POLARISATION, PESSIMISM AND POSITIVITY

IPSOS
GLOBAL
TRENDS

Contents

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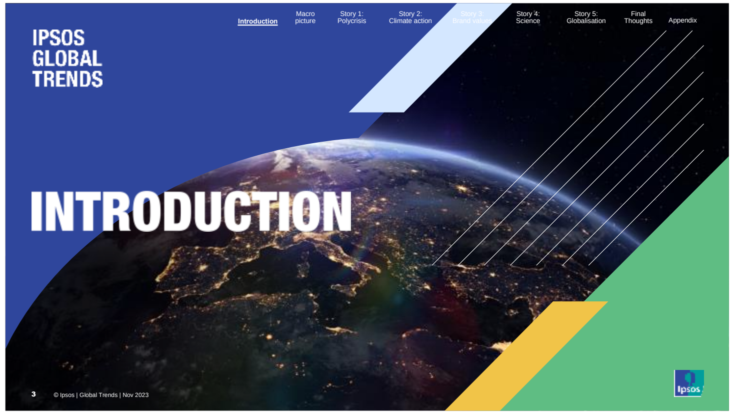

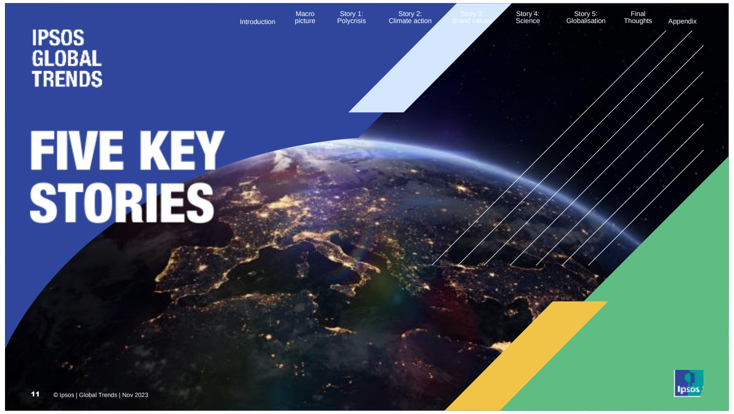

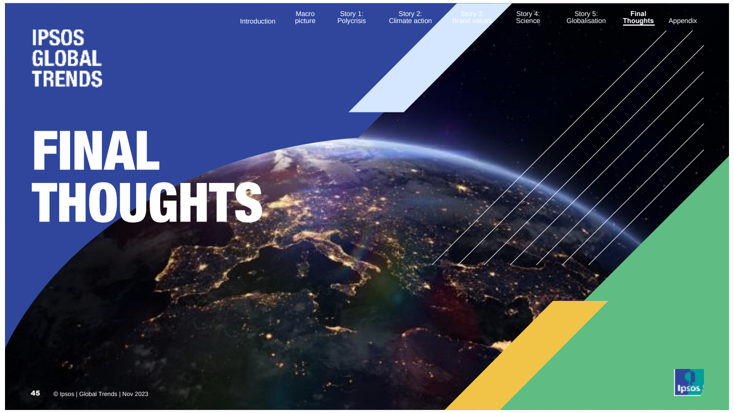

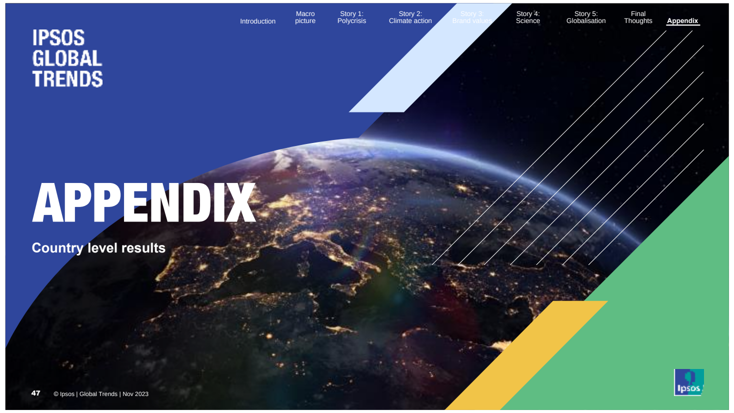

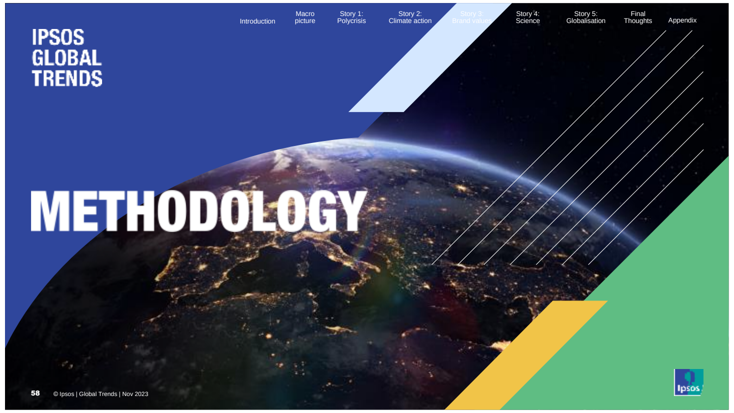

IPSOS GLOBAL TRENDS

INTRODUCTION

The persistent polarisation and pessimism of the polycrisis

As 2023 draws to a close, the polycrisis grinds on. Each component – political uncertainty, climate change, and war – has arguably worsened. This is reflected in our updated data and in the increasing sense of pessimism we felt as we wrote up the results.

And this is in the context of an explosive growth in artificial intelligence (AI), which is likely to create significant disruption to how we live, work, do business and run societies.

Earlier this year, we released our most ambitious Ipsos Global Trends[1] update since 2013. Here we update our analysis using 10 key data points.

We find some troubling negative shifts. Fewer than half think that their quality of life will improve over the next five years. And we find a yearning in a number of countries for a return to "how things used to be".

Today's crises can certainly feel overwhelming when you think about them. We see signs in the data that they are causing people to retreat and focus more inwardly on themselves and their world, rather than on the broader problems swirling around them:

- Many still think that we're headed for disaster if we don't act on climate change, though **the intensity has slipped**.
- As economies cool, people are **focusing more on price** than making sure the brands they choose align with their values.
- Markets with more developed health systems **are least likely** to say that "eventually all medical conditions and diseases will be curable". Perhaps this is a legacy of the decline in trust in science which we observed last year.

"We can see signs causing people to focus more inwardly on themselves and their world, rather than on the broader problems."

Where do we find positivity in the polycrisis?

Some crises are global in nature, like climate change. Others are more regional or local, such as the various ways economic uncertainty is playing out in different markets. Regional conflicts may initially seem limited in scope, but they possess the capability to escalate into wider confrontations involving numerous state and non-state actors. This has been evident in the Ukraine war and the war between Israel and Hamas, as well as in the 110 other armed conflicts currently monitored by the Geneva Academy of International Humanitarian Law and Human Rights.[2]

Despite this worsening geopolitical environment, the global public are not yet giving up on cooperation. We see no discernible trend away from the view that most people, in most countries, hold which is that globalisation is a positive influence on their country. And in a recent Ipsos survey, three quarters of people (73%) say that they are happy.[3]

Continuing to navigate the polycrisis means that we need to keep up to date with how trends are – and are not – shifting. In this report we discuss the Macro Forces combining to create greater issues and how some of the key issues that we have been tracking since 2013 are evolving. We hope you find it a useful update.

Get in touch with us via globaltrends@ipsos.com to discuss further.

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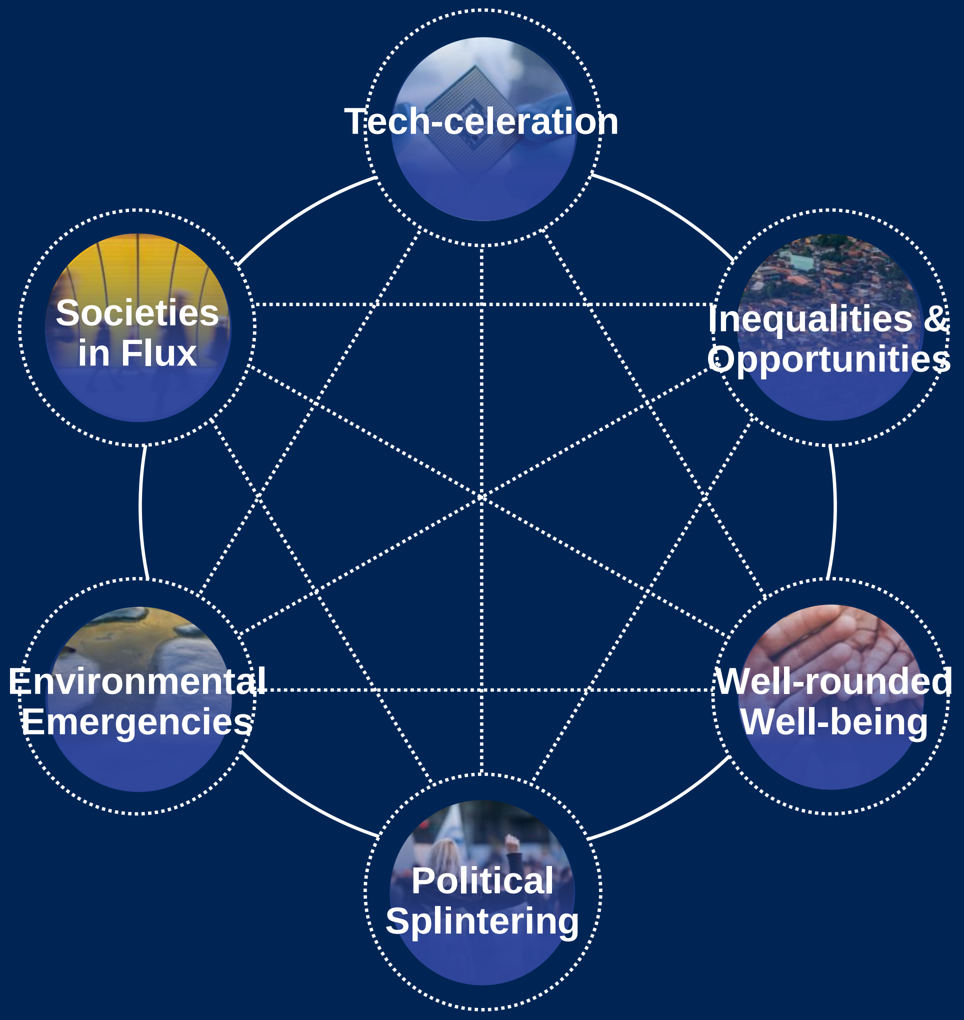
THE MACRO PICTURE

The Macro Picture

Our six global Macro Forces



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

A full breakdown of each of the Macro Forces and their underlying themes can be found here: https://www.ipsos.com/en/global-trends/macro-forces

An update to the macro picture

To bring this to life in our 2023 full edition of Ipsos Global Trends, we identified six Macro Forces and themes impacting the world. These are planetary-scale forces, which have been developing over time and have significant implications for all, including citizens, businesses, governments, and organisations, helping to explain what we are seeing at a human, attitudinal level in the data. Against the backdrop of the polycrisis, these forces interact, amplifying both positive and negative outcomes.

The rising frequency and severity of extreme weather events – from rainstorms in Hong Kong, forest fires in Canada, to the recent storm flooding in Libya that devastated coastal towns – highlight the eminent force of the climate emergency. However, in a world riddled with crises, including growing mental health issues, increased inequalities due to inflation, more frequent geopolitical conflicts, and in the context of the hyper development of artificial intelligence, planning for a single force is insufficient.

A comprehensive approach that considers the wider ecosystem is imperative.

Three macro challenges provide a closer look at the intricate interrelations of projections to 2050:

1. First, technology is a double-edged sword presenting both opportunities for societies, markets and people, but also exacerbating inequalities. Despite the anticipated universal internet access by 2050, today a third of the global population remains offline.[4] This digital divide is deepening social and economic disparities as technological advancements, such as AI and e-commerce, s-commerce,

m-commerce and q-commerce, surge forward. The call of the United Nations Under-Secretary-General for Economic and Social Affairs, Li Junhua, for an inclusive and equitable digital future,[5] underscores the need to address this challenge.

2. Second, migration driven by climate change, or political circumstances, is driving both environmental and advanced technological solutions, like smart cities, while simultaneously fuelling inequalities. With approximately two-thirds of the global population projected to live in urban areas by 2050,[6] the strain on infrastructure, housing, service delivery, and employment is escalating – particularly in regions experiencing urgent community migration due to environmental emergencies and conflict.

"Migration driven by climate change, or political circumstances, is driving both environmental and advanced technological solutions, while simultaneously fuelling inequalities."

3. Lastly, by 2050, the median global age will be 36 years,[7] rising from 30 today. This demographic shift accentuates a bifurcated world. While Western and some Asian countries grapple with ageing populations and associated workforce drain, social and health service pressure, and economic stagnation, Africa, the Middle East, and parts of Asia, with their youthful populations, could witness significant economic growth and transformation.

Given the interconnections and complexities across these Macro Forces, a systems thinking approach and collaborative foresight are essential for future planning. The goal is to balance the needs of today with those of the future: ensuring digital strategies do not exclude a third of the world, accommodating urban housing needs without exacerbating environmental and inequality issues, and preparing for an ageing society without neglecting the younger populations. The solution to the polycrisis lies not with a single actor, but in collaborative efforts to navigate the intricate dynamics within the change ecosystem.

"The solution to the polycrisis lies not with a single actor, but in collaborative efforts to navigate the intricate dynamics within the change ecosystem."

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FIVE KEY STORIES

Five key stories

1. The polycrisis wears on

2023 has been a challenging year marked by multiple global crises. This has led to a decline in optimism about the future, with only a third across 31 countries believing their quality of life will improve significantly in the next five years. Furthermore, there is wide country-level variation reflecting the very different realities worldwide.

Read more

2. Climate action collides with reality

The green transition is under way, with countries legislating their commitments to net zero. Dealing with climate change is still important for a large majority around the world. However, people are becoming more cautious in their attitudes towards climate change, as they are also dealing with rising cost-of-living pressures.

Read more

3. Brand values lose ground to value brands

The continued rise of brand/value alignment is another casualty of tougher economic times. Consumers are becoming more cautious with their spending and are less likely to buy brands that reflect their personal values. This trend is more pronounced in developed markets and among lower-income and less-educated consumers.

Read more

4. Science faces headwinds

Science and scientific professions remain highly trusted in countries around the world, but sentiment is flat or declining rather than increasing, despite the many significant discoveries that science continues to make. In every region, the trend for optimism about science is downward.

Read more

5. Globalisation: a local story

The improved standing of globalisation has been one of the key stories throughout the ten years of Ipsos Global Trends. This year, as globalisation comes under increasing strain, we see this value holding steady – but showing localised signs of tension that point to further change in the years ahead.

Read more

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1.

The polycrisis wears on, feeding nostalgia and pessimism

Enduring polycrisis

How has it felt to live through 2023?

Life in a time of polycrisis appears to have sapped longer-term optimism for many people around the world.

Looking to our measures of consumer confidence,[8] just 35% of the public across the 31 countries think their quality of life will be much higher in five years' time compared with today. While this is higher than the 25% who disagree, it is hardly a ringing endorsement of the future and suggests hesitancy from many. Furthermore, there is wide country-level variation reflecting the very different realities worldwide: two-thirds of Indians expect far better living standards in the future, compared with just 4% of Japanese citizens.

There is an argument that responses to this question are driven by dissatisfaction with the present day. For some, it appears to be a case of "things can only get better". Sixty-one per cent of Argentines and 54% of South Africans agree their standard of living will be much higher in five years' time – perhaps because both countries have experienced significant economic and social issues in 2023.

