GLOBAL TRENDS

IPSOS GLOBAL TRENDS

IN SEARCH OF A NEW CONSENSUS: FROM TENSION TO INTENTION.

November 2024

Contact us with any questions you may have:
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Ipsos

Welcome to Ipsos Global Trends

We launched the regular Ipsos Global Trends study in 2014, to provide a comprehensive view of how the world feels from a human perspective.
Ten years on, we show what is unchanged and what has shifted in public attitudes and values.

'In Search of a New Consensus: from Tension to Intention', our latest edition, unveils Ipsos' refreshed framework of nine Global Trends, which we introduce in the next section. These are based on more than 50,000 interviews across 50 markets representing three-quarters of the world's population and 90% of the world's GDP, which separates our report from any other "trend report" you might read. There is no better tool to understand the context of society, markets and people.

Each of the nine Trends we have identified is important on its own, but there are also clear inter-relationships that emerge when the trends are examined together.

Three key tensions have become more acute over the past decade, and three key constants explain perpetual feelings people hold about world around them.

Understanding people, their tensions and intentions is crucial in mapping positive possible futures and opportunities for both brands and policy makers.

Through the data and expert analysis, you'll get a comprehensive picture of today's global citizen, and a view of the trajectory these trends are taking.

We're here to help you interpret how it impacts your company or organisation. For more information contact: globaltrends@ipsos.com.

Ben Page, Global CEO, Ipsos

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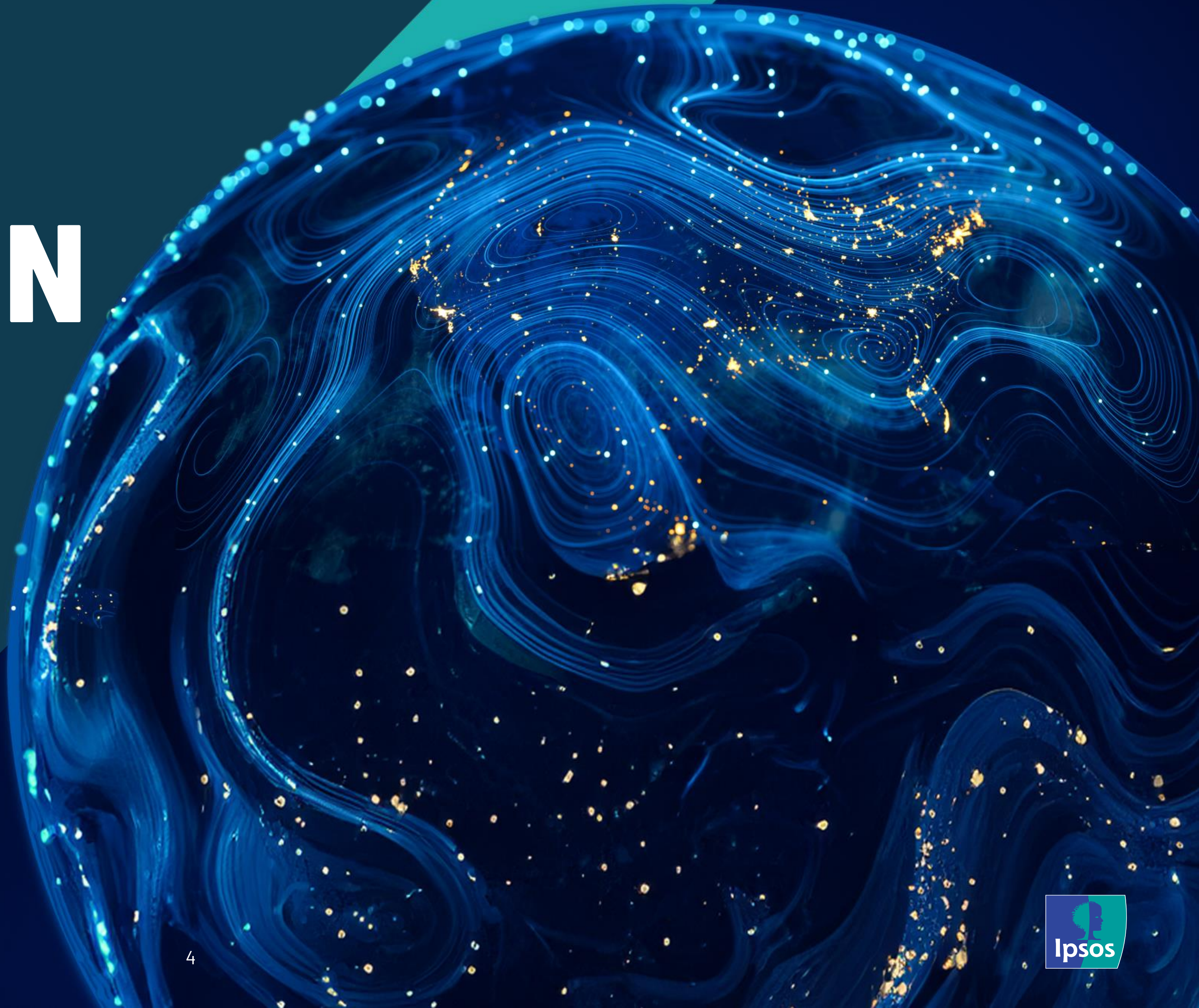
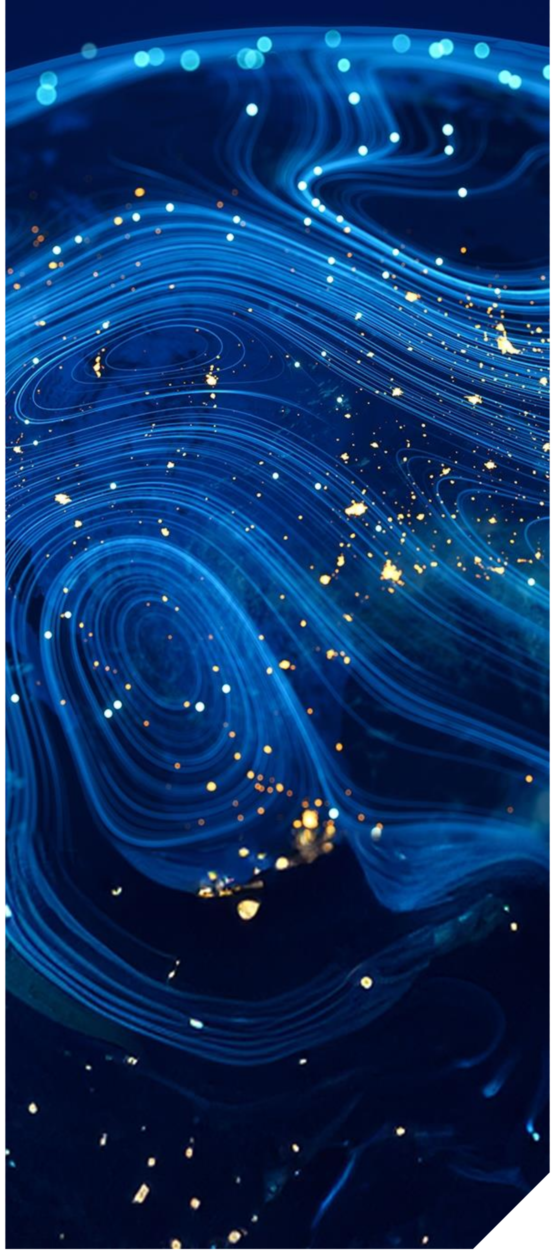




Executive Summary

In thinking about how humanity is reacting to change, context is king — but is always complex. Local and national culture have huge impacts. More than eight in ten citizens across 50 global markets feel that the world is moving too fast. While this has always been true, it feels even more so in an age of mass data, social data and AI that has never existed before.

Public pessimism and private optimism

Overall people feel overwhelmed by the complex geopolitical, economic, and technology shifts they can see all around them, to say nothing of climate change. But as we look beyond the headlines, we see the human reaction to this uncertainty: an inward personal focus, with a flourishing sense of individualism, enhanced by new choices over lifestyle and consumption.

In search of a new consensus

There is now a clear tension in many societies between the primary concerns of different groups and a lack of consensus on how to achieve growth. The unravelling of the post-World War Two world has impacted us all. The end of communism in 1991, and the entry of China into global markets, released huge global economic growth. Then democracy and neo-liberal capitalism came under pressure after the 2008 global financial crash as living standards stopped rising and people searched for who was to blame. All this was further exacerbated — and inequalities were exposed — more recently through the Covid-19 pandemic.

Since the start of this century Ipsos has observed a widespread "loss of the future": a tension we see in this edition of Global Trends. Three-quarters (75%) believe it is natural for each generation to have a higher standard of living than their parents. The challenge is that all over the world — especially in the US, LATAM and Europe — this seems less and less likely for large groups of people, who are experiencing "the loss of the future". In this macro environment, where most people (75%) also believe governments will do too little to help them in the years ahead, and often trust governments less than brands, populists have fertile support - as the demand for protection from outsiders rises.

Executive Summary

In all this there are some clear tensions:

We are more global, yet more introspective: interest in global brands and culture is more widespread than ten years ago despite rising geopolitical tensions, but we also see a rising interest in just focusing on the self.

We are more nostalgic, yet more open-minded: nostalgic sentiment has risen across a swathe of markets but there has been significant movement from the morals of yesteryear too: the world has continued to become more liberal.

We are more environmental, yet more fatalistic: the world is near consensus on the facts of climate change, but the public are unclear how to help without clear leadership from brands and governments.

It is also worth remembering some constants:

The world is always changing too fast: it is the human condition to feel that things are more dangerous, lower quality, or simply worse than they were in the past.

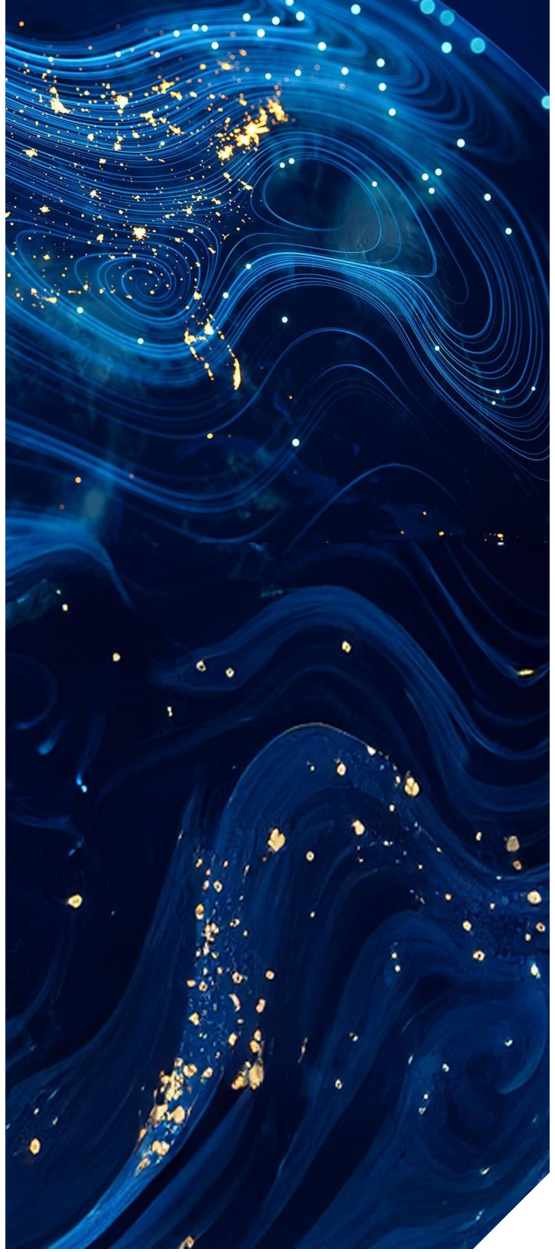
We always worry about data privacy: contradictory impulses to control or share personal data have continued for a decade without resolution.

We are forever more optimistic closer to home: even when we feel the world is on the brink, we are a lot more certain that things are on the up for us and our families.

A strong theme this year is that among all these **tensions**, people are acting with **intent** to take control of their futures. Brands, organisations, and nations can also act with similar intent, using tools like our Trends and Macro Forces to identify paths to alternative futures that build on public attitudes, and where they are willing to be led.

What does Ipsos Global Trends mean for leaders?

People's choices are often economic, but not *only* economic. Over the past decade, every trended market we examine has shown an average double-digit increase in people saying they buy from brands that reflect their personal values. People want more from their governments, too. People will always react to the change around them: the data and analysis here is intended for you to react to and plan with.



How we built the Trends for this edition

Our framework is a product of collaboration between Ipsos colleagues across nearly 90 markets using Ipsos' Theory of Change — a model for exploring how **Macro Forces** (the external context against which people and organisations act), **Shifts** (changes in attitudes and values across society, markets and people) and **Signals** (visible real-world expressions of change observed at local and more surface levels) pull and push one another, interact and cause tension, and ultimately allow us to identify trends.

At Ipsos, our curiosity about society, markets, and people is what drives us — so at the heart of our trends sits the largest public survey in Ipsos history of over 50,000 interviews, resulting in over five million data points. We used advanced analytics to identify **23 human values,** that to a lesser or greater extent, unite humans across the globe. These sit at the heart of our robust and reliable data driven framework.

In this report we also explore and present Signals and outline our updated Macro Force Framework. Equipped with this context, we have subsequently identified nine global Trends — which you can read at a glance on the next page.

Ipsos Global Trends at a glance

Globalisation Fractures
While the world remains highly interconnected, globalisation is seen as having winners and losers, both at the market level and personally. Focus on playing up local strengths as well as global cooperation and scale.

Splintered Societies
Rising inequality leads to a splintering of traditional structures with new ideologies and political allegiances emerging. People feel that businesses and governments need to do more. Focus on commitment to our many shared values worldwide to help lower temperatures at home.

Climate Convergence
Worldwide investment in climate resilience and mitigation is rising, as the impacts of climate change become more evident. Focus on demonstrating commitment at the organisation and market level, but also help people feel that they are contributing, too.

Technowonder
As technology becomes more pervasive, there is a tension between excitement for all the problem-solving tools, connection and entertainment technology can bring us and concerns about privacy, job loss and potential for misuse. Focus on identifying the benefits and reducing concerns.

Conscientious Health
Health understanding is more holistic, tied to both our physical and our mental wellness. Tensions persist in terms of who has access to care. Focus on helping people navigate this ever more complicated landscape with clear, trusted information and accessible solutions.

Retreat to Old Systems
As an escape to nostalgia is widely appealing, some people also yearn to revert to historical power structures around religion, politics, gender and more. Focus on the positive aspects of the past but realise that not everyone wants to return to it.

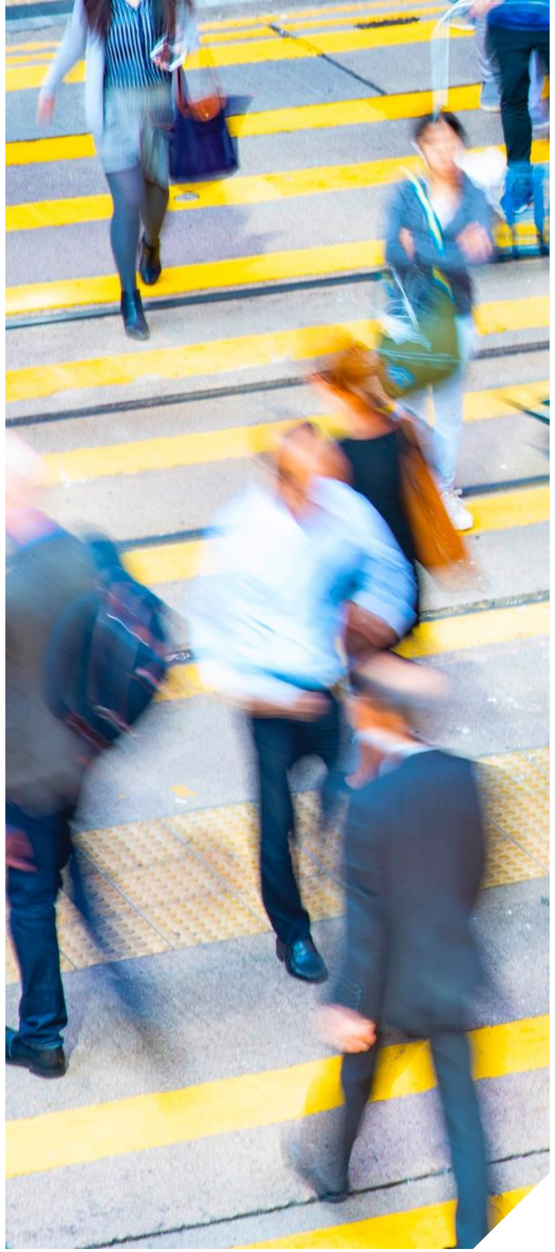
Nouveau Nihilism
As economic stresses are preventing many from realising their long-term dreams, a sometimes- but-not-always-fatalistic "live for the moment" attitude is rising. Focus on helping people bridge the gap between their aspirations and their realities.

The Power of Trust
As we are bombarded with information, we crave authentic messages from trusted sources but have a harder time figuring out who and what to believe. Focus on aligning your shared values with those of your audience to build trusted relationships.

Escape to Individualism
As the world feels overwhelming, people are focusing on one thing they can control – themselves. But there's a tension between those who strive for stature and those who focus more inward. Focus on leveraging trusted relationships to help people express their identities as they choose, even if they choose historical norms.

GLOBAL TRENDS

THE MACRO CONTEXT



The Macro Context: Geopolitical and demographic instability

Global Dynamics: Fragmentation, populism, and geopolitical tensions

The fractures in globalisation are driven by an increasingly intermingled and overlapping set of forces: the rise and fall of middle classes increases political polarisation and fuels radical populist and nationalist tendencies. These in turn contribute to geopolitical conflicts, which can cause or accelerate community migration and population displacement. Migration can then drive political opinion towards extremes inhabited by radicals, populists and nationalists. This fosters a global environment that challenges the previous growth in open trade.

Innovation and Ambition: The upside of global challenges

Yet as we have seen in the past, tension breeds innovation: we see heavy investment accelerating the energy transition and AI and automation advances, and a quickening drumbeat of discoveries, from quantum computers and nuclear fusion, to breakthrough therapies and access to space. In 2023, 2,664 objects were launched into orbit — a decade prior it was just 210, according to the United Nations Office for Outer Space Affairs.

Demographic Changes: Fluctuating populations

The global total fertility rate — the number of children expected to be born to a woman over her lifetime — hit 2.3 in 2023, barely above the 2.1 replacement rate, according to the United Nations. What this means is that at some point this century we will likely hit "peak people" and the global population will start to decline.

For countries in Europe, East Asia and North America, the immediate consequence of this demographic change is ageing and falling populations, which risks straining welfare and health systems in the coming years and can sap younger generations of their hope for the future. Business too will have to adapt — older consumers will form an increasingly larger segment, at the expense of younger segments where marketing was traditionally focused.

Others in Africa and Asia hope for an oncoming demographic dividend as their populations age into their economically productive prime: in Niger today, the average age of a citizen is just 14.

The Macro Context: Climate change and diversity remodelling society

Demographic Diversification: Openness, inequality and diversity

In some markets greater ethnic and religious diversity, systemic health inequality and increasing wealth disparity are challenging many of the assumptions on which the most affluent societies have been based.

Rising inequality is the chief driver: the wealth owned by the richest 0.01% of the population has doubled since 1995, reaching nearly 12% today. In India, the top 1% of the population hold 40.1% of the wealth, while the poorest half have just 6.4%, according to a report from the World Inequality Lab.

Yet in fragmentation we also see a higher level of identity acceptance. Though sometimes controversial, the blurring or erasing of pre-defined categories and the acceptance of holding multiple orientations and identities point to a strength of a splintering society; that it is more open, even as some feel left behind.

Combatting Climate Change: Investment and innovation

The effects of climate change, loss of biodiversity and resource depletion are now very tangible: combined economic losses from natural disasters in 2023 stood at $380 billion, 22% above the 21st century average to date, per AON.

The steps required to build these solutions are urgent and demand significant investment today if they are to have impacts on many countries' drive to "net zero" emissions by 2050. The costs to states, businesses and individual taxpayers feel steeper still in a context of moderate to slow economic growth, high levels of debt and the aftershocks of a global inflationary surge.

Changing Values: Societies being remade

Falling birth rates, continued urbanisation and higher educational achievement also drive change in our societies, changing the balance away from previously dominant ways of living, working and socialising.

In Europe, North America and East Asia, this has direct implications for the balance of power between employers and employees, driving employers to consider a wider range of candidates and contemplate how they recruit, train and retain a more diverse workforce from a shrinking talent pool.

Almost a quarter of the way through the 21st century, alternative value structures are being built, particularly among younger generations. Yet it is an open question whether this will lead to a global convergence of lived experience, or a slow drifting apart.

We can see signs of ongoing liberalisation of values across the world, but also persistent differences in values and cultures, as well as some divides that have grown: one example is young men and young women's views of diversity and equity issues in the US and Europe.

The Macro Context: Technology, trust and the future

Technology: The problem and the solution

Technological change is at the centre of both expectations and fears globally. Recent biotech developments, ranging from rapid vaccine development, through GLP-1 drugs for the treatment of diabetes and other conditions, to the use of generative AI to discover new antibiotics are exciting not just for medics, patients and consumers, but also for investors: the market value of the Danish firm Novo Nordisk, which manufactures the drugs Ozempic and Wegovy, is now larger than the entire Danish economy.

The long-term impact of automation and generative AI on employment and work is one of the most controversial areas of development. Another contentious area is the role generative AI can play in creating and distributing disinformation; in more splintered and segmented societies, the scope of these problems is multiplied.

Yet technology was vital in the global response to the COVID-19 pandemic; rapid development of drugs and contact tracing apps allowed us to address the immediate crisis without dealing with the underlying social fragility it revealed. If anything, society today is more fragile than it was in 2019, meaning that the role of technology will be more important still in future crises.

