

# Global Trends 2020

## *Beyond the pandemic*

**How much have long term trends changed?**

Ben Page, Chief Executive, Ipsos MORI

# How has COVID-19 changed our societies?

The pandemic has  
had far-reaching  
impacts on our  
**behaviour.**

How far is this  
translating into  
change in **values?**





# Coronavirus: how the pandemic has changed our perception of time

May 28, 2020 12:54pm BST

## How we exercise is different now – the pandemic changed everything

App-based studies have shown older people have been more active than before

Fri, Oct 16, 2020, 06:01

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

*Simon Tisdall*



FC Fast Company

### 5 ways the pandemic has changed staff development forever

This Deloitte exec says the evolution is a net positive. 5 ways the pandemic has changed professional and staff development forever. [Photo: ...]  
3 days ago



World Economic Forum

### 3 ways the COVID-19 pandemic has changed youth activism

The COVID-19 pandemic has made us all more reliant on digital tools for connection and communication;; Dealing with COVID-19 restrictions ...  
1 month ago



## Everything

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

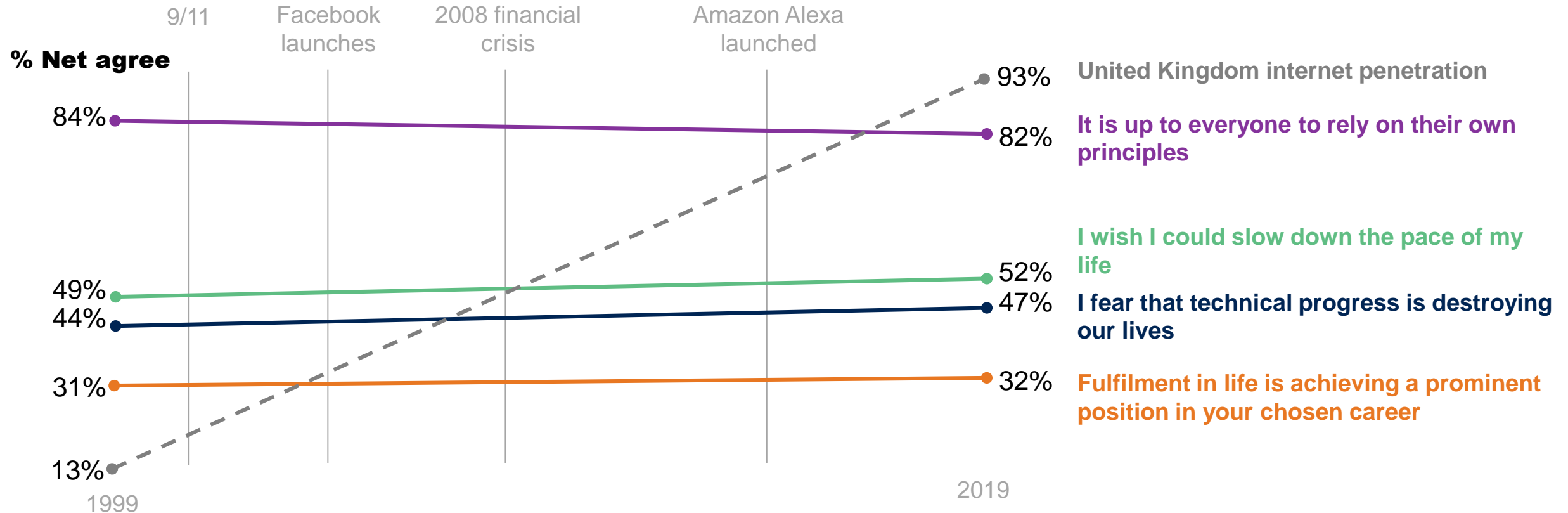
weather | iPlayer | Sounds | CBBC | More | Search

ility Matters | Remote Control | Unknown Questions | Worklife 101 | More

VS | UNKNOWN QUESTIONS

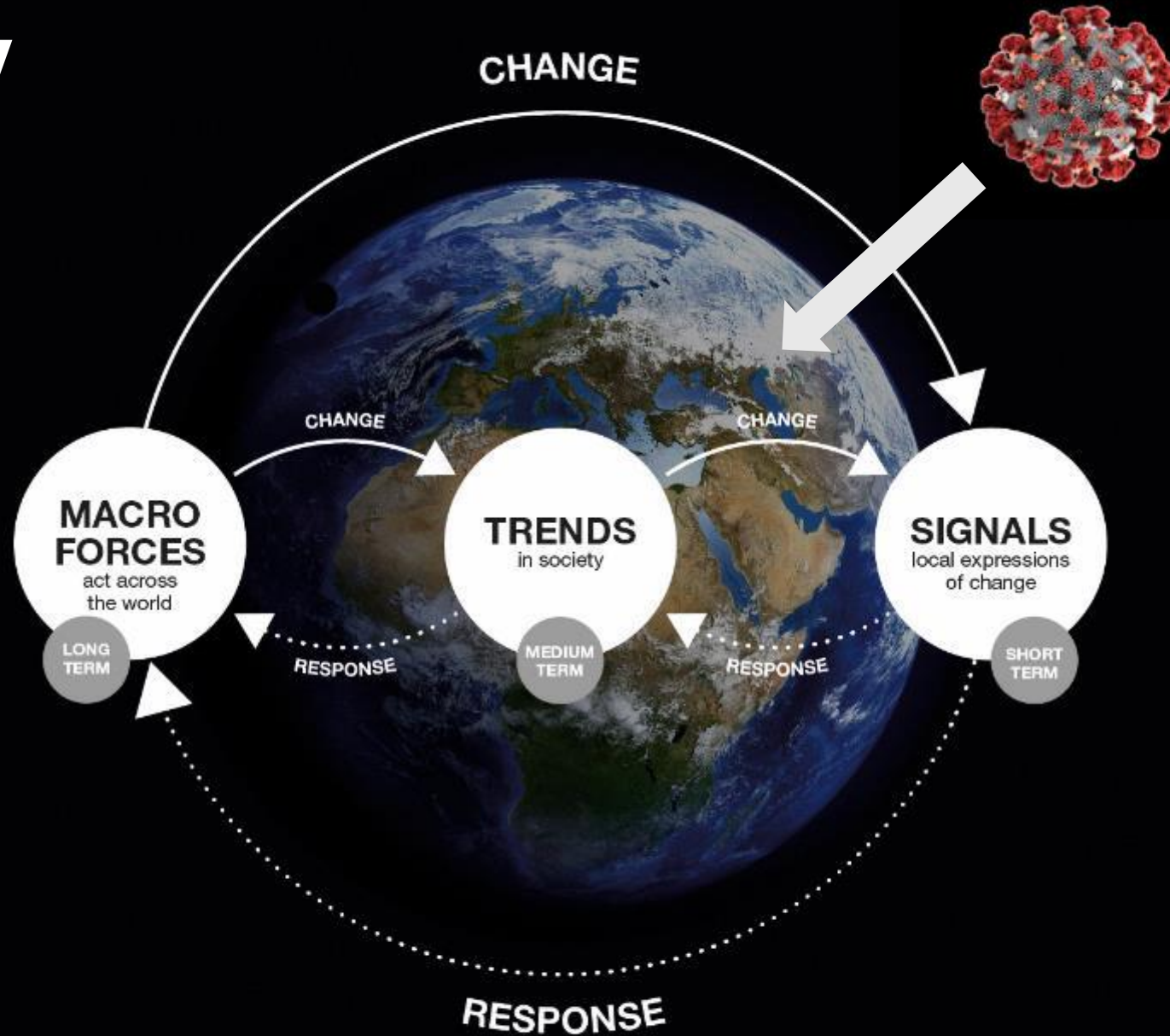
# d of work may change forever

# Values can hold true over the medium term



Sources: 1999: Ipsos Socioconsult Survey, 2019: Ipsos Global Trends survey – GB data, United Kingdom Internet penetration, Office for National Statistics (UK)