But for other countries, we see evidence of the powerful optimism that dwells in many emerging markets – 61% of Colombians, 54% of Chileans and 53% of Indonesian citizens expect big increases in their standard of living.

Enduring polycrisis

Losing faith in the future?

Others, especially in Europe, are gloomier. After Japan, just 14% of Belgians and 15% of French people expect a higher quality of life in half a decade.

This end of year update exposes what happens among a public who lose faith in the future: a rise in nostalgia.

Ipsos has asked citizens around the world whether they would like their country to be "the way it used to be" for a decade now. While some countries like Great Britain have always been nostalgic, we also see some new entrants to the club.

The top five biggest risers on this measure expose an intriguing mix of societies in rapid flux. Top of the list are China and Sweden, where the proportion looking back at their country through rose-tinted glasses has risen by 37 and 35 percentage points respectively over the ten-year period. Most strikingly, China's increase has all come in the post-COVID world: in late 2020, just 18% agreed, compared with 59% today.

Close behind is Indonesia. Even though the country has only been part of Ipsos Global Trends since 2016, over that time the proportion of nostalgics has risen 34 points.

Rounding out the top five are Brazil (+24ppt) and Germany (+23ppt) – both countries where the past means something rather different and more positive than it did ten years ago.

Despite this nostalgic mood, there has been no real change in the number of global citizens who think that the world today is changing too fast (75% in 2013 Vs 76% in 2023). The pace of change is always a concern, no matter how unstable the macro context is.

"There is wide country-level variation reflecting the very different realities worldwide: two-thirds of Indians expect far better living standards in the future, compared with just 4% of Japanese citizens."

Enduring polycrisis:
Views from our regions

Not all regions are pessimistic, according to our regional and local market experts. At least not in the same ways. For instance, while most (61%) Chinese consumers said they would maintain or increase overall spending in 2023, there is caution about big purchases. Nostalgic marketing has appeal in **China**, but living in the moment is preferred. So, spending will focus on daily necessities and experiences like domestic travel.

In contrast, there is a sense of hopelessness and despondency among **South Africans** as the promises of the post-democratic rainbow nation remain broadly unrealised. In his inaugural address as South Africa's President, Cyril Ramaphosa promised a "New Dawn", igniting a surge of optimism. But now only 51% of South Africans are proud of their country (compared to the 70% global average). However, due to South Africa's history, although they are pessimistic about the future, they do not necessarily long for the past.

Italy, meanwhile, is facing a perfect storm of crises that darkens the future outlook for Italian citizens. Only 28% expect a better quality of life in five years, while 57% nostalgically remember Italy's past, a trend unchanged over the past decade.

Latin America shows greater optimism overall, with expectations for improving quality of life, but tensions over economic and political instability foster some nostalgia in countries like **Argentina** and **Brazil.**

Finally, **US** consumers have shown remarkable resilience in spending and travel despite inflation, cushioned partly by pandemic savings. Their outlook seems more positive than most other regions.

"There is a sense of hopelessness and despondency among South Africans as the promises of the post democratic rainbow nation remain broadly unrealised."

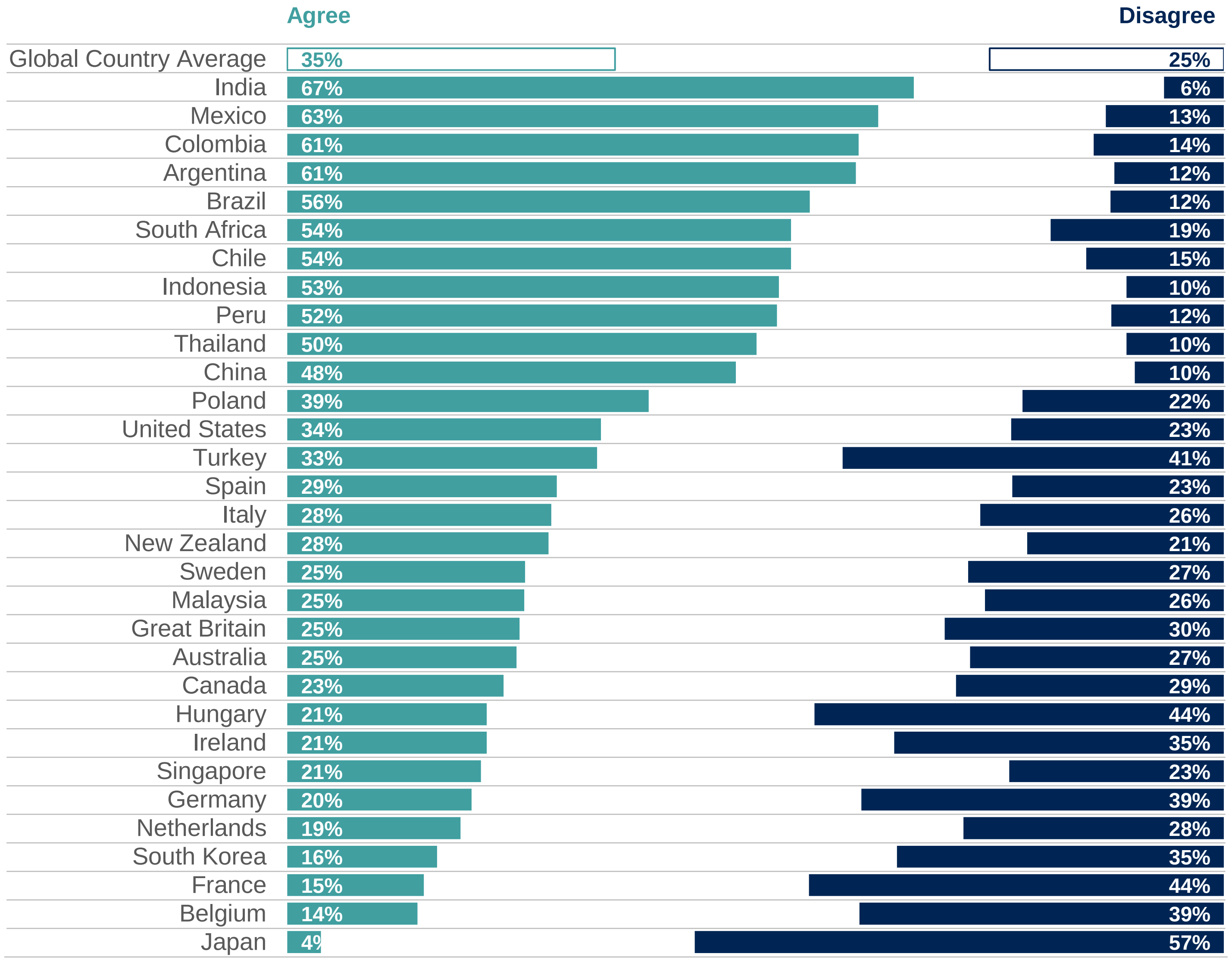
Fewer than half expect a better quality of life five years into the future – especially in Europe and Japan

QUESTION:

"I expect my overall quality of life to be much better in 5 years than it is now"

% agree (6-7 out of 7)

% disagree (1-3 out of 7)



Ipsos Global Consumer Confidence Index – 24,220 participants across 31 countries, interviewed online 22 September – 6 October 2023

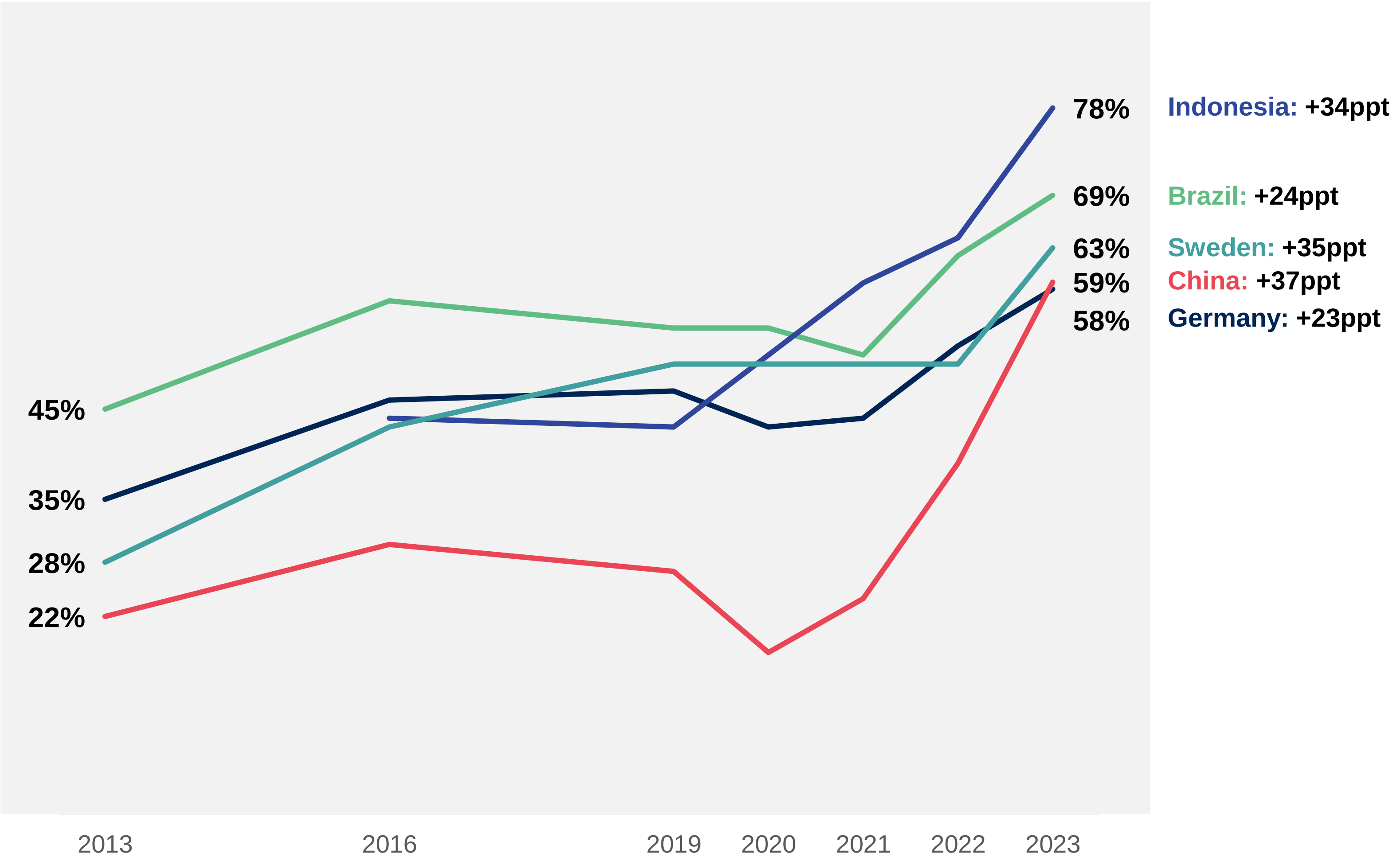
Online samples in Brazil, China, Chile, Colombia, Indonesia, Ireland, Malaysia, Mexico, New Zealand, Peru, Singapore, South Africa, Thailand, and Turkey tend to be more urban, educated, and/or affluent than the general population

Countries with the biggest increase in nostalgic sentiment over the past decade

QUESTION:

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

% agree



Ipsos Global Trends Series: 500-1,000 adults aged 16-75 per market per year

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2.

Climate action collides with reality

Climate as *a* priority, not *the* priority

The reality of transition

The hard work of the green transition has begun. Warm words and statements of intent at green gatherings like COPs 26 and 27 are now being legislated into reality. The long road to net zero now stretches out before many countries who have made these commitments.

This reality has also broken on the global public at the same time as rising cost-of-living pressures. As a result, Ipsos Global Trends records a cooling of public attitudes.

Dealing with climate change is still important for a large majority around the world – as in our update earlier this year, there is no country where less than half of people agree that we are headed for environmental disaster unless we change our habits quickly.

The Dutch are most sanguine on this point, but still 60% agree this is the case. Agreement rises to around nine in ten in emerging markets who are more exposed to our increasingly unpredictable world: 93% in Indonesia and 87% in Thailand.

"The hard work of the green transition has begun. This reality has also broken on the global public at the same time as rising cost-of-living pressures. As a result, Ipsos Global Trends records a cooling of public attitudes."

Climate as *a* priority, not *the* priority

A new normal for green aspirations

This update reinforces the conclusions from other Ipsos series such as Earth Day and our sustainability segmentation: people are considering the issue of climate in the round alongside other factors such as their personal economic circumstances, convenience and security.

Across the 26 countries who were included in Ipsos Global Trends in both 2023 and 2022, agreement that we are headed for environmental disaster without changing our habits has slipped in 22 of them.

Movement is more limited in emerging markets: we see an increase of three points in Argentina and a one-point rise in Indonesia, and small drops for Chile (-1) South Africa and Singapore (both -2). Canada, Poland, China and Australia have also not changed their minds significantly (a drop of -3).

The biggest changes come in developed economies who have publicly positioned themselves as leaders of the green transition – agreement has dropped by 14 points in Germany, 11 points in Great Britain and nine points in Italy.

This is a potentially troubling development: the success of the green transition will require sustained commitment from governments, societies and businesses to make the necessary sacrifices.

It makes climate leadership even more important – unless leaders can paint a positive image of a net zero world and the path required to reach it, public attitudes could cool further in the coming years.

"Unless leaders can paint a positive image of a net zero world and the path required to reach it, public attitudes could cool further in the coming years."

Climate as *a* priority, not *the* priority:
Views from our regions

The climate crisis won't play out evenly across all regions and nor will the response to it. There are signs in some areas that we are prioritising more immediate crises, according to our experts in each region.

Latin America, for instance, demonstrates high awareness of climate impact, but addressing daily needs often takes precedence over changing habits.

Likewise, **South Africans** recognise the threat of climate change but look to government to prioritise other challenges first.

Italians see climate change as a grave global threat worsened by human activity and requiring urgent action to avert disaster. Though considered a priority issue, climate still trails unemployment, inflation and poverty, according to Ipsos' October 2023 What Worries the World study.[9]

The **US** is facing active political backlash to climate efforts beyond the longstanding thread of climate change denialism. That shows in the erosion in commitment to environment and sustainability-related issues like ESG. Backlash against "woke" corporate values has led brands to shy away from taking a stand on these topics or even to conceal continued efforts. Some connect this to a broader "anti-woke" movement. Forbes[10] notes that mentions of ESG and DEI declined on earnings calls but rose in proxy statements – indicating that companies may be continuing these initiatives, but not talking about it.