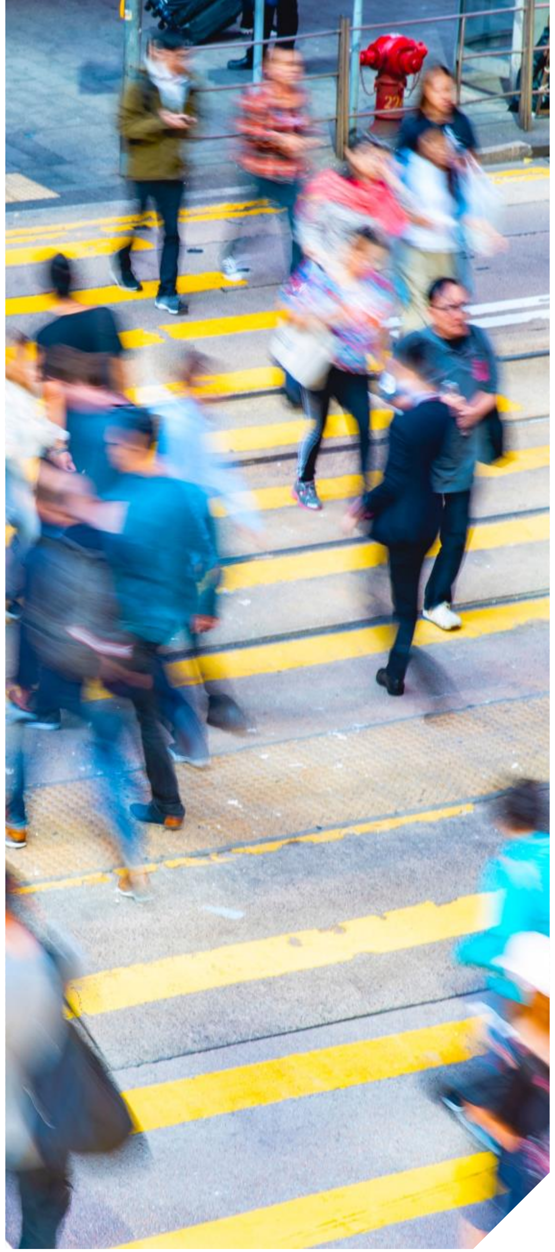
Trust and Authority: Building for the future

Recent global crises reveal both the tremendous importance of trust and its fragility. While trust in many institutions has been low for decades, today's tensions may have led us into a more acute phase.

One common response is more regulation: to take one example, in the wake of global food inflation, retailers and food manufacturers in some markets are facing new regulation designed to thwart what authorities see as profiteering from rising prices.

That fact that the causes of recent crises were clear ahead of time naturally leads us to question the ability of authorities to plan for the future or learn lessons from the past. This brings us to the central theme of this year's Ipsos Global Trends: a turn inwards to support the self.

As you have just read, the macro context does not act in isolation, but our framework on the next page provides a starting point to discuss and debate the consequences of the external environment for your organisation.



Ipsos' Macro Forces

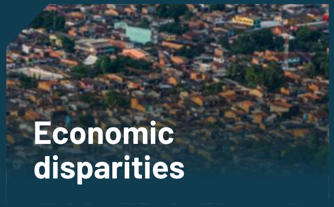
The external context, against which people and organisations act, can be distilled into six Macro Forces and related themes. While they do not act in isolation, our framework is a starting point to discuss and debate the consequences of the external environment for your organisation.

Societies in flux

- Population fluctuation
- Community migration & displacement
- Life stage & family evolutions
- Greater ethnic & religious diversity
- Identity acceptance

Tech-celeration

- Pervasive technology
- The immersive frontier
- AI & automation advances
- Exponential data
- Toll of technology



Economic disparities

- Rise & fall of middle classes
- Employee power shift
- Wealth disparity
- Rising cost of living
- Alternative value structures

Environmental emergencies

- Climate change
- Loss of biodiversity
- Sustainable growth
- Resource depletion

Political splintering

- Rising nationalism & populism
- Technology's dark side
- Rethinking institutions
- Increasing geopolitical conflicts
- Entrenched inequality

Wellness revolution

- Systemic health inequality
- Breakthrough therapies
- Integration of health & technology
- The next pandemic

GLOBAL
TRENDS

TRENDS & FRAMEWORK INTRODUCTION

Our Trend Framework

Our analysis has identified nine Trends, and 23 Values that tell the story of what it's like to be human in 2024.

The big picture is more forbidding than it was previously — the international global order and our national societies both appear to be under immense pressure, while climate change has become a pressing enough threat to unite much of global opinion.

Technology is moving at a far faster pace than ten years ago. It is acting as an accelerant of further progress, bringing wonder and worry in near-equal measure.

The responses we see from people are a turn inwards, focusing on the issues we feel we can most easily control, such as our health.

Some seek sanctuary in the warm glow of nostalgia for an imagined past, or by trying to remake the world to be more like it was before. Others simply shrug their shoulders and focus on living in the moment.

This has two important impacts: a more **uncertain world for brands** which are expected to align with individuals' divergent worldviews but also continue to deliver quality products and customer service.

For individuals, intentionality, **autonomy and self-control become the new status symbols** as evidence that we can shape our own destinies in a more complex and unpredictable world.

The contradictory world of human opinions

Tensions exist within each of the trends of course. Humans are complicated and all of us are capable of holding conflicting ideas at the same time. Psychologists call this “cognitive polyphasia”.

For example, while the majority believe that **technology is destroying our lives**, a larger majority think that only modern **technology can solve our future problems** (71%). Understanding these tensions helps us see why people behave differently in similar situations and gets at the rich nuances of human motivation.

Some tensions are generational within countries, some cross borders. Tensions about gender do both: eight in ten people in Pakistan agree that women's **main role in society is to be good mothers and wives**, but only 13% in Portugal, and under 20% in Sweden and Ireland say the same.

Businesses and organisations must learn how to navigate this complexity: global organisations face unique challenges. National ones can deal with one set of tough challenges, while global businesses have to navigate much more diverse situations.

There is widespread agreement that **brands can do good things for the world and make money** and that **businesses have a “duty” to do good** things for the world. However, trust that business will achieve these "win-wins" is lower, with eight in ten thinking there needs to be **more government regulation of corporate environmental impacts**. A similar number think “**we are heading toward environmental disaster**” if we do not change our habits quickly.

Over the past decade we have seen double-digit increases in the proportion of people saying they **tend to buy from brands that reflect their personal values.** In fact, every core market shows an increase compared with ten years ago. Yet half also say they **do not care about a brand's social or ethical responsibility, so long as they make good products**. How is a brand or a policy maker supposed to navigate supporting people’s values, when such values are so internally and externally conflicted?

People might not see the idiosyncrasies in their own attitudes, but they see the conflict and tension around them.

Three in four say they see more conflict between people who do not share the same values in their nation, and almost half see it in their own families.

How does a leader lead in this environment and balance all the tensions?

Our nine Trends cover a broad range of contexts from geopolitical to deeply personal. That is relevant because people — your customers, citizens, audience, and patients — are dealing with issues across those dimensions, too.

Our closing Trends take us from the global to the human level. In response to the chaos people see in the world around them, we see a flourishing of individuality and an inward focus. As *the world* spins out of people’s control, they want to lean into controlling *their world*: their physical *and* mental health, their identity, their data. So understanding the values that drive people is crucial.

A unique opportunity to understand human values

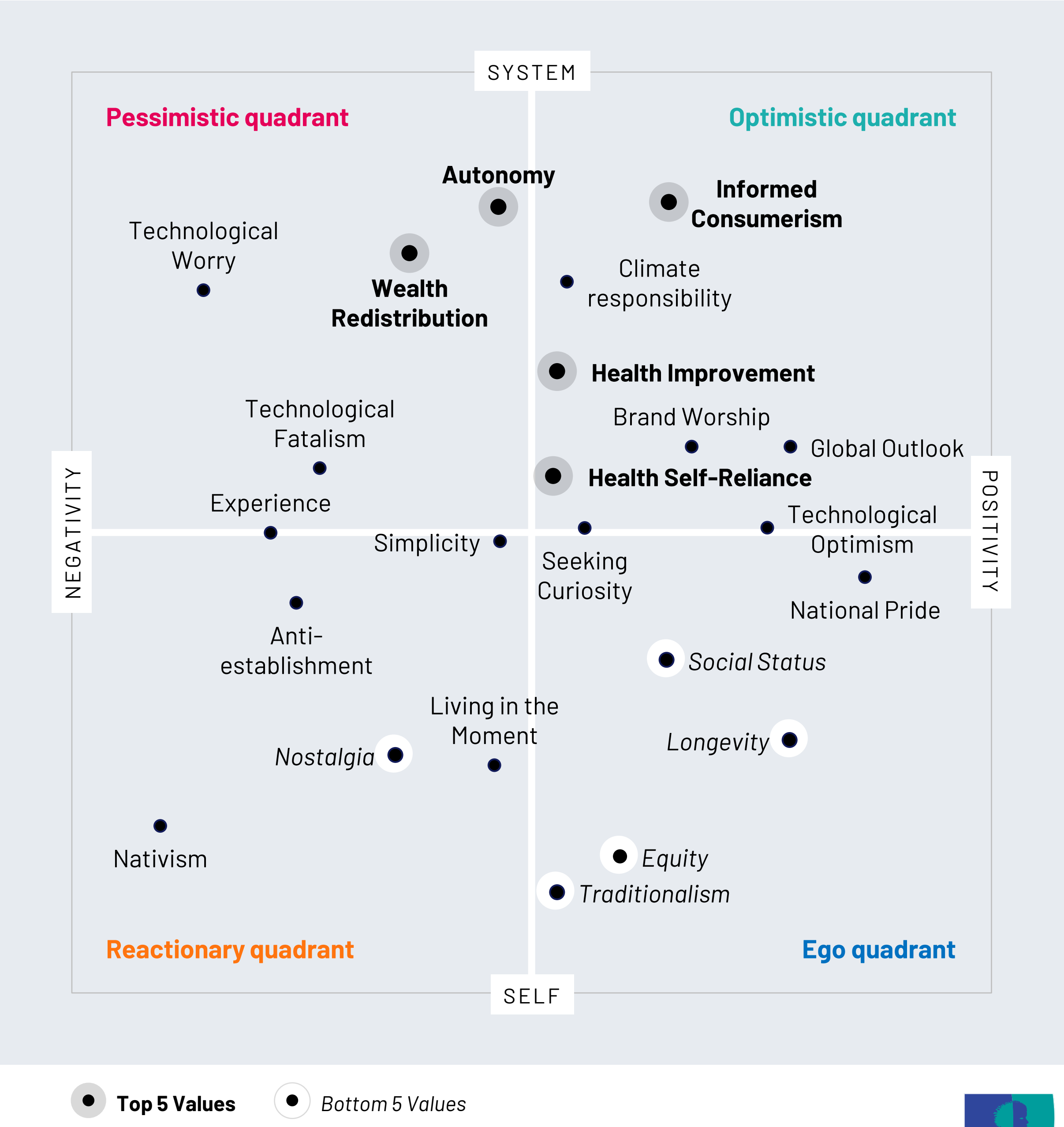
Asking questions about what it means to be both citizen and consumer across 50 markets, we can use statistical analysis to uncover hidden connections and new relationships between people's attitudes.

Our analysis has surfaced 23 human values — each compromising a set of strongly correlated questions. By presenting these on a map, we can start to understand how closely aligned people's values are. The further apart two values are — for instance, Nativism and Global Outlook — the less likely a single person might be to hold both values.

We have plotted the values onto four quadrants, oriented towards the system (top half of the map) or the self (bottom half of the map), and between a negative or positive reaction to today's world (left to right parts of the map).

The five most intense values that unite humans globally (highlighted in bold) are in the system part of the map but balanced between optimism and pessimism. The five least intense values — those that are less likely to unite humans around the world (highlight in italics) — are all in the bottom half of the map. While these are less intense, they may show signs of greater growth in the future and need careful attention.

The 23 values that underpin our nine Trends support a more intimate understanding of each, making our framework more actionable for you.



Globalisation Fractures

Trend: Perceptions of globalisation have improved in many markets around the world over the past decade. While the world remains highly interconnected, the geopolitical environment has grown more contested. Increasingly, political leaders are asserting the primacy of their nation and its allies.

Tension: Despite the development of a more positive view on the impacts of globalisation, geopolitical headwinds are promoting a focus on one's nation.

Takeaway: Even global brands can and should play up their local ties — while also highlighting the benefits of their scale.

Values

Global Outlook

National Pride

Beyond peak globalisation

The biggest tension in this trend is between slow improvements in how globalisation is perceived by the public and the tenor of international political debate as conflicts persist. Another key factor is changes in the middle class, which is shrinking in many regions but growing in some. People often link these changes (positive and negative) to the effects of globalisation, and those sentiments are leading to shifts in opinion.

Terms like "derisking" and "decoupling" dominate, with many companies outside of China launching "China +1" strategies to diversify their supply chain.

Further, the rebirth of industrial strategy and stimulus has led to a search for national champions in strategic sectors such as microchip manufacturing, generative AI and rare earth metal refining.

Both tendencies are visible in the data:

Under the value of Global Outlook, we find 60% agreeing that globalisation is good for them personally. Agreement is highest among emerging markets in Africa as well as in China, Indonesia, the Philippines and Vietnam, where four in five concur.

Yet in the value of National Pride we find a similar proportion (63%) saying they are very proud of their country. As with perceptions of globalisation it is European nations who are less proud, with Germany at the foot of the table on 41%.

As our Values map suggests, these viewpoints need not be adversarial; indeed, there is a reasonably strong correlation between agreement in both questions.

At present many in the global public remain positive on globalisation and also positive about their nation, pointing to a future where an optimistic view of globalisation and the nation are self-reinforcing.

49%

of Dutch agree "I feel very proud of my country"

Global: 63%

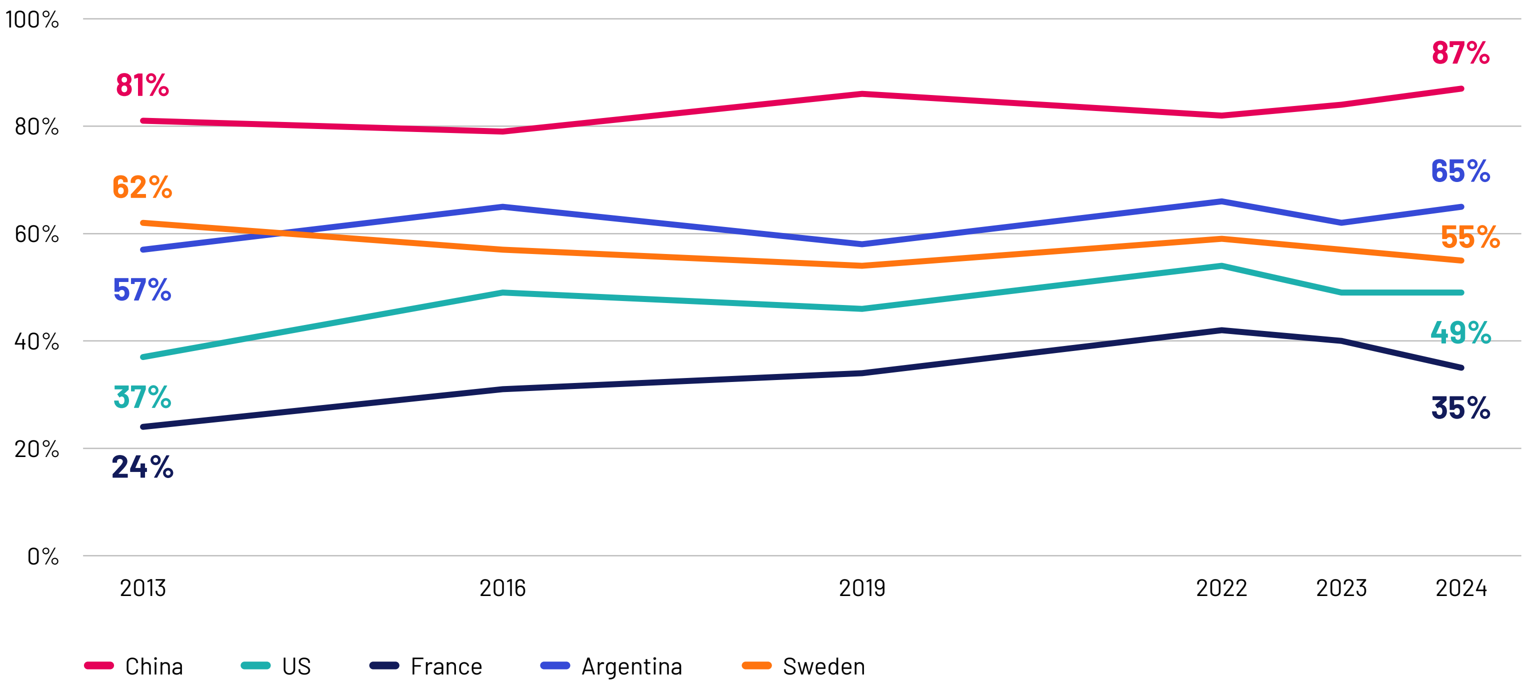
Ten-year trend: Globalisation Fractures

Improving public views of globalisation are one of the enduring stories from the past decade of Ipsos Global Trends.

Across all types of markets, we have seen a slow rise in the proportion of citizens who believe that globalisation is good for their country. This is as true in China, which has long been one of the most positive about global trade, as it is in France where the public are typically the least enamoured with the term. The only exception in the 19 markets we have tracked is Sweden, where still more than half are positive this year.

This is a good news story against a backdrop of a more polarised and competitive world — through a decade of pandemic, war and adversarial political rhetoric, the proportion of people around the world who see the benefits of global economic connection has risen and remains higher than a decade ago.

% agree "globalisation is good for my country"



Base:
Varies between years. Data shown is based on 19 Comparable Markets that were questioned in both 2013 and 2024. For full methodology see ipsosglobaltrends.com.
Comparable markets: Argentina, Australia, Belgium, Brazil, Canada, China, France, Great Britain, Germany, India, Italy, Japan, Poland, South Africa, South Korea, Spain, Sweden, Türkiye, United States.
Source:
Ipsos Global Trends 2024 and Ipsos Global Trends 2014

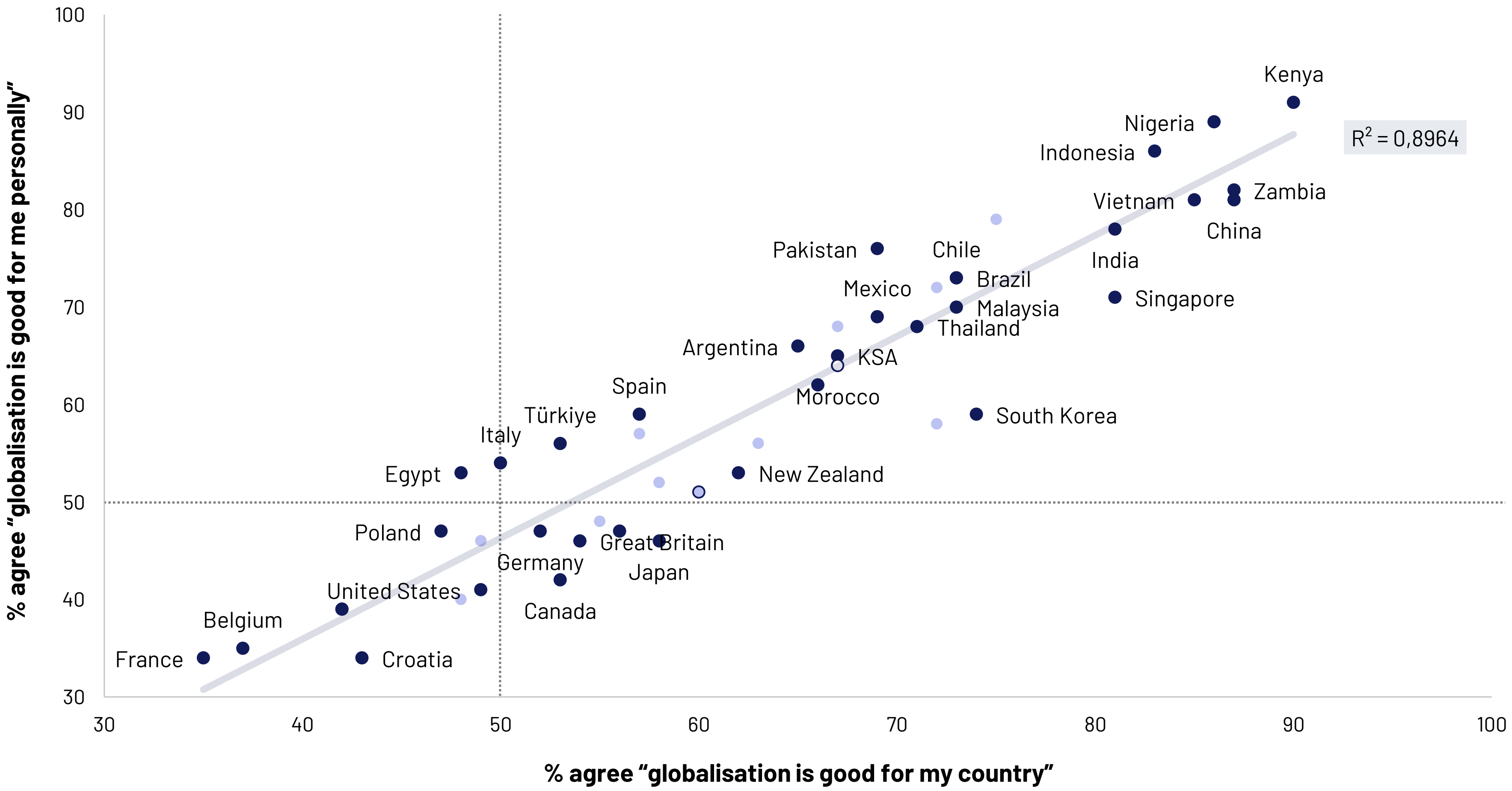
Globalisation: good for me and the country?

Perspectives on the benefits of globalisation, for the self and for the country, march in lockstep. Nearly all citizens see globalisation as one tide that lifts – or sinks – all boats.

All nations where a minority say globalisation is good for either the self or society are European or North American. The French are the least enthused (although support has risen over the past decade) alongside the Belgians and Croatians. Even the United States, a huge beneficiary of globalisation at a market level, has public scepticism about it and fits into this double negative category.

By contrast, it is emerging markets that are the most positive – the public in Nigeria, Kenya, Indonesia, Zambia and China, among others, are the most enamoured.

Globalisation is good for me vs. good for my country



Base: 50,237 adults surveyed in the markets shown between 15 February and 23 April 2024. Selected markets labelled. For full methodology see ipsosglobaltrends.com.
Source: Ipsos Global Trends 2024

Driving Forces of Globalisation Fractures

Signals

The internet fragments

Social networking firm Meta has announced it will not roll out its multimodal AI model virtual assistant in the **European Union** due to regulatory uncertainty.

"Guochao" or "national trend"

The **American** coffee company Starbucks has long tapped into younger Chinese consumers' more traditional cultural interests. It recently opened another "intangible cultural heritage" concept store in Suzhou, China based on a traditional tea shop.