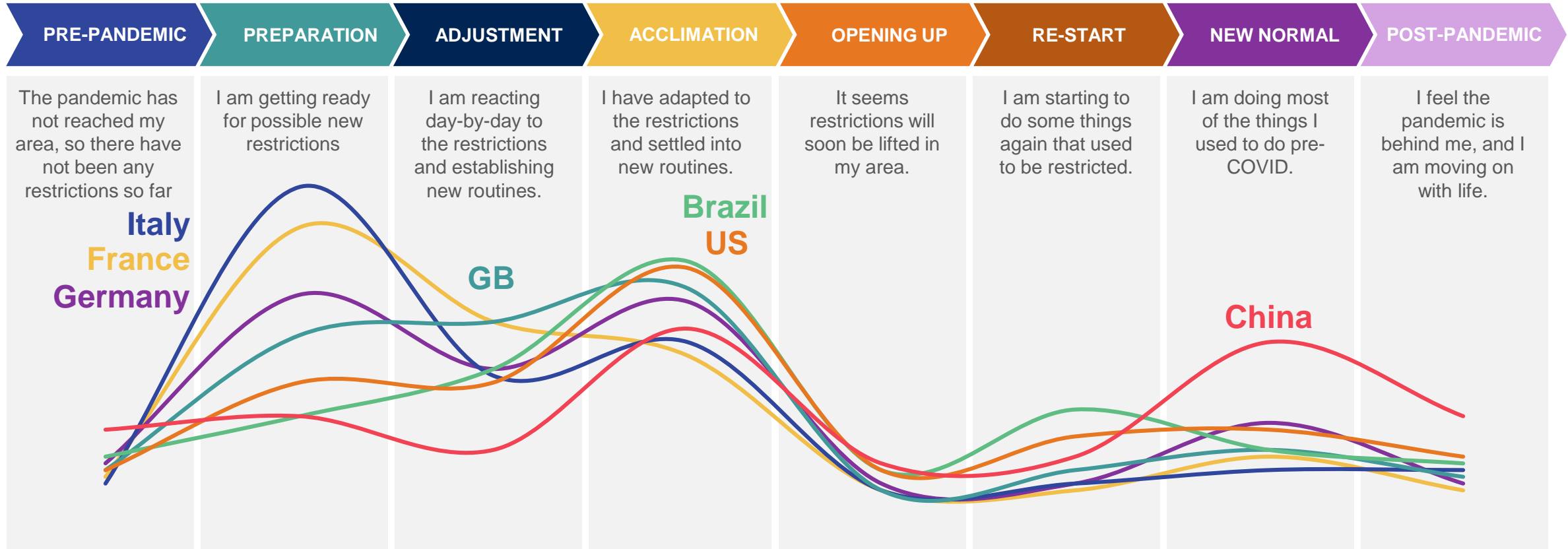
# Our theory of change



A shock to the system

# To check it, we picked seven markets...

## Ipsos Essentials COVID-19 phases



Ipsos Essentials polling: October 2020

# The macro forces -

# Known knowns

**Dynamic  
populations**



**Growing inequality  
and opportunity**



**Geopolitical  
tensions**



**Data  
world**



**Technology  
tipping points**



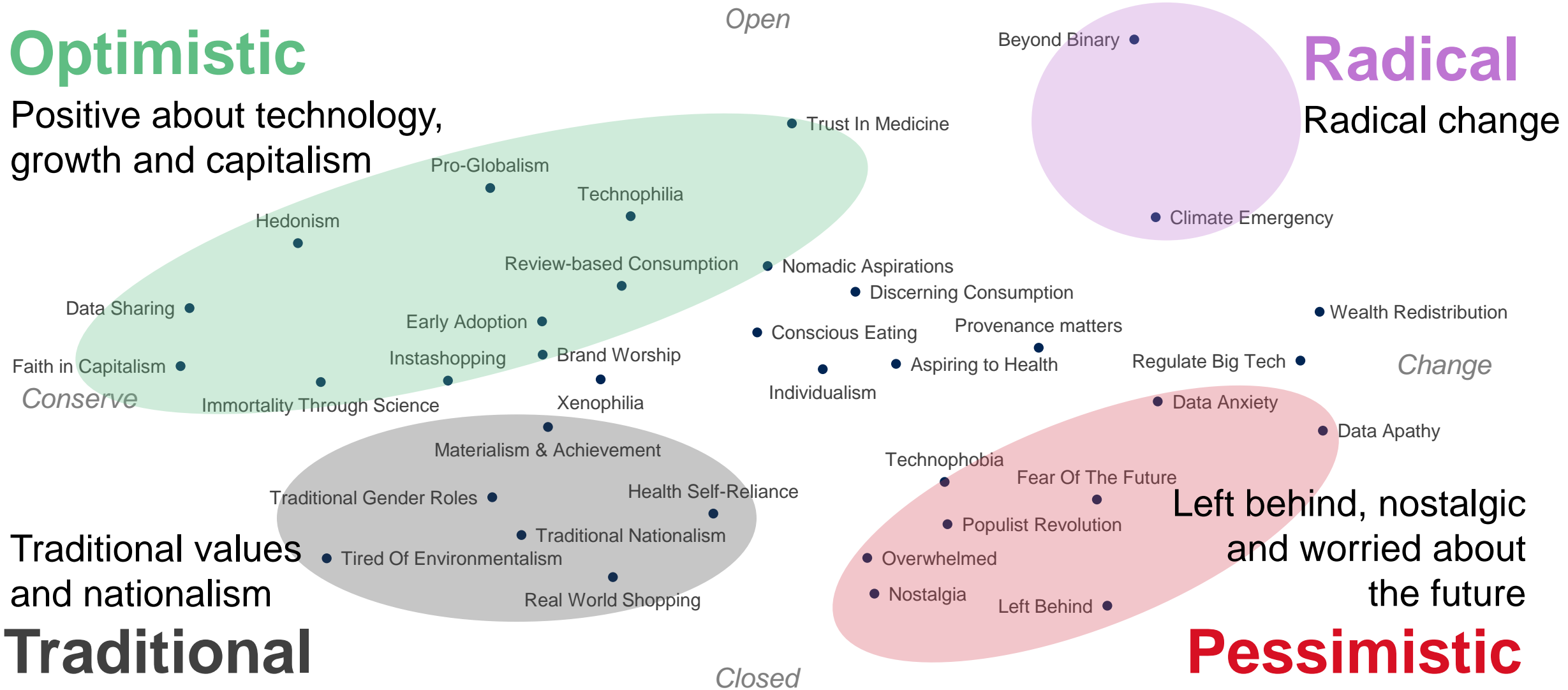
**The fragile  
planet**



# We found 36 global values...

## Optimistic

Positive about technology, growth and capitalism



Traditional values and nationalism

