

A NEW WORLD DISORDER?

Navigating a Polycrisis

GLOBAL
TRENDS
2023



Welcome to Ipsos Global Trends

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

Some of this year's key findings are:

- Concern about climate change rose consistently from 2013 through the Covid-19 pandemic until the inflation crisis. It has now plateaued. At the same time, climate scepticism remains. People look to brands and business – more trusted than government in most markets – to act.
- With normal life resuming in most places after the pandemic, the appeal of global brands has returned to previous levels across much of the world, especially Asia and Africa.
- While concerns about data privacy and Big Tech remain strong, data apathy continues to grow, with citizens recognising that some loss of privacy is inevitable. This coincides with a rising proportion who think that technical progress is destroying our lives as the metaverse and generative AI burst onto the global scene.
- Despite the decline of populism and nativism, the underlying ingredients – stagnating real wages, the 'loss of the future' and the enduring appeal of nostalgia – continue to rise. Most people expect governments not to support them adequately in the years ahead.

- With the effects of the Covid-19 pandemic echoing around the world and putting even more pressure on healthcare systems (which are facing rising demand from ageing populations), our findings confirm the rise of mental health as a key issue – especially for the young. How brands and politicians show empathy – that they are on 'your side' – remains important.
- Finally, despite war and geopolitical tensions, and reshoring or 'friendshoring' of supply chains, most people worldwide still believe that globalisation is good for their country – a trend that has not changed since 2013.
- While most people are pessimistic about the macro environment, they remain far more positive about their own and their families' prospects – especially in Asia. As we have found, there is more difference between markets than there is between generations, and the world remains divided on a wide range of issues.

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

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

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Contents

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

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

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

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



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EXECUTIVE SUMMARY

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

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

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

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

Another shift we are seeing is a growing tension

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

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

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

It's a world of polycrisis...

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

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



The good news may be yet to come.

Amid this backdrop of disorder, there are bright spots.

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

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

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

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

1. An economic crisis hitting our wallets

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

2. A tension between global and local

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

3. A climate crisis we need to solve

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

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