender



Nick Chiarelli

Mike Clemence

Philip Ryan

Billie Ing

While the report authors are shown on this page, Ipsos Global Trends is very much a team effort.

Thank you very much to our local market experts and marketing teams; the editors, designers, proof-readers; the fieldwork, operations and admin teams; and our Data Liberation and Ipsos Knowledge Centre colleagues, who have all worked hard 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.

The Global Trends and Foresight Team

Globaltrends@ipsos.com

GLOBAL TRENDS 2023

APPENDIX

The analysis and content in this report has been built by Ipsos consultants and researchers around the world, using qualitative and quantitative techniques

Ideate & Analyse

Trends & Foresight experts in Strategy3, Ipsos's consultancy, used Ipsos's Theory of Change to understand how change is (and isn't) happening.

Field

Global Advisor – our monthly omnibus that keeps track of what the world thinks – fielded and coordinated the survey across 50 markets – our broadest edition ever!

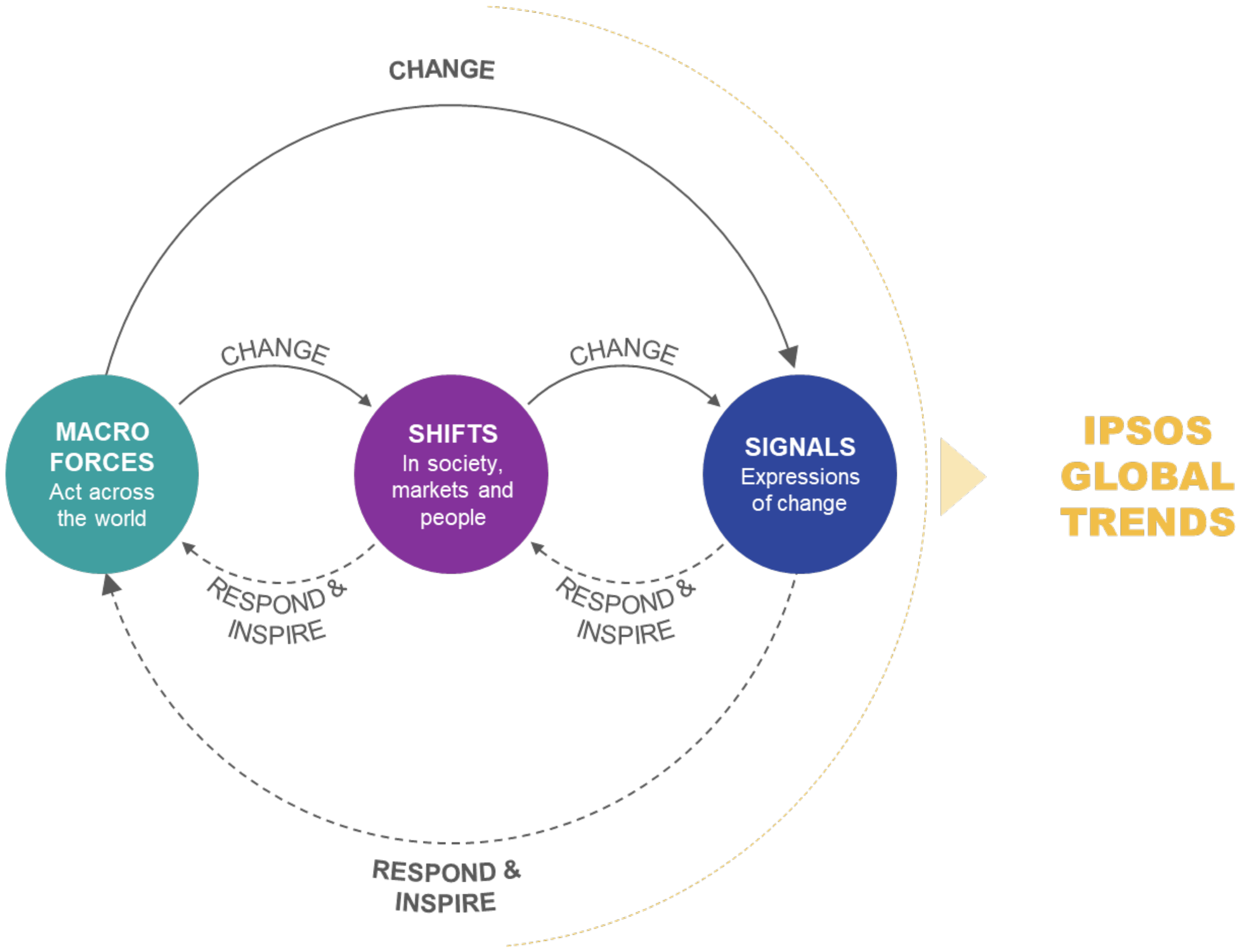
Contribute

Local and global Ipsos experts across 50+ countries contributed to the analysis and reporting.