## Traditional



# ... sorted into twelve trends



# Six trends have registered most change

Healthcare, brands, climate, globalisation and reactions to inequality



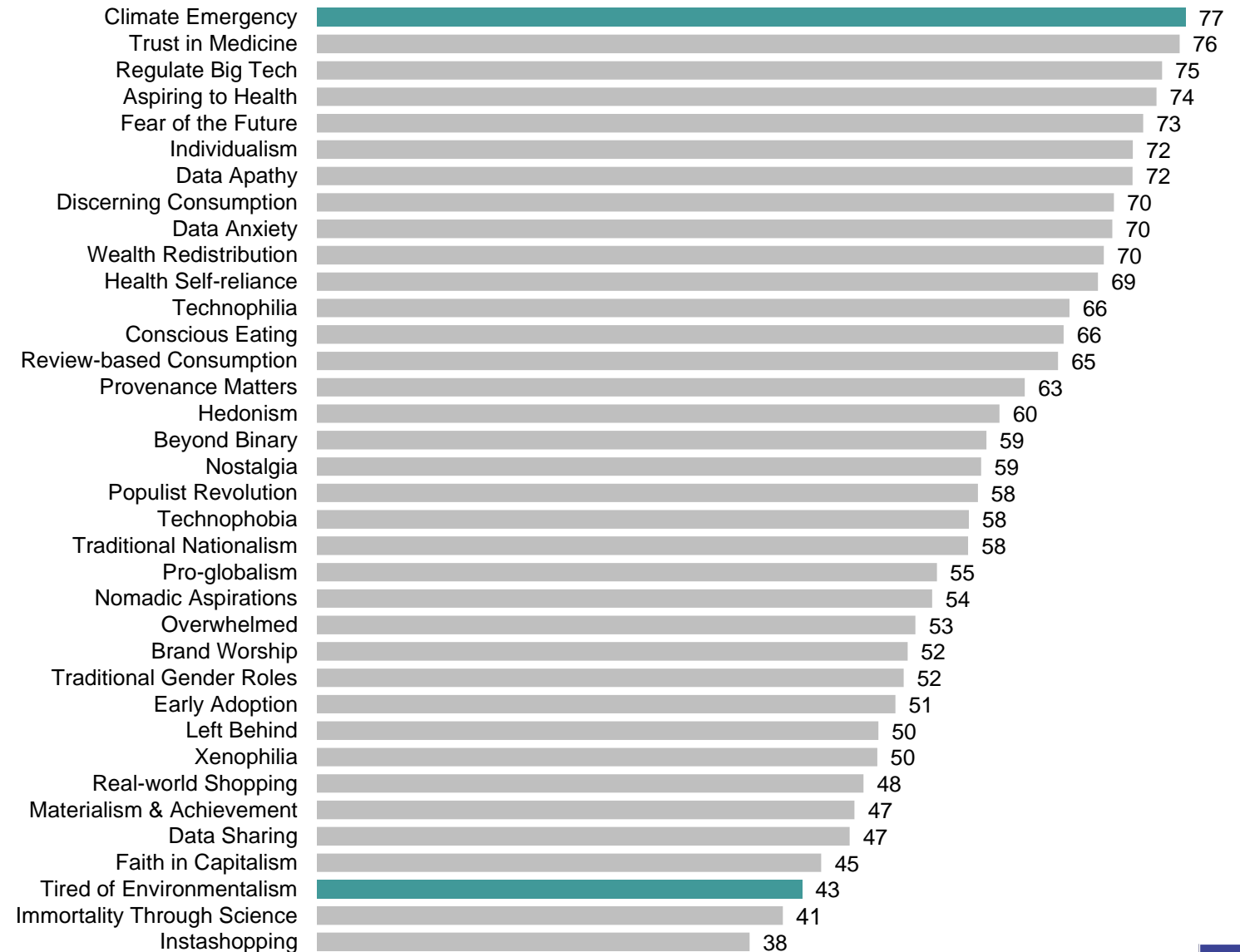
# The climate emergency



# Our strongest global value

Climate emergency emerges as the strongest value in Global Trends  
Scepticism is far weaker yet remains significant

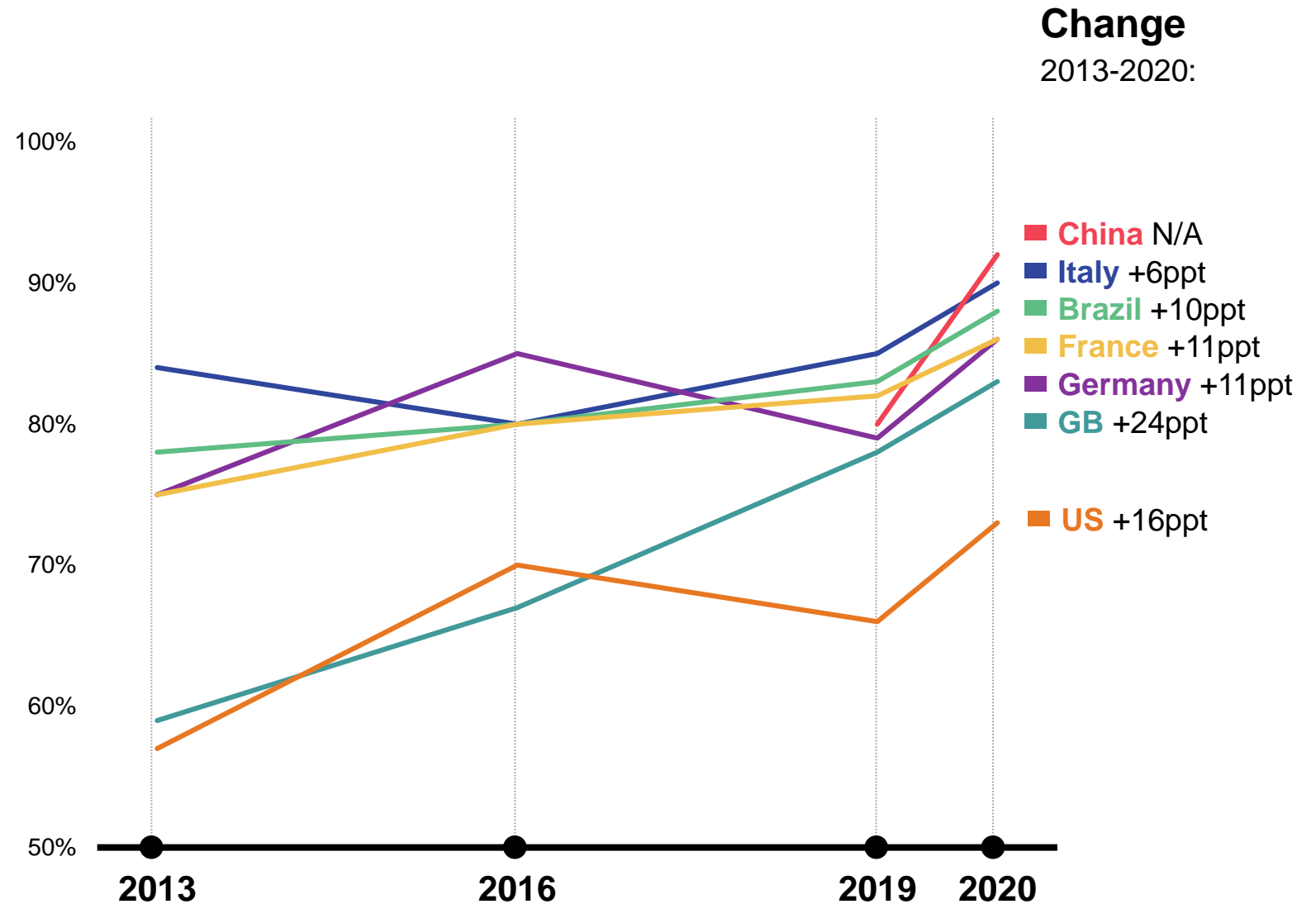
## Value intensity



# COVID-19 has not dented climate concern

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

% agree



Ipsos Global Trends Series  
Base: c.1,000 adults aged 16-75 (18-75 in US) in each market for each wave