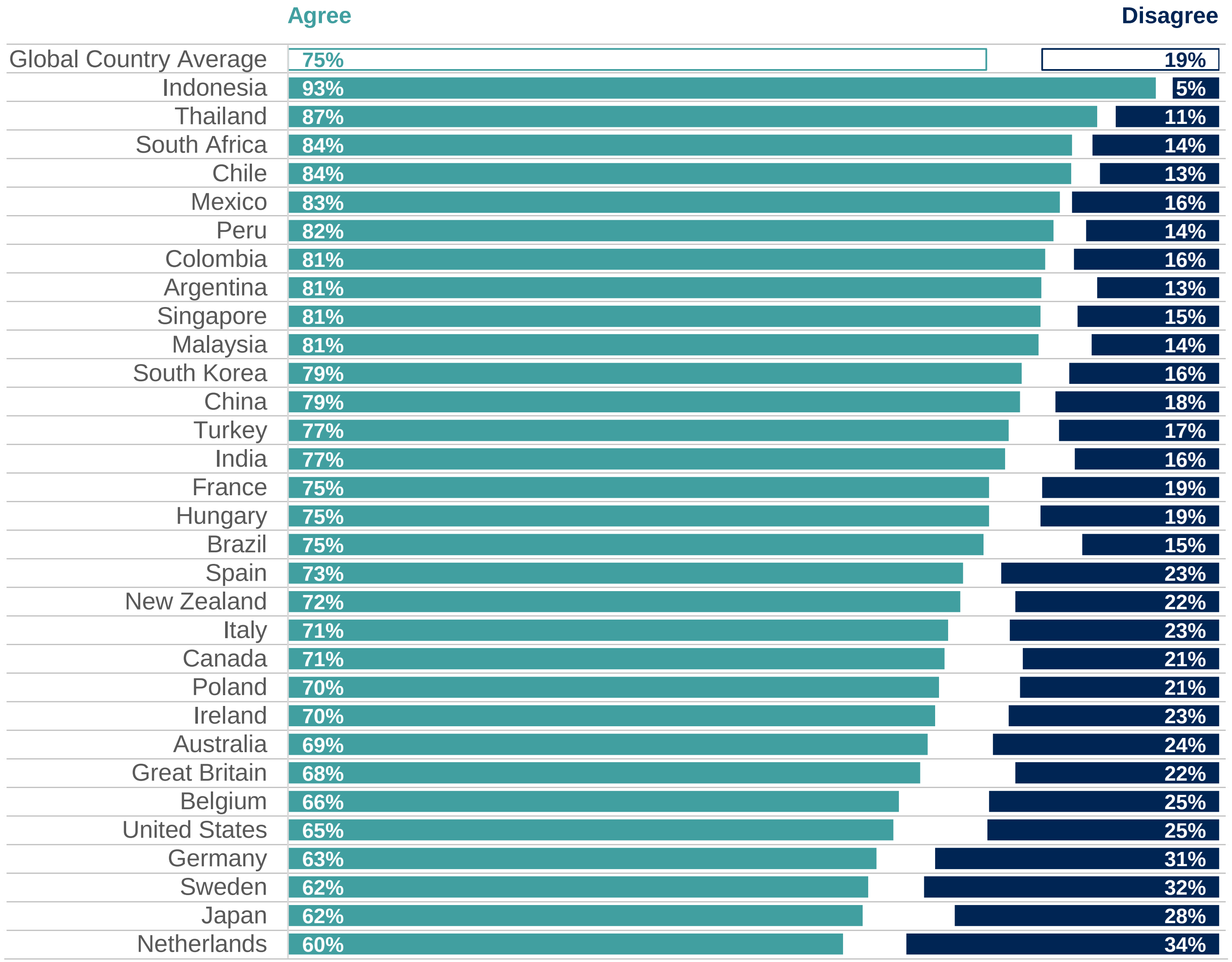
And in **China**, the new energy industry extends beyond vehicles to renewables like solar and biomass, with China leading in new energy production and efficiency improvements. Therefore, China remains committed to climate leadership to reduce both emissions and public anxiety.

"The US is absolutely losing traction on all things ESG including sustainability.
There has been much debate around "woke capitalism" and new companies are starting up specifically to not have "liberal woke values."

The argument has been won: around the world we agree we urgently need to act on climate…

QUESTION:

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



Ipsos Global Trends 2023 – 24,220 participants across 31 countries, interviewed online 22 September – 6 October 2023

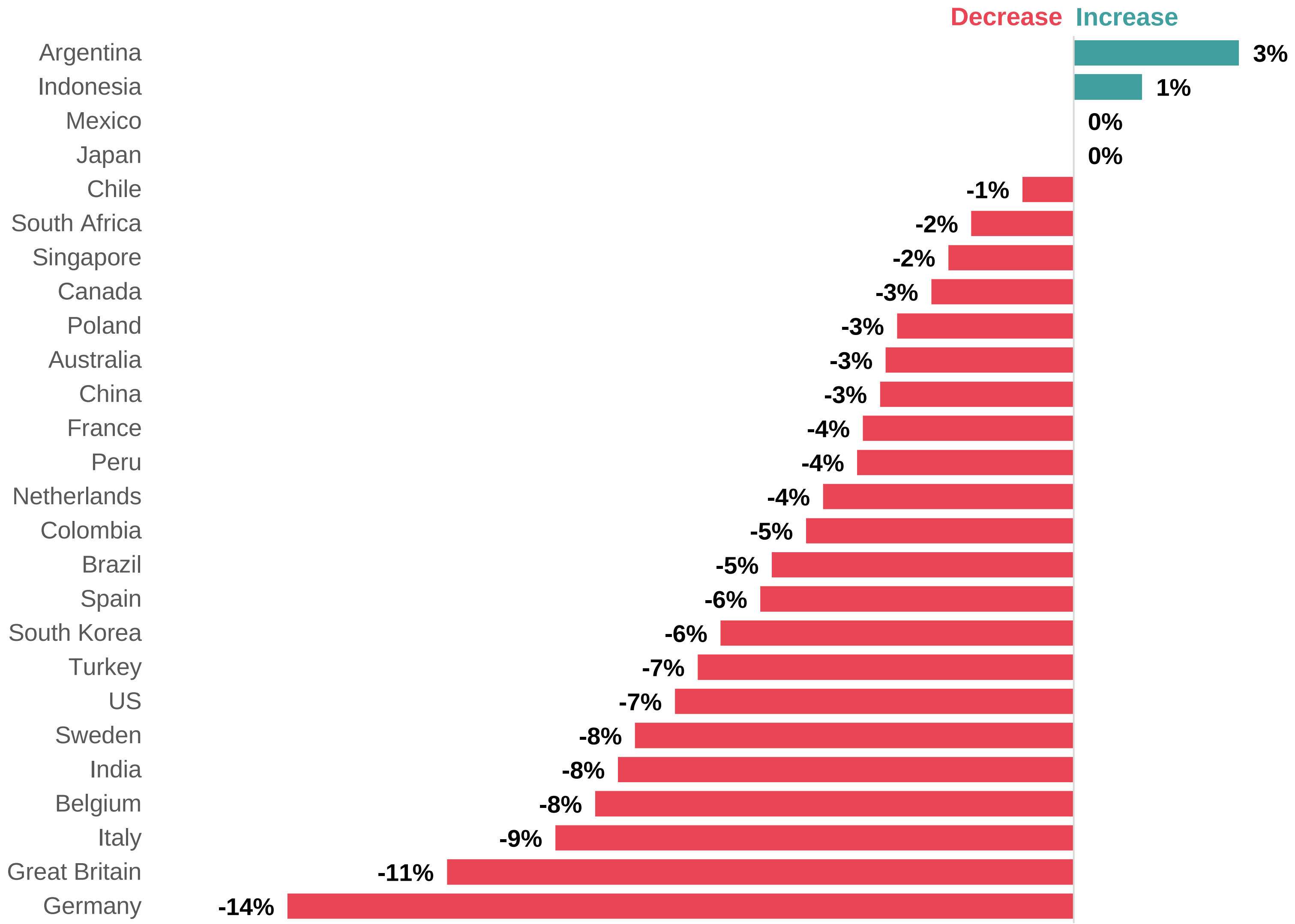
Online samples in Brazil, China, Chile, Colombia, Indonesia, Ireland, Malaysia, Mexico, New Zealand, Peru, Singapore, South Africa, Thailand, and Turkey tend to be more urban, educated, and/or affluent than the general population

…But the intensity has slipped since 2022

QUESTION:

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

Change in agree, 2022-23



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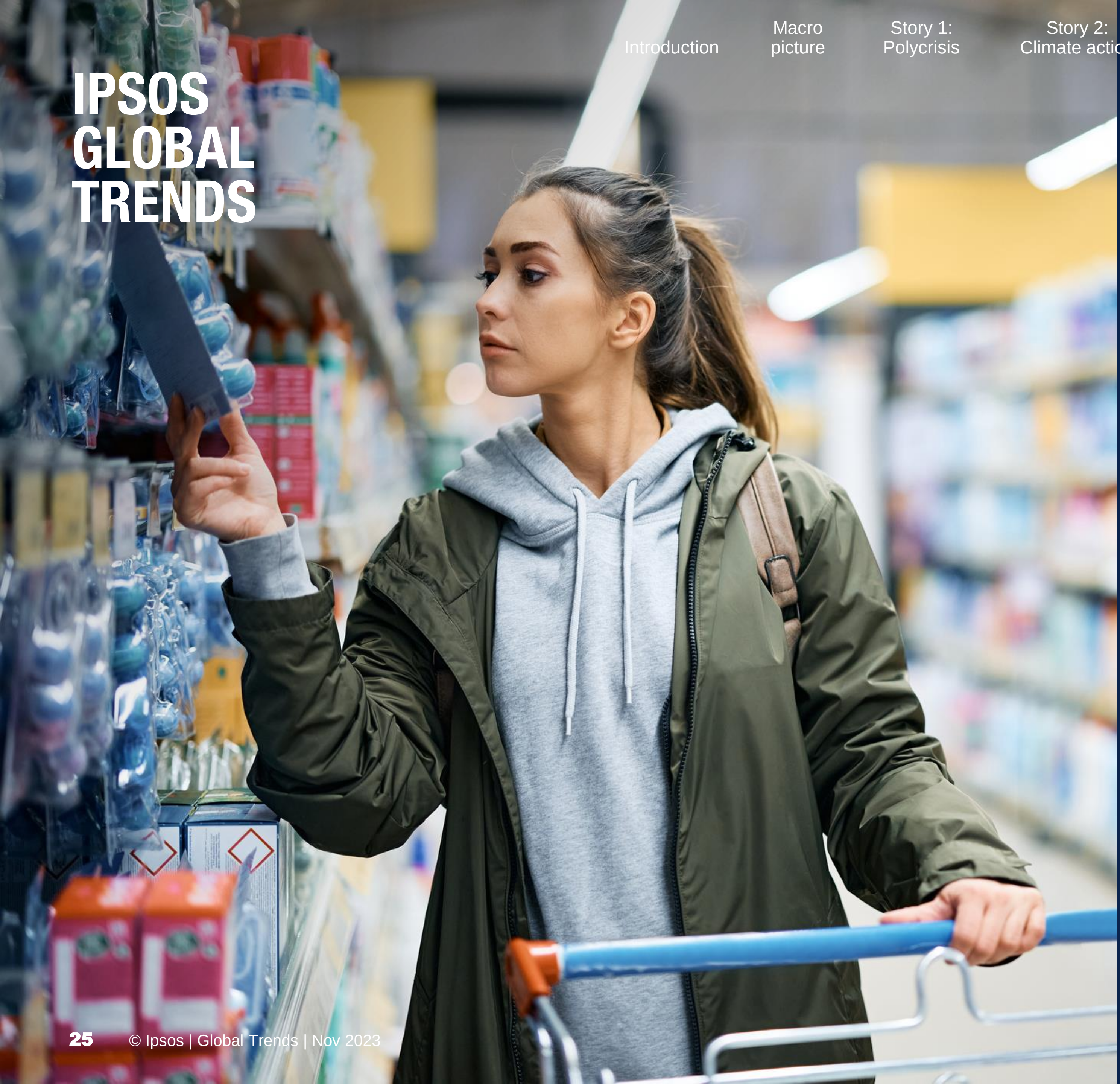


3.

Brand values lose ground to value brands

Brands values versus value brands

The onward rise of brand/value alignment is another casualty of more economically difficult times.

This year's update marks the first time in a decade, in a wide range of markets, that the proportion who say they tend to buy brands that reflect their personal values has fallen: a drop of three percentage points to 57% in Great Britain; down five points in the US to 61%; and a nine-point fall to 52% in France.

This trend is also observed in emerging markets, where agreement with this statement tends to be higher: with significant drops between 2021 and 2023 in Turkey, Singapore and South Africa.

But it remains the case that emerging markets lead on this question, likely reflecting the more affluent samples we deal with in many of these markets: the top three countries in agreement are Indonesia, China and India (89%, 84%, 79%) while the bottom three are the Netherlands, Hungary and Japan (49%, 46%, 41%).

The importance of affluence to brand values is underlined by analysis of the views of different income groups. While brands with value have appeal to people across different groups, the strongest preference is among those who have attained high education levels or have more income.

Across the 31 countries of the study, 61% agree that they tend to buy brands that reflect their personal values, while 30% disagree – a trend mirrored across most demographic groups.

61%

Across the 31 countries of the study, six in ten agree that they tend to buy brands that reflect their personal values, while 30% disagree.

Brands values versus value brands

But the argument is much closer among those from lower income groups: a little over half (55%) agree they tend to buy brands that reflect their personal values while a third (34%) disagree. But there is a strong contrast with higher income individuals: two-thirds (67%) agree and just one quarter (27%) disagree.

The pattern is repeated for education: a closer-run contest among those with fewer educational qualifications (52% versus 36%) and a much more one-sided debate among those with the highest educational attainment (67% versus 26%).

After a few years where brands with value have grown in appeal, our new economic reality suggests they are becoming more of a luxury for those with the means to choose it. For lower income and educational groups, the focus appears to be returning to value brands.

"After a few years where brands with value have grown in appeal, our new economic reality suggests they are becoming more of a luxury for those with the means to choose it."

Brands values versus value brands:
Views from our regions

How is this tension between values and value playing out regionally?

Just as we are seeing inflation and price hikes shift our attention from the climate crisis, we're also seeing these competing crises change our relationship to brands. Before the pandemic, consumers were looking beyond themselves and thinking about "the world", not just their world. With ongoing economic strains, attentions are shifting back to "me" and "my world".

One theme we hear across regions and countries is a renewed interest in private label products. **Latin Americans** tend to prioritise personal wellbeing in purchases, maximising benefits and turning to private labels amidst instability. As are **South Africans**, also facing economic challenges, who increasingly trust and purchase private label products over name brands.

Italians reveal skepticism of brand values. Brand activism must translate to real economic support, not just "values washing". Global brands are perceived as superior.

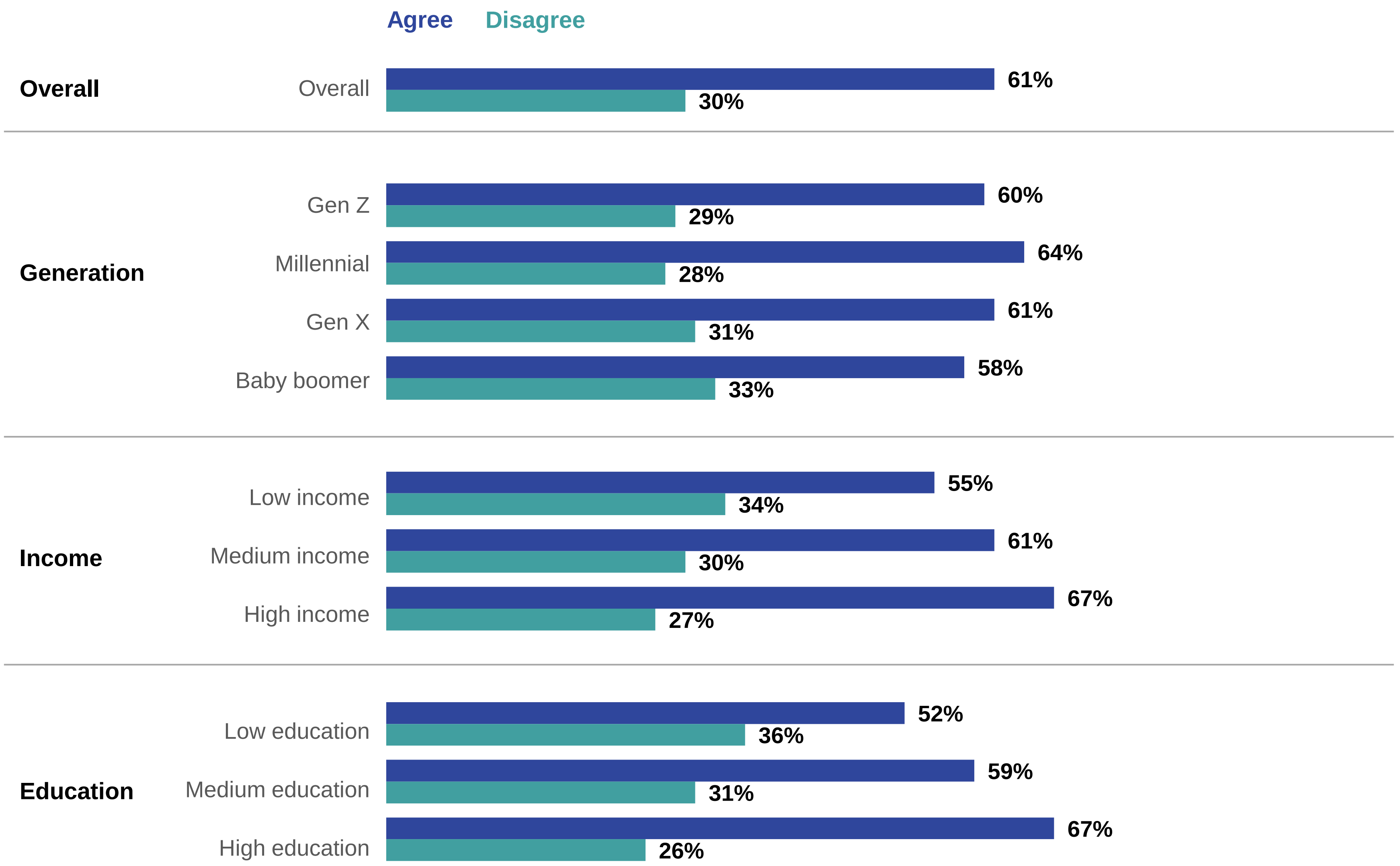
In the **US**, convenience and cost trump values for many consumers, especially given economic disparities. Values-based buying is becoming a luxury pursuit for many consumers, especially given economic disparities – for example, electric vehicles are increasingly positioned as premium purchases, not just reflecting their costs but associating sustainability with aspiration that warrants higher prices.