Global brands, local pride

Food conglomerate Nestlé has launched a special edition of one of its chocolate bars in Rio Grande do Sul province in **Brazil.** Its name has been changed from the Portuguese for "boy" to the equivalent word in the local dialect of the province.

The most impactful Macro Force themes affecting this trend

Increasing geopolitical conflicts

Rising nationalism and populism

Rise and fall of middle classes

Community migration and displacement

Resource depletion

Pervasive technology

Navigating a mosaic of globalised and deglobalised trade

Thought Starters

The global trade system is becoming an increasing source of tension – while the headwinds are leading to a world that is more multipolar with fragmented and localised supply chains, much of world trade remains very closely integrated. How can you identify and track areas of change to ensure your business remains resilient in a part-de-globalised world?

This tension also has implications for brand, with the balance of preference between global and local brands becoming tighter and more competitive. How can you adjust your approach to match shifting consumer preferences? What unique value can you offer that combines the benefits of globalisation with the appeal of local or national products?

Many local consumer brands in Asia have begun to outpace global competitors, offering better pricing, locally-tailored preferences, and greater agility in responding to rapidly changing local trends. Some local consumer brands have also successfully entered the global market, demonstrated their quality, and boosted their brand value. This development signals to global brands the increasing necessity of accommodating local tastes and market dynamics more than ever before."

– Irfan Setiawan, Ipsos in Indonesia

Splintered Societies

Trend: Large income and wealth disparities are widely recognised as detrimental to society, yet in many countries they have widened over the past decade. The intensity of this feeling has resulted in heightened societal stress and a splintering of traditional structures, with new ideologies and political allegiances emerging.

Tension: As societies worldwide age and begin to shrink, immigration will be the primary dividing line. Around the globe, about half feel that immigration has a positive impact on their society. But even more feel that there are too many immigrants.

Takeaway: People also feel that businesses need to contribute more to society. Demonstrating this more clearly could help reduce the temperature of people's feelings about inequality worldwide and at home.

Values

Wealth Inequality
Nativism
Equity

Rising attention on our divisions

Not only is there fracturing of sentiment about globalisation, but within borders and even households, there is tension as well. This year of elections has drawn greater attention to the divisions many see within their societies.

Three quarters (76%) across the 50 markets in this study agree there is rising conflict between people who hold different sets of values; half (46%) say the same about differences of opinion within their own families.

With a perception of heightened conflict, our value of Equity speaks to experiences of discrimination based on gender, age, race and sexuality. But while it is a value many strive for, it is the value least likely to unite us globally. Progress — as on climate change — will need to come from business and government leadership.

Immigration continues to be a salient divide as global movement rises, driving the backlash found in our value of Nativism. Seven in ten (71%) agree that employers should prioritise hiring local people over immigrants when jobs are scarce, making it one of the few remaining acceptable forms of discrimination.

Yet despite strong competition, economic inequality remains one of the most salient divides. Indeed, the value of Wealth Distribution is one of the top five strongest this year, and across all waves of Global Trends around three quarters have agreed that having large differences in income and wealth is bad for society overall.

Almost three quarters also perceive the economy of their country to be rigged, while a similar proportion say the wealthy in society should pay more tax (76%) and that large income gaps are bad for society (77%).

While these values focus on how our societies are pulling apart, they also contain the seeds of how we might pull together.

Families remain more united than wider society, and there is a clear role for businesses to demonstrate their commitment to society and to social and political causes. The challenge is in understanding which causes will unite.

75%

of Dutch agree that having large differences in income and wealth is bad for society

Global: 77%

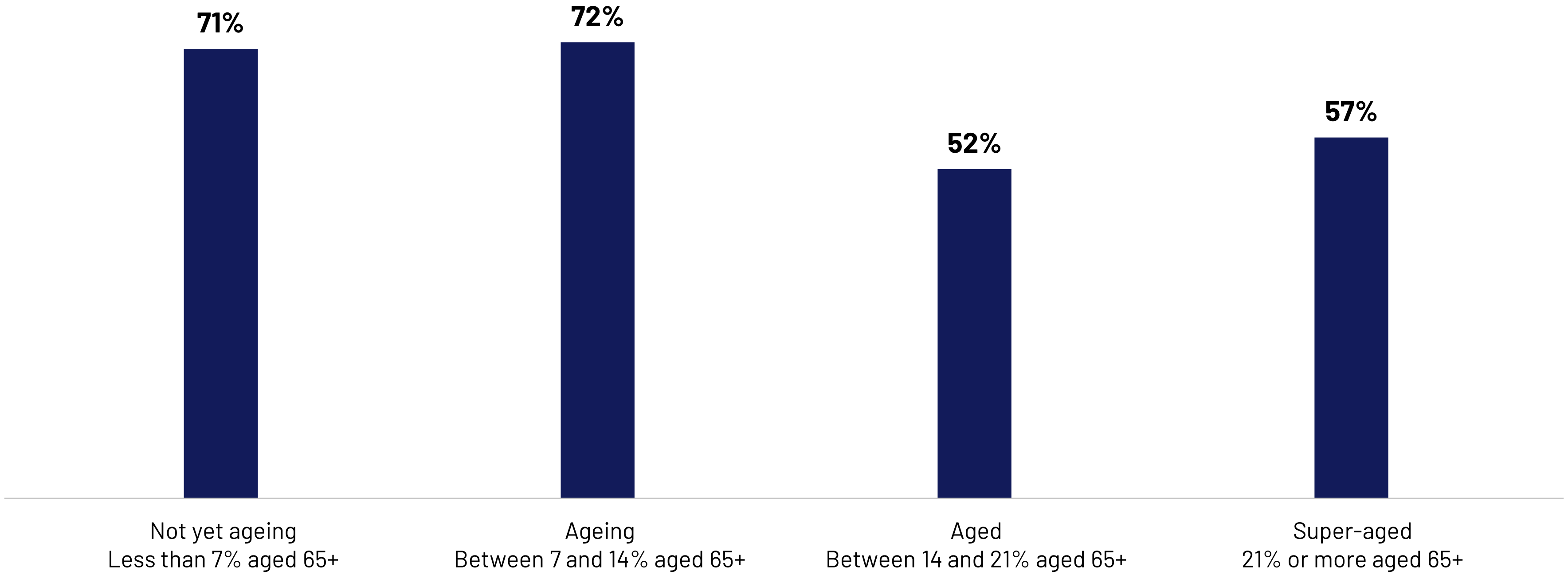
Who needs immigration?

It is often presented as an uncomfortable truth for many living in ageing societies that they may become more reliant on immigration over the coming decades. Yet our analysis suggest that older societies are less likely to agree that there are too many immigrants.

Among younger societies – those which are defined by the WHO as ageing or not yet ageing (with less than 14% of their citizens aged over 65), seven in ten agree there are too many immigrants, perhaps because economic pressures are higher in many of these societies.

"There are too many immigrants in my country"

% agree in the markets that are classified as the four population ageing groups as defined by the World Health Organisation



Base: 50,237 adults surveyed in the markets shown between 15 February and 23 April 2024. For full methodology see ipsosglobaltrends.com.
Source: Ipsos Global Trends 2024, World Health Organisation, World Bank, Statista

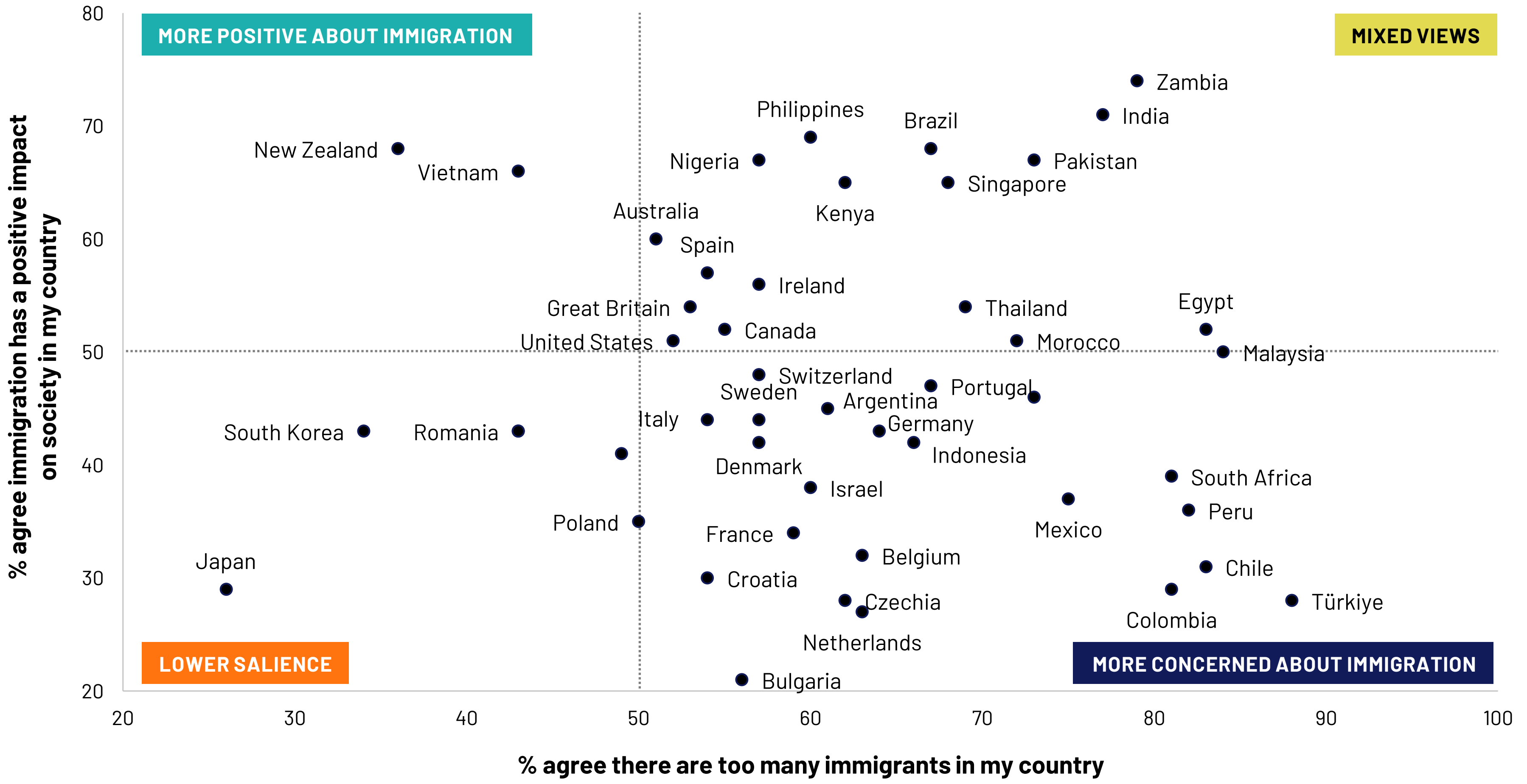
Immigration issues

Globally, 62% agree there are too many immigrants in their country, while 48% agree that immigration has a positive impact on national society.

Just two countries – New Zealand and Vietnam – are doubly positive, seeing immigration as a boon for their society and disagreeing that there are too many immigrants. By contrast, in almost half of the markets (22) the public are doubly negative, including much of Europe.

Many more are somewhere in between – in 18 markets, including the United States, Great Britain and Brazil, a majority are agreed on the positive social impacts of immigration, yet also feel that there are too many immigrants in their country at present.

Immigration has a positive impact vs. There are too many immigrants in...



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Source: Ipsos Global Trends 2024

Driving Forces of Splintered Societies

Signals

Widening access to financial services

The **Spanish** Neobank Ikualo allows immigrants in Europe who might lack the types of documentation typically required to access financial services. Its in-app identity verification service allows people to open an account with only a passport.

Refugees for the climate transition

In the **Netherlands** an organisation called The Switch has set up a programme to recruit and train refugees to overcome a significant shortfall in skilled engineers and workers for the energy transition.

Democratising information

A new chatbot in **India** provides Indian farmers with real-time market information about crop prices, tackling knowledge asymmetry and helping them to negotiate better deals for their produce with purchasers.

The most impactful Macro Force themes affecting this trend

- Population fluctuation
- Increasing geo-political conflicts
- Greater ethnic and religious diversity
- Systemic health inequality
- Climate change
- Wealth disparity

How to build and maintain mass appeal in a centrifugal era?

Thought Starters

Many societies in our study appear to be centrifugal — individuals do not share cultural and economic goals but instead seek out brands and experiences that align with their own personal values and beliefs. How can your brand build multi-faceted associations with consumers to help them appeal to a broader audience?

In this context, the moments that still unite us assume even greater importance. What can you take from these moments to create content that reaches across divides?

There is also a challenge for organisations internally — how can you engage in genuine, transparent communication with employees that reflects their values and is also mindful of the diverse perspectives within your staff?

> In Latin America, decades of polarization between left- and right-wing governments, exacerbated by corruption, have left no room for centrist options. Persistent lack of job opportunities, education access, monetary poverty, and violence have fragmented societies. Increasing immigrant flows seeking better lives add tension among locals due to scarce opportunities.
> To evolve, Latin American societies must embrace diversity, equity, and inclusion (DEI) in our new multicultural reality."
>
> **— Luis Giraldo, Ipsos in Colombia**

Climate Convergence

Trend: The macro environment for climate is changing rapidly as worldwide investment in renewables continues to rise and the impacts of global warming become more evident. Our data reflects this: globally, views on the importance of climate action are converging, and have increased in intensity over the past ten years. The key question now is how far — and how fast — people are willing to change their daily lives to reach shared goals.

Tension: While outright denial and scepticism is rare, there are real differences between a core for whom climate is the lead issue and the wider population who flirt with disengagement.

Takeaway: Brands should demonstrate commitment because people expect companies to help and don't think they're doing enough. But people also need help to feel like they are contributing to solutions — through everything from policy to programming to packaging.

Values

Climate Responsibility

Dividing lines emerge in the new climate consensus

As in previous editions, a large majority – 80% – of the global public agree we're headed for environmental disaster without rapid change. An issue that is becoming clearer and more obvious through increases in number and intensity of severe weather events, and in terms of how populations are shifting in response, contributing to the shifts seen in the more geopolitical trends.

This caps a remarkable convergence in global public opinion over the past decade, across markets and generations. Where the debate was once on whether climate change was occurring, now it is focused on the significant trade-offs inherent in meeting net zero goals.

But the debate of how far and how fast we decarbonise — and who bears the costs — has even greater potential to be polarising.

On the one hand, there is a widespread feeling that companies are not playing their part — 77% across the 50 markets say companies do not pay enough attention to the environment, and eight in ten (81%) say companies' impacts on the environment should be subject to closer government control.

On the other, the public themselves tend to think they are doing enough. Almost three quarters say they are already doing all they can to save the environment, meaning they may be ill-disposed to consider more (or more effective) climate action, especially in the face of cost pressures and an unpredictable world. To give one example, 58% think it is important that people in their country switch to electric motors in cars, falling to 37% in the US and Germany.

At Ipsos, our model for building a sustainable future begins with understanding the "me" agenda, before considering the context of "my world" and then the impacts on "the world". Our data suggests that while climate remains a top concern, it is often superseded by other issues focussed on citizens' "me" agenda — including health and wealth inequality.

As the salience of climate responsibility as a human value continues to wax and wane — albeit at a high level — governments and businesses will have to lead rather than follow opinion.

69%

of Dutch say they are already doing all that they can to save the environment

Global: 72%

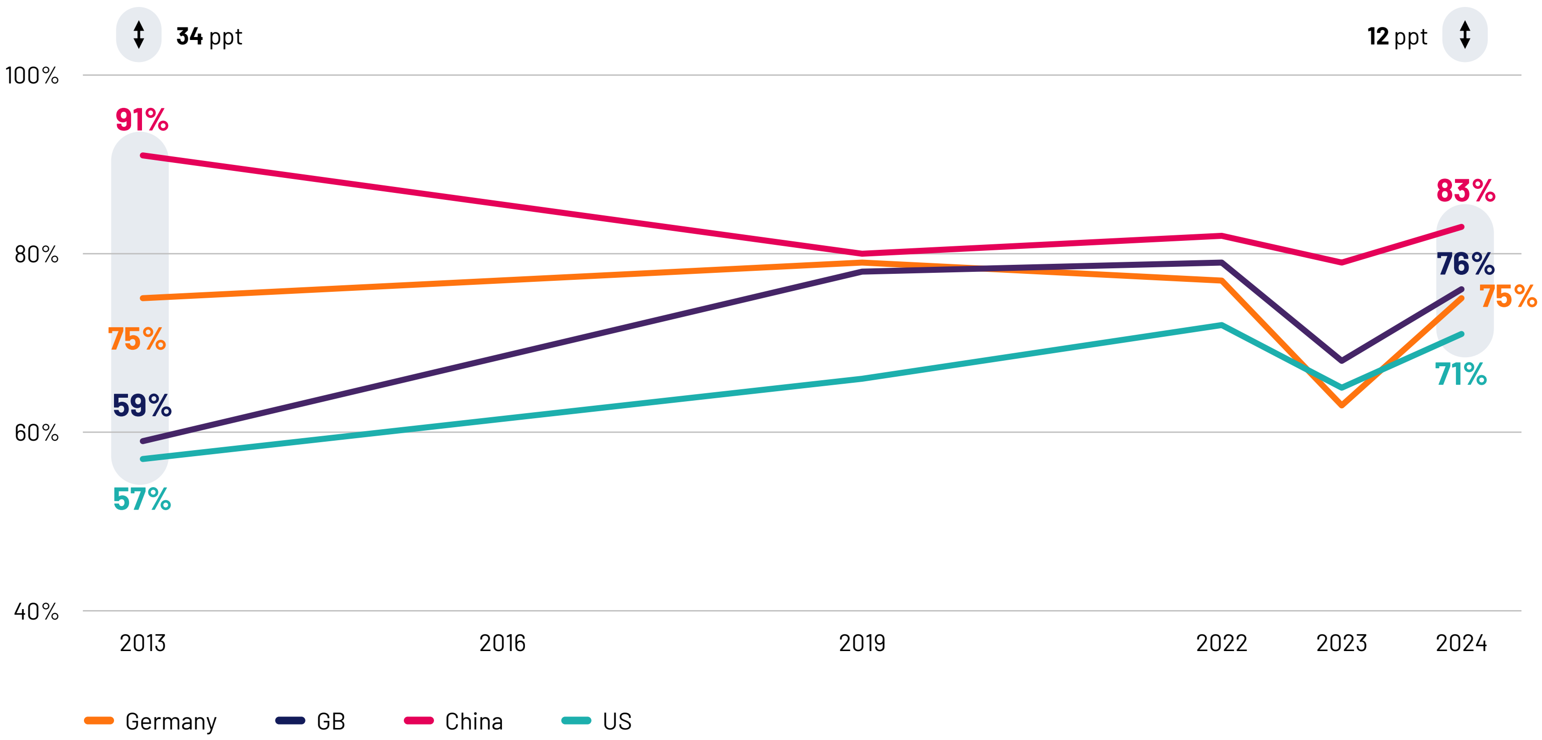
Ten-year trend: Climate Convergence

Attitudes towards climate and the environment have shown one of the strongest shifts we have recorded over a decade of Ipsos Global Trends. Between 2014 and 2024 the world has moved from questioning whether climate change is really happening, to debating how best we meet binding global targets for carbon emissions.

This shift is exemplified by the spread in agreement that "We are headed for environmental disaster unless we change our habits quickly". A decade ago there was a 34-point gap between China and the US, two of the most divergent markets on this question. By 2024, this gap has shrunk to 12 points. While China's enthusiasm has waned somewhat, the main shift has been in attitudes in the US, Great Britain, and other richer markets.

This question also shows lack of differentiation between the generations – regardless of birth cohort, eight in ten people agree we are headed for climate disaster without drastic action.

% agree "we are headed for environmental disaster unless we change our habits quickly"



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Source:
Ipsos Global Trends 2024 and Ipsos Global Trends 2014

Mixed EV enthusiasm

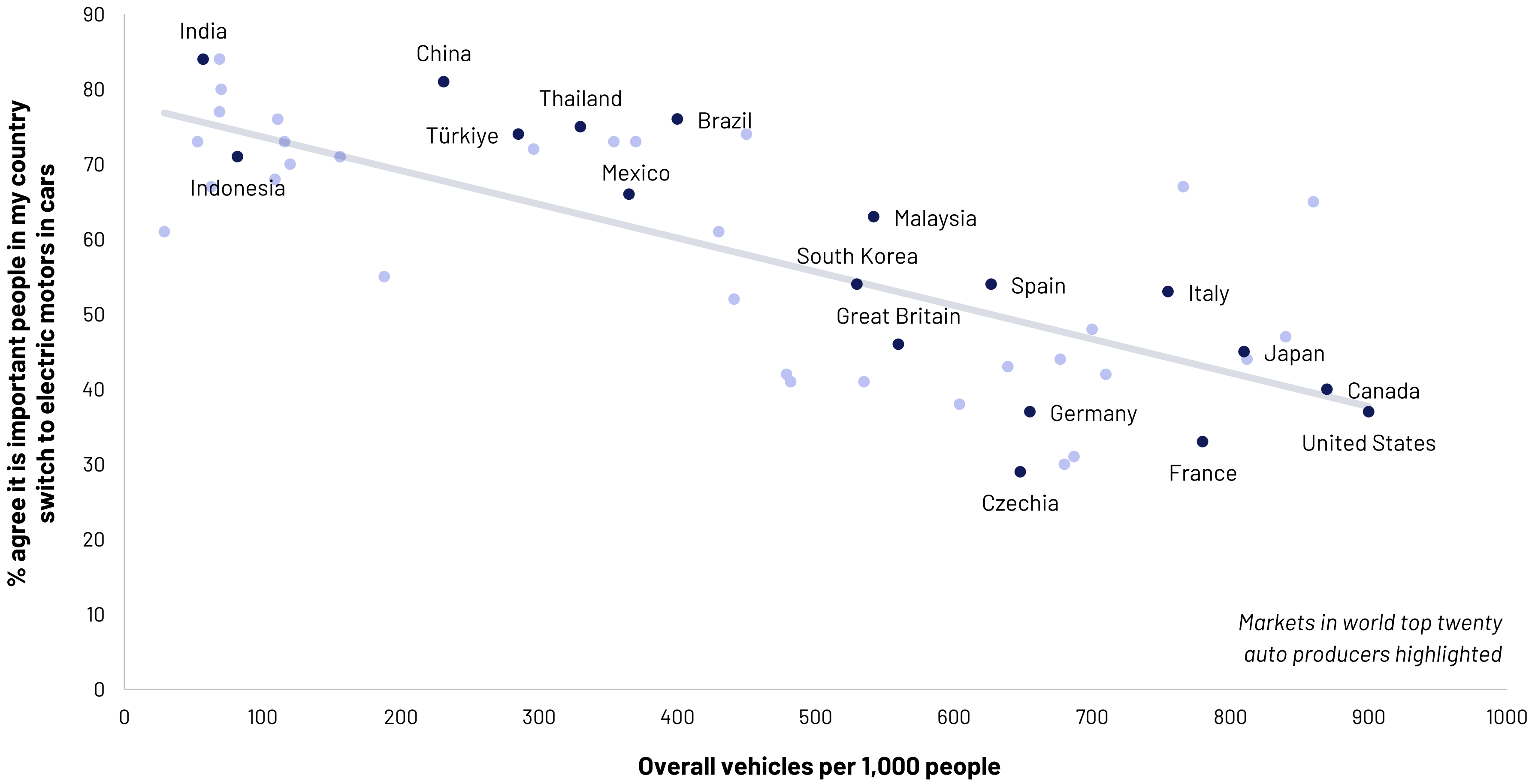
While markets agree that something ought to be done about climate change, disagreement is rife when it comes to the types of action that are important.