# Signals of the future



**IKEA's #BuyBackFriday**



**BMA, Lancet and Royal Colleges call for a tax on meat**



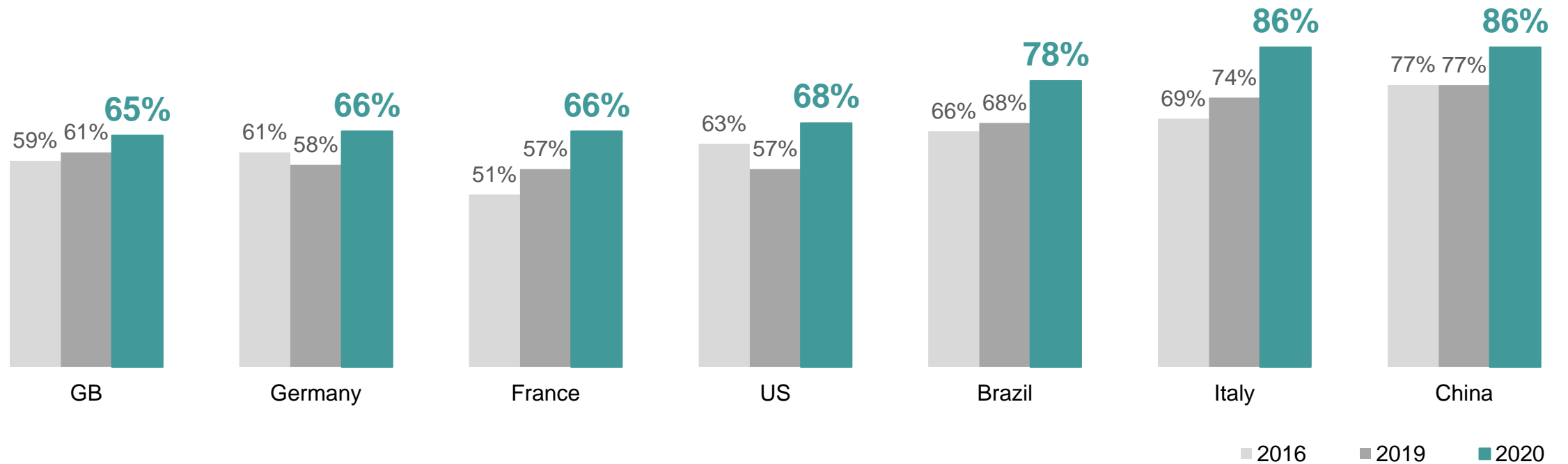
**Renewables surpass coal in the US**

# Healthcare and trust in science



# Health has moved up the agenda for consumers

“I will sacrifice convenience if it means getting healthier products” - % agree



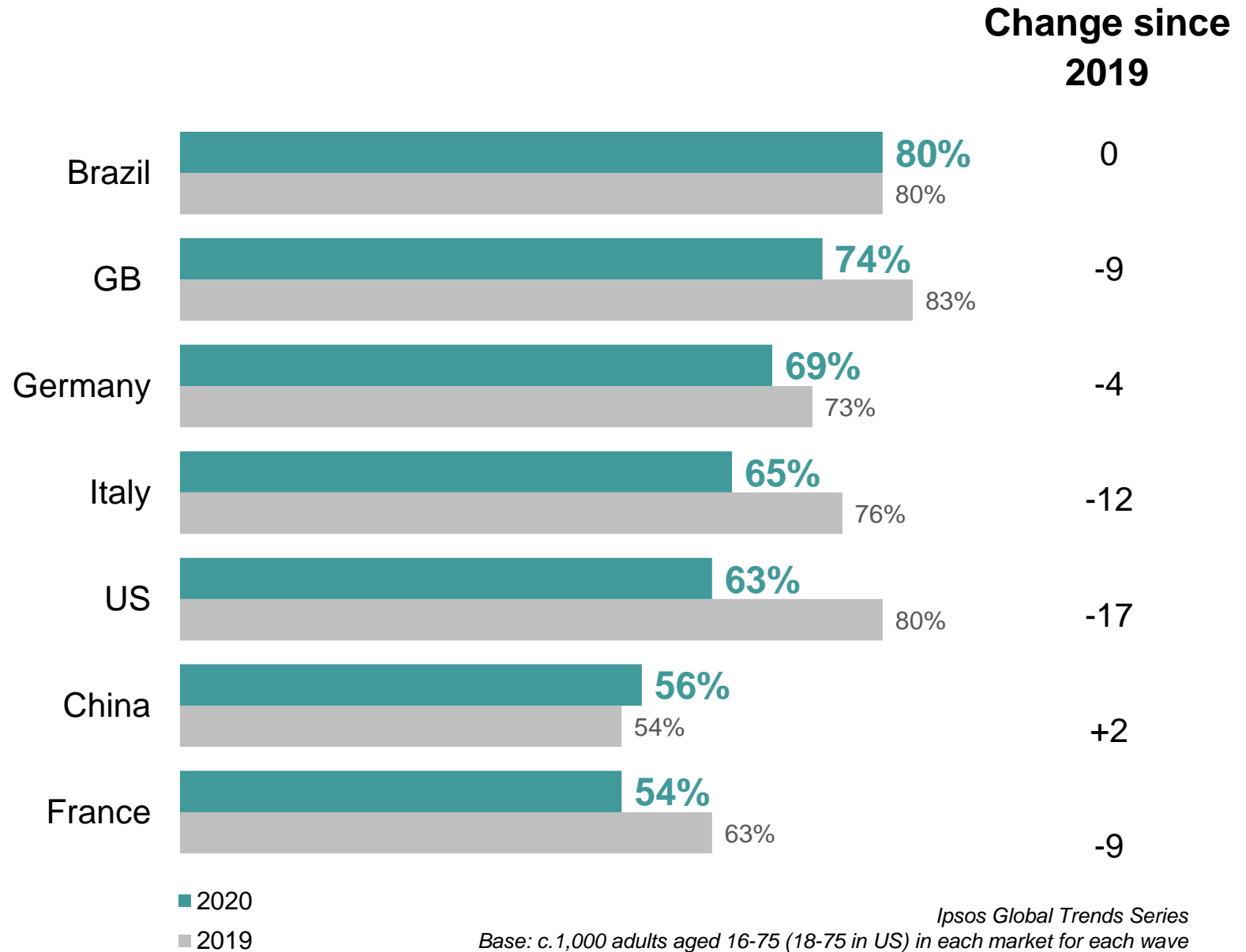
Base: 7,444 adults aged 16-75 (18-75 in US) in 7 markets interviewed in September 2020



# While faith in vaccines has dropped in the US and Europe

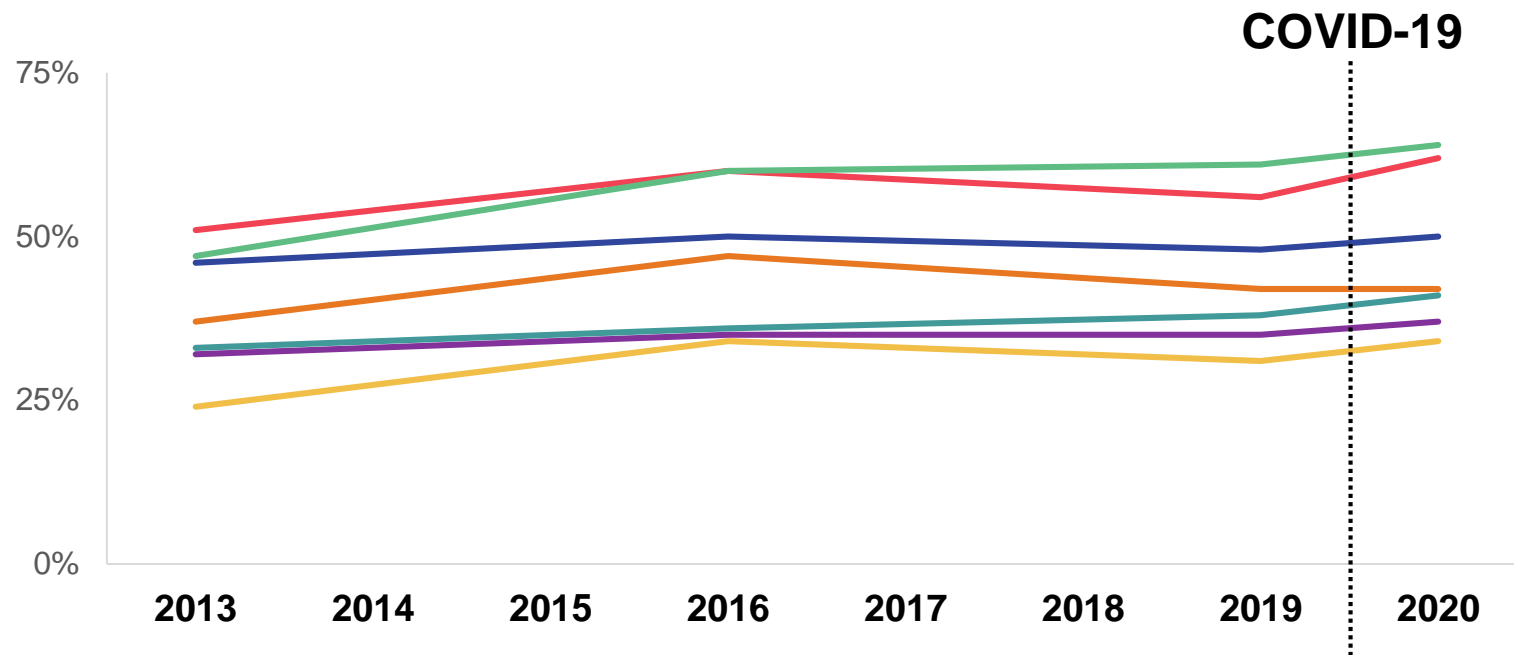
“I believe all recommended vaccines are beneficial for me and my family”

% agree



# Although rising belief that science has the answers has been unaffected

“Eventually all medical conditions and diseases will be curable” - % agree



Change 2013 - 2020	
Brazil	+17ppt
China	+11ppt
France	+10ppt
GB	+8ppt
US	+5ppt
Germany	+5ppt
Italy	+4ppt

Ipsos Global Trends Series  
Base: c. 1,000 adults aged 16-75 (18-75 in US) in each market for each wave