"In Latin America, people are prioritising the wellbeing of themselves and their loved ones. This is reflected in the growth of private label brands, and greater presence of hard discounters and convenience stores."

Brand values for the affluent and educated, value brands for the less well-off

QUESTION:

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



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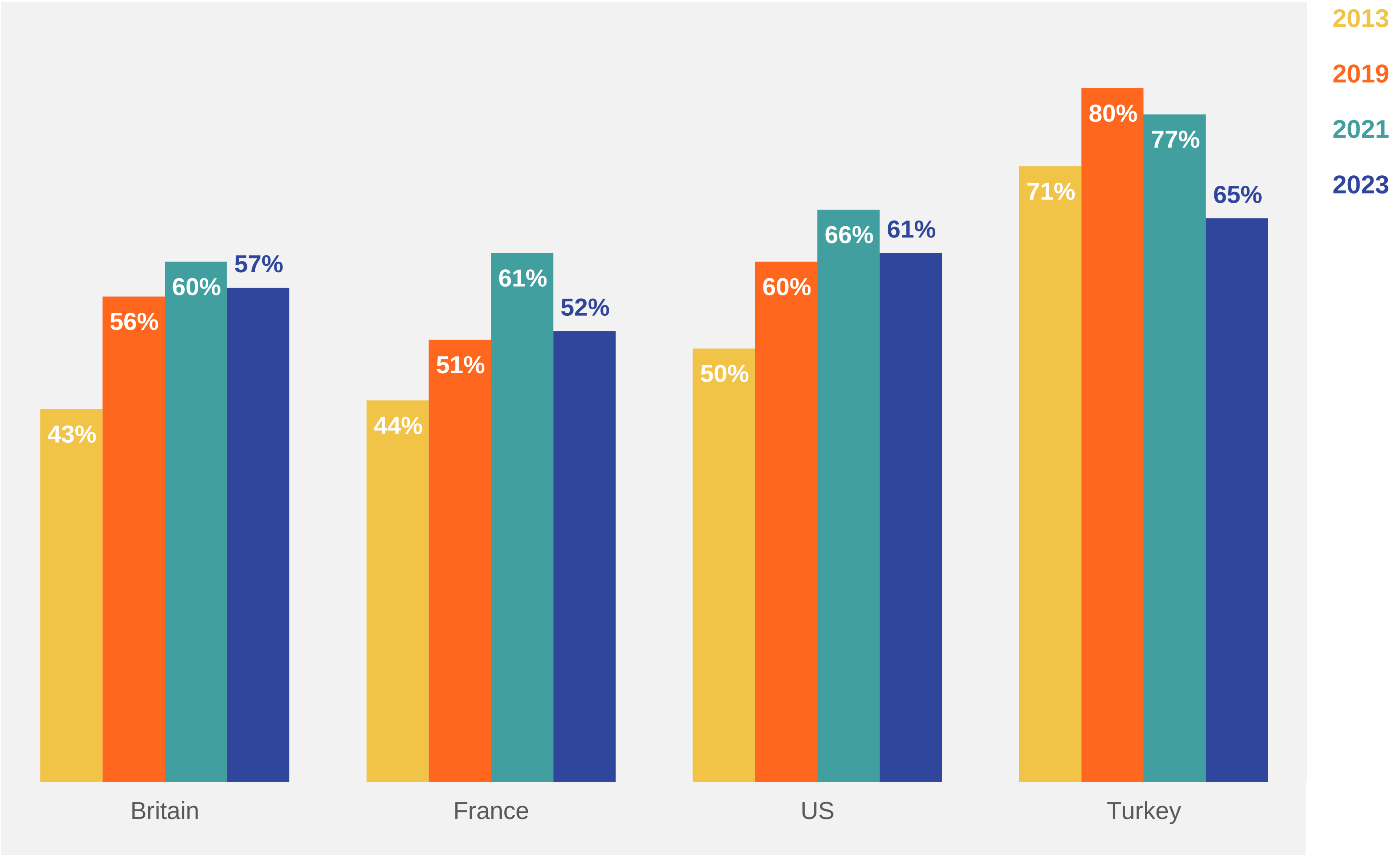
The appeal of brand values falls back

QUESTION:

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

% agree



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4.

Science faces headwinds

Science faces headwinds

The blistering pace of the scientific response to the pandemic was a shot in the arm for the scientific community. The first vaccinations against the disease were developed within a year of the outbreak and the public reaction was positive towards those who developed, ordered and administered the shots.

Yet, a few years on, much of that good feeling has dissipated. Most notably, politicians have lost the minor gains they made in the public eye – indeed many democratic leaders lost their positions for reasons tied to how their country fared during the early years of the pandemic.

Science and scientific professions remain highly trusted in countries around the world, but sentiment is flat or declining, rather than increasing. We saw this last year on climate, where the proportion agreeing that "even the scientists don't really know what they are talking about on environmental issues" rose across a range of countries.

Does it still provide us with answers?

Science continues to make significant discoveries that are reshaping our world:

- Earlier this year, the US regulator the Food and Drug Administration (FDA) approved the use of a new drug that slows the progression of Alzheimer's disease by 27% in an 18-month period.[11]
- The WHO has recently approved a vaccine against malaria, which offers hope that we have turned a corner against a disease which still kills hundreds of thousands of people a year.[12]

"Science and scientific professions remain highly trusted in countries around the world, but sentiment is flat or declining, rather than increasing."

Science faces headwinds

Yet despite this, across a range of countries we see the belief that science will cure all diseases is diminishing. Overall, a bare majority (51%) agree that "eventually all medical conditions and diseases will be curable", with emerging economies remaining more optimistic on this front.

But the trend is strongly downward: in only five of the 31 countries (Italy, Netherlands, Australia, Thailand and Colombia) has agreement increased between 2022 and 2023. In the other 26 there has been a decrease or no change – including a 16-percentage point drop in Poland, a fall of 15 points in Peru and a 12-point decline in New Zealand.

This disenchantment is centred over Latin America: there has been a ten-point fall across the six countries surveyed in 2022-23. But in every region, the trend for optimism about science is downward.

"Overall, a bare majority (51%) agree that "eventually all medical conditions and diseases will be curable", with emerging economies remaining more optimistic on this front."

Science faces headwinds:
Views from our regions

Some markets are seeing a tension between trust in science and healthcare broadly as the pandemic and disinformation surrounding it led to dents in the reputation of these normally highly trusted fields. But not in all markets. In **South Africa**, for instance, our experts don't see it playing out at all.

In **Italy** and in **Latin America**, trust is very high for doctors and scientists but more mixed for the healthcare system itself. The pandemic revealed strengths like adaptability, but doubts linger about how prepared we are region to region for the next pandemic. Many Latin Americans have a perceived growth in alternative, natural therapies.

The **US** data does not indicate a clear theme, but potential links could be made to broader distrust in institutions and loss of faith across sectors like higher education.

One related theme that is playing out in every region is a growing worry about artificial intelligence. At the end of 2021 and again in mid-2023, Ipsos asked people in 24 markets if "products and services using artificial intelligence make them nervous".[13] Overall concern was up 12 points in just 18 months, with increases occurring in every market surveyed. We have also seen a 7-point increase in people thinking that artificial intelligence "will profoundly change my daily life" in the next 3-5 years.

"Doctors and scientists are the professional figures that enjoy the highest level of trust among Italians (60%), more than three times that of politicians (17%). The same cannot be said for the healthcare system as a whole."

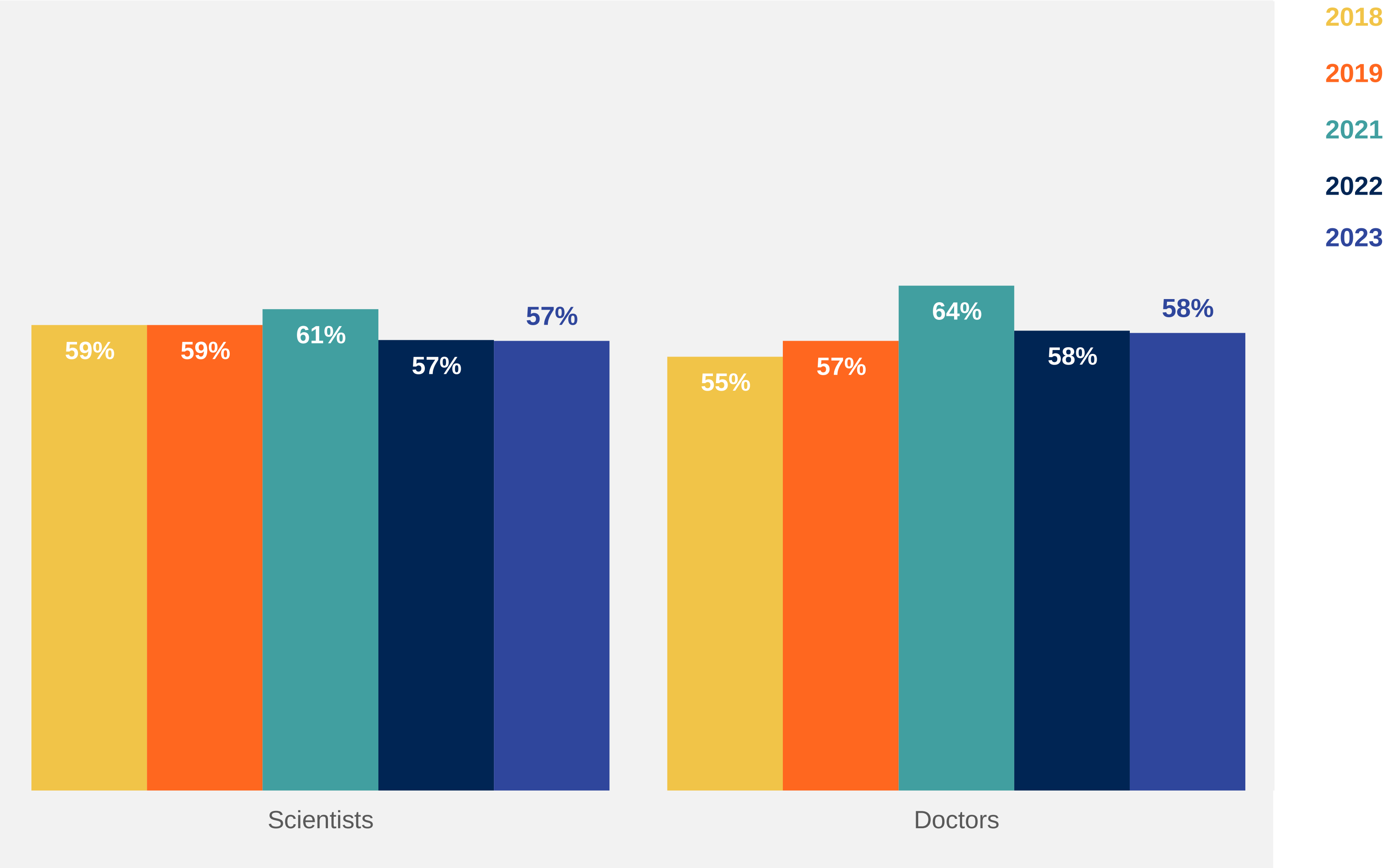
The bigger picture: science professions remain highly trusted, despite the end of the COVID boost

QUESTION:

Please look at this list of different types of people. In general, do you think each is trustworthy or untrustworthy in your country?

Please use a scale of 1 to 5, where 1 is very trustworthy and 5 is very untrustworthy

% trustworthy (1-2)



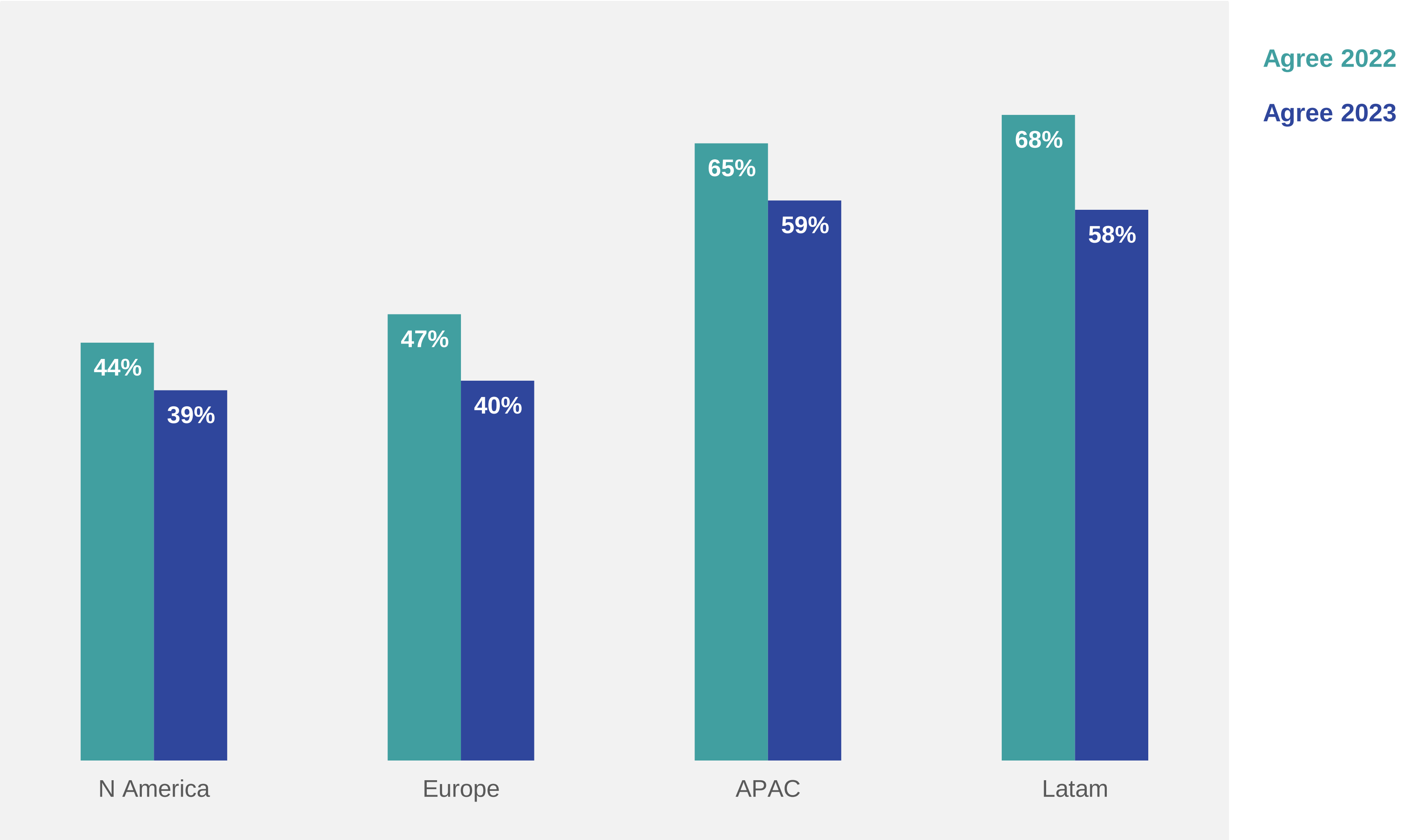
Ipsos Global Trustworthiness Index: Scores presented here are based on a 22-country average covering only those countries which have participated in all previous waves of the survey. Note that Russia was included in previous waves but has been omitted from 2022 onwards, meaning the 2022 figures do not reflect the same sample as 2021 or previous waves. China was also omitted from the 2023 wave, meaning that the 2023 figures also do not reflect the same sample as 2022.