Electric vehicles are a key example: decarbonising personal transportation is a significant step towards net zero.

Yet the importance of this shift varies dramatically. While Indian and Chinese people are among the most convinced of the case for EVs, less than half agree in much of Europe and in the US.

Agreement decreases in line with the number of vehicles per 1,000 people in each market – suggesting the conversion to EVs will be more difficult in markets that already have a lot of cars.

It is important people in my country switch to electric motors in cars



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Source: Ipsos Global Trends 2024. Cars per 1,000 people statistics from multiple sources, via Wikipedia

Driving Forces of Climate Convergence

Signals

Recognising the carbon footprint of the internet

In **Germany** a new energy efficient search engine, Ecosia Browser, was launched on Earth Day this April. The browser promises to produce 25 watt hours of renewable energy for each daily user.

Carbon negative jewellery

British brand Skydiamond has released a new range of fine jewellery that features carbon-negative diamonds made from atmospheric carbon dioxide.

Mandatory carbon calculator

In **Abu Dhabi** the Department of Culture and Tourism has enforced a mandatory carbon calculator for all hotels in the city. It tracks fuel, gas, electricity and water use and converts it into a CO2 equivalent score to enable comparison between hotels.

The most impactful Macro Force themes affecting this trend

- Climate change
- Resource depletion
- Sustainable growth
- Alternative value structures
- Loss of biodiversity
- Community migration and displacement

The public are looking for political and economic leadership on climate to prove the path to net zero

Thought Starters

Incidents of greenwashing and the steep path for decarbonisation are making the public increasingly cynical about the world's ability to reach net zero. How can your organisation highlight positive examples to inspire fresh enthusiasm among citizens and consumers?

We know one way of getting people to make big changes is to start with smaller ones. Can organisations put additional effort into smaller steps that have less climate impact overall, but are symbolically important for the public to see and do?

How can policies and products be designed to appeal to citizens at moments of higher and lower passion for an issue that we know will be with us for the long haul?

Brazil's climate paradox is evident in its significant strides towards reducing deforestation and setting ambitious emissions targets, juxtaposed with ongoing investments in fossil fuels. As extreme weather events become more frequent and severe, the government must resolve these contradictions and lead with coherent, ambitious climate policies that safeguard both the environment and its diverse communities."

– Luciana Obniski, Ipsos in Brazil

Technowonder

Trend: We are in awe of the technology around us and the role it plays in our lives. We live in wonder: 71% agree we need modern technology to solve future problems. But also, we worry: 57% think technical progress is destroying our lives — a feeling that has significantly risen over a ten-year period. We have very real concerns about our mental health and our careers and don't always see the benefits of technology or tech companies.

Tension: The beauty and convenience of technology often collide with potential threats and human vulnerabilities.

Takeaway: There is a lot of opportunity for brands and platforms to build trust and educate people on the benefits of technology while assuaging concerns over privacy, disinformation, security, and potential job losses.

Values

Technological Worry
Technological Fatalism
Technological Optimism

We live in wonder of what technology can do, but we worry that it's gone too far

It seems apt to use a science fiction analogy when talking about technology trends. If we take technological progress as akin to The Force in Star Wars, we can feel that there is a push and pull between the light side and dark side.

On the light side, we find ourselves in wonder of all tech can accomplish. We can imagine things like finding faster cures for diseases, simplifying our jobs, or helping grow food in ever-challenging climates.

Globally almost three in four (71%) feel that we need technology to solve the problems we face as a society.

On the dark side, there is a growing worry about about how companies and governments use the data they collect about us.

We are much more united in our worry, however. That could be due to a number of factors. First, our worries are very tangible and real. People are divided on whether AI will create more jobs than it replaces. That's an easy and very possible idea for people to understand and to fear. There's a reason Cisco, Microsoft, Google and other AI leaders also formed a consortium to study its impact on jobs.

But another part of the worry could be due to a third value: fatalism. We realise the impacts of tech progress are sometimes beyond our control. Majorities in nearly every market are concerned about the use of our data by companies and governments. Yet the fatalism manifest in that we are resigned to some of the drawbacks of our technological progress including a loss of privacy we view as inevitable. That contributes to a majority of people feeling that tech progress is "destroying our lives."

Despite our desire to unplug and put our screens down more often, technology is still all pervasive in every facet of our lives including entertainment and healthcare.

AI, virtual spaces like the metaverse, breakthrough health technologies and more will continue to drive change in our lives. But with any new development, people must buy into it, and it must solve problems for it to fully succeed.

58%

of Dutch feel that we need modern technology because only this can help to solve future problems

Global: 71%

Global direction of travel: Technowonder

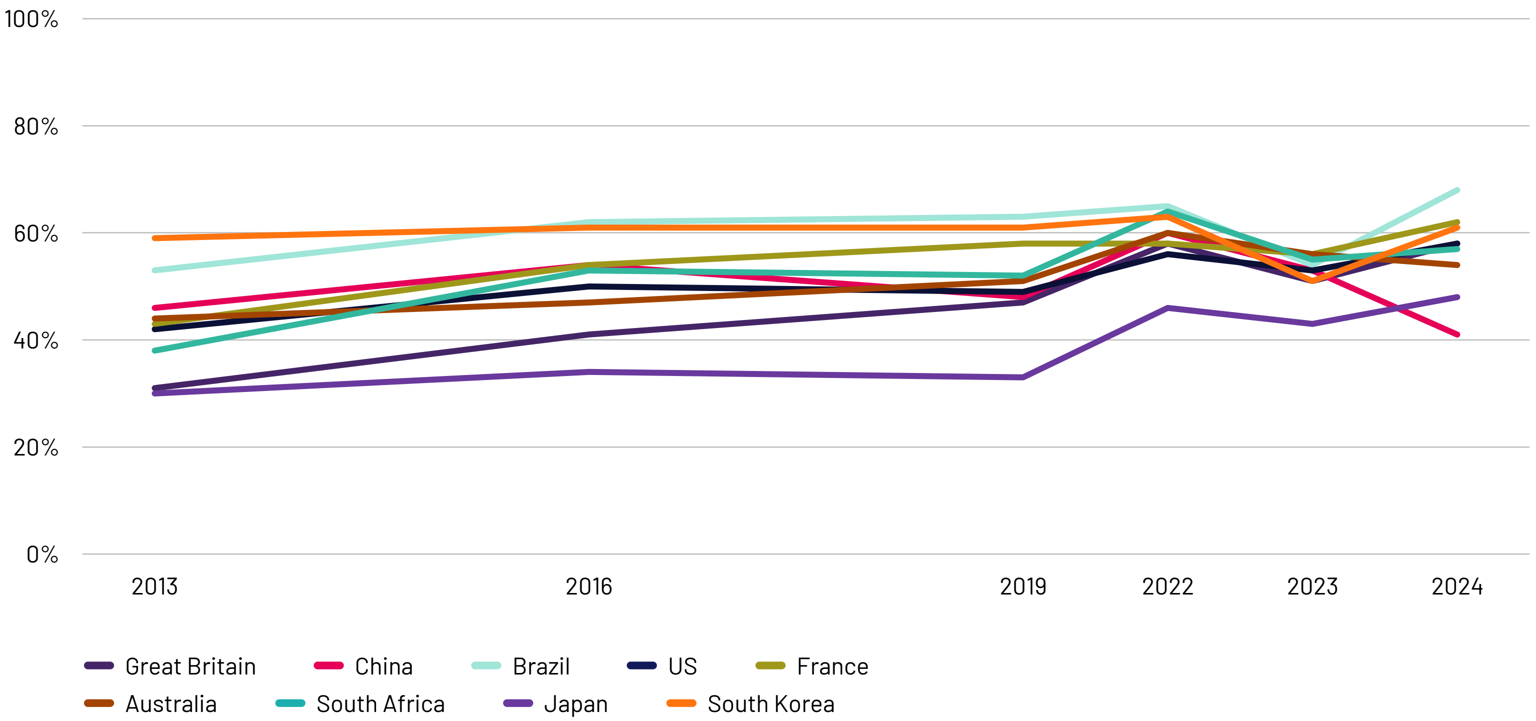
As technology has become more and more pervasive in every aspect of our lives, so has our fear of that progress.

There was a marked increase in concern across every market trended since 2013, except China. Averaged across the markets there is a 15-point increase in this sentiment.

In China, the story is more nuanced, as there was a rise in fear between 2013 and 2022, but that has dissipated since netting out with a five-point decrease since 2013.

While it would be easy to presume this sentiment is shared more strongly among older citizens, there is high-level agreement across generations.

% agree "I fear that technical progress is destroying our lives"



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Source:
Ipsos Global Trends 2024 and Ipsos Global Trends 2014

Technowonder?

The feeling that technical progress is destroying our lives is held by a majority in 41 of the 50 markets surveyed, but by more than four in ten in every market.

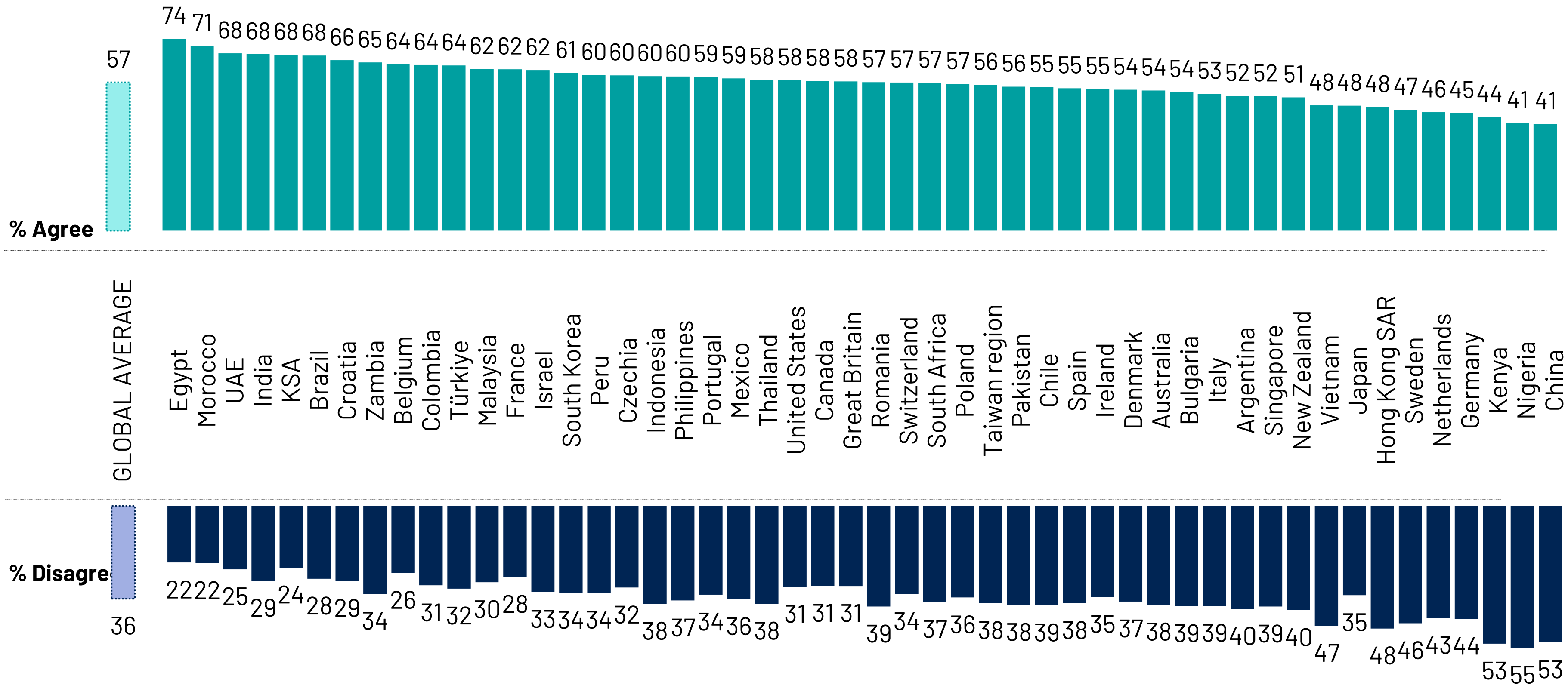
That's balanced with a feeling held by 71% who say technology is also the only thing that will solve the problems facing us as people, markets and society.

Our worries include 73% who are concerned about how their data is used by companies or the government (68%) and that it's inevitable that we will lose more privacy (78% agree).

While a majority agree that social media companies have a positive impact, there's wide variance from 87% in Indonesia to just 24% in the Netherlands.

I fear that technical progress is destroying our lives

To what extent do you agree or disagree with the statement…



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Source:
Ipsos Global Trends 2024

Driving Forces of Technowonder

Signals

Tech companies studying the role of AI in job loss

A consortium of technology companies, including leading AI producers Cisco, Microsoft and Google have launched a research project to understand the impacts on job loss and creation (Washington Post).

Asia leading on battery innovation

Batteries are quite literally going to power our technology advancement. Asian companies hold 87% of the patents on solid-state technologies (Asia Business Outlook).

US partners with Kenya to build semiconductors

As nations jockey for position in the supply chain for critical tech components, the US is investing in resource-rich Africa, bringing advanced jobs to a growing economy (WEF).

The most impactful Macro Force themes affecting this trend

- Pervasive technology
- The immersive frontier
- AI and automation advances
- Exponential data
- Toll of technology
- Technology's dark side

In a world with pervasive technology, highlight the benefits

Thought Starters

How can you lean into helping customers see the wonder and lessen their worry about technology used in your products and services?

Just because people feel an inevitable decrease in their privacy doesn't mean they're happy about it. How can you help them feel confident sharing data and information?

People know technology is used in the things they buy. Can you focus less on the how, and more on the benefits they will get from using your services and products?

Tech advancements are driving the development of the African continent, from mobile money enabling large-scale financial transactions across formal and informal sectors, to mobility solutions enabling commuting and tech-based freight solutions driving intra-Africa trade. This rapid adoption leads to tensions: technology advancements need to address the continents' challenges, chiefly, education, healthcare, infrastructure and the development of a skilled workforce.

– Mac Mabidilala, Ipsos in South Africa

Conscientious Health

Trend: Health is becoming more holistic, as most of us globally feel that we need to do more for our physical as well as our mental wellness. Despite this, healthy living is a struggle for many and most people feel they need to lose weight. The interconnectedness of health with other systems such as nutrition and technology is also being examined. This is leading to an overall focus not on just living longer but ageing better.

Tension: The tension between physical and mental health is dissolving, but there is a persistent question of who has access, especially as new "wonder" drugs enter the market. Tech makes it easier to track and manage our health but is also blamed in part for the mental health crisis.

Takeaway: Now people are aware of the need for a holistic approach to managing their health, there are opportunities to help people navigate this ever more complicated landscape.

Values

Health Self-reliance
Health Improvement
Longevity

Health in 2024: a holistic pursuit of longevity

Our data highlights a strong commitment to health, with health Improvement and Self-reliance among the top values.

The global growth in concern about mental health is evident, with an almost equal proportion of people saying they should prioritise physical health (84%) and mental wellbeing (81%). The gap globally between these two statements was ten percentage points in 2019 and is just three points now.

The urge to lose weight is also widespread, with 63% agreeing they would like to shed some pounds, including 58% of Generation Z. While breakthrough therapies such as glucagon-like peptide-1 agonists (GLP-1s) may offer a solution, there are significant cost and cultural barriers to adoption, especially in emerging markets with scarcer medical professionals.

Self-reliance in health is the second-strongest value in 2024: 80% want more control over their health and 69% say they look up health information rather than relying on doctors, seeking information on their own, highlighting a trend toward personal empowerment and the growing importance of healthcare in emerging markets.

At the edges of medical science, the quest for longevity stands out. The expectation of living to 100 is not solely the preserve of Silicon Valley; we find optimism of reaching this milestone far exceeding current life expectancy in almost every market, especially those in Asia and Africa.

Men are more optimistic than women about reaching their century.

These values ladder up to the trend of Conscientious Health, which is expanding particularly in emerging markets where a growing middle class is investing in health choices. This creates a new tension between self-guidance and traditional medical approaches.

Health improvement and self-reliance lie in the optimistic quadrant of our values map and rank among the top values, presenting opportunities for organisations to offer proactive and positive health-related solutions.

65%

of Dutch agree they need to do more to look after themselves physically

Global: 84%

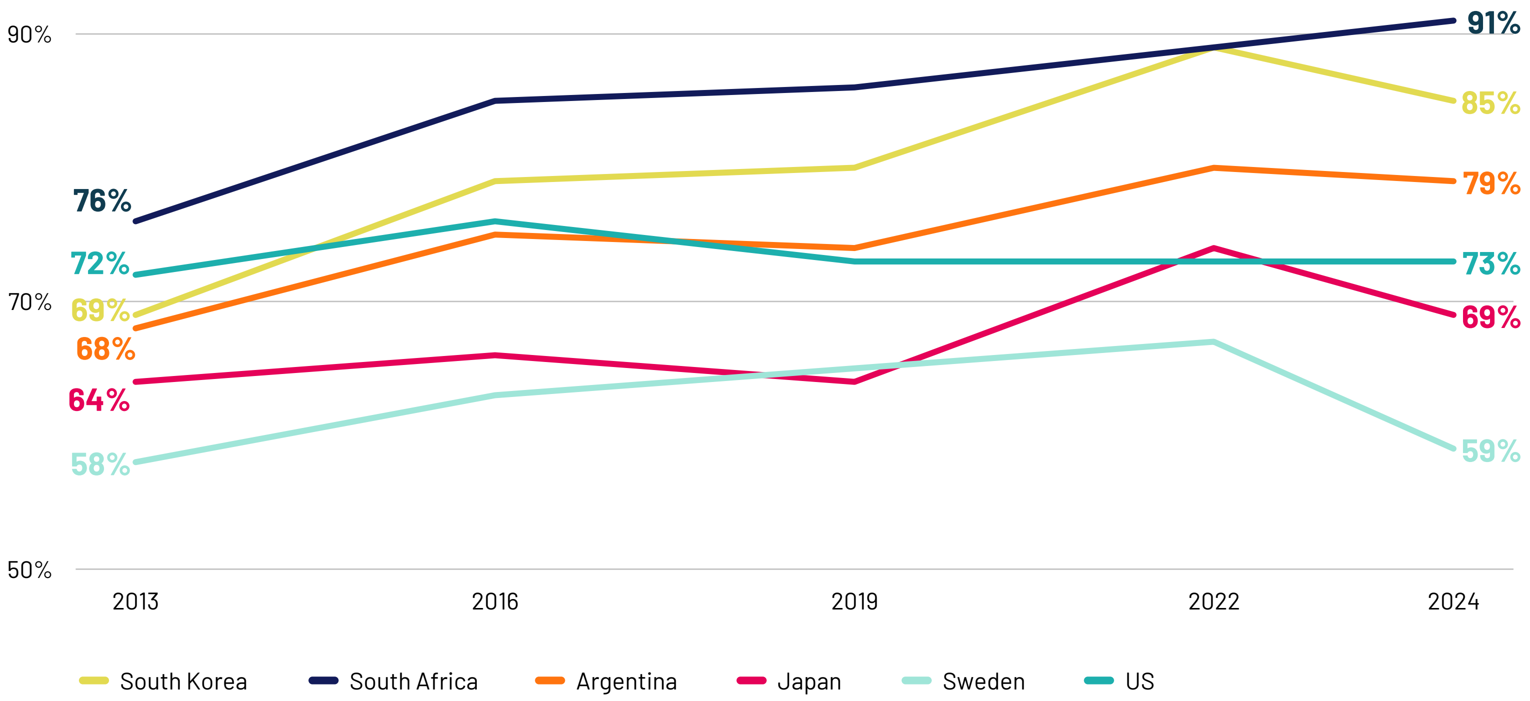
Ten-year trend: Conscientious Health

For a decade, a majority of people around the world have considered taking control of their health to be important. While this has risen at a global level over the past ten years, the global change masks a plethora of market-level stories, pointing to different systems of healthcare, along with culture and politics, all playing a role in how much control the public feel they need to have in decisions about their health.

Despite a narrative that focusing on one's health has been driven by the pandemic, the only significant changes between 2019 and 2022 were in South Korea, Argentina and Japan. Most changes to this sentiment came before Covid was part of our lexicon, pointing to control over health being more of a perennial concern.

In 2024 this desire for control is held by around eight in ten people, holding true across all age groups, gender and income levels.