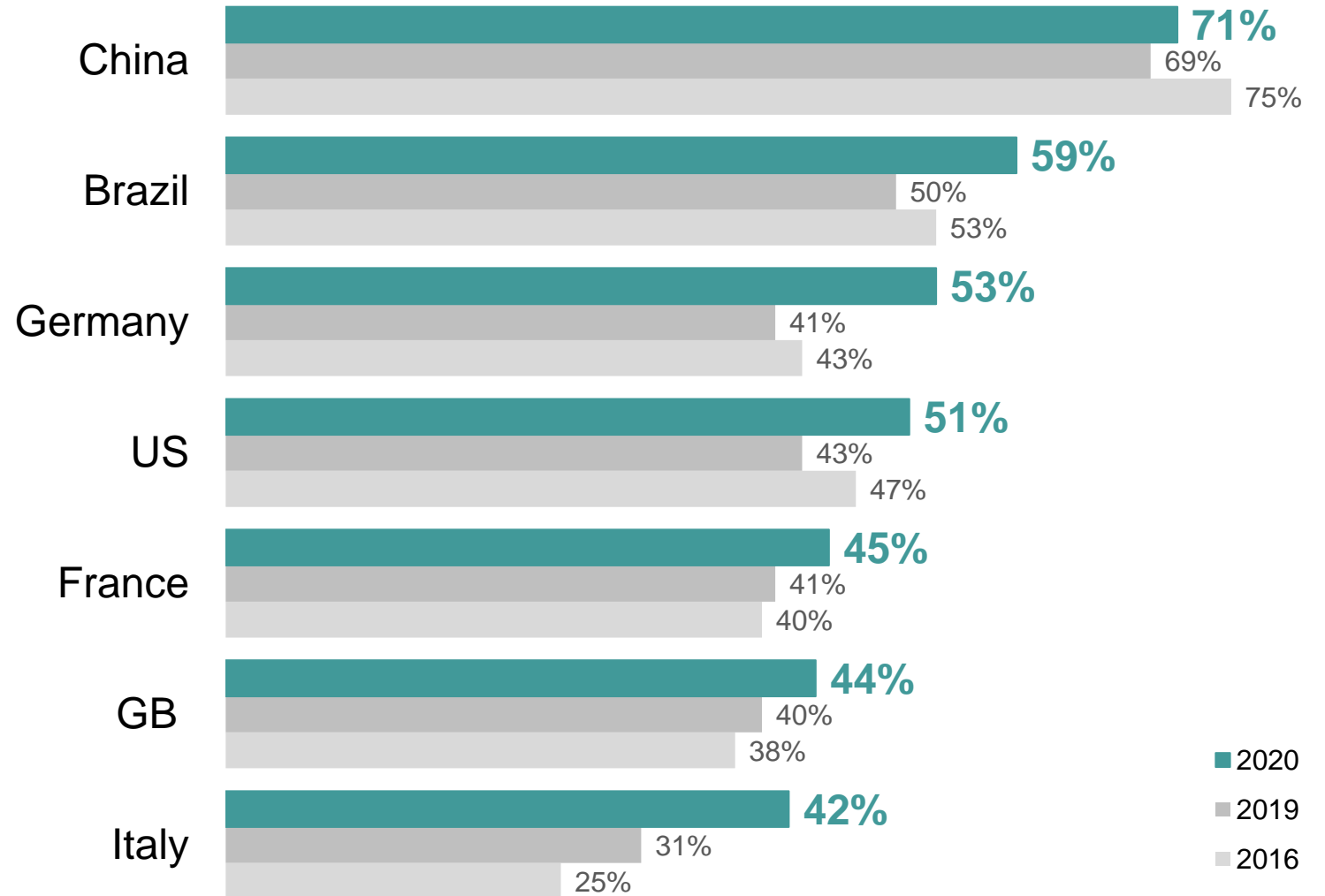
# Authenticity is King



# Brands have gained in importance

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

% agree

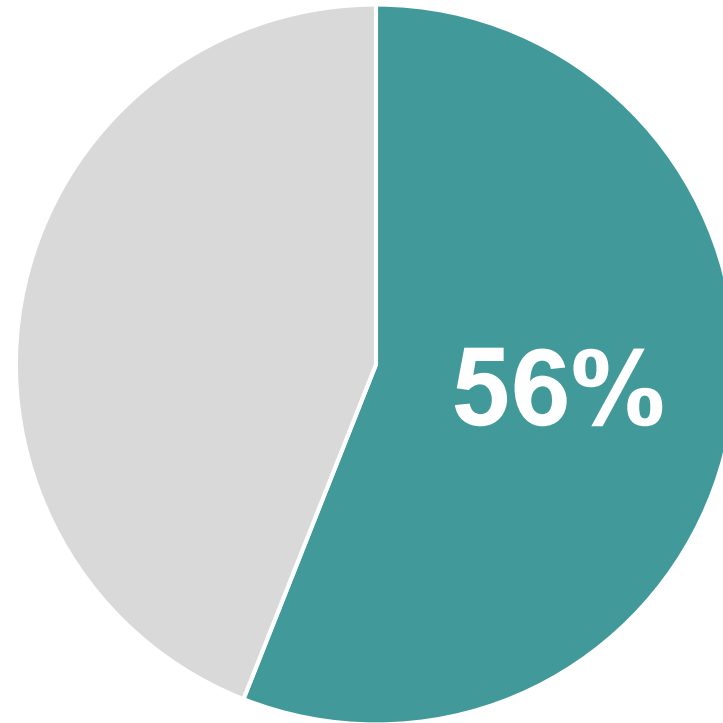


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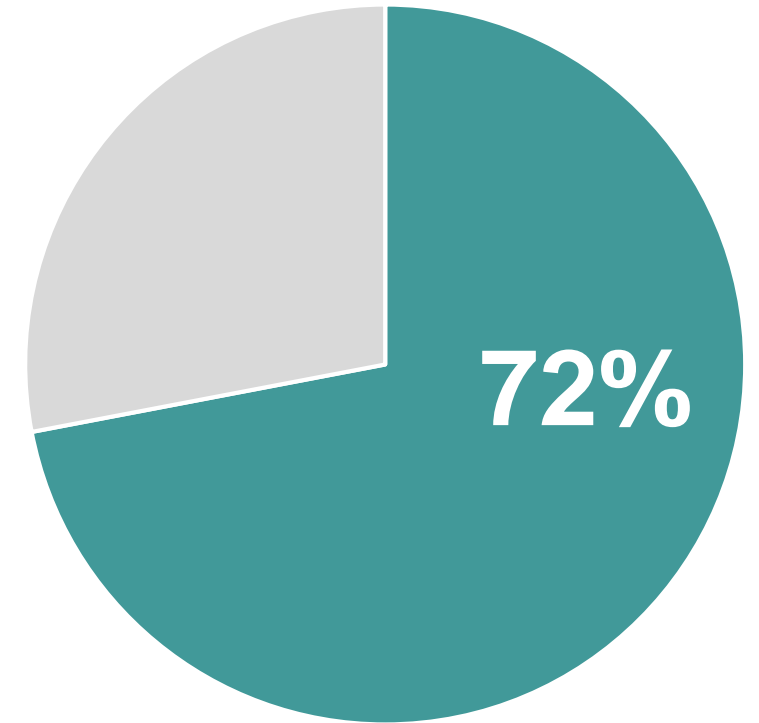
# With a greater role for purpose

“I tend to buy brands that reflect my personal values”