But belief that medicine will cure us all has fallen – most strongly in Latin America

QUESTION:

"Eventually all medical conditions and diseases will be curable"

% agree 2022-2023



Ipsos Global Trends 2023 – 24,220 participants across 31 countries, interviewed online 22 September – 6 October 2023

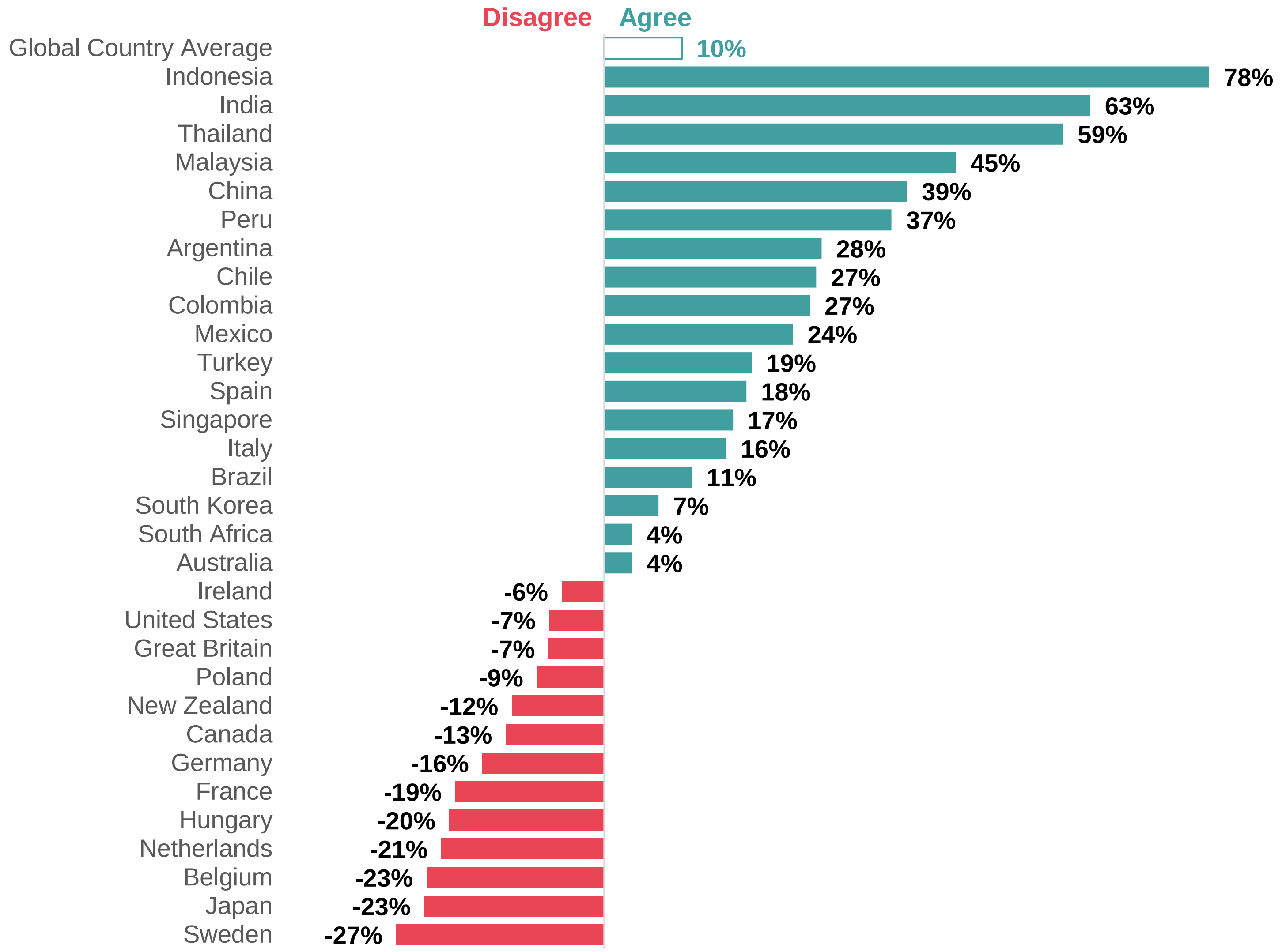
Online samples in Brazil, China, Chile, Colombia, Indonesia, Ireland, Malaysia, Mexico, New Zealand, Peru, Singapore, South Africa, Thailand, and Turkey tend to be more urban, educated, and/or affluent than the general population

However, the world is still split on this issue between more optimistic emerging markets and the pessimistic/realistic developed world

QUESTION:

“Eventually all medical conditions and diseases will be curable”

Net agree



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IPSOS GLOBAL TRENDS

5.

Globalisation: a local story

Globalisation holds steady

If the macro story for globalisation has been one of rearmament, walls being erected and trade being slowed, then we see a different picture for public opinions and values.

The improved standing of globalisation has been one of the key stories across the ten-year life of Ipsos Global Trends. Even in countries that are more resistant, the trend has been upward over time.

This year, as globalisation comes increasingly under strain, we see this value holding steady – but showing signs of tension that point to strongly contrasting public responses over the coming few years.

Views on globalisation plateau…

Across the 31 countries of this year's study, there is no strong pattern to change in whether people feel globalisation is good for their country. We see agreement compared with 2022 fall most notably in markets like Turkey (-15ppt), Colombia (-13) and Brazil (-11) – but in all three countries a majority still agree. This is also balanced out in the global view by strong increases in agreement in Chile (+16ppt) and Thailand (+7).

…views on global brands fall back, but are becoming more global

The proportion who agree that "global brands make better products than brands which are just local to my country" has fallen across a range of countries this year. But the bigger picture is more noteworthy.

"If the macro story for globalisation has been one of rearmament, walls being erected and trade being slowed, then we see a different picture for public opinions and values."

Globalisation holds steady

Historically, agreement with the statement that “global brands make better products than brands which are just local to my country” has been lower in developed economies (and typically lowest in France), and higher in emerging economies. Yet over the pandemic and into this new era, agreement has risen in the developed world, while falling in the emerging economies. The result is that this balance between global and local is more even, in a wider range of countries, than it was ten years ago.

Despite the appeal of global brands falling a little this year, their appeal is becoming more globalised – and is coming into tension.

What does “made in China” mean now and in the future?

Nowhere typifies this story better than China. In 2019, half of Chinese citizens agreed that global brands made better products and four in ten disagreed. In the pandemic this was inverted, with a powerful focus on the local. But since 2022, the question of whether global or local is better has split opinion almost down the middle.

This suggests a tension in which claims denote quality to Chinese citizens. Will the label “made in China” become a mark of higher quality in future, or will people in China look to global and international brands?

Globalisation holds steady:
Views from our regions

The trends about globalisation are not… global. They play out very differently region to region and country to country, according to our experts.

In **China**, both the government and consumers have embraced globalisation with a more friendly outlook, and fewer restrictions on imported products that meet national requirements. As a result, Chinese brands are seeking opportunities to fuel business growth. The focus on building global brands and increasing exports has become particularly important as domestic growth has slowed down. Notably, China's vehicle exports have experienced significant growth, surpassing even that of **Japan**.

South Africa shows a different view, with rising anti-immigrant sentiments as locals and immigrants compete over scarce jobs and resources.

Italy's views are mixed. Technological advancement is bringing anxiety over excessive change, while globalisation divides opinion. Only one in two (49%) Italians are convinced that this internationalisation is beneficial for their country. However, Italians agree that wealthier nations should support poorer ones on health, which, as the pandemic has taught us, connects individuals beyond any border.

In the **US,** fluctuating opinions on globalisation may stem from the contrast between information scarcity experienced by previous generations and today's interconnectedness. Whereas geographical isolation in the US used to be a barrier to learning more about the world around it, today's rapid communications bring exposure that is both positive (excited about new tech product launches) and negative (awareness of the poor labour conditions under which some of their favourite products are manufactured).

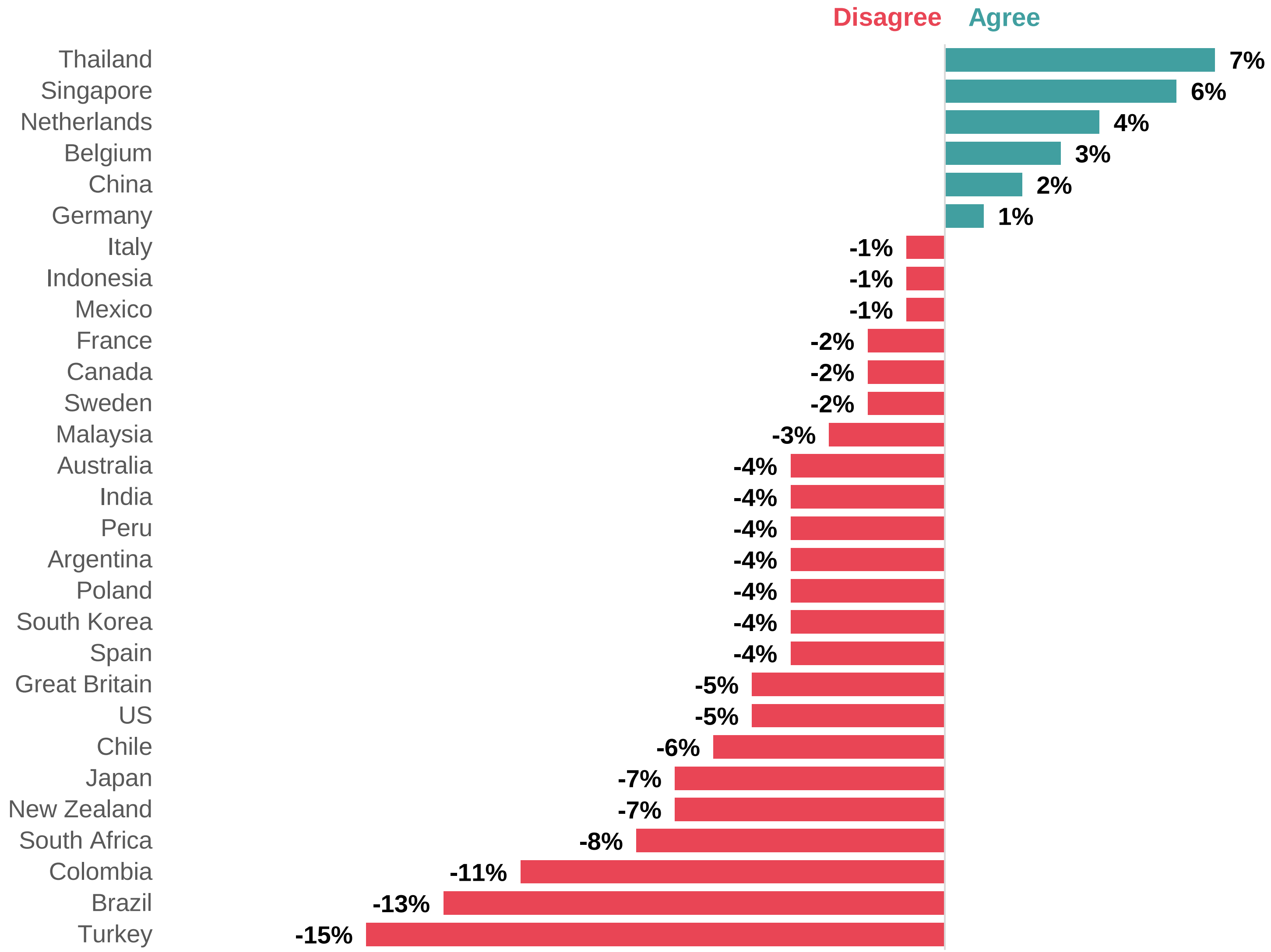
"In China, the focus on building global brands and increasing exports has become particularly important as domestic growth has slowed down."

Perceptions are changing slightly at the country level but no overall pattern

QUESTION:

"Globalisation is good for my country"

% change in agree, 2022-3



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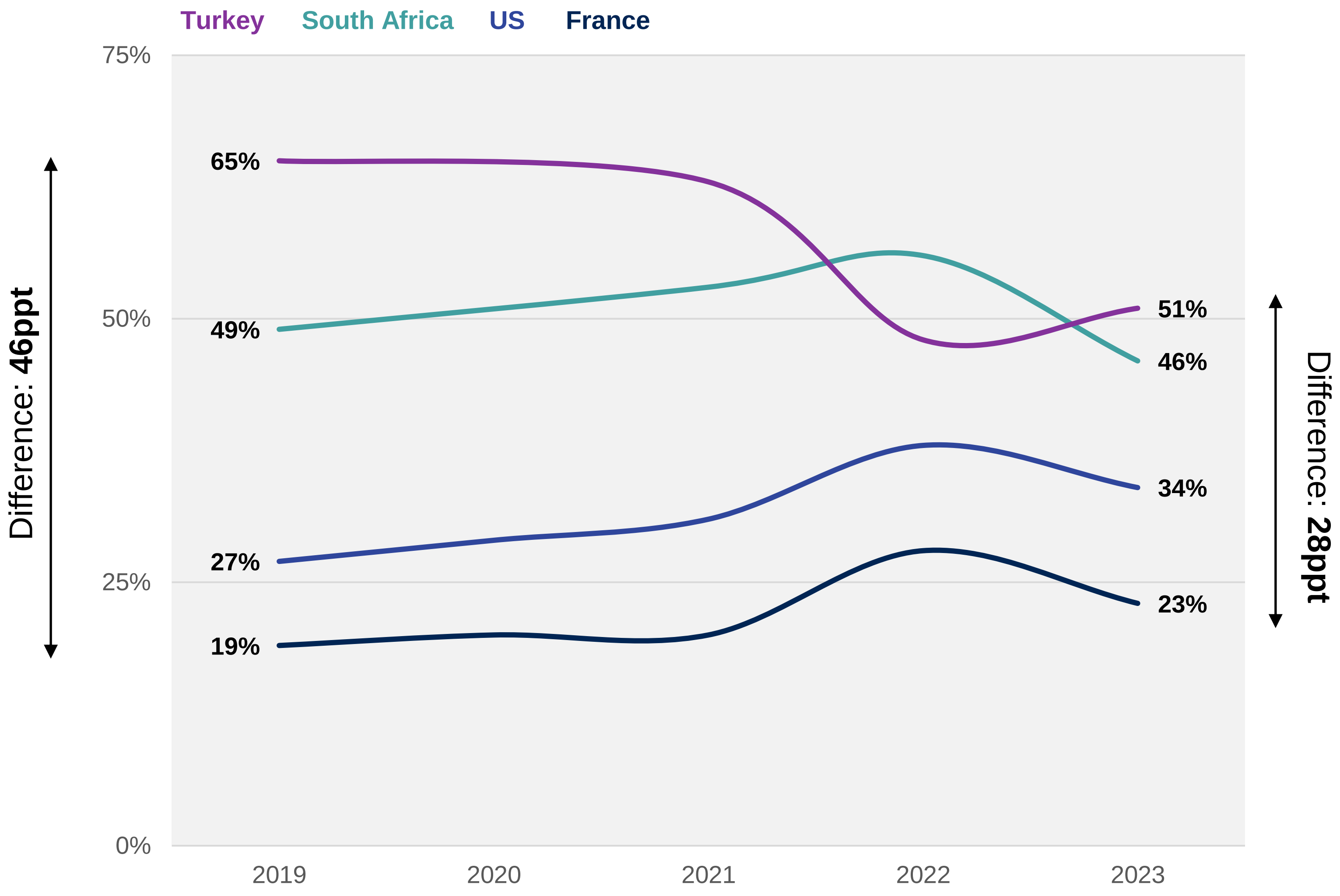
Views on global brands are narrowing between emerging and developed markets