% agree "I would like more control over decisions about my health"



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Source:
Ipsos Global Trends 2024 and Ipsos Global Trends 2014

Conscientious Health

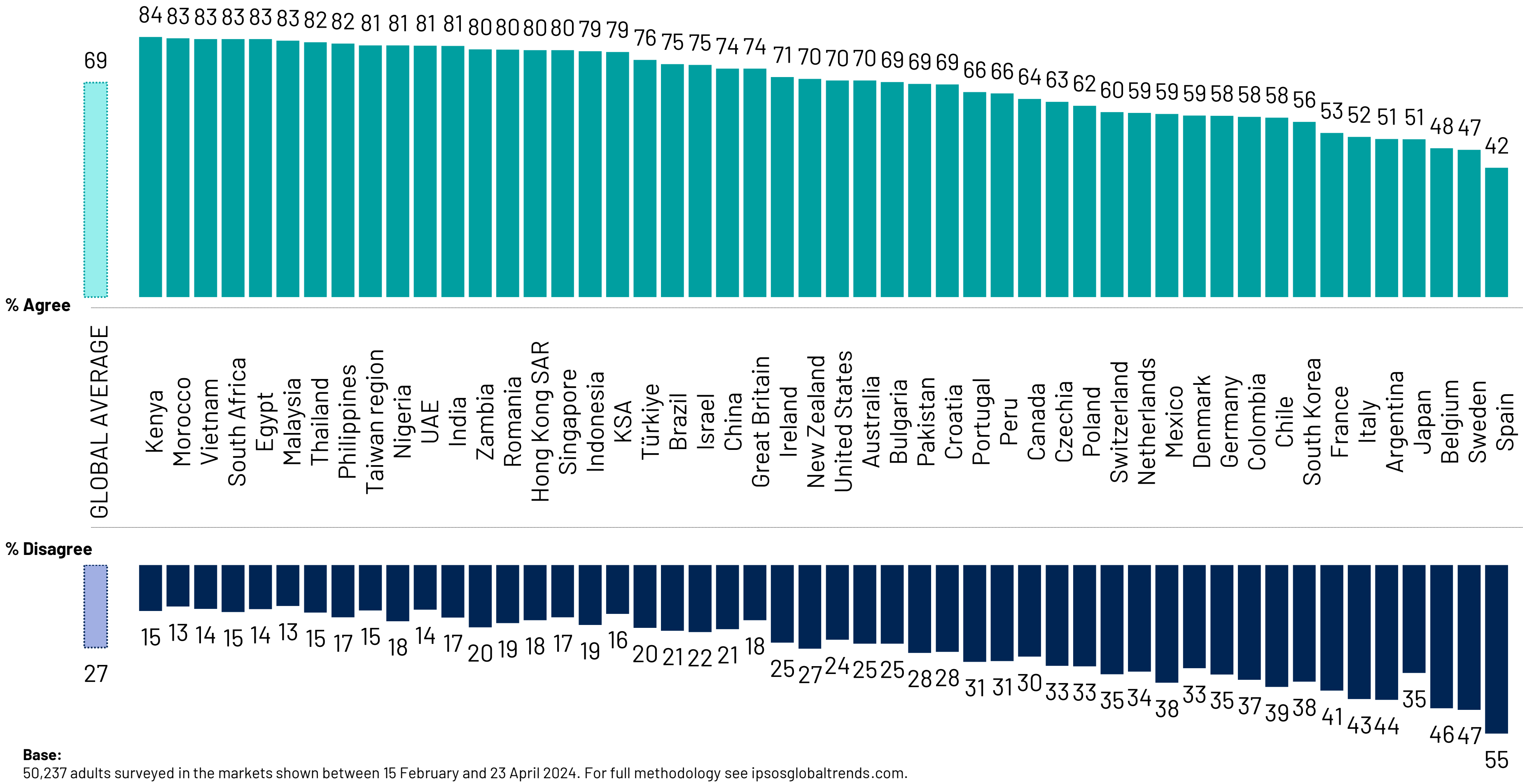
Around seven in ten people globally take health matters into their own hands, conducting personal healthcare research rather than depending completely on doctors.

This trend, often linked to "Dr Google," echoes a desire for autonomy, particularly in well-served populations. Yet, this self-reliance is strongest in areas with limited medical infrastructure. In markets with fewer physicians per capita, such as Kenya, South Africa, Morocco, and Egypt, there's a notable appetite for self-guided health information.

Conversely, in Sweden, Belgium, and Spain, where doctor availability is higher, and health services are more proactive, less than half of the population actively seeks out health information independently.

I always try and find out information on healthcare by myself, rather than just relying on what my doctor tells me

To what extent do you agree or disagree with the statement…



Base:
50,237 adults surveyed in the markets shown between 15 February and 23 April 2024. For full methodology see ipsosglobaltrends.com.

Source:
Ipsos Global Trends 2024

Driving Forces of Conscientious Health

Signals

Caring for the carer

Dementia **Singapore's** CARA app now includes Care Circle, enabling caregivers to create support groups for shared insights on patient care (Care Givers).

Accessible and convenient health foods

US start-up Blue Zones aims to enhance longevity with affordable, accessible frozen meals inspired by diets from the world's healthiest regions (Blue Zones).

Technology to aid mental health

Estonian company Nurosym have developed wearable technology to stimulate the vagus nerve through electrical pulses to help people manage anxiety, sleep issues and depression (Nurosym).

The most impactful Macro Force themes affecting this trend

Systemic health inequality

The toll of technology

Integration of health and technology

Break-through therapies

The next pandemic

Population fluctuation

As holistic health has become the norm, how can stakeholder groups work holistically to tackle outstanding challenges?

Thought Starters

How can stakeholders work together to ensure equitable access to health resources and technologies, particularly for those in regions with limited medical infrastructure? What strategies can be put in place to support populations that are currently underserved?

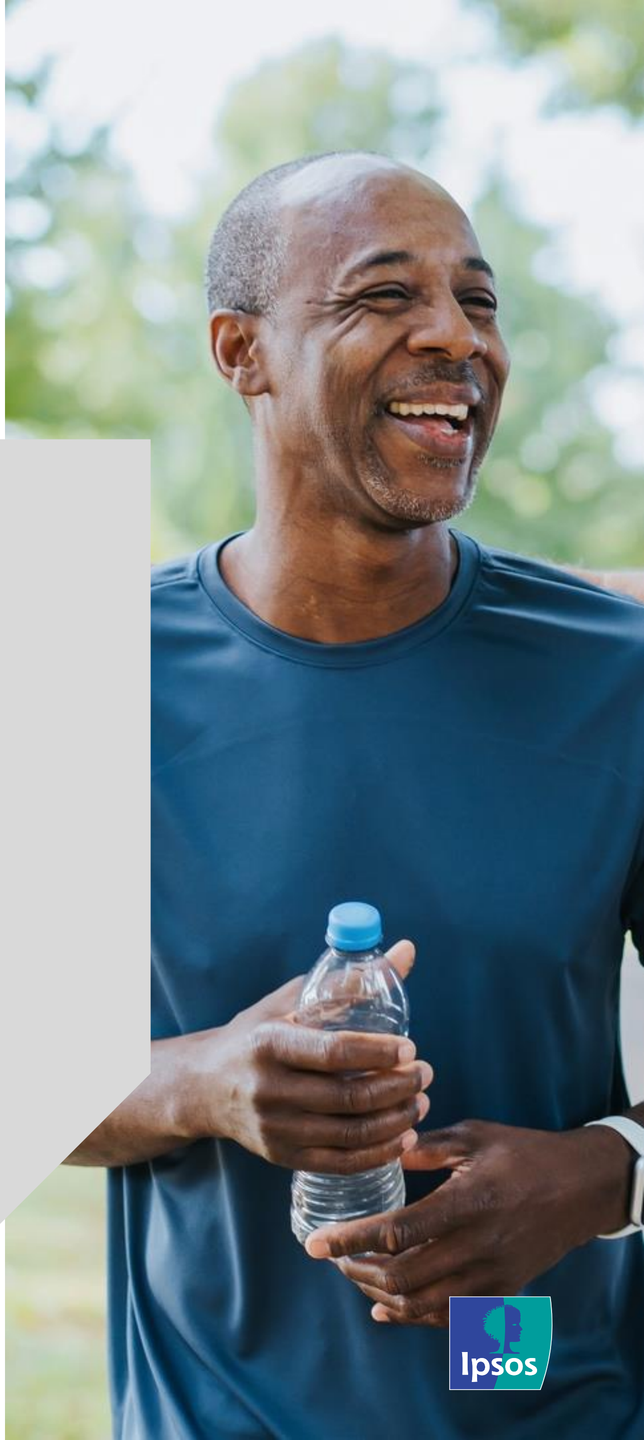
As technology is both credited for advances in health management and blamed for contributing to a mental health crisis, how can organisations balance the promotion of digital health tools with the need to mitigate technology-related health issues?

How can organisations address the challenges of ageing populations while also promoting sustainable lifestyle choices that contribute to long-term health and wellbeing?

In Asia and especially China, when we think of health, we immediately associate both physical and mental health. That is the typical Chinese concept of YIN and YANG. Finally other regions understand this, too!

The pandemic, shifted not only impact Chinese ideas of health but also behaviors in the way we research these topics, the way we understand nutrition, and our interest in health wearables, which have great potential for self-monitoring.

— Kelly Yin, Ipsos in China



Retreat to Old Systems

Trend: An escape to nostalgia appeals to many people around the globe, at least half in 40 of our markets would like their country to be the way it used to be. Even if the past we are nostalgic for is imagined as a sanitised one, this can lead people to push back against trends that are seen to challenge existing systems. This can be a clamour for a "return" to historical power structures, religious practices, employment patterns, gender roles, and more.

Tension: What some see as progress, others see as a move away from traditional values they hold dear, or a threat that will see them lose out to the benefit of others.

Takeaway: While nostalgia remains a powerful tool for marketers looking to build connections, it's good for brands to remember that the good old days weren't always good for everyone.

Values

Nostalgia
Traditionalism

The comfort of old structures and systems has mass appeal in the face of an uncertain future

The perfect storm of a challenging present and an uncertain future brings a natural allure to the past. The warm glow of nostalgia is a trope of recessions and crises across the past century.

The Trend of Retreating to old systems describes one reaction to this environment, but it can go further than nostalgia; linking to power structures and control. For the young, it is partly rooted in pessimism for their present and future.

The value of Traditionalism provides one clear example: 81% agree traditions are an important part of society. We see this through rising interest in content promoting traditional gender roles, exemplified by “tradwives” who focus on children and the home, as well as influencers in the “manosphere” who exalt what some see as traditional ideas of masculinity.

The value of Nostalgia is more complex than simply suggesting everyone would like to live in the past, with significant variation by culture and demographics.

The perceived role of genders and changes in how we form and express identities play a large part in this trend globally. There is a near-70 percentage point gap among the 50 markets on whether the main role of women in society is to be good mothers and wives.

Almost six in ten (57%) would like their country to be how it used to, with both younger individuals and more youthful markets idealising the simplicity and perceived ease of an age they never knew. Yet often this is national rather than personal nostalgia: less than half (46%) would prefer to have grown up when their parents were children.

Both values under this trend speak to a retreat; into the self or into structures that feel familiar. While they remain weaker values overall, the volume of signals we see across people, markets and societies speaks to the rising importance of tradition and nostalgia worldwide, as we advance into an unpredictable and intimidating future.

21%

of Dutch agree the main role of women in society is to be good mothers and wives -but agreement varies from 82% to 13% across the world

Global: 39%

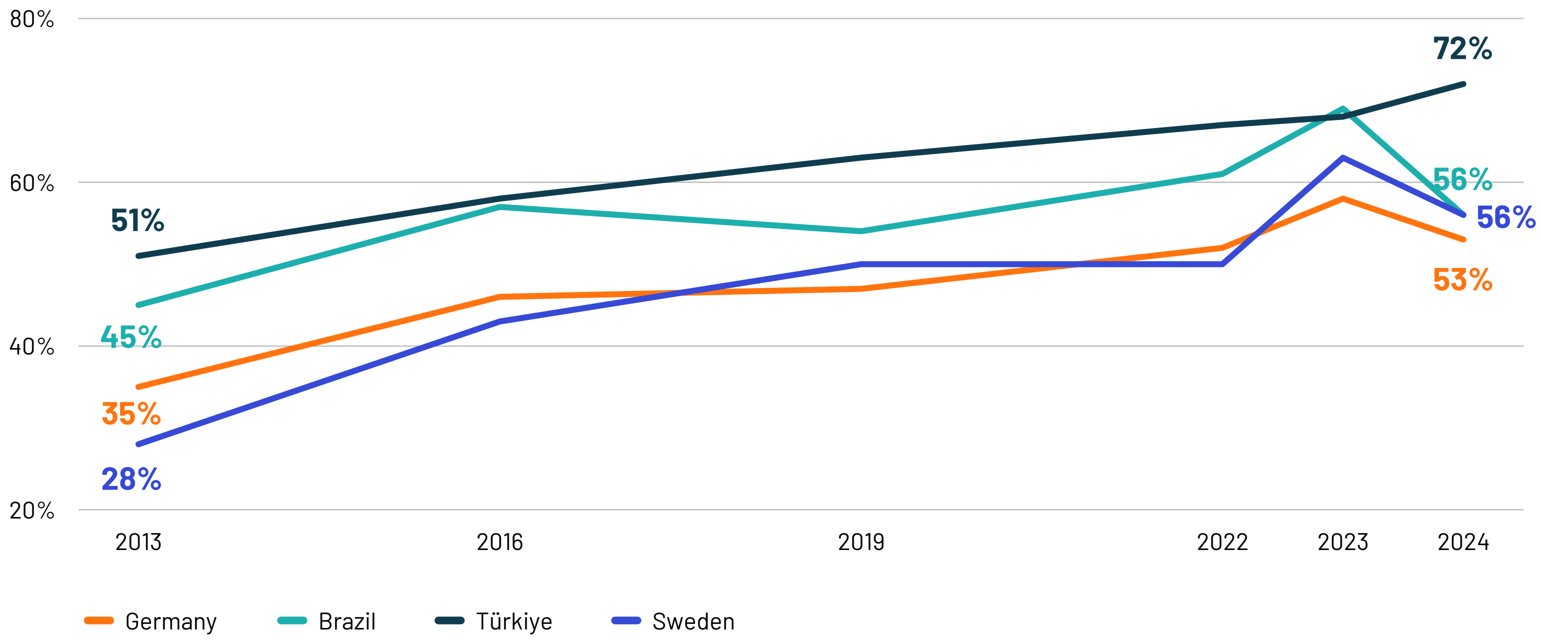
Ten-year trend: Retreat to Old Systems

Across the 19 markets we have tracked since 2013, we have seen an increase of eight percentage points in the proportion who say they would like their country to be the way it used to be. More than half (56%) now feel this way, compared with 47% in 2013.

Some markets stand out for particularly sharp turns to the past: nostalgic sentiment has more than doubled in Sweden and increased by around 20 points in Türkiye. This re-evaluation of the past is as strong in countries with more complex modern histories too: nostalgia has increased notably in Brazil, as well as Germany.

At the same time, there has been no noticeable increase in some markets, among them Italy, China, the US, Belgium and Japan.

To what extent do you agree or disagree with the statement…"I would like my country to be the way it used to be"



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Source:
Ipsos Global Trends 2024 and Ipsos Global Trends 2014

The four flavours of nostalgia

We measure two types of nostalgia in Global Trends: national nostalgia and personal nostalgia. Markets can exhibit, both, one or neither:

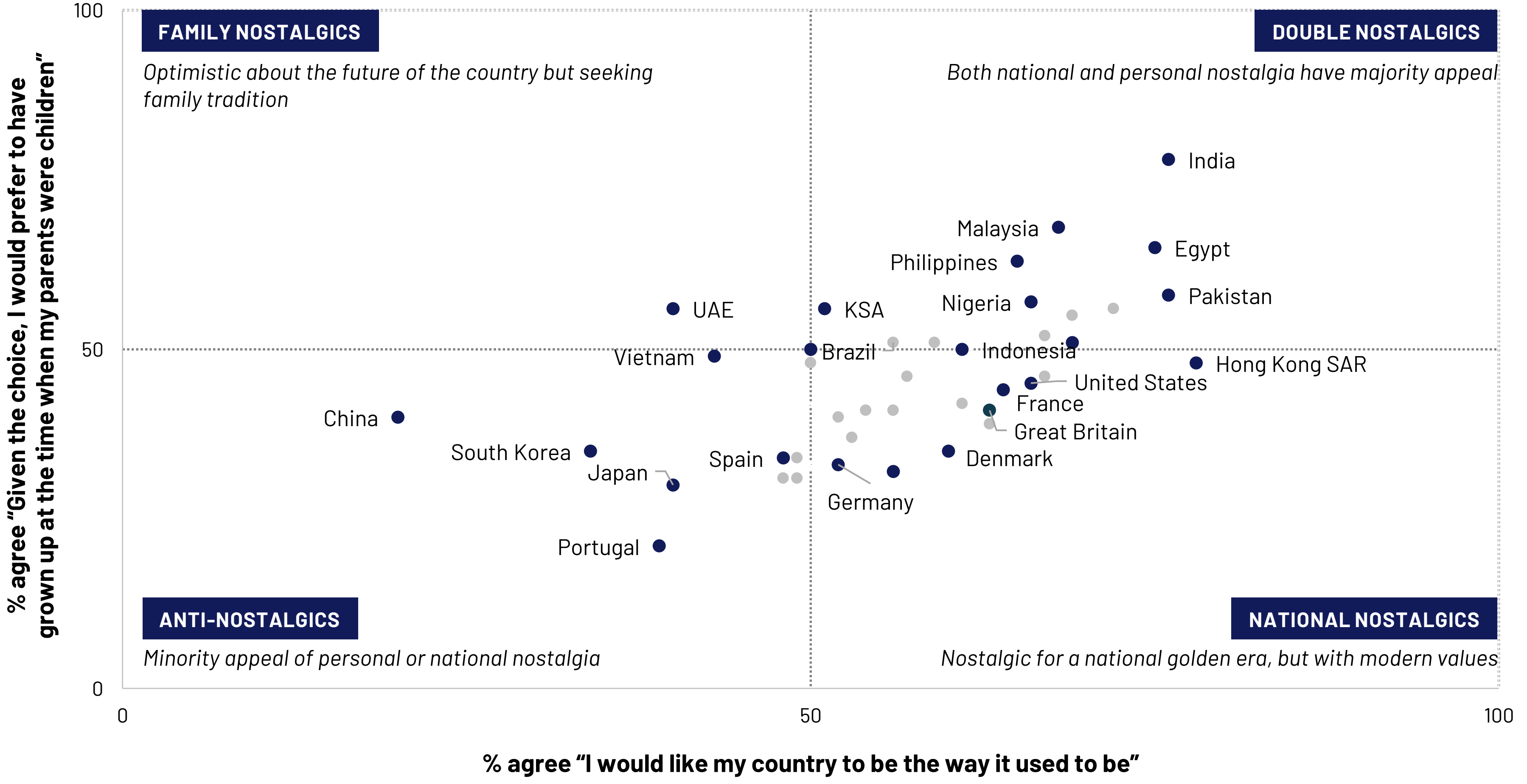
Double nostalgics feel their nation was greater in the past and would also like to have grown up when their parents were children.

National nostalgics would like their nation to relive its glory days, but without the values and hardships their parents grew up with.

Family nostalgics favour a modern nation with the mores of their parents.

Anti nostalgics see the present as better than the past for their nation and their families.

To what extent do you agree or disagree with the statements... [Selected markets]



Base: 49,233 adults surveyed in the markets shown between 15 February and 23 April 2024. For full methodology see ipsosglobaltrends.com.
Source: Ipsos Global Trends 2024

Driving Forces of Retreat to Old Systems

Signals

The rise of the tradwife lifestyle

Content featuring "tradwives" — women who value being a traditional wife, homemaking and conventional gender roles — is attracting significant audiences on TikTok, especially in the **US** (ABC News).

Style from a bygone era

The **global** fashion trend regencycore glorifies the past but also has elements of colourblind casting, etc, which makes the past more accessible to today's more diverse audiences (L'Officiel).

Harking back to simpler times and combatting digital addiction

Dutch beer brand Heineken and creative agency Bodega have launched the "Boring phone", a stripped back, clear flip phone without apps to evoke nostalgia and encourage more social interaction (Dezeen).

The most impactful Macro Force themes affecting this trend

Community migration and displacement

Rising nationalism and populism

Wealth disparity

Greater ethnic and religious diversity

Identity acceptance

Pervasive technology

How can organisations ensure our relationship with the past stays a healthy one?

Thought Starters

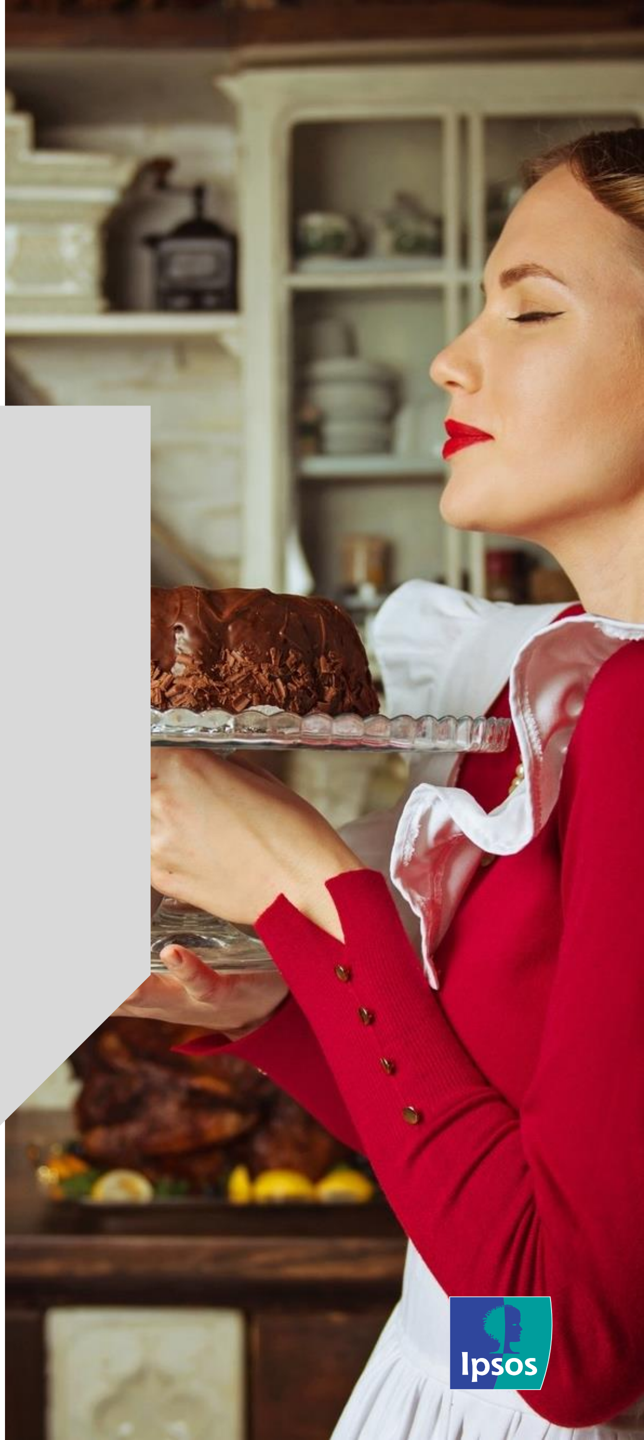
Leveraging nostalgia is far from a straightforward application of rosy retrospection. Instead, it requires a deep understanding of the details and drivers behind the idealisation of the past and how those need to be blended with modern considerations. How can organisations best balance these concerns of past and present?