% agree, GB



2019



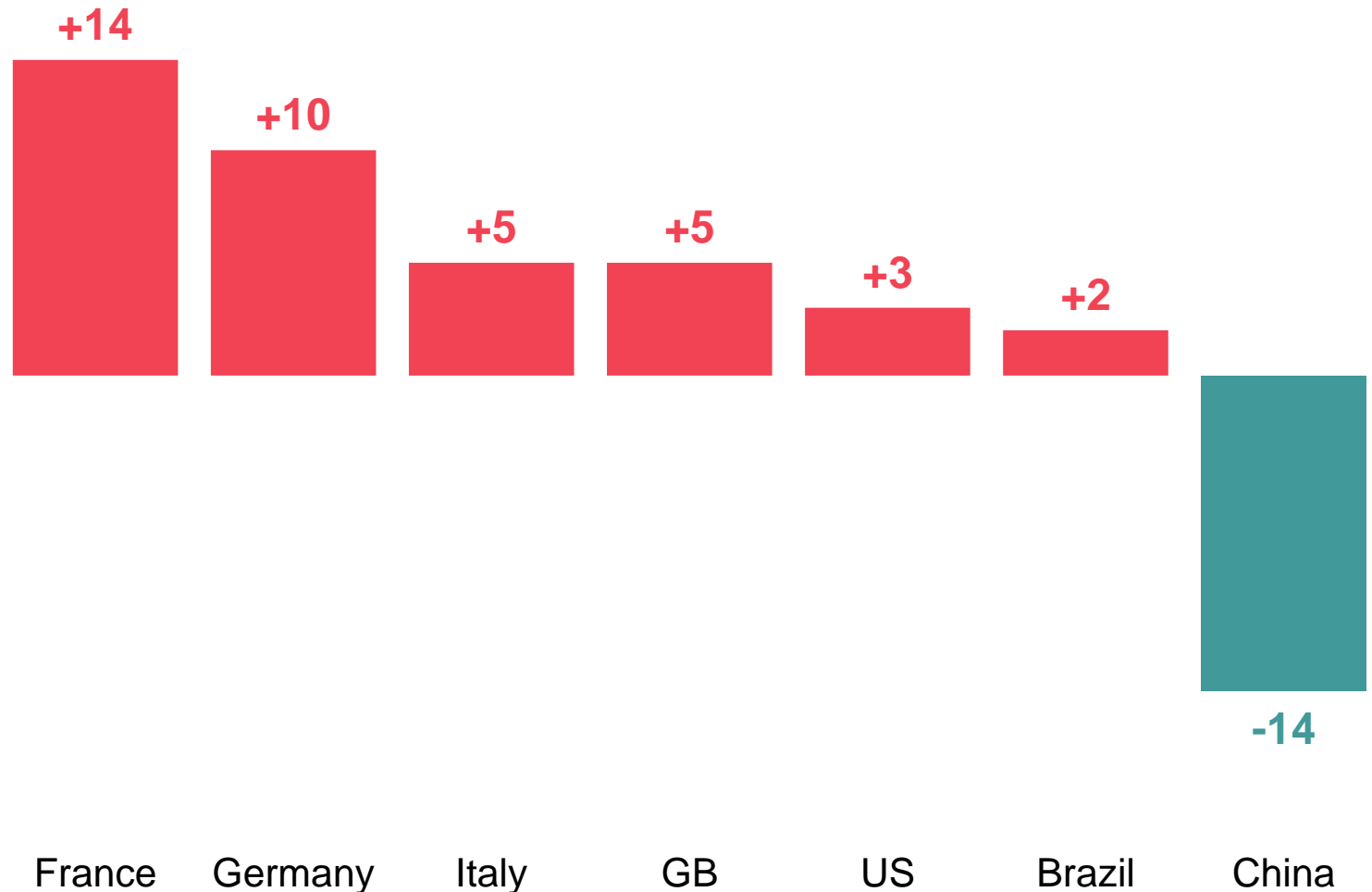
2020

Base 2019: Ipsos Global Trends – 1,001 British adults aged 16-75 interviewed June - July 2019  
Base 2020: Ipsos.Digital polling – 1,000 British adults aged 16-75 interviewed 1-2 October 2020

# Friction with ecommerce has grown

“I find shopping online more difficult than shopping in traditional stores”

Change in % agree  
2019-2020

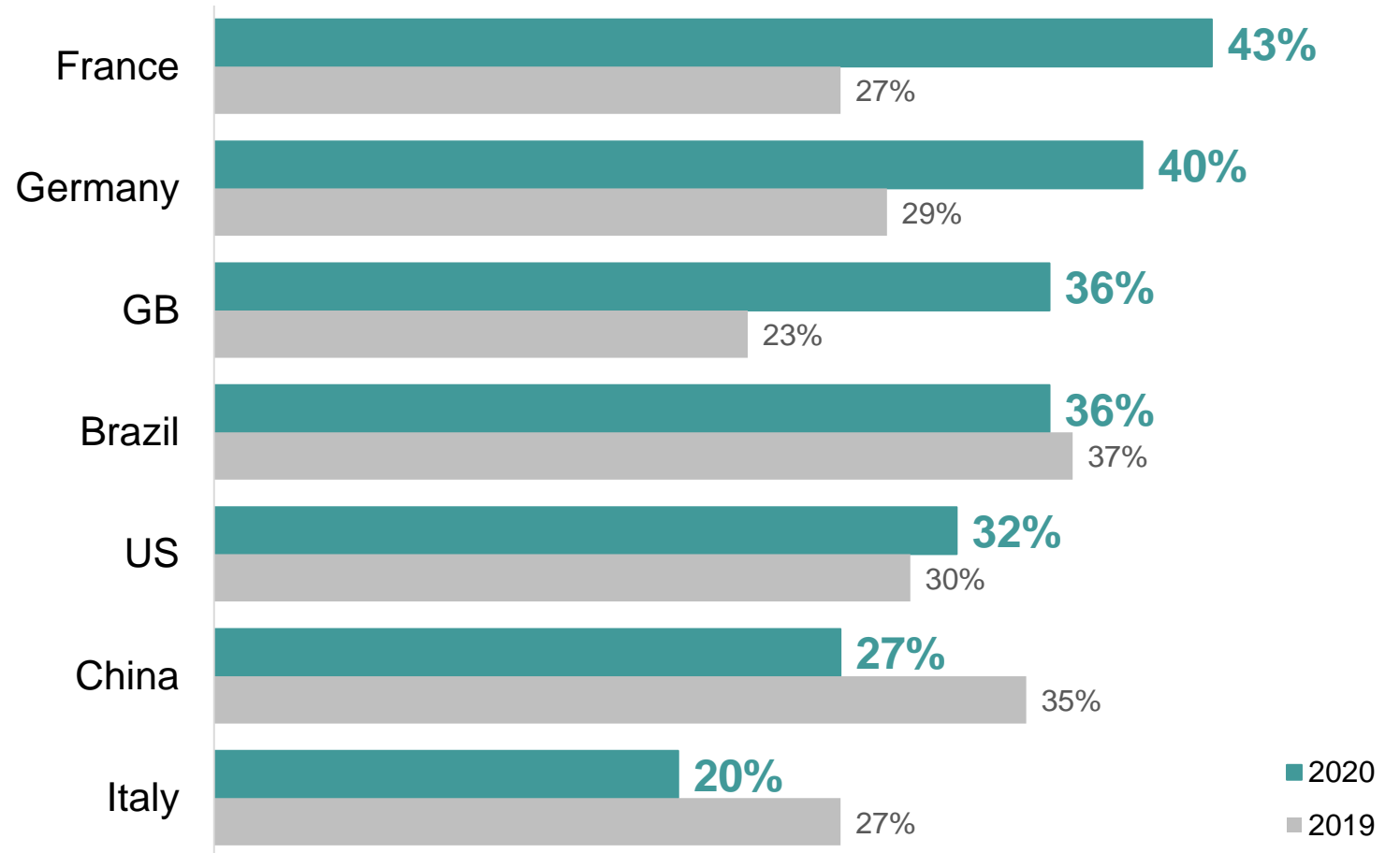


Ipsos Global Trends Series  
Base: c.1,000 adults aged 16-75 (18-75 in US) in each market for each wave

# And Gen Z are no exception

“I find shopping online more difficult than shopping in traditional stores”

% agree, Generation Z



Base: c. 150 Gen Z adults per wave in each country. Fieldwork dates June-July 2019 and September 2020