QUESTION:

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

% agree



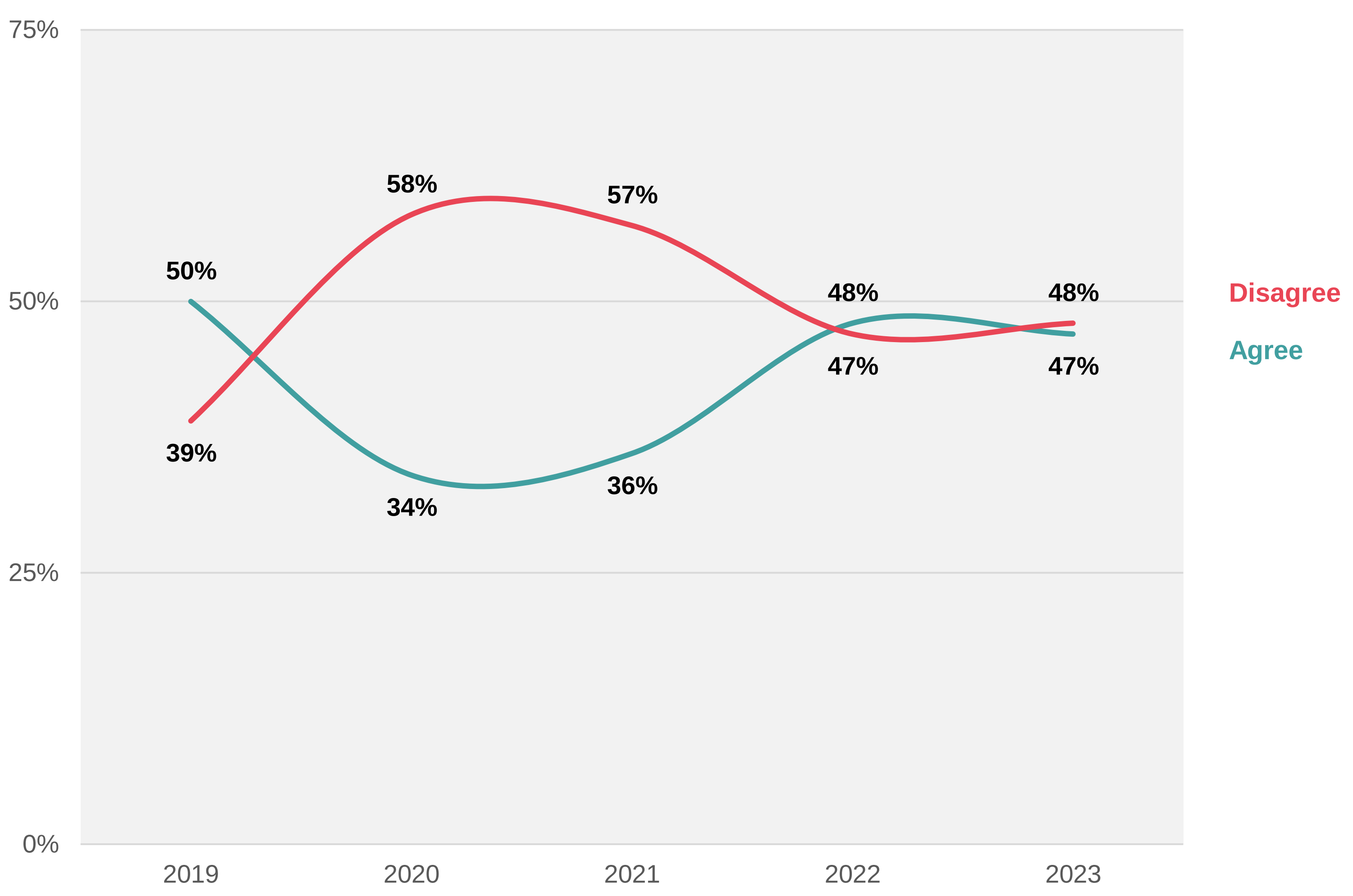
Ipsos Global Trends Series: 500-1,000 adults aged 16-75 per market per year

The appeal of "made in China" splits the Chinese public

QUESTION:

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

China 2019-2023



Ipsos Global Trends Series: c1,000 Chinese adults aged 16-75, interviewed per year

FINAL THOUGHTS

Making the right decisions as the polycrisis wears on

Our Ipsos Global Trends programme, running since 2013, provides the evidence and data needed to make decisions for a range of plausible future scenarios.

Our data has given us signs that today's crises are causing people to retreat and focus more inwardly on themselves and their world rather than on the broader problems swirling around them. So, preparing for one singular issue is no longer enough.

As optimism about the future fades, we must be mindful of how the cost-of-living crisis is impacting attitudes towards brands and climate, and at the macro level, thinking ahead and planning for compounding factors is crucial.

As the polycrisis grinds on, it will take systemic thinking, collaboration, and foresight to prepare for both opportunities and threats. And despite this context, three quarters of people around the world say that they feel happy.

In this short update, we have shared how the six Macro Forces from our main launch early this year are interacting to amplify both positive and negative outcomes over the next few decades, and we review the changes we see in our Global Trends framework.

We've only had time so far to tell stories from the top-line data. For a deeper dive, please contact us via globaltrends@ipsos.com for a custom analysis of this incredibly rich data source.

Please stay tuned for a major release next year, where Ipsos will be celebrating 10 years since the launch of this flagship programme.

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

"As the polycrisis grinds on, it will take systemic thinking, collaboration, and foresight to prepare for both opportunities and threats."

IPSOS GLOBAL TRENDS

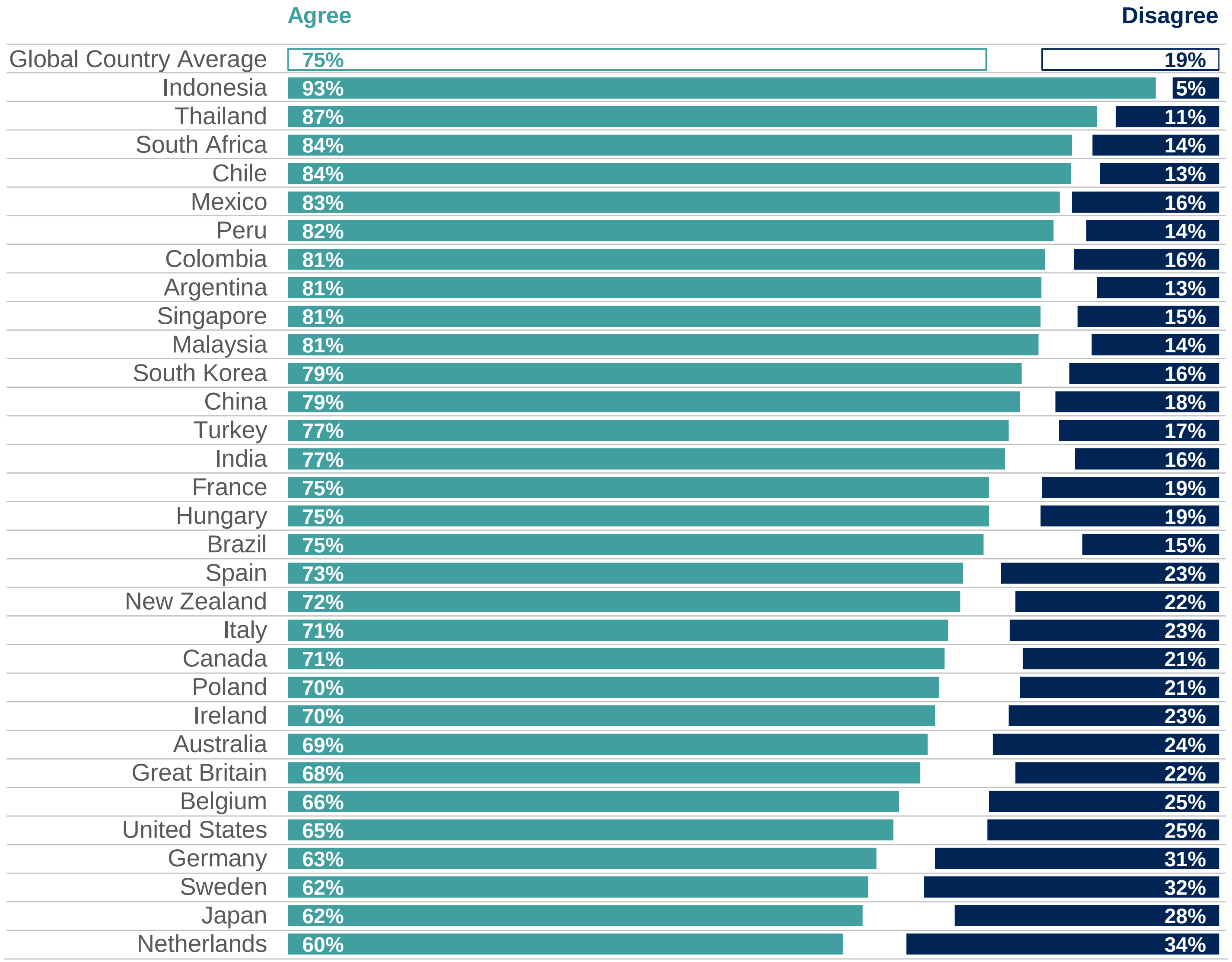
APPENDIX

Country level results

Climate Antagonism

To what extent do you agree or disagree that…

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



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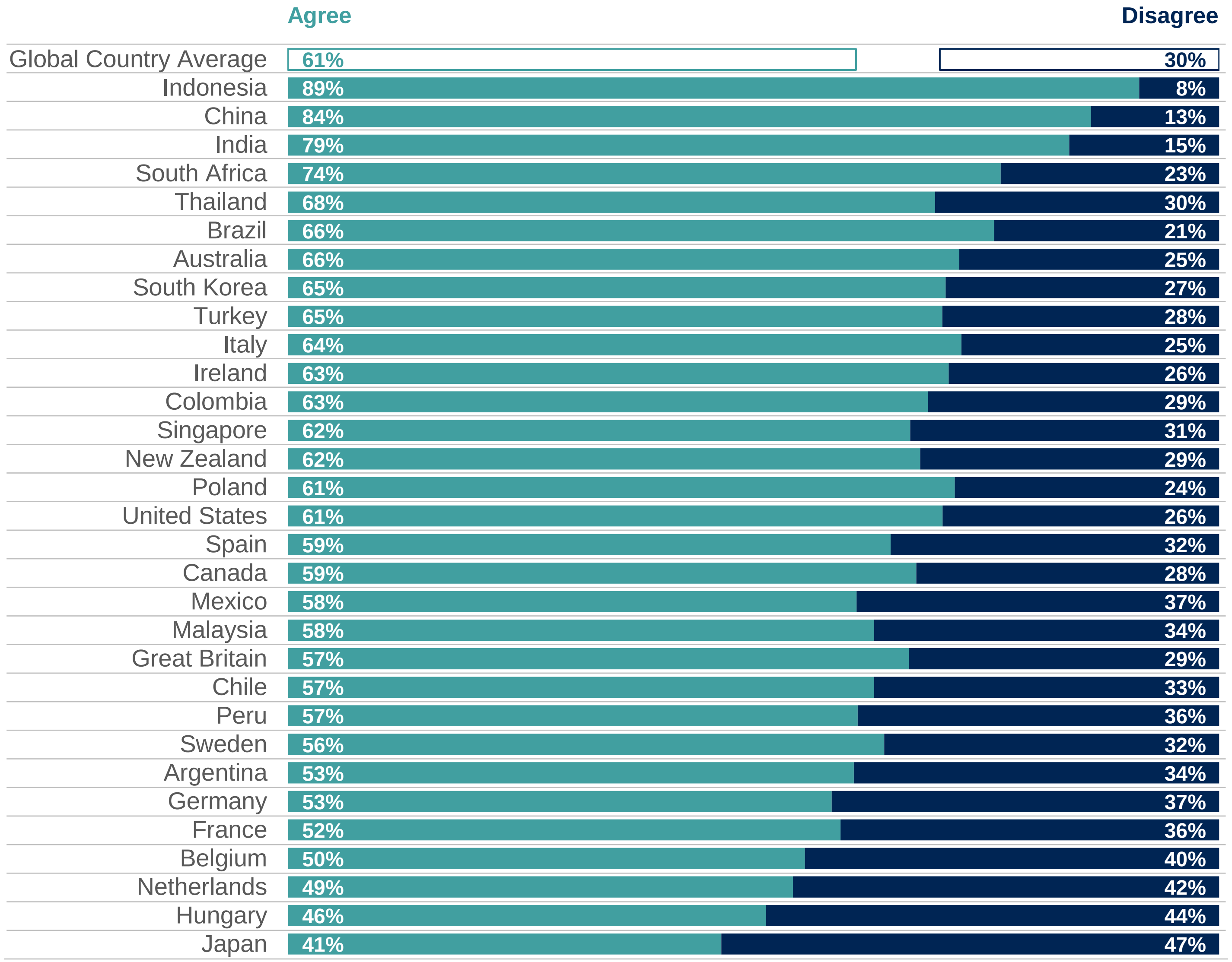
Authenticity is King