While the role of tradition cannot be over-stated, how can organisations help to ensure it is not used as a tool to divide society along traditionalist-progressive lines?

And remember nostalgia is not a panacea some are anti-nostalgics. How can you leverage nostalgia without seeming old fashioned?

In Italy, younger people especially agree with the nostalgic view that they would have preferred to grow up in the era their parents did. This attitude should not be seen as a passive retreat into the past or as intrinsic laziness about building the future. Instead, it reflects a desire for a better future.

— Guilia Bertini, Ipsos in Italy

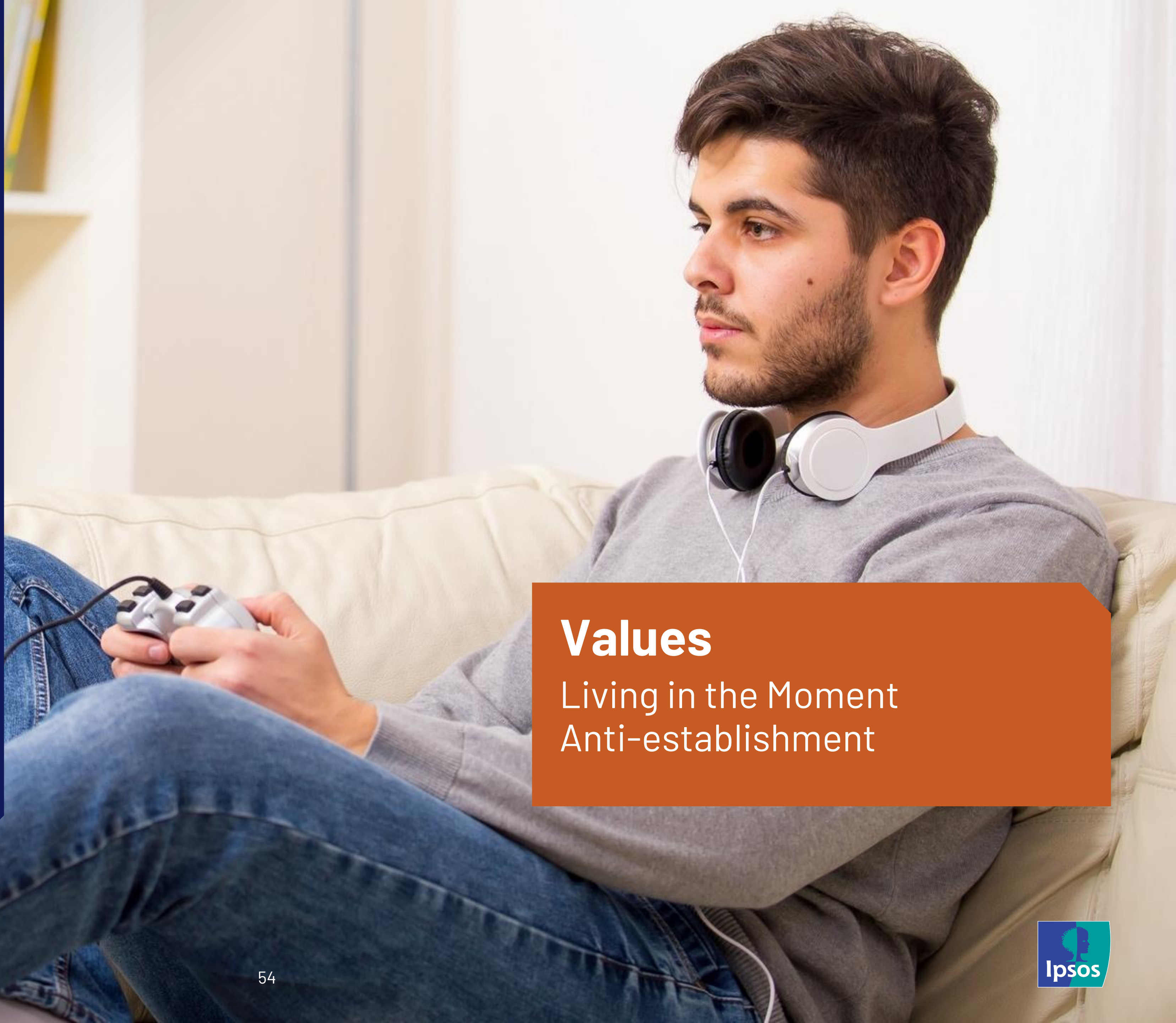


Nouveau Nihilism

Trend: There is now a generational disconnect when it comes to milestones like buying homes, getting married, and starting families. Financial realities are keeping those dreams out of reach for many. This is feeding widespread sentiment that it's better to live for today — either because tomorrow is uncertain, or that it will simply take care of itself, because individuals feel powerless to take personal control.

Tension: Traditional milestones are still very much prioritised in many countries; even as increasing numbers find they are out of reach.

Takeaway: Nihilistic tendencies drive people to live in the moment and potentially take rash decisions, exemplified by the rise of buy-now, pay-later and personal debt products. Helping people to bridge the gap between their lived reality and their aspirations is an opportunity for brands and governments alike.



Values

Living in the Moment
Anti-establishment

What's new about nihilism?

There are myriad reasons to believe the world is going to hell in a handcart. From climate disasters, to multiple ongoing wars and humanitarian crises, to economic uncertainty and inequality, the world is arguably in worse shape than in 2004 when the aphorism "you only live once" (YOLO) was first popularised. But the sentiment has been around for more than a century, and we've been through disasters, wars and uncertainties before — so what has changed?

First, **we are much more aware** of what's happening in the world around us. For better or worse, we have access to information 24/7 from anyone and anywhere — and that ongoing internet-fed news cycle and stream of social commentary means that it's much harder to ignore the headlines. Second, the pandemic taught everyone how fragile life is, and how globally interconnected the world is — those lessons will shape attitudes and behaviours for decades to come: why save for the future when the future is uncertain?

The Living in the moment value embodies this in two ways: while many citizens hew toward enjoying the present and not worrying about the future because it's uncertain, many also express faith that tomorrow will take care of itself.

The value of Anti-establishment also carries weight here — and it's more than dissatisfaction with current government and politics. It starts from a position that the government should represent people's interests and look after them, it quickly sours amid a feeling that the powers that be — corporations, governments and other organisations — are ignoring people's concerns and failing to address the challenges facing society.

This lack of trust and faith in the powers that be should worry leaders of public and private organisations alike. Addressing these issues, presents some risk, but also great opportunities for leaders as people look to them for hope and direction.

52%

of Dutch agree with the statement: "I live for today because the future is uncertain"

Global: 64%

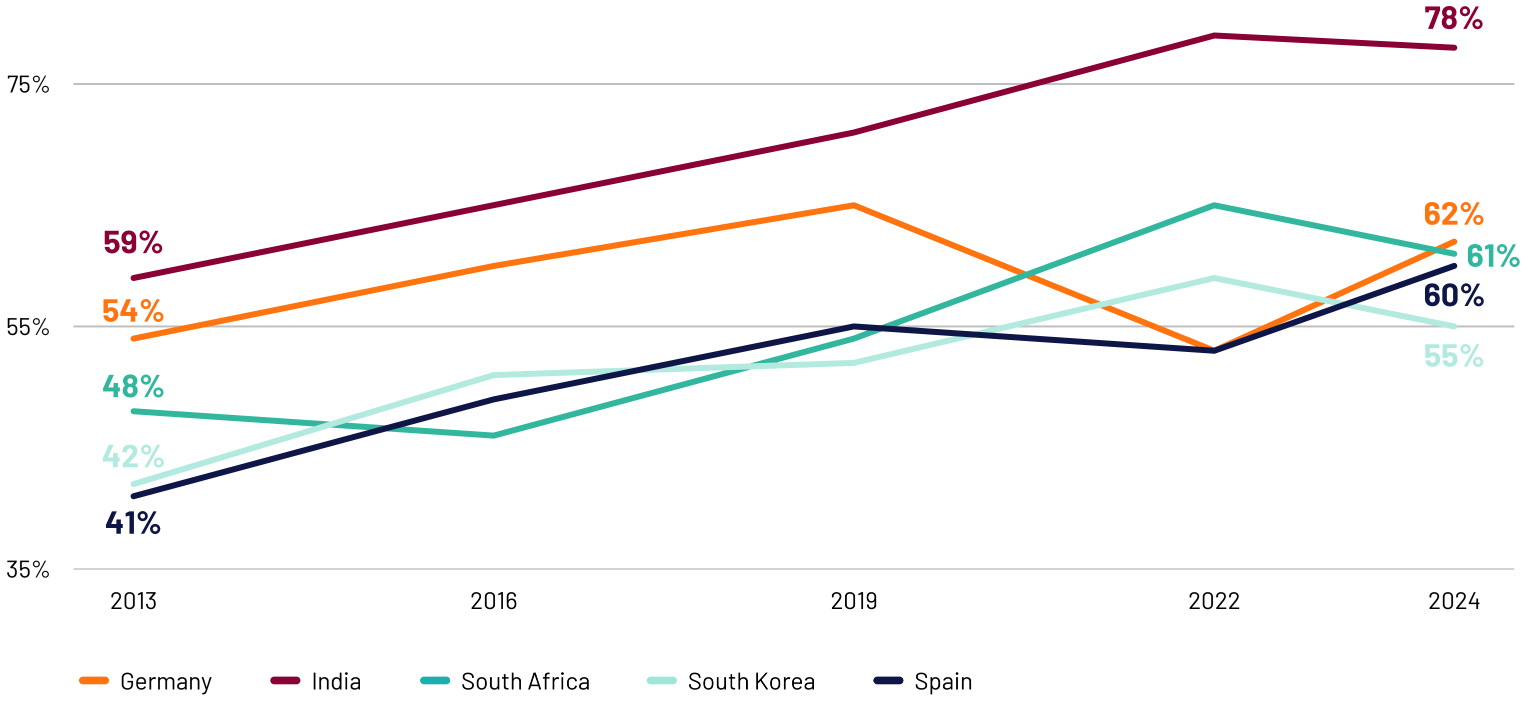
Ten-year trend: Nouveau Nihilism

Across the markets where this question has been asked over the last decade, we see a clear pattern: a jump from 50% agreeing with the sentiment when we began our study, to 61% today.

While sentiment on this measure increased in all but three markets, India and Spain stand out for having around a 20-point jump in this sentiment over the past decade.

The impact of the pandemic on hedonism varies widely, as shown in the peaks and valleys between 2019 and 2022: sentiment continued to rise in India, South Africa and South Korea, while Germany dropped by double-digits and took until this year to recover.

To what extent do you agree or disagree with the statement…"The important thing is to enjoy life today, tomorrow will take care of itself"



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Source:
Ipsos Global Trends 2024 and Ipsos Global Trends 2014

Nouveau Nihilism

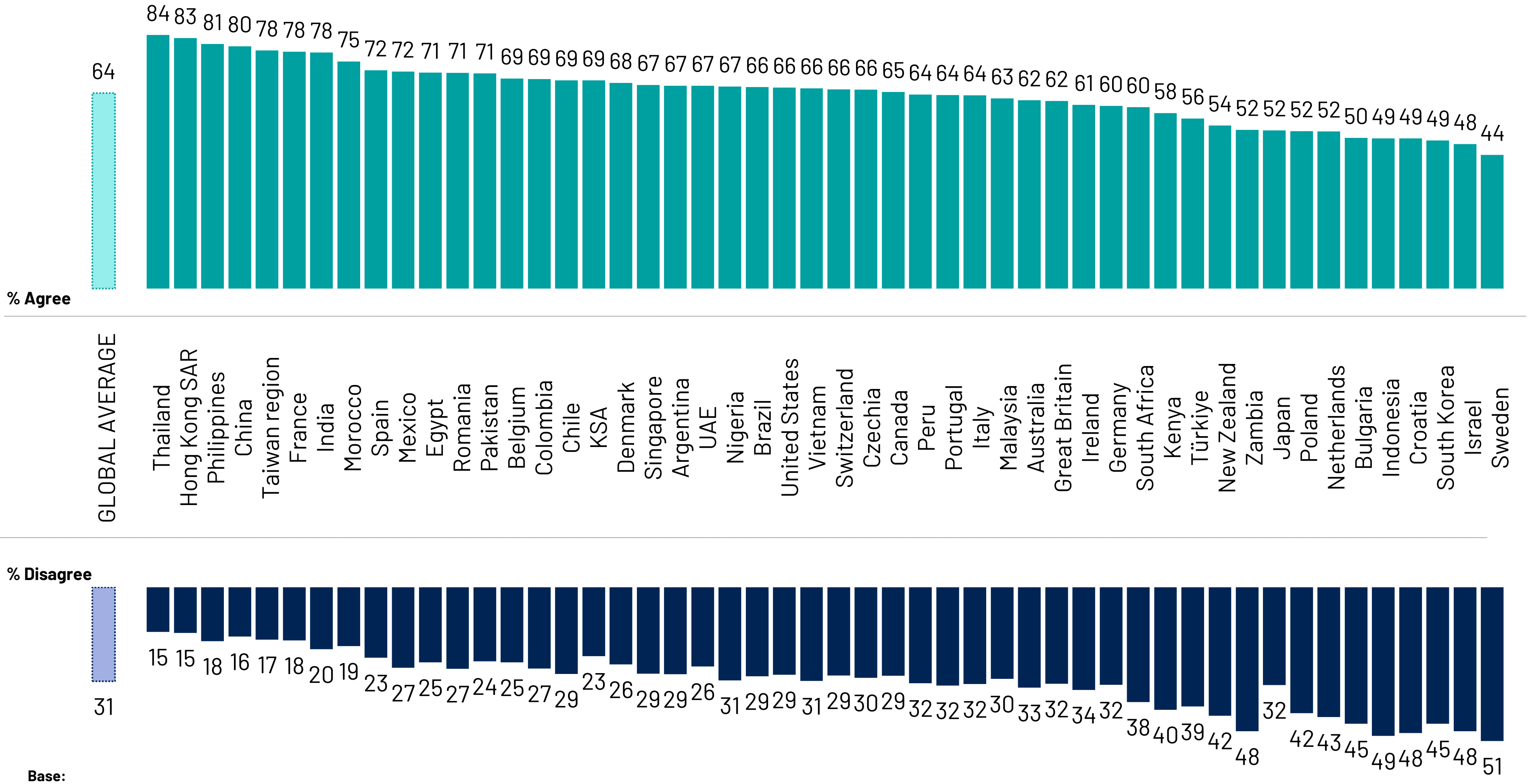
Two thirds across 50 markets embrace the "YOLO" mentality, living for today because the future is uncertain. This mindset is particularly strong in Thailand, where 84% agree, but weaker in Sweden where only 44% feel this way.

Hedonism — which has seen increased sentiment over time — has always existed, but nowadays when combined with low faith in government and authorities to improve the future, it feeds a new type of nihilistic sentiment that erodes support.

We see a complex landscape of evolving attitudes and economic realities that governments and policy makers will need to navigate carefully.

I live for today because the future is uncertain

To what extent do you agree or disagree with the statement...



Base:
50,237 adults surveyed in the markets shown between 15 February and 23 April 2024. For full methodology see ipsosglobaltrends.com.

Source:
Ipsos Global Trends 2024

Driving Forces of Nouveau Nihilism

Signals

Offsetting electoral apathy

Ben & Jerry's has always taken a stand on social issues, but they've leaned into election mobilisation lately to offset voter apathy. After voting in June, **Dutch** citizens could trade in their red voting pencils for a free ice cream from the brand (Ben & Jerry's)

Brat summer

A movement, driven by the launch of Charli XCX's album "Brat" in June 2024, inspiring women to live carefree and hedonistic lives (The Guardian).

Increasing debt from BNPL

Buy now, pay later loans have become the norm for many consumers in the **US**, but economists worry about long-term effects – and there is currently no way to tell how many consumers are behind on payments (CNBC).

The most impactful Macro Force themes affecting this trend

Climate change

Increasing geopolitical conflicts

Rethinking institutions

Entrenched inequality

The next pandemic

Helping people navigate feelings of nihilism can nudge us toward a more positive future

Thought Starters

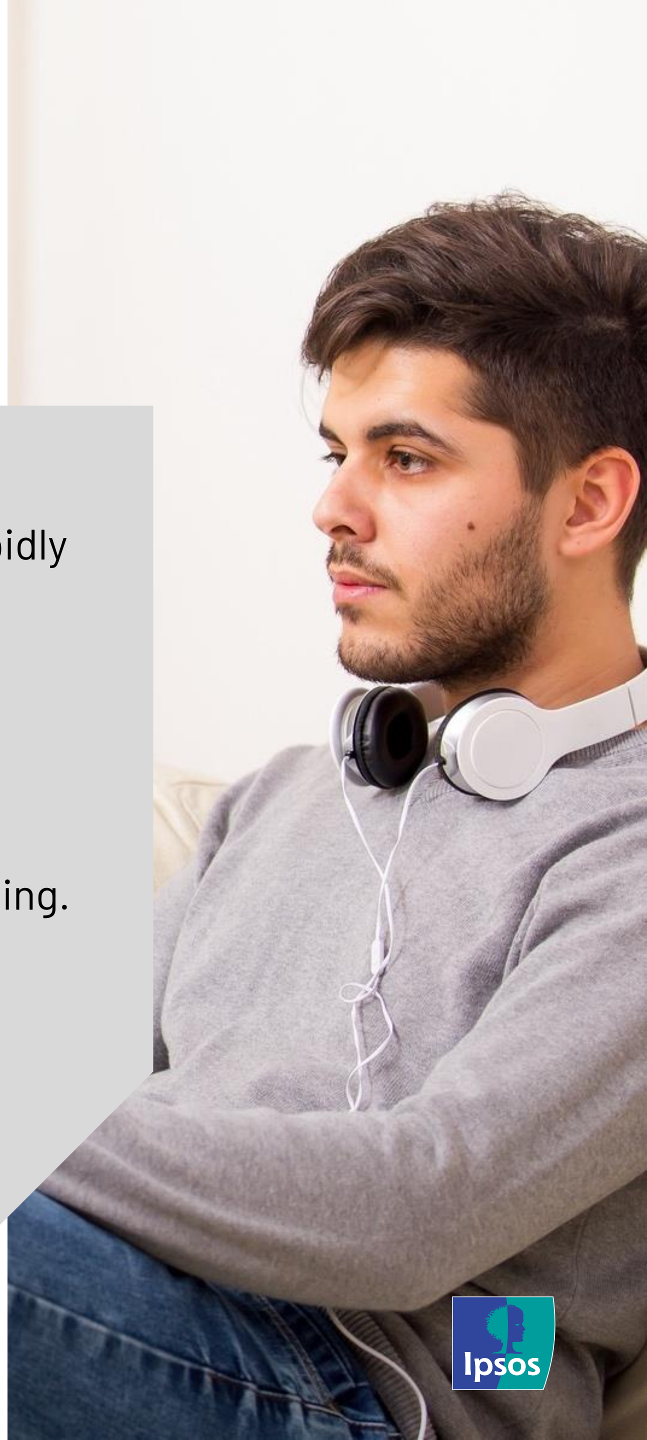
Optimism is more than a feel-good story; how can brands, governments and organisations help people feel positive about the future and work collaboratively to shape it in a positive direction?

There will always be an element of throwing caution to the wind, especially in uncertain times. How can we encourage citizens to do so without causing future harm, such as getting themselves deep into debt with buy now, pay later programmes?

What role do institutions play in an era of declining trust? Are there ways to cut through rhetoric and come to a consensus on what the future holds and how to deal with it?

"In Spain, even the way we grieve is changing rapidly in the aftermath of the pandemic. We have seen death become a daily statistic and everyone has suffered personal loss in one way or another during Covid-19. Cremations are on the rise and funerals are simplified. The ceremonial part of saying goodbye to a loved one is rapidly diminishing. And with little faith in the future of the system, Spaniards decide to live more for today and report saving less for their retirement than the average European.

— **Xavier Santigosa, Ipsos in Spain**



The Power of Trust

Trend: In a world flooded with information, misinformation and even disinformation, we crave authentic messages from trusted sources. In this context — and more dramatically so than in 2013 — brands assume greater importance, becoming extensions of our own worldview and values. But greater uncertainty now comes from changes in how and why we choose to trust some organisations and not others.

Tension: As trust becomes more erratic, it also becomes more important. Yet a widespread sense that customer service is worse and more automated than it was threatens the trust companies have already built.

Takeaway: In polarised times, brands must figure out where it's best to lean into values, and when to simply serve the consumers who just want the benefits of product — while also reconciling these seemingly opposite stances.

Values

Informed Consumerism
Brand Worship
Experience

New opportunities and threats for brand affinity

This trend arises from the tensions created by the confluence of competing changes: rapid technological development and shifting attitudes towards global and local products heightens the power of brands, while also eroding the traditional advantages of incumbents.

Regulation comes into play as well as transparency and responsibility are emphasised in the EU, Americas and other markets.

This levelling of the playing field also applies to trust, where a cacophony of voices now receive equal attention; and in customer service, which the public thinks risks being reduced to the lowest common denominator by advances in AI.

The strongest value in this trend is Informed Consumerism, which speaks to the lingering aftereffects of the 2022-23 global inflation; deal-seeking online remains paramount.

Data in the second value, Brand Worship, reaffirms the importance of brand: 80% are more likely to trust a new product made by a brand they know. But it also shows its limits as barely half (55%) say they are willing to spend extra for a brand with an appealing image. In 37 of 50 markets, more than half agree both that they tend to buy brands that reflect their personal values, and also that they don't care if a brand is ethically or socially responsible, they just want them to make good products.

Customer Experience emerges as the value which imperils the trust and equity brands have built. More than half agree that their experience as a customer is worse than promised, and three quarters feel customer service is getting too automated and impersonal — but almost two thirds say they're willing to spend more for a better experience, rising to almost seven in ten among higher income households.

Contradiction and tension exist across this trend, between local and global, online and offline, purpose and value. While this means there is no single solution, it offers a variety of strategies brands can harness to adapt to their unique circumstances.