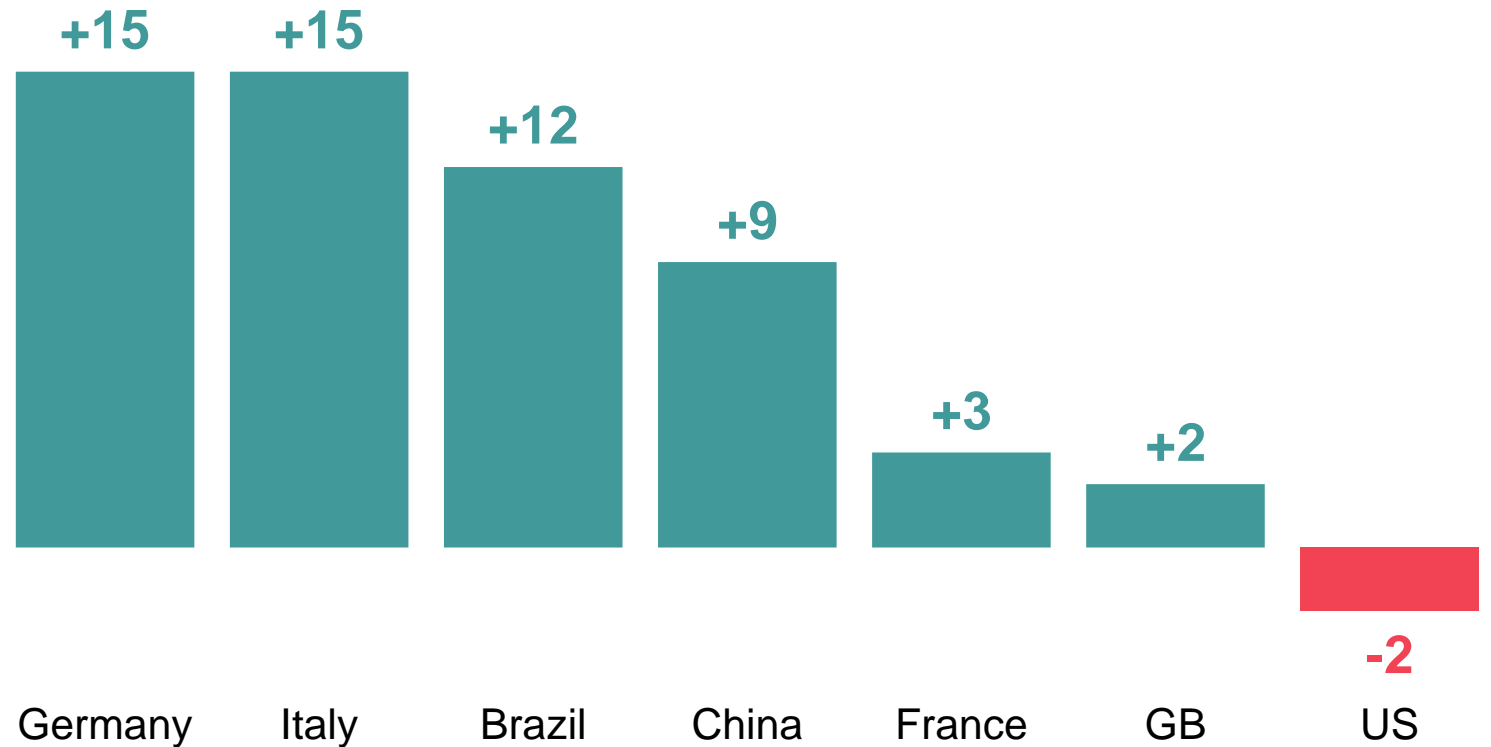
# Rebalancing global and local



# National pride is tied to the pandemic

“I feel very proud of my country”

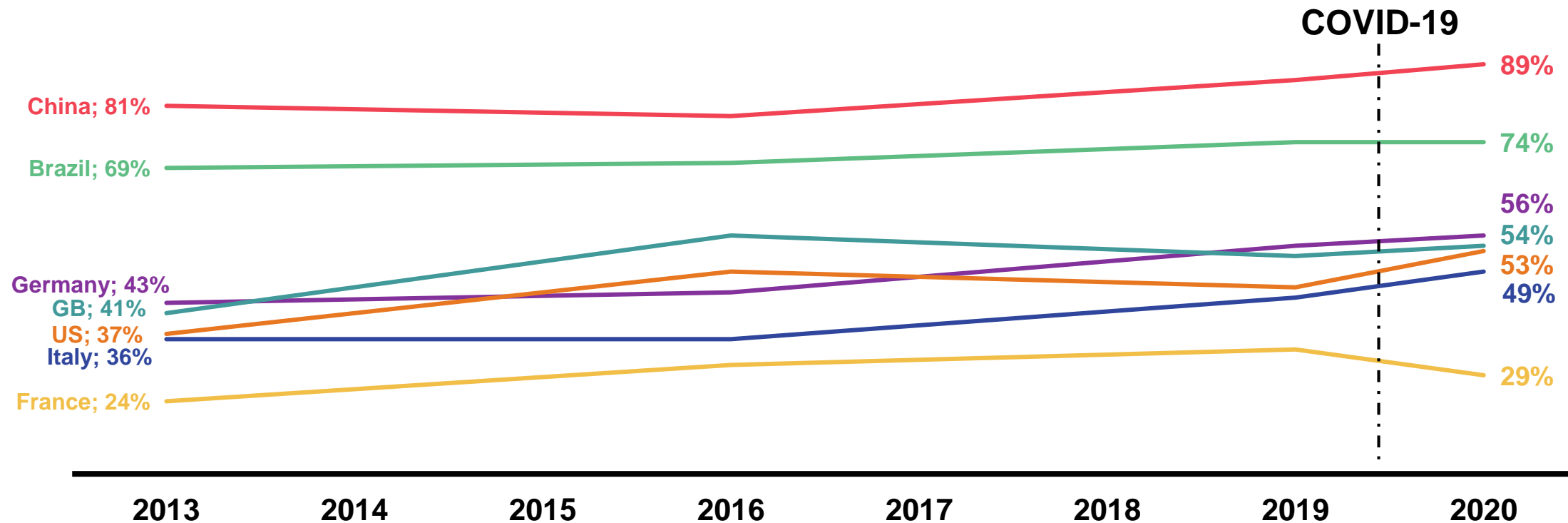
Change in % agree  
2019-2020



*Ipsos Global Trends Series*  
Base: c.1,000 adults aged 16-75 (18-75 in US) in each market for each wave

# Globalisation is not seen as THE problem

“Globalisation is good for my country” - % agree



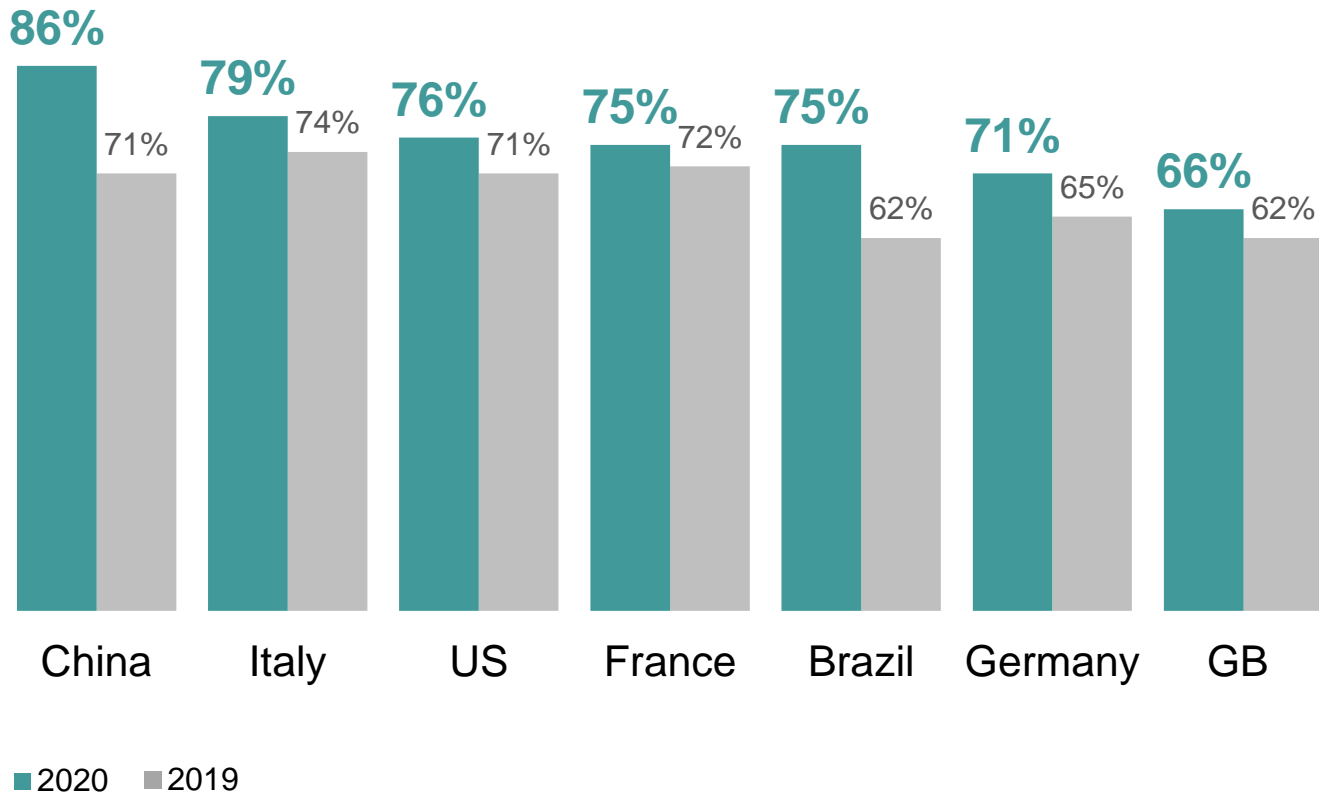
Ipsos Global Trends Series  
Base: c.1,000 adults aged 16-75 (18-75 in US) in each market for each wave

# But more are looking closer to home

“I prefer to buy products  
from my country rather  
than products from abroad”