To what extent do you agree or disagree that…

I tend to buy brands that reflect my personal values



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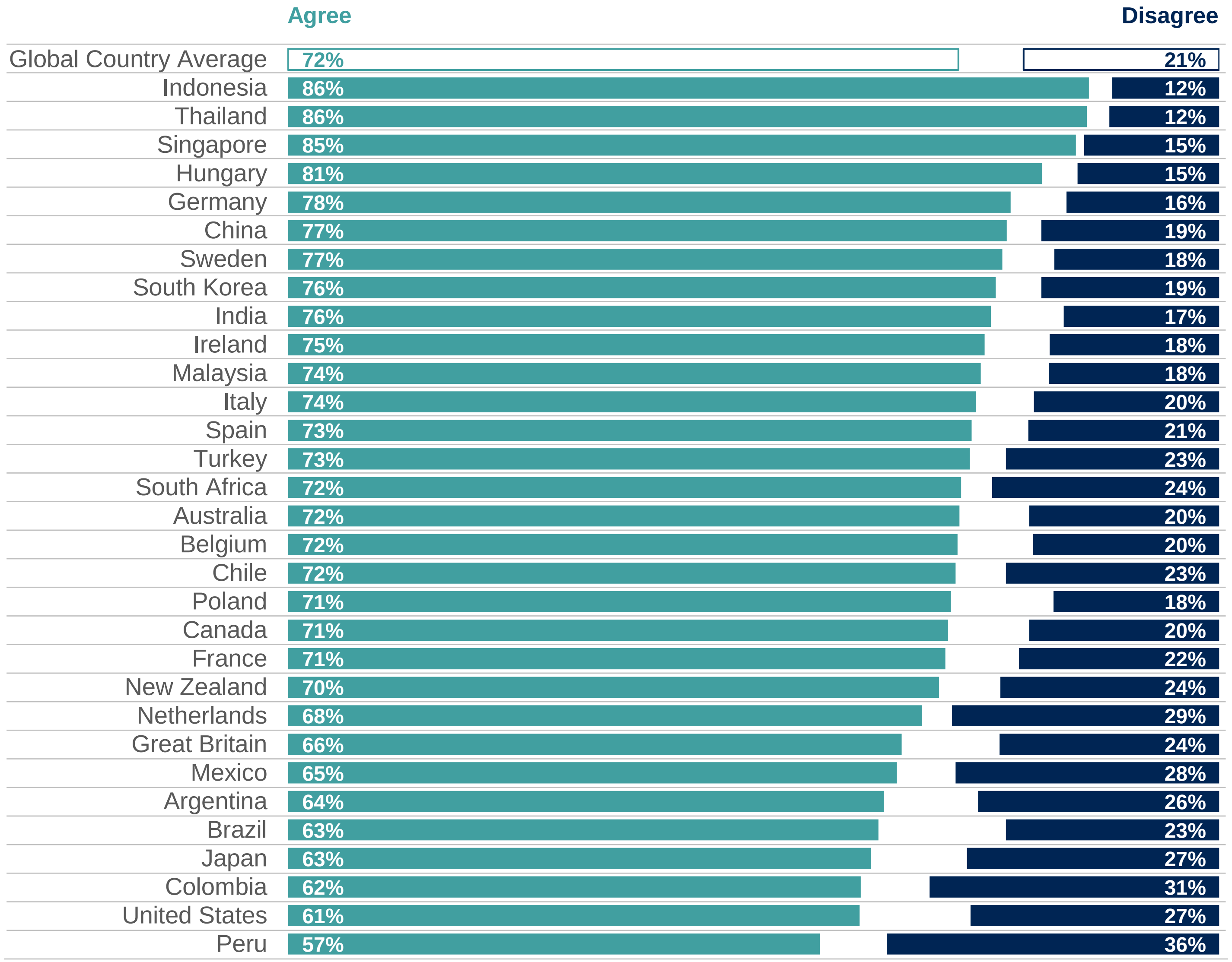
Capitalism's Turning Point?

To what extent do you agree or disagree that…

Having large differences in income and wealth is bad for society overall



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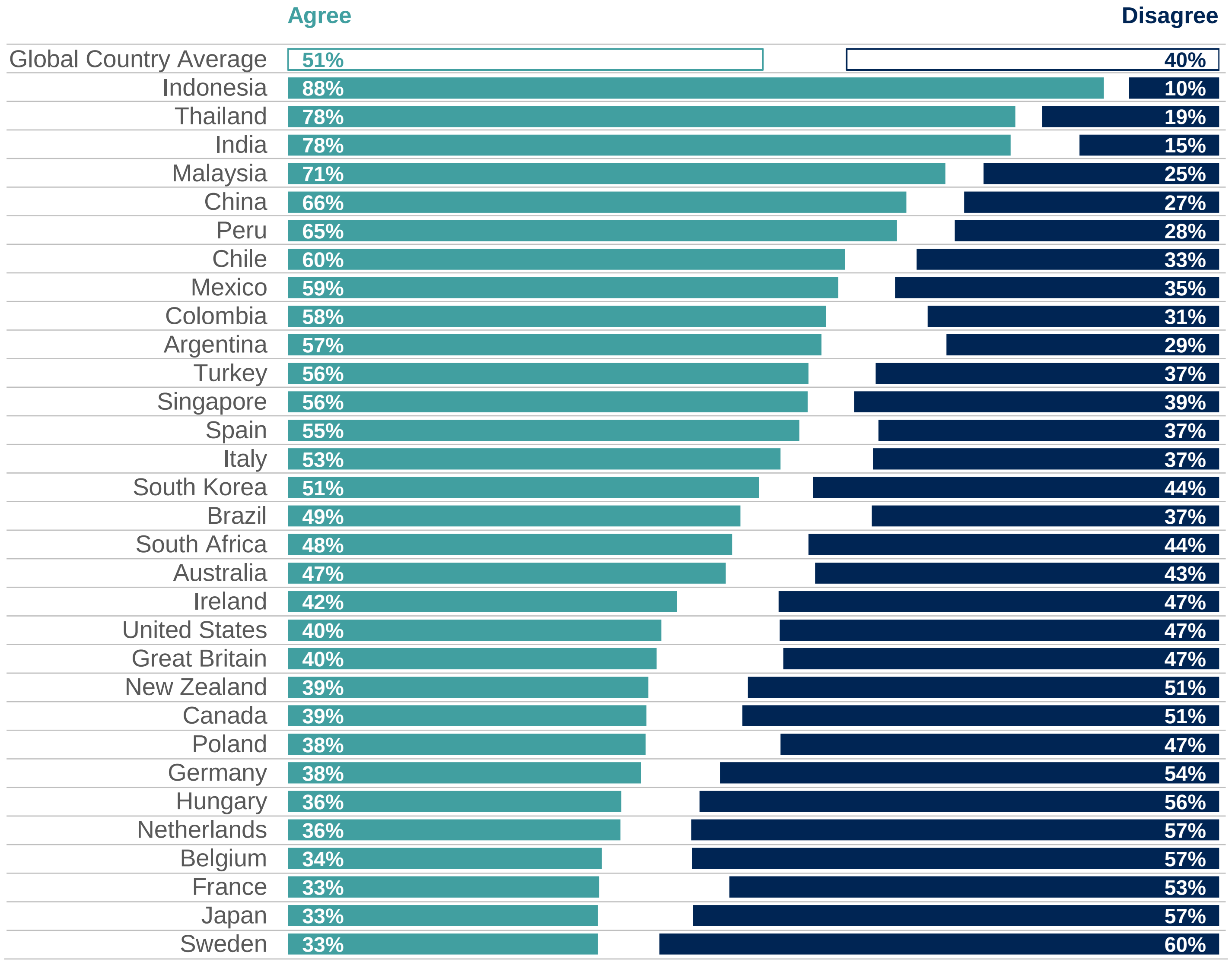
Choices Over Healthcare

To what extent do you agree or disagree that…

Eventually all medical conditions and diseases will be curable



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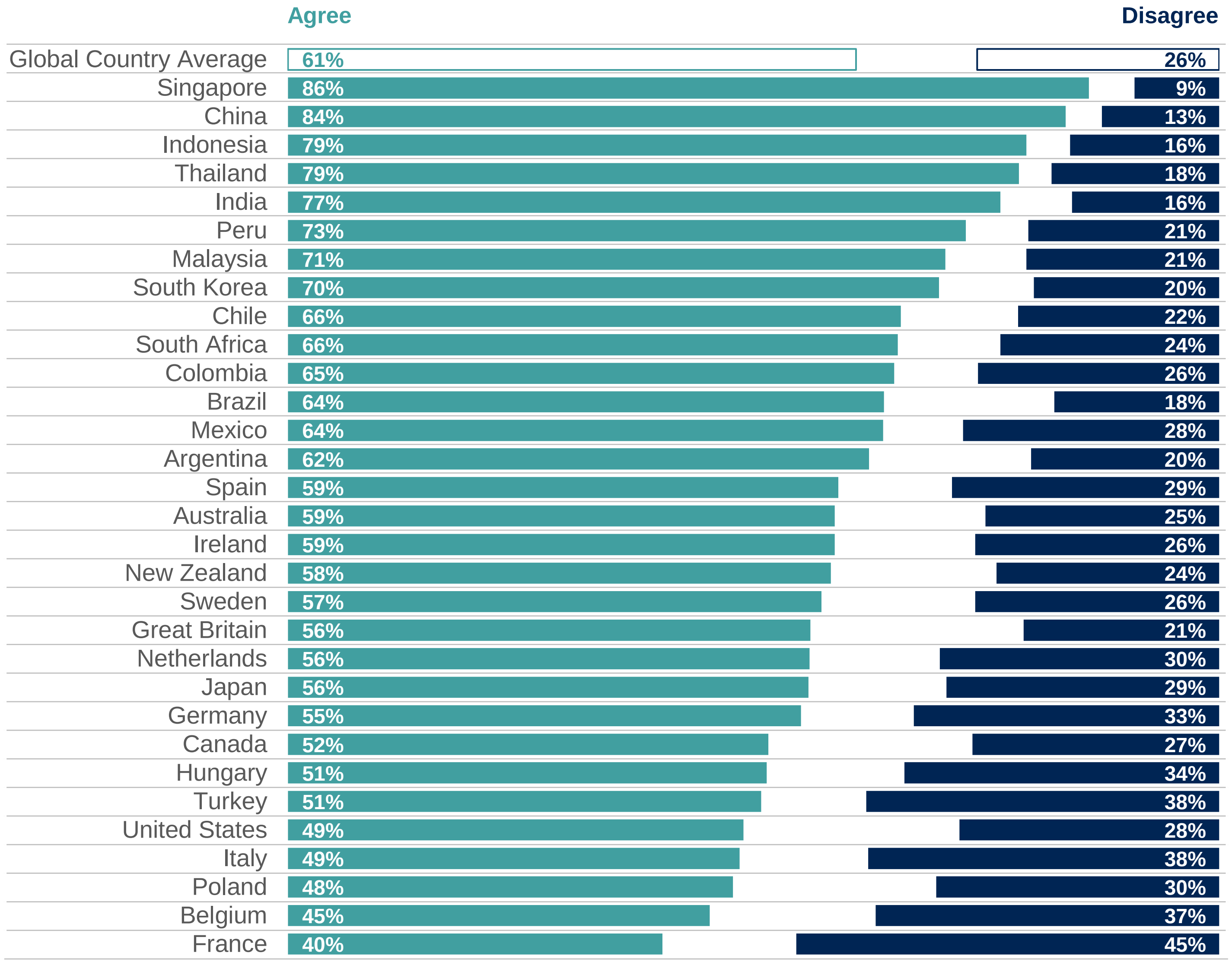
Peak Globalisation?

To what extent do you agree or disagree that…

Globalisation is good for my country



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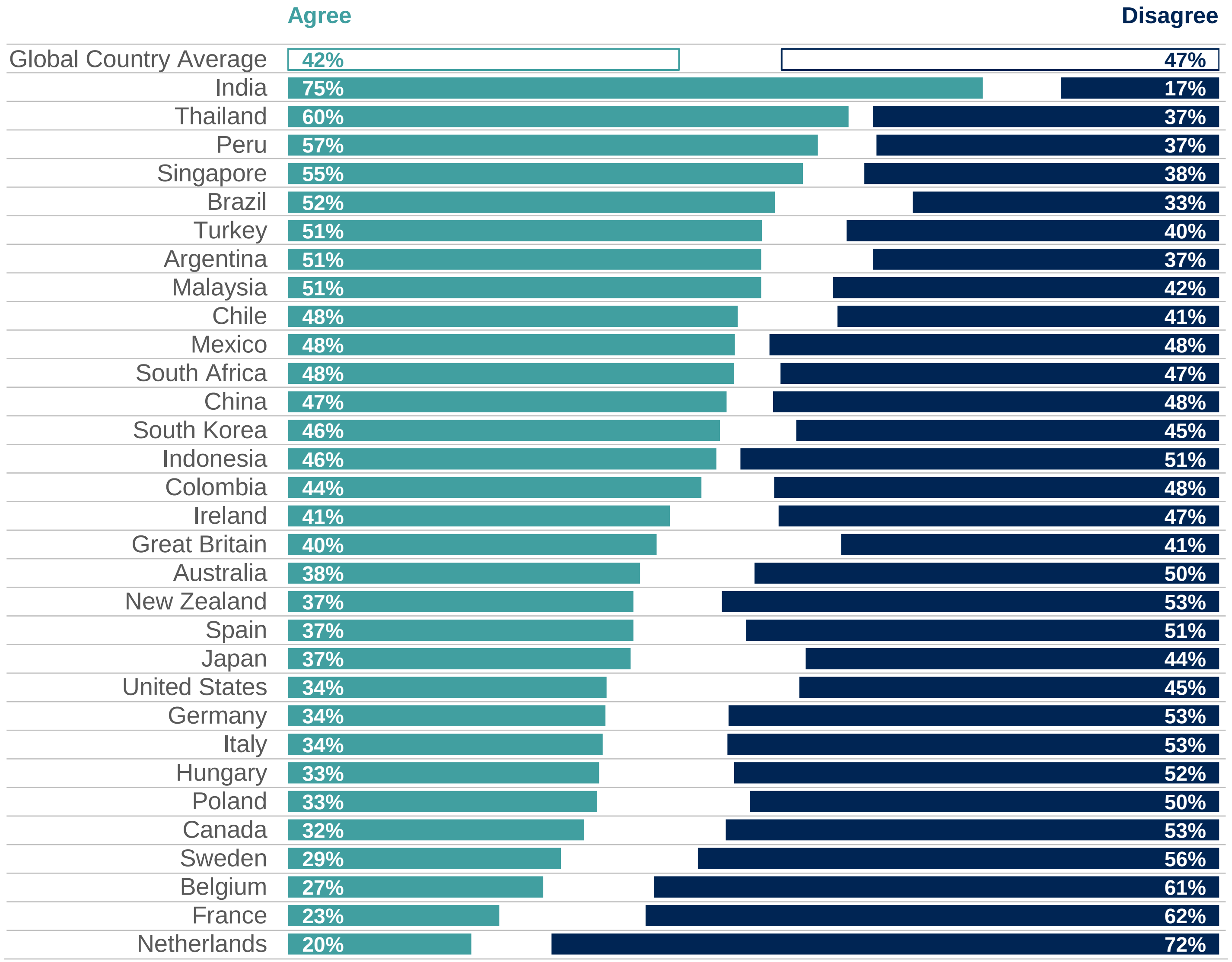
Peak Globalisation?