46%

of Dutch say they are prepared to pay more for a better customer experience

Global: 63%

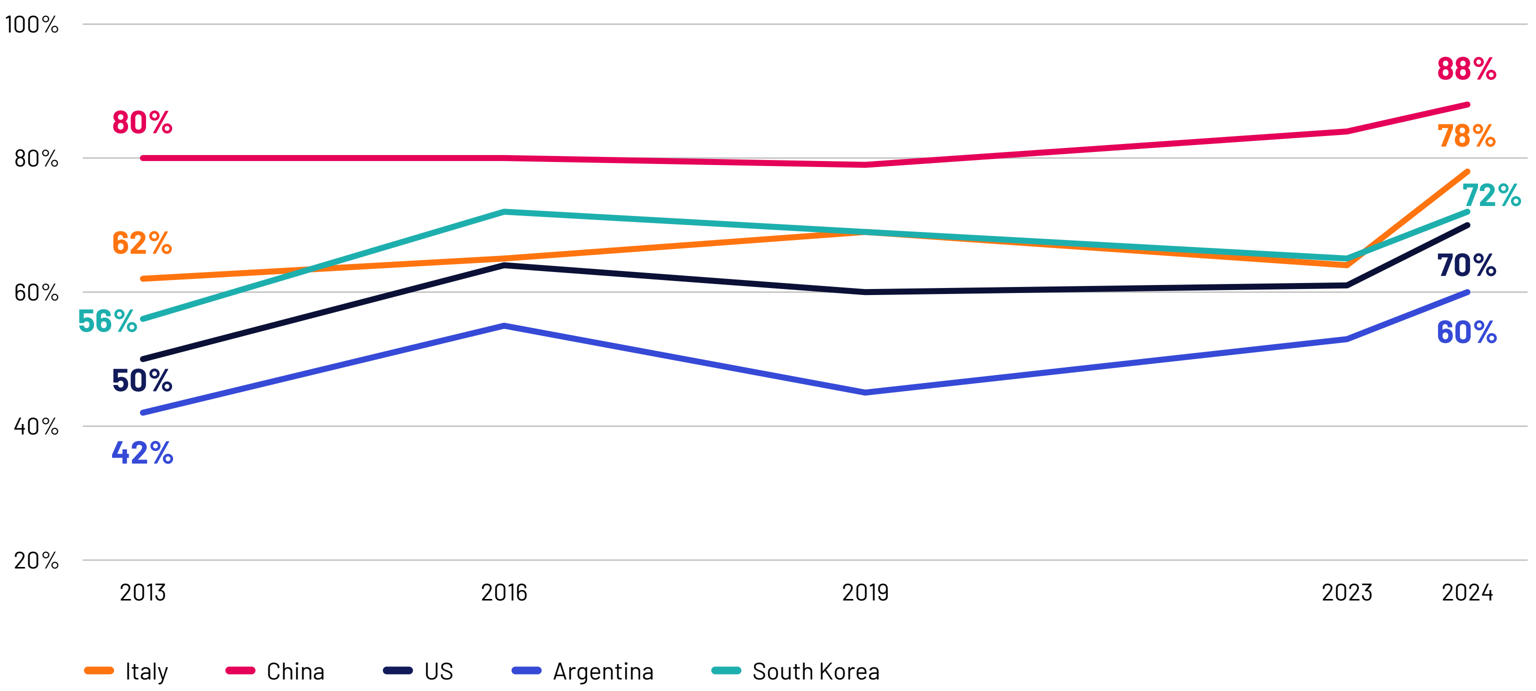
Ten-year trend: The Power of Trust

The importance of consumers buying brands that align with their personal values has continued to heighten, creating a "bumper sticker" world, where rising numbers of people expect everything they use or interact with to reflect who they are and what they stand for.

Across our 19 core markets we've seen agreement with this statement rise from 53% in 2013 to 69% this year.

This transformation can be seen across different markets around the world – rising 16 percentage points in Italy, 18 points in Argentina, and 20 points in the US. Even in China, where agreement has been high since 2014, it has risen by eight points.

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



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Source:
Ipsos Global Trends 2024 and Ipsos Global Trends 2014

Brands vs Value

The world is divided when it comes to spending more on a brand with an appealing image – 55% globally agree and 41% globally disagree.

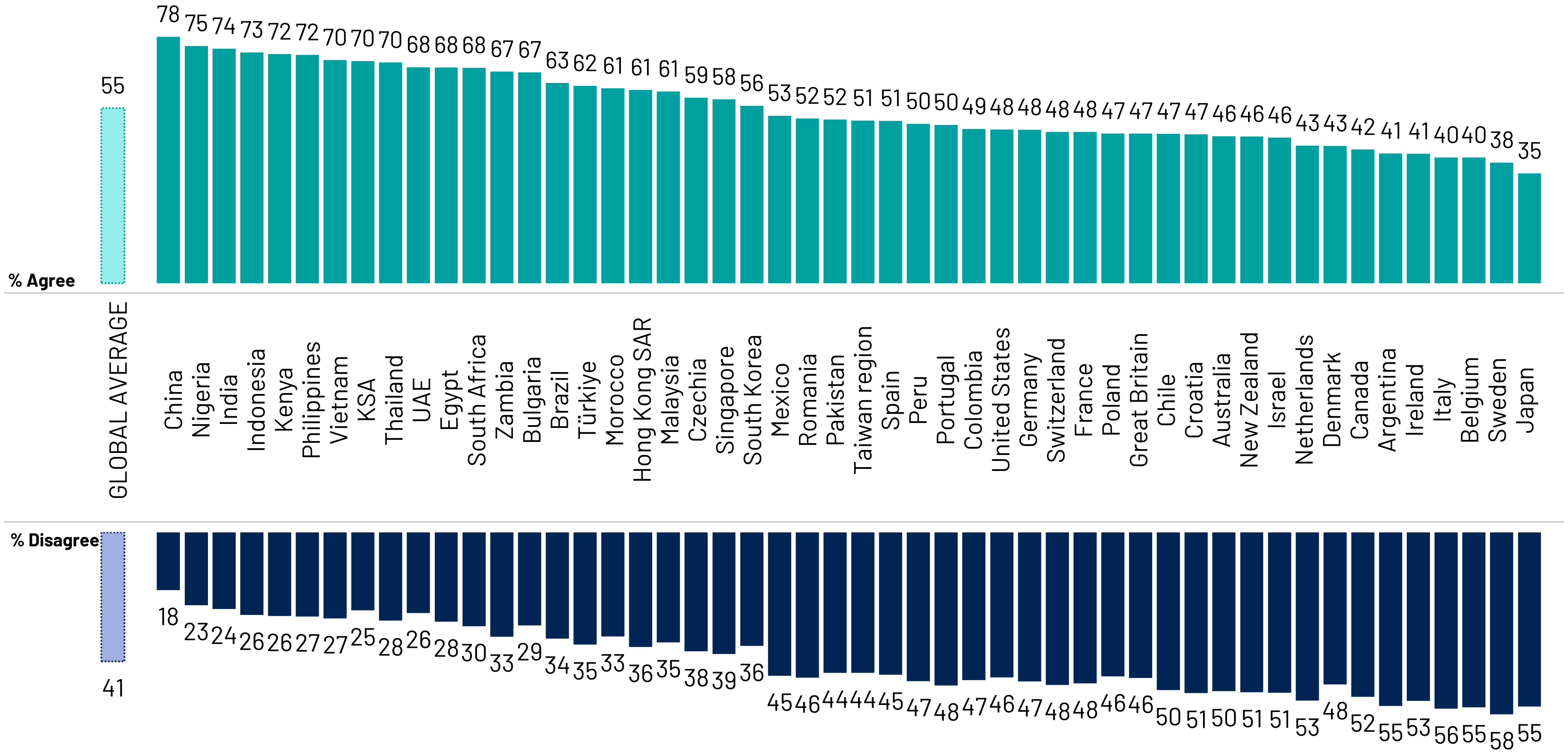
European markets predominate at the foot of the chart: disagreement is strongest in countries like Belgium, Sweden and Italy, alongside Japan.

At the other end of the scale are Asian and African markets, led by China where almost eight in ten say they are willing to spend extra for an appealing brand.

Yet most markets lie somewhere in between, suggesting that this mentality will vary between different products, occasions, and even brands.

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

To what extent do you agree or disagree with the statement...



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Source:
Ipsos Global Trends 2024

Driving Forces of The Power of Trust

Signals

Regulation driving transparency

Retailers in **France** are required by law to highlight when "shrinkflation" (when a food product becomes smaller but remains the same price) has taken place (Food Navigator Europe).

Value alignment throughout the value chain

A company in the **US** has started marketing vegan compost as some consumers demand that their food is grown without any animal products, in accordance with their vegan values (CabbageHillFertilizer).

AI disruption to customer service

The head of Tata Consultancy Services in **India** has raised the alarm that AI chatbots could lead to the rapid closure of the call centres that form a large part of its global business (Financial Times).

The most impactful Macro Force themes affecting this trend

- Pervasive technology
- Rising cost of living
- Technology's dark side
- AI and automation advances
- Toll of technology

Heightened tensions in brands, trust and customer experience

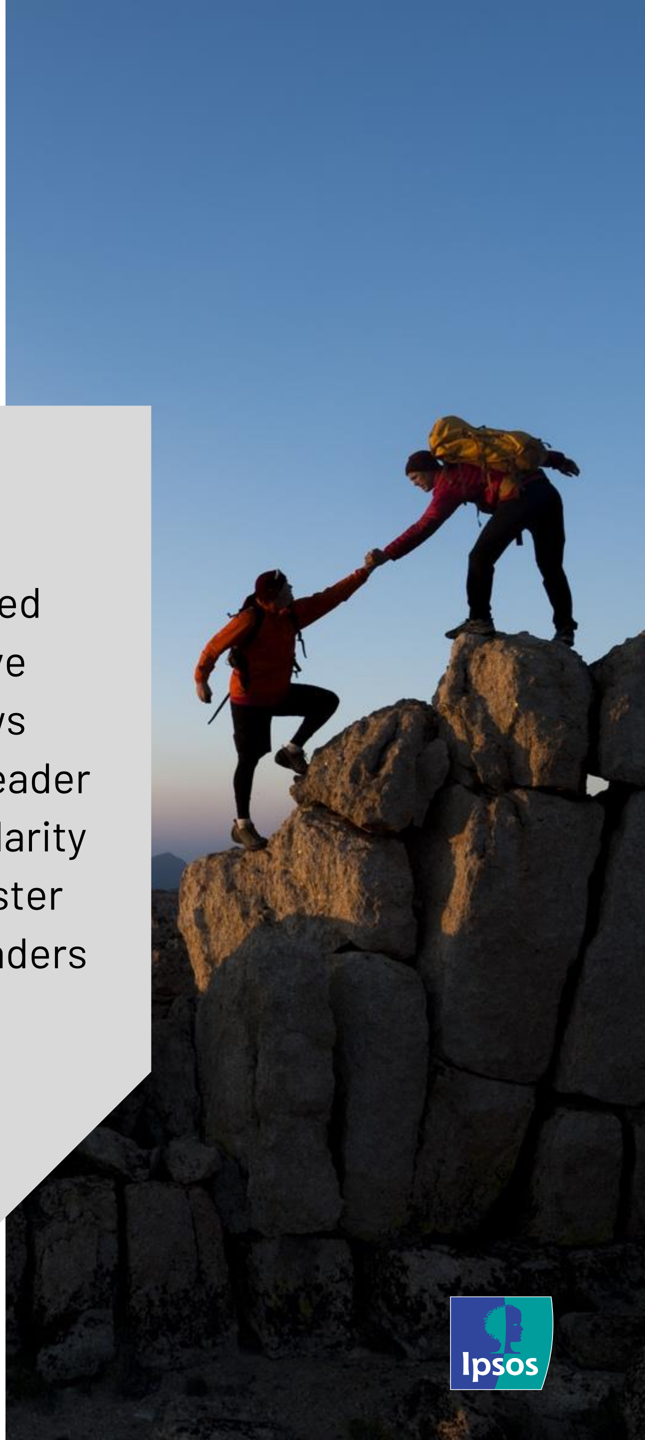
Thought Starters

How far has the balance in marketing swung to brands over products over the past decade, and where might it go next?

How interested are your consumers in brand values, versus value brands? How does this differ dependent on their context?

How can shifts to AI and automated customer service systems be communicated in a way that accentuates their positives of increased access, rather than being seen as a loss of human contact?

> In an operating context of hyper-tasking, where consumers seek to achieve more with their limited time, trust becomes a brand's critical competitive advantage. This takes many forms, from the news people watch, to the food they eat, or even the leader they vote for. A testament to this trust-led popularity of leadership, the Vice president and Prime Minister of UAE ranks among the top 10 most followed leaders on social media globally, despite the nation's relatively small population.
>
> – **Karthik Ramamurthy**
> **Ipsos in United Arab Emirates**



Escape to Individualism

Trend: In the face of a world that feels threatening and overwhelming, people are focusing on one thing they can control — themselves. While this focus on individualism has been high over the past decade, this year personal autonomy is the most powerful value. But this is, by definition, a multifaceted trend. We see the draw of simplicity, social status and seeking new experiences all as ways of developing ourselves.

Tension: For some, self-development is about slowing the world down and avoiding the rush — yet for others it is about achievement and building social status. The balance of the strivers and the satisfied varies between and within nations.

Takeaway: As people focus on the things they can control in their lives, helping people express and project that sense of self and reinforce their own values sets up lots of opportunities for brands and policymakers alike.

Values

Autonomy
Seeking Curiosity
Simplicity
Social Status

A “me first” mindset of controlling what we can by expressing our identity and individualism

In the face of socio-political turmoil, existential climate threats, and growing worry about the world’s future, people’s focus on themselves is continuing to grow in importance.

Autonomy is the strongest value in our framework, and it is the engine that drives highly individualistic definitions of aspirations, goals and modes of behaviour.

The tensions arise in the other values associated with this Trend which range from Social Status (how people express that, through milestones of career success or material gain) or Seeking curiosity with new experiences or Simplicity, rejecting those pressures and trying to return back to the basics.

For many, being able to shape one’s own destiny is the ultimate sign of success.

This focus on the individual also strengthens a diversification of how personal autonomy is perceived.
The right to make our own decisions about how to live our lives, define our success and balance ourselves and communities appears to be globalising, as younger populations in developing markets seek ways to blend self-determination with faith and tradition.

Younger generations are much more likely than those in older groups to believe that the acquisition of material goods enables them (and presumably the wider world) to see just how successful they are.

The quest for autonomy can be aided by new technology and its influence on the human experience, particularly in bringing a range of choices to peoples’ attention. But at the same time, the constant barrage of perfect online lives is overwhelming for many — too much choice, too much information, too much uncertainty creates a state of overwhelm and drives a desire for simplicity, control, and a sense of security.

The strong focus on the individual we find in the data can be interpreted as a reaction to a decade of rising unpredictability and tension in the world. While this can be helpful in providing a sense of control and allowing greater individual expression, there is an important role for governments, businesses and others in supporting and building the societies in which these individuals would like to exist.

49%

of Dutch feel overwhelmed by too many choices in life

Global 61%

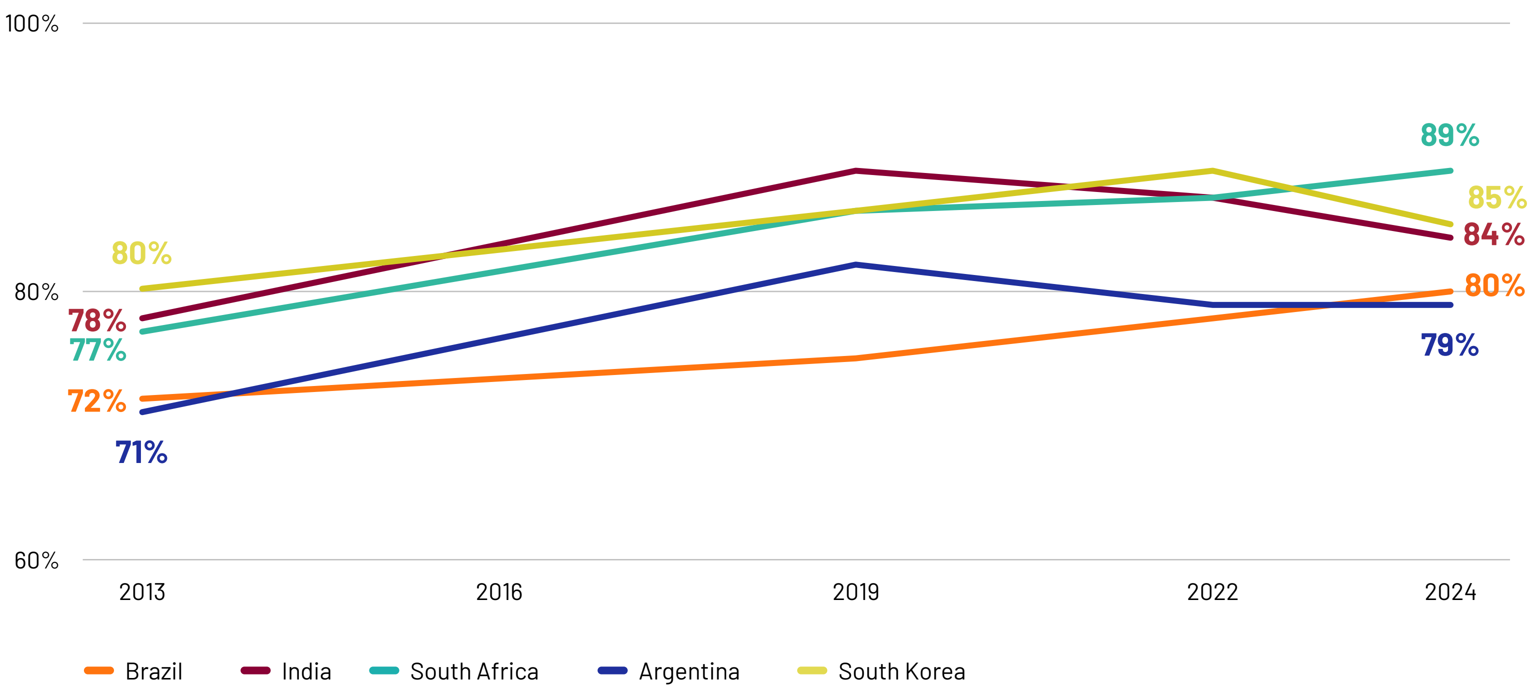
Ten-year trend: Escape to Individualism

The importance of autonomy has always been high, with self-determination and empowerment creating a strong focus on the self around the world.

Across our 19 core trend markets we've seen limited change in the numbers agreeing that "it is up to everybody to work out their own set of principles to guide their decisions". Overall agreement is just one point higher than in 2013 and has remained at high levels across the decade.

There are, however, larger increases in some markets such as South Africa (+12ppt), Brazil and Argentina (both +8ppt), India (+6ppt), and South Korea (+5ppt).

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



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Source:
Ipsos Global Trends 2024 and Ipsos Global Trends 2014

Escape to Individualism

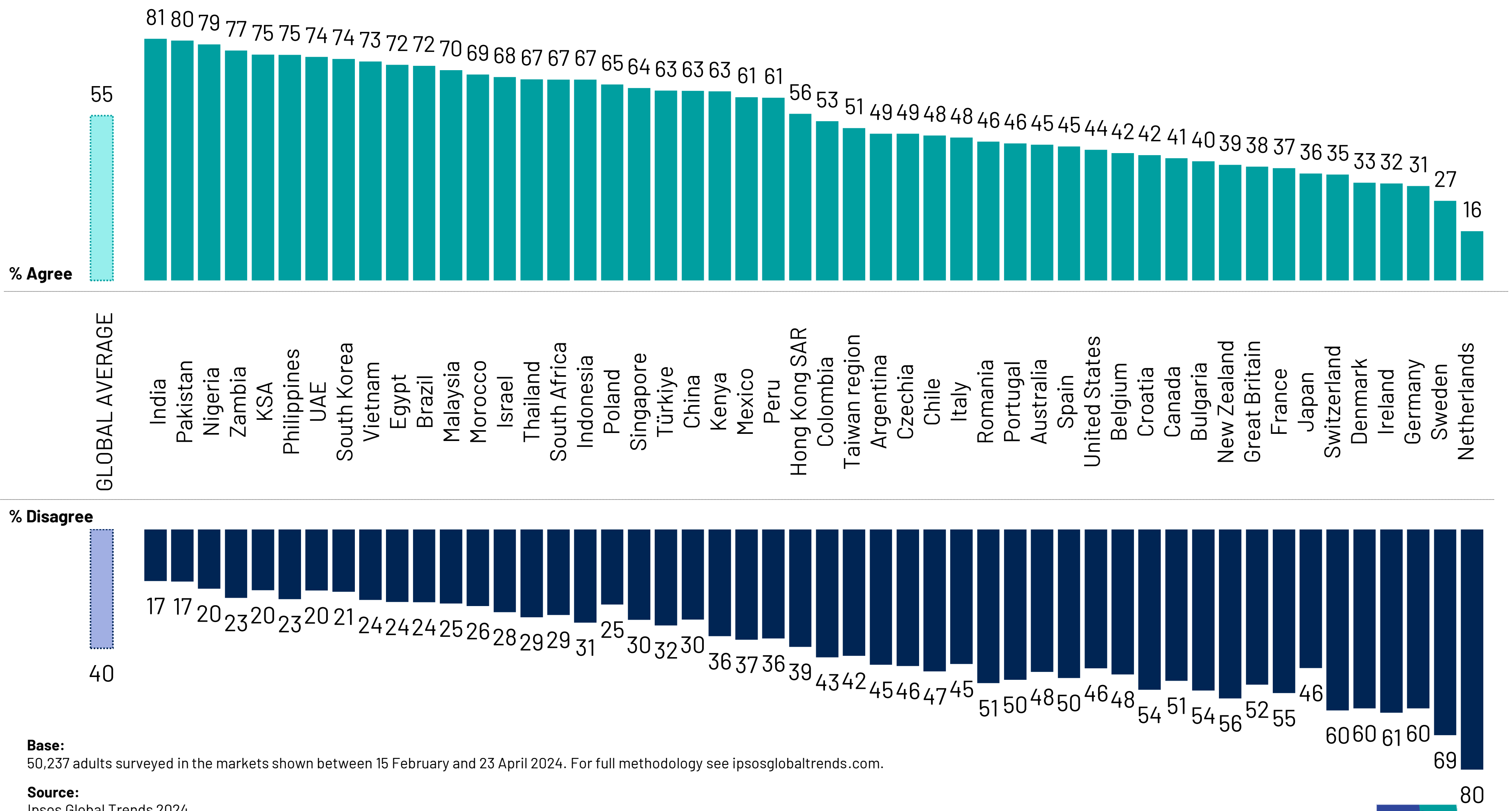
The world is divided on the importance of career success.

Just over half (55%) feel that fulfilment in life is achieving a prominent position in their career, while 41% disagree. Agreement is higher in Asian and African markets — most notably India, on 81% — and lower in European and developed markets, especially the Netherlands (16%).

Curiosity and openness to new experiences, such as travel, is perhaps a more universal path to individualism: 52% worldwide would consider moving to a different country to take a new job, while 67% of people say they would like to experience living in different parts of the world.