Ipsos's Theory of Change helps us look at how change happens across several levels

We used this framework to develop our 12 Trends in 2020, and to monitor how they are evolving over time.

- **Macro Forces** operate at a broad level and have far-reaching impacts within a country and across borders.
- **Shifts** are changes in values and attitudes across society, markets and people that we have been tracking over time.
- **Signals** are local changes, such as new product launches.



IPSOS GLOBAL TRENDS 2023

TECHNICAL DETAILS

MARKETS

50 markets are included in Ipsos Global Trends 2023. These are Argentina, Australia, Belgium, Brazil, Bulgaria, Canada, Chile, China, Colombia, Costa Rica, Denmark, the Dominican Republic, Ecuador, France, Germany, Great Britain, Greece, Guatemala, Hong Kong, India, Indonesia, Israel, Italy, Japan, Kenya, Malaysia, Mexico, Morocco, the Netherlands, New Zealand, Nigeria, Pakistan, Panama, Peru, the Philippines, Poland, Puerto Rico, Romania, Saudi Arabia, Singapore, South Africa, South Korea, Spain, Sweden, Thailand, Turkey, the United Arab Emirates, the United States, Vietnam and Zambia.

METHOD

In most markets this wave of the survey was carried out online with adults aged 16–75, or 18–75 in Argentina, Canada, Greece, Guatemala, Hong Kong, Japan, the Philippines, Sweden, Thailand, the US, Vietnam, New Zealand, Costa Rica, Chile, Israel, Peru, Ecuador, Panama, the Dominican Republic, Bulgaria and Puerto Rico. In Indonesia and Singapore the age range is 21–75. The majority of fieldwork was conducted online through Ipsos panels. However, in some countries where internet penetration is lower, different methods were used: in Nigeria, Pakistan and Zambia a face-to-face methodology was employed, while in Kenya the survey was carried out over the telephone. In these countries there was no upper age limit on participation, so coverage can be considered 16+ in Pakistan and 18+ in Nigeria, Kenya and Zambia. In all cases fieldwork was carried out between 23 September and 14 November 2022.

The results are weighted to ensure that the sample's composition reflects that of the adult population according to the most recent census data.

Total global data has not been weighted by population size, but are simply a market 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.

FIELDWORK DATES

- 2023 edition (September–November 2022)
- 2021 edition (August–September 2021)
- 2020 edition (September 2020)
- 2019 edition (June–July 2019)
- 2016 edition (September–October 2016)
- 2013 edition (September–October 2013)

BASE SIZES

The total sample size across all markets in 2022 is 48,541.

In most countries the sample size is approximately 1,000. However, a sample size of 500 was used in Guatemala, Costa Rica, Panama, the Dominican Republic, Puerto Rico, Israel and Zambia, while the Japanese and Pakistan samples consisted of 2,000 participants each.

HISTORICAL DATA

Comparison is made with previous waves of the Ipsos Global Trends Survey in 2021, 2020, 2019, 2016 and 2013. In nearly all cases the methodology and sample sizes will be the same in each wave of the panel: c.1,000 or c. 500 adults interviewed through the Ipsos online panel system.

References

Chapter 1 Introduction Page 1 – Page 3

Chapter 2 Executive Summary Page 4 – Page 7

1. https://www.theguardian.com/environment/2022/dec/27/biggest-climate-toll-in-year-of-devastating-disasters-revealed

Chapter 3 Macro Forces Page 8 – Page 16

1. https://www.un.org/development/desa/en/news/population/2018-revision-of-world-urbanization-prospects.html
2. https://ifr.org/ifr-press-releases/news/china-overtakes-usa-in-robot-density
3. https://www.ft.com/content/e9c4743b-945d-422b-8f4b-3c2a8a237b70
4. https://www.populationmedia.org/blog/introduction-overdevelopment-overpopulation-overshoot
5. https://www.overshootday.org/
6. https://technologymagazine.com/articles/cost-of-data-breaches-to-surpass-us-5mn-per-incident-in-2023
7. https://www.who.int/news-room/fact-sheets/detail/mental-disorders

Chapter 4 Trends Overview Page 17 – Page 18

Chapter 5 Climate Antagonism Page 19 – Page 26

1. https://www.bbc.com/news/world-africa-63280518
2. https://www.nytimes.com/2021/11/06/us/puerto-rico-beaches-threats.html
3. https://www.abc.net.au/news/rural/2022-02-08/record-amounts-of-rooftop-solar-installed-during-lockdown/100805838
4. https://www.abc.net.au/news/rural/2022-02-08/record-amounts-of-rooftop-solar-installed-during-lockdown/100805838