To what extent do you agree or disagree that…

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



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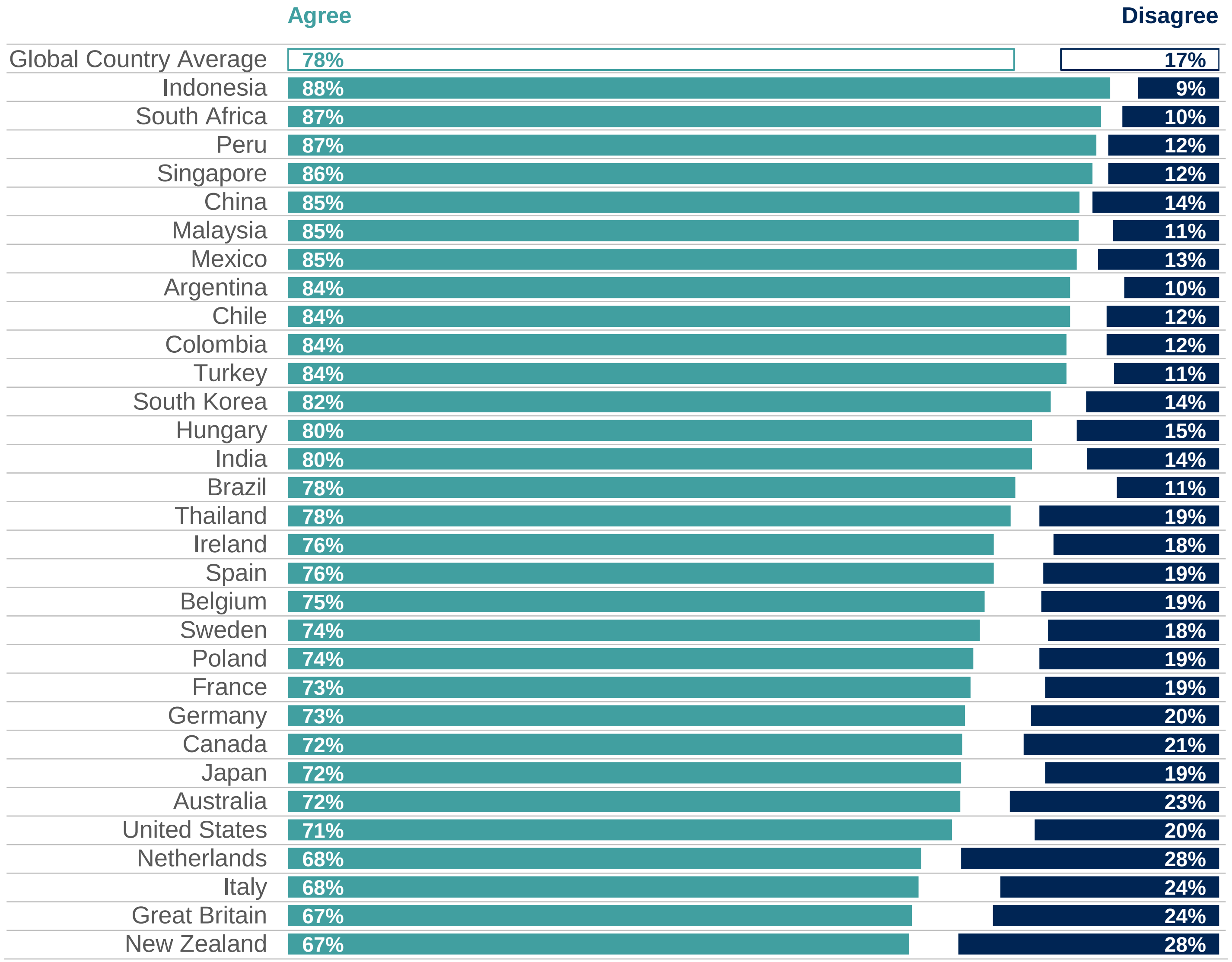
Reactions to Uncertainty and Inequality

To what extent do you agree or disagree that…

The world today is changing too fast



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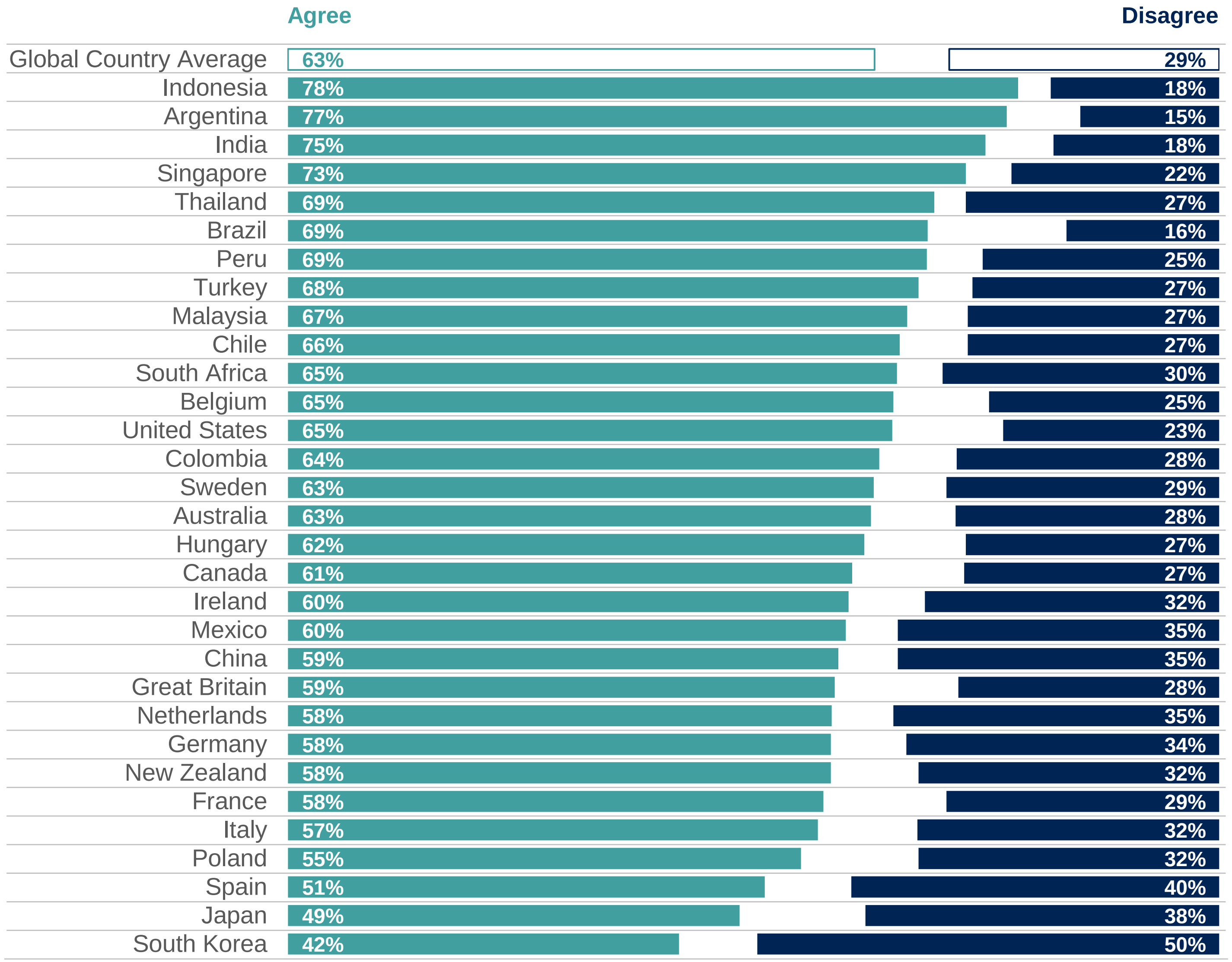
The Enduring Appeal of Nostalgia

To what extent do you agree or disagree that…

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



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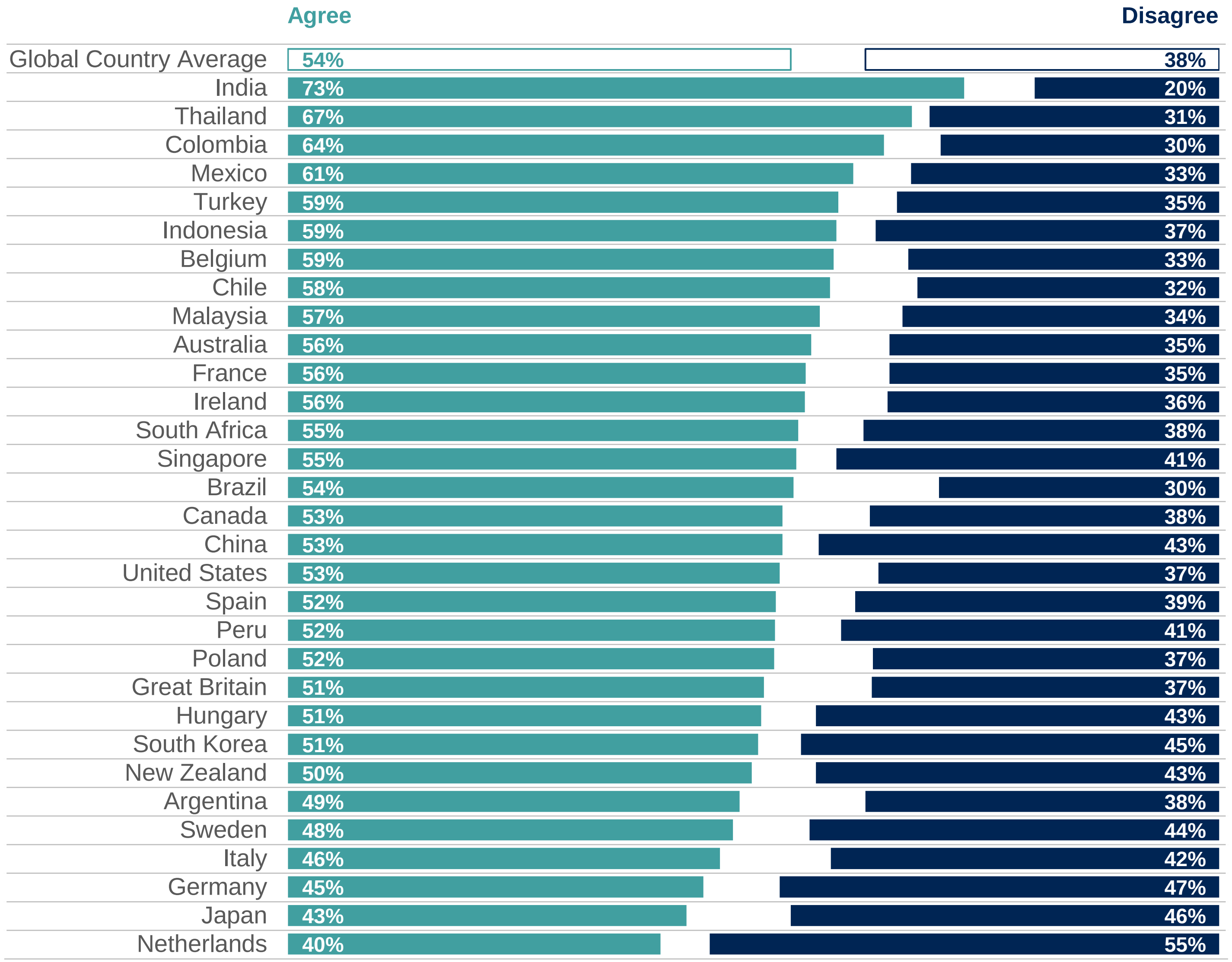
The Tech Dimension

To what extent do you agree or disagree that…

I fear that technical progress is destroying our lives



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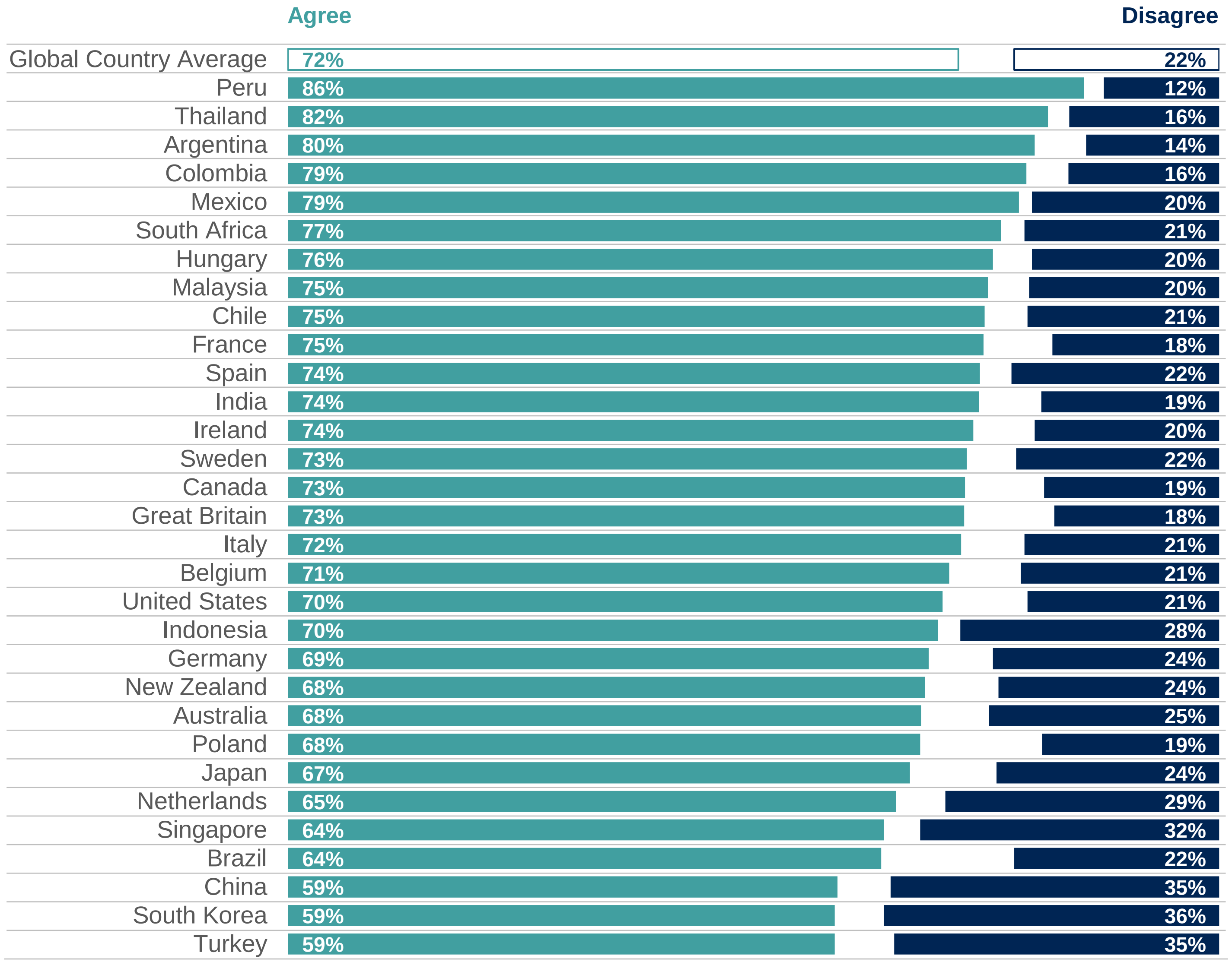
Future focus

To what extent do you agree or disagree that…

I am worried that government and public services in my country will do too little to help people in the years ahead



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METHODOLOGY

Methodology

These are the results of a 31-country survey conducted by Ipsos on its Global Advisor online platform and, in India, on its IndiaBus platform, between Friday, September 22 and Friday, October 6, 2023. For this survey Ipsos interviewed a total of 24,220 adults aged 18 years and older in India, 18-74 in Canada, Republic of Ireland, Israel, Malaysia, New Zealand, South Africa, Turkey, and the United States, 20-74 in Thailand, 21-74 in Indonesia and Singapore, and 16-74 in all other countries.

The sample consists of approximately 2,000 individuals in Japan, 1,000 individuals each in Australia, Brazil, Canada, mainland China, France, Germany, Great Britain, Italy, New Zealand, Spain, and the U.S., and 500 individuals each in Argentina, Belgium, Chile, Colombia, Hungary, Indonesia, Ireland, Malaysia, Mexico, the Netherlands, Peru, Poland, Singapore, South Africa, South Korea, Sweden, Thailand, and Turkey. The sample in India consists of approximately 2,200 individuals, of whom approximately 1,800 were interviewed face-to-face and 400 were interviewed online.

Samples in Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, Italy, Japan, the Netherlands, Poland, South Korea, Spain, Sweden, and the U.S. can be considered representative of their general adult populations under the age of 75. Samples in Brazil, Chile, mainland China, Colombia, Indonesia, Ireland, Malaysia, Mexico, New Zealand, Peru, Singapore, South Africa, Thailand, and Turkey 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.

India’s sample represents a large subset of its urban population – social economic classes A, B and C in metros and tier 1-3 town classes across all four zones.

The data is weighted so that the composition of each country’s sample best reflects the demographic profile of the adult population according to the most recent census data. Where stated, the “Global Country Average” reflects the average result for all the countries and markets in which 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.

When percentages do not sum up to 100 or the ‘difference’ appears to be +/-1 percentage point more/less than the actual result, 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 where N=1,000 being accurate to +/- 3.5 percentage points and of where N=500 being accurate to +/-5.0 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 and regulations.

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

In particular, we would like to give special thanks to our regional Ipsos contributors:

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About Ipsos

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

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

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

GAME CHANGERS