Fulfilment in life is achieving a prominent position in your career

To what extent do you agree or disagree with the statement...



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Source:
Ipsos Global Trends 2024

Driving Forces of Escape to Individualism

Signals

Democratising access to first class

Aether, a private terminal at the **UK**'s Manchester Airport, is making first and business class-style of travel available to all passengers regardless of ticket class (Manchester Airport).

Influencing stress management

The terms "soft life" and "soft era" are driving a growing TikTok trend started by **Nigerian** influencers focusing on minimising stress wherever possible and seeking a more easy and enriched life (The Ripple).

Encouraging curiosity

German frozen food brand Iglo embodied the traditional idea of Das Gewohnheitstier, or the Creature of Habit as a friendly dinosaur to encourage people to step out of their comfort zones and try something new for Veganuary (Iglo).

The most impactful Macro Force themes affecting this trend

Identity acceptance

Employee power shift

Entrenched inequality

Rise and fall of middle classes

Wealth disparity

Unlocking opportunity in the age of the individual will require much more targeted efforts

Thought Starters

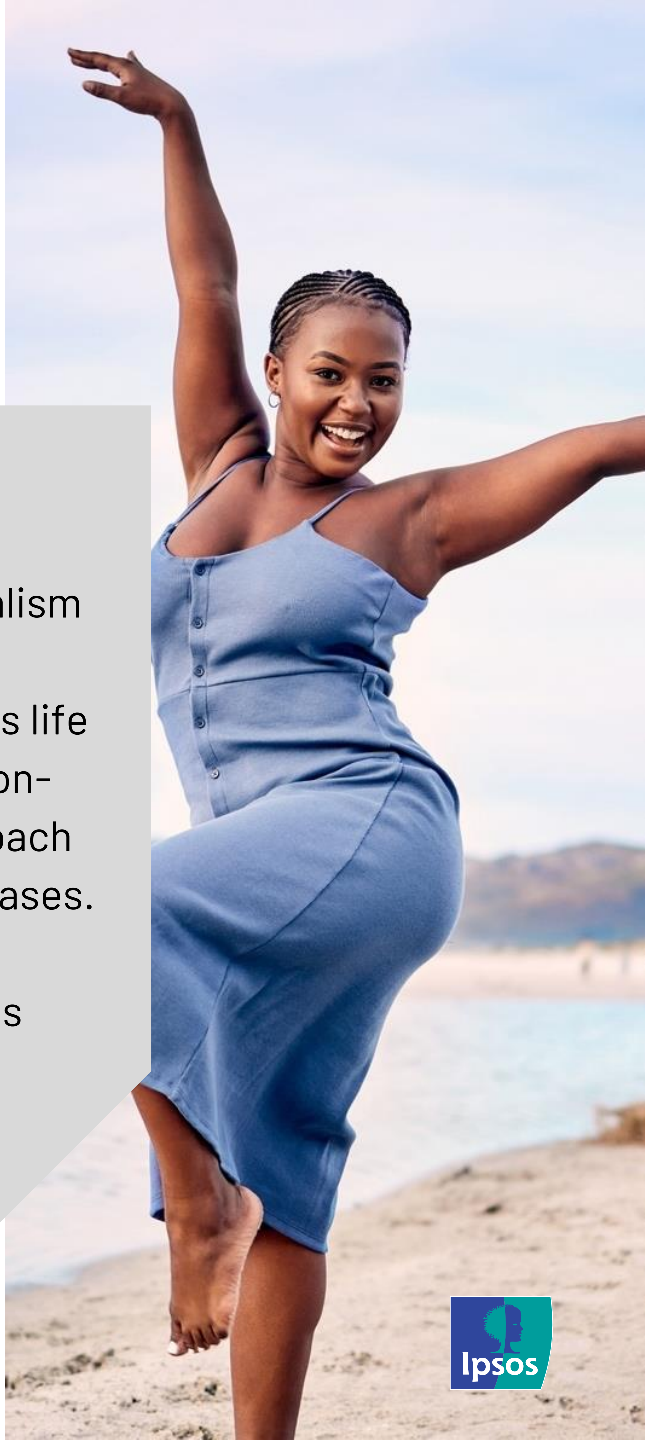
While segmentation and personalisation are not new concepts, organisations still struggle with adapting to the individual needs of their audience. How will your organisation strike the right balance between generic or individualised messages or offers?

The expectations of different generations are being shaped by the rapid pace of change and information overload. How can your organisation tailor its strategies to address the unique concerns and needs of each generation?

Different opinions of how to behave, and when to focus on oneself or the broader community, highlight much bigger questions: What is right and wrong? Who is really in control? What responsibility do we have to one another? And what does a better tomorrow look like?

Discussions of individualism often focus on Millennials and Gen Z, yet expression of individualism is highly visible in Canada's fast-growing 60+ demographic. Older Canadians are redefining this life stage, moving away from the traditional education-work-retirement model to a more dynamic approach that reflects longer lifespans, multiple career phases. Yet, these older individuals will put pressure on Canada's housing, healthcare, and labour markets which will likely come in conflict with a society unable to accommodate their wants and needs.

— **Diane Ridgway-Cross, Ipsos in Canada**



FINAL THOUGHTS

You've reached the end of the IGT report. What now?

That was a lot. We know.

Ipsos Global Trends summarises five million data points. It includes year-round work collecting signals and identifying macro forces from a truly global team of experts and analysts.

To recap at the highest levels:

There are constants. Throughout, we see values that strong majorities have agreed with over the last decade across markets, genders, ages, incomes and languages. We've identified three over-arching themes and many other individual issues.

There are tensions at all levels. Sociopolitical tensions about the very ideas of globalisation, tensions within markets, tensions between citizens and even tensions within households.

There are also tensions *within* each of the trends. Nostalgia is a shared value, and a powerful tool for bringing us together, but taken further, that idea can cause a rift between those who yearn for what they see as traditional values and others whose sense of identity is shifting.

Brands, businesses, organisations and governments have roles to play in everything from combatting global problems like climate change, to helping us express ourselves as individuals. Determining what those roles are and how to demonstrate you're playing them authentically is complicated.

As the world gets more complex, people focus on what they think they can control: themselves. People think they are doing all they can to solve climate change, but most feel overwhelmed by the complexity of the world around them. Even if feeling overwhelmed is part of being human, it's still a powerful emotion that brands should be aware of and look to alleviate. One way: help people express themselves however they and their surrounding culture can.

That was insightful, but... now what?

Now comes the interesting part. Trends are holistic narratives that help to unearth opportunities and navigate potential threats, acting as compelling conversation starters and catalysts for within your organisation.

Yet, the multifaceted and sometimes paradoxical nature of trends can make them elusive and challenging to quantify. In contrast, by exploring the human values underpinning each trend, we can quantify and rank their intensity, and truly apply them to your organisation so that you can act with intent.

So run a workshop. Role play. Take the data and tell a story about a persona you're trying to appeal to. Figure out how these trends apply to segments in your market. Know your audience, as these trends will apply differently to insights or innovation.

We present Ipsos Global Trends to get you thinking and give you tools to help you, too, understand society, markets and people today, and, through applied foresight, into tomorrow. It goes without saying, that Ipsos stands ready to help with any of those challenges — like the case studies we provide on the next page.

FUTURE-PREPARED FIRMS OUTPERFORM THE AVERAGE BY:

33%

higher profitability

200%

higher growth

Source: René Rohrbeck, Menes Etingue Kum, Corporate foresight and its impact on firm performance: A longitudinal analysis, Technological Forecasting and Social Change, Volume 129, 2018

WORK WITH US TO ACTIVATE GLOBAL TRENDS TO...

UNDERSTAND SOCIETY.

Empower your team with a decade of societal trends, to make strategic decisions with confidence and positively influence your organisation's future.

UNDERSTAND MARKETS.

Unlock the full potential of your market with our data portal, signals dashboard and hackathon to identify opportunities and challenges to shape your innovation strategy.

UNDERSTAND PEOPLE.

Master generational beliefs and attitudes to develop powerful communication platforms to engage vital demographics and position your brand as an insightful leader.

WE CAN SUPPORT YOU WITH:

Data Access
Direct access to our 2024 trend data via our portal and drill down to specific markets, target groups to meet your project requirements. Available from 6.000 Euro

Trend Localisation
Bringing trends to life by revealing how shifts impact Dutch consumers in comparison with other markets and sectors. This through bespoke reporting and presentations powered by Ipsos UU Team.
Available from 15.000 Eur

Trend Activation
Consultants from Ipsos S3 team draw key trends out of the data helping you anticipate tomorrow's business issues and fuel strategic decision-making. This through Strategy Activation workshops.
Available from 33.000 Eur

Please contact Lizet for more information and general enquiries: Lizet.vandekamp@ipsos.com

GLOBAL TRENDS

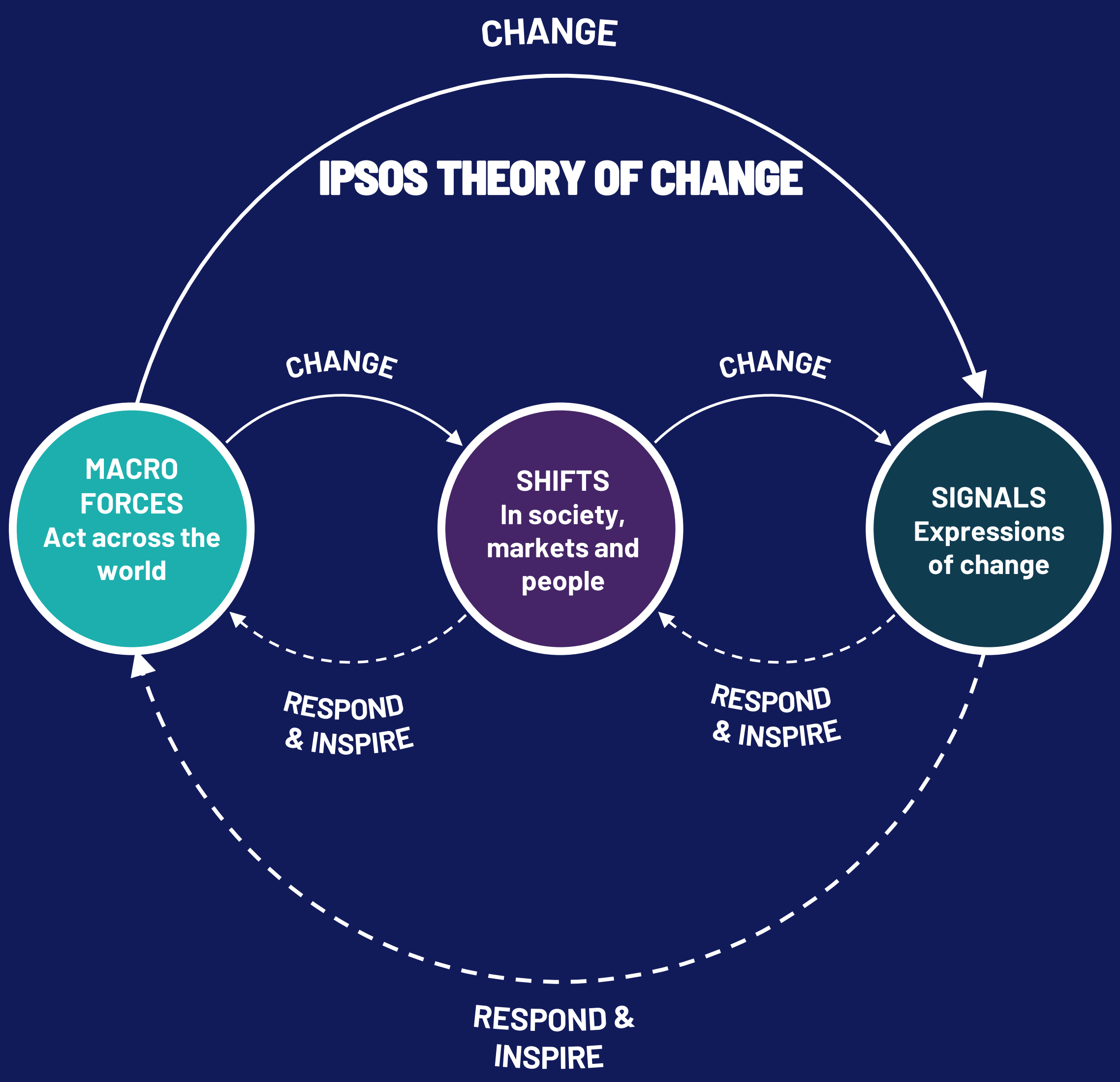
TECHNICAL INFORMATION

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

We used this model to refresh our Trends framework this year, building nine Trends from an analysis of each level of change.

- ***Macro Forces*** are the "known knowns" that operate at a planetary level. They work over a longer time horizon and have far-reaching, sometimes measurable or forecastable, impacts. They are the context against which people and organisations act.
- At the other end of the scale, ***Signals*** are localised expressions of change. They are things that we can observe occurring at the level of a single country or a community within a specific area, such as a new product launch in India, or a new cultural phenomenon in Japan.
- In the middle, we have ***Shifts*** in society, markets and people, including opinions, attitudes and values. Shifts can emerge, enter mainstream culture, and fall out of practice in response to macro forces and signals.

Our model acknowledges the **role of feedback loops in understanding the complexity of our world, recognising the circular nature of change** and tension within this ecosystem allows us to develop robust trends.



Understanding shifts in human values

Values can be understood as the core principles that define an individual's personality, guide their actions in life, and are essential for a meaningful and orderly existence. They have been statistically developed using a factor analysis of the 99 agree/disagree statements in our questionnaire.

Our Value Intensity Ranks and Scores **reveal which Values most or least unite humans around the world.** These measures are calculated using the mean agreement or disagreement scores for each statement within a Value. This provides an overarching gauge of the relative intensity of each Value, which we can then rank.

Trend	Value Name		Global Intensity Score	Global Intensity Rank
Escape to Individualism	Autonomy	Values most likely to unite us	79	1
Conscientious Health	Health Self-Reliance		78	2
The Power of Trust	Informed Consumerism		76	3
Splintered Societies	Wealth Redistribution		76	4
Conscientious Health	Health Improvement		76	5
Climate Convergence	Climate Responsibility		74	6
The Power of Trust	Brand Worship		68	7
Technowonder	Technological Worry		64	8
Escape to Individualism	Simplicity		64	9
Nouveau Nihilism	Living In The Moment		63	10
Technowonder	Technological Fatalism		63	11
Nouveau Nihilism	Anti-establishment		62	12
Globalisation Fractures	National Pride		62	13
Escape to Individualism	Seeking Curiosity		62	14
The Power of Trust	Experience		61	15
Technowonder	Technological Optimism		61	16
Splintered Societies	Nativism		58	17
Globalisation Fractures	Global Outlook		56	18
Retreat to Old Systems	Nostalgia		44	19
Escape to Individualism	Social Status		44	20
Retreat to Old Systems	Traditionalism		43	21
Conscientious Health	Longevity		38	22
Splintered Societies	Equity	Values least likely to unite us	26	23

GLOBAL TRENDS

The markets in the 2024 survey

Argentina
Australia
Belgium
Brazil
Bulgaria
Canada
Chile
China
Colombia
Croatia
Czechia
Denmark
Egypt
France
Germany
Great Britain
Hong Kong SAR
India
Indonesia
Ireland
Israel
Italy
Japan
Kenya
Malaysia
Mexico
Morocco
Netherlands
New Zealand
Nigeria
Pakistan
Peru
Philippines
Poland
Portugal
Romania
Saudi Arabia
Singapore
South Africa
South Korea
Spain
Sweden
Switzerland
Taiwan region
Thailand
Türkiye
United Arab Emirates
United States
Vietnam
Zambia

The Ipsos Global Trends Authors

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

Hundreds of Ipsos experts from throughout the business and our nearly 90 markets provided input on survey design and methodology; sourced sample; conducted translations, fieldwork and quality control; collected signals from their regions; ran analysis, proofed, designed, amplified, produced events, presented to clients, workshopped and more.

Special thanks to the Global Advisor team; Data Liberation for building a fantastic data portal; the Data Processing team and the Healthcare Global Modelling Unit for running the analysis; the UK and US Design Studios; the Ipsos Knowledge Centre; and the global and market marketing and event teams.

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Survey Methodology in detail

These are the results of a 50-market survey conducted by Ipsos on its Global Advisor online platform and in partnership with other global Ipsos teams around the world. The survey was conducted using Ipsos Online panels in all markets except for India which used its mixed-method "IndiaBus", and Zambia which used a face-to-face methodology. Ipsos interviewed a total of 50,237 adults aged 18-74 in the United States, Canada, Hong Kong SAR, Israel, Malaysia, New Zealand, South Africa, Türkiye and Vietnam; 20-74 in Thailand; 21-74 in Indonesia and Singapore; and 16-74 in all other markets between Thursday, February 15 and Wednesday, April 23, 2024.

The sample consists of c.1,000 individuals in each of Argentina, Australia, Belgium, Bulgaria, Brazil, Canada, Chile, mainland China, Colombia, Czechia, Croatia, Denmark, Egypt, France, Germany, Hong Kong SAR, India, Indonesia, Ireland, Israel, Italy, Japan, Kenya, Malaysia, Mexico, Morocco, Netherlands, New Zealand, Nigeria, Pakistan, Peru, Philippines, Poland, Portugal, Romania, KSA, Singapore, South Africa, South Korea, Spain, Sweden, Switzerland, Taiwan region, Thailand, Türkiye, United Arab Emirates, Great Britain, the United States, Vietnam and Zambia.

The samples in Argentina, Australia, Belgium, Bulgaria, Canada, Croatia, Denmark, France, Germany, Great Britain, Ireland, Italy, Japan, the Netherlands, New Zealand, Poland, Portugal, South Korea, Spain, Sweden, Switzerland, Taiwan region, the United States and Zambia can be taken as representative of their general adult population under the age of 75.

The samples in Brazil, Chile, mainland China, Colombia, Czechia, Egypt, Hong Kong SAR, India, Indonesia, Israel, Kenya, Malaysia, Mexico, Morocco, Nigeria, Pakistan, Peru, Philippines, Romania, KSA, Singapore, South Africa, Thailand, Türkiye, the UAE, and Vietnam are more urban, more educated, and/or more affluent than the general population. The survey results for these countries should be viewed as reflecting the views of the more "connected" segment of their population.

Apart from Zambia, the data for all countries is weighted so that each market's sample composition best reflects the demographic profile of the adult population according to the most recent census data.

"The Global Market Average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result.

Where results do not sum to 100 or the 'difference' appears to be +/-1 more/less than the actual, this may be due to rounding, multiple responses, or the exclusion of "don't know" or not stated responses.

The precision of Ipsos online polls is calculated using a credibility interval with a poll of 1,000 accurate to +/- 3.5 percentage points. For more information on Ipsos' use of credibility intervals, please visit the Ipsos website.

The publication of these findings abides by local rules

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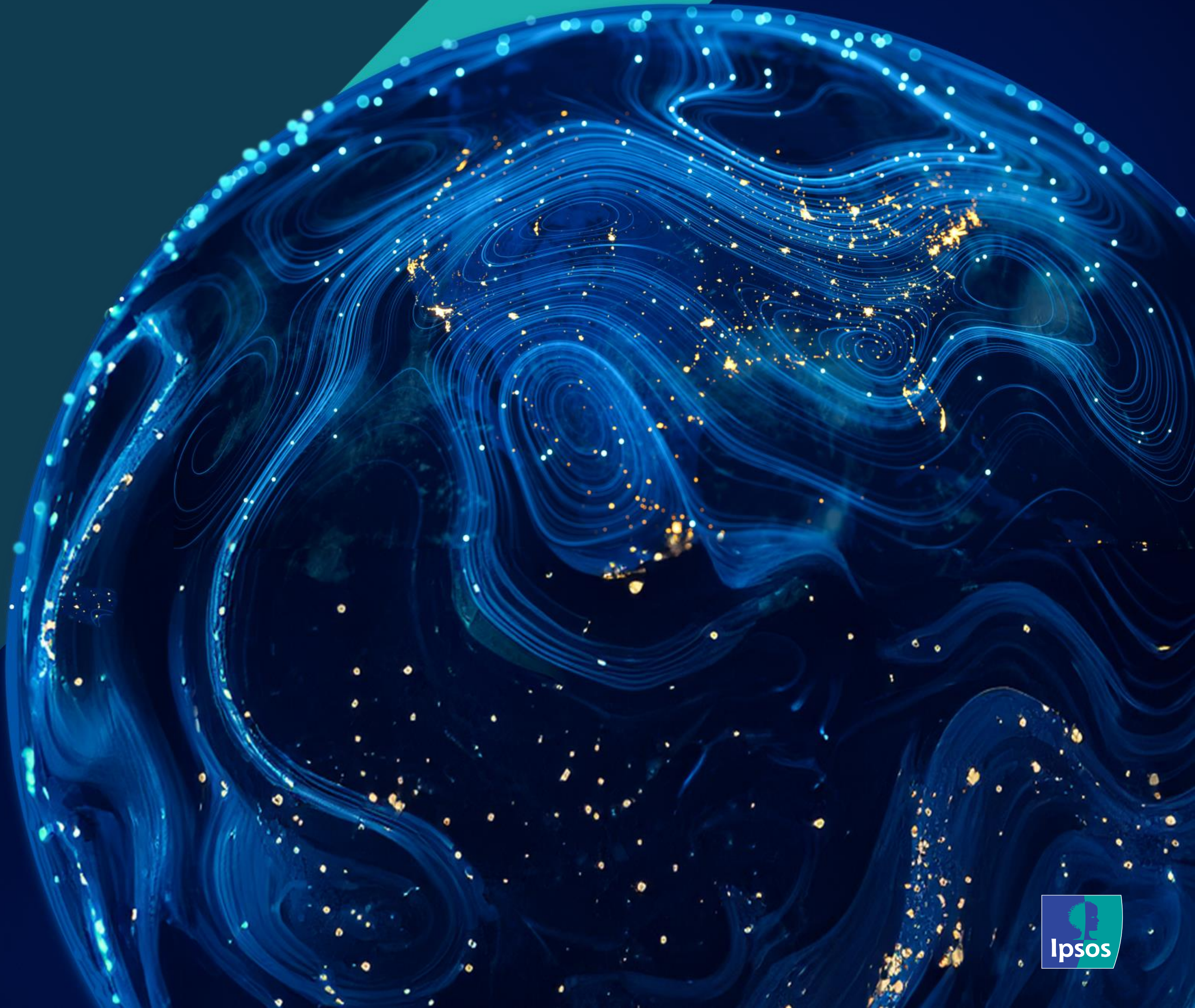
THANK YOU



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