% agree

Resilience  
Shorter supply chains  
Retreat to known and  
familiar

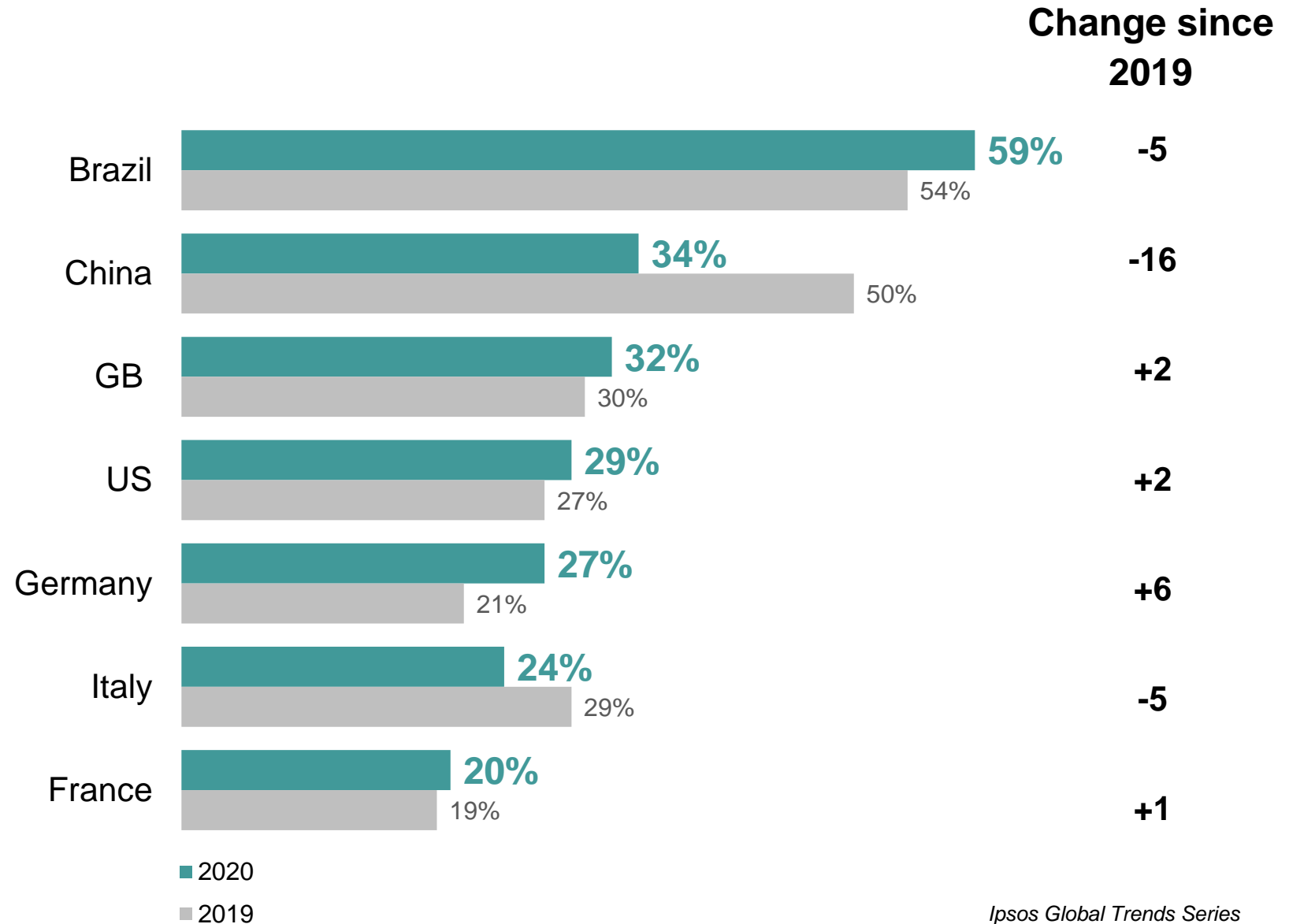


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# And local pride has surged

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

% agree

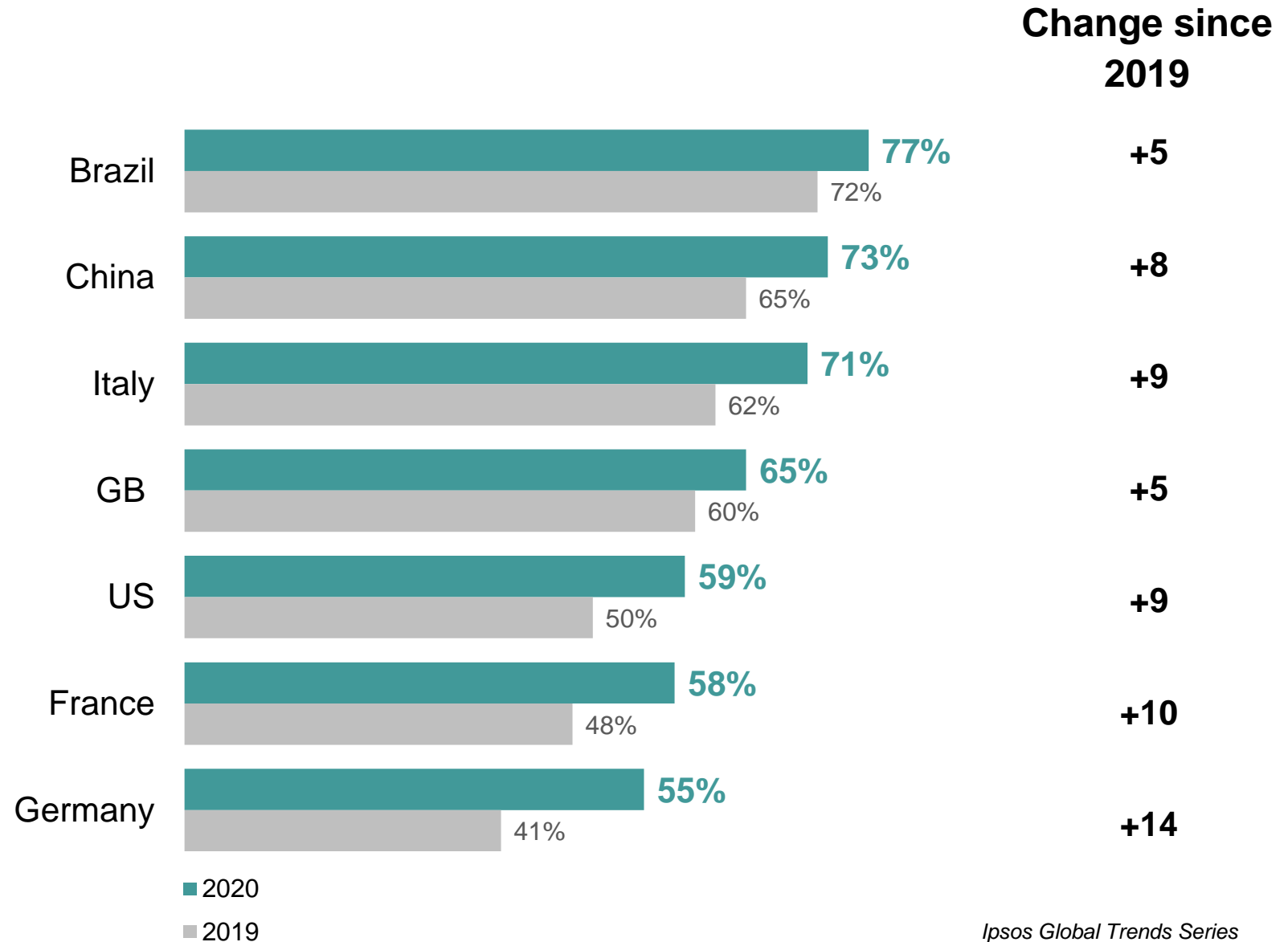


Ipsos Global Trends Series  
Base: c.1,000 adults aged 16-75 (18-75 in US) in each market for each wave

# Wanderlust has risen under lockdown

“I would like to experience living in different parts of the world”

% agree



Ipsos Global Trends Series  
Base: c.1,000 adults aged 16-75 (18-75 in US) in each market for each wave



# Big picture values are slower to change

# What does it mean for 2021?



# In conclusion...

Pandemic has NOT changed everything...

Massive behavioural changes not attitudinal ones – although attitudes around brands, health resilience and localism have been impacted

What hasn't changed:

- Environmental concern
- Attitudes to tech & data
- Ideological divides

But we are still less than a year into this...



# THANK YOU!

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