Chapter 6 Conscientious Health Page 27 – Page 34

1. https://www.straitstimes.com/singapore/more-people-working-out-at-gyms-than-before-the-pandemic
2. https://danonehealth.be/nl/danone-institute/artikels/hoe-kunnen-we-de-gezondheid-van-mens-en-planeet-het-beste-verenigen
3. https://www.capital.fr/auto/les-pubs-pour-les-voitures-vont-maintenant-vous-inciter-a-privilegier-le-velo-ou-la-marche-1430075
4. https://www.nzherald.co.nz/lifestyle/new-zealand-ranks-fifth-in-the-world-for-veganism/2KLKTB4UHNBFQPITTSNXNEO56U/

Chapter 7 Authenticity Page 35 – Page 41

1. https://bienpensado.com/wom-chile-y-su-publicidad-radical/
2. https://entreprise.monoprix.fr/monoprix-sengage/consommer-mieux/petits-producteurs-de-grands-partenariats
3. https://www.promturpanama.com/noticias/notas-de-prensa/panama-vive-por-mas-una-marca-inspirada-en-el-corazon-del-panameno/

Chapter 8 Data Dilemma Page 42 – Page 48

1. https://www.nbcnews.com/pop-culture/tiktoker-consensually-doxxing-people-teach-social-media-privacy-rcna55037
2. https://es.bebee.com/
3. https://datosprotegidos.org/

Chapter 9 Tech Dimension Page 49 – Page 57

1. https://www.insurely.com/open-insurance-blog/open-insurance-is-inevitable-and-to-everyones-benefit
2. http://kitchenpalapp.com/en/
3. https://www.youtube.com/watch?v=9N0jpUF-oHM

Chapter 10 Peak Globalisation Page 58 –Page 65

1. https://www.foodnavigator.com/Article/2021/02/12/Danone-International-CEO-talks-brand-acceleration-and-innovation-The-Local-First-project-is-a-growth-project
2. https://www.theguardian.com/technology/2022/sep/27/apple-shifts-some-iphone-14-production-from-china-to-india
3. https://www.lovemoney.com/galleries/98705/big-multinational-companies-moving-out-of-china?page=21
4. https://www.cnbc.com/2019/08/27/hasbro-ceo-moving-out-of-china-has-gone-very-well-for-us.html

Chapter 11 Divided World Page 66 – Page 73

1. https://www.bbc.com/news/world-europe-63511142
2. https://www.youtube.com/watch?v=--T8-Jw52Qc

Chapter 12 Capitalism Page 74 – Page 81

1. https://ltse.com/
2. https://www.pvda.be/raoul_hedebouw_laat_ons_van_2022_een_jaar_van_verzet_maken
3. https://cestquilepatron.com/
4. https://www.washingtonpost.com/magazine/2022/10/24/universal-basic-income/

Chapter 13 Reaction to Uncertainty Page 82 – Page 88

1. https://www.weforum.org/agenda/2022/04/economic-inequality-wealth-gap-pandemic/
2. https://elpais.com/opinion/2022-04-07/rumbo-populista-en-costa-rica.html
3. https://www.unicef.org/panama/acción-humanitaria-y-gestión-de-riesgo
4. https://www.brusselstimes.com/belgium/286828/lacking-national-identity-polish-history-textbook-mocks-belgium

Chapter 14 Nostalgia Page 89 – Page 95

1. https://www.packshotmag.com/films/sodebo-se-nourrir-de-bonheur/
2. https://www.latercera.com/laboratoriodecontenidos/noticia/chilenos-se-inclinan-por-la-nostalgia-y-el-contenido-local-a-la-hora-de-ver-television/Q3AAXMF32VB2BPSN6GN6YKEMQM/
3. https://www.minimeinsights.com/2022/09/10/foodpanda-evokes-nostalgic-memories-with-local-delicacies/
4. https://www.vrt.be/vrtnws/nl/2021/12/13/lokeraar-start-met-vinylplaatperserij-uniek-want-er-zijn-er-nog/

Chapter 15 Search for Simplicity Page 96 – Page 102

1. https://mudita.com/
2. https://www.viva.co.id/gaya-hidup/travel/1367099-tren-pariwisata-era-new-normal-solo-traveler-kian-meningkat
3. https://www.cuppatime.org.au/about/cuppa-time
4. https://www.waerbeke.be/

Chapter 16 Choices over Healthcare Page 103 – Page 110

1. https://www.ipsos.com/en-uk/nhs-overtakes-economy-and-inflation-most-mentioned-issue-facing-britain
2. https://www.belle.ai/
3. https://adtusalud.org/
4. https://www.beehive.govt.nz/release/major-reforms-will-make-healthcare-accessible-all-nzers
5. https://www.yna.co.kr/view/AKR20220104142400004
6. https://e27.co/startups/ehumanlife/

Chapter 17 Final Thoughts and Next Steps Page 111 – Page 115

1. https://www.ipsos.com/en/ipsos-global-predictions-2023

GLOBAL TRENDS 2023

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

Globaltrends@ipsos.com

ipsosglobaltrends.com

About Ipsos

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

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

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

GAME CHANGERS