

GLOBAL TRENDS 2021

Aftershocks and continuity

November 2021

GAME CHANGERS



After The Crisis

How the New Normal Will Look Like the Old Normal

Covid didn't transform human nature, which means that the more some things have changed, the more they'll stay the same.

The Pandemic Really Has Changed The World Forever



Enrique Dans Senior Contributor
Leadership Strategy
Teaching and consulting in the innovation field since 1990

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

Simon Tisdall



PEW RESEARCH CENTER | FEBRUARY 18, 2021

Experts Say the 'New Normal' in 2021 Will Be Far More Tech-Driven, Presenting More Big Challenges

As global demand truly radical age
Coronavirus

Our cities may never look the same again after the pandemic

Pandemic-proofing: Insurance may never be the same again

Life will never be the same for people over 60

The Pandemic Will Change Everything

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

COVID-19 a 'boomer remover' — Why millennials are angry and done with older generation

WUV RALI WILL NEVER BE TAIN AFTER COVID

SIGNALS OF A CHANGING WORLD

China ends funding for coal



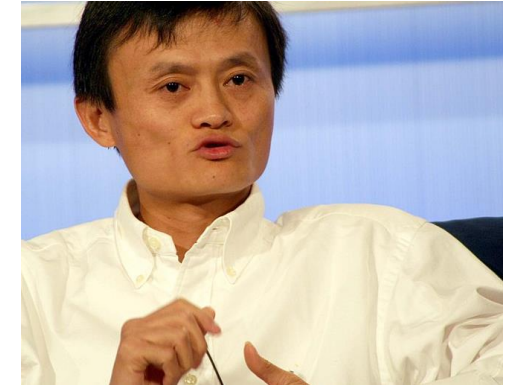
Soaring used car prices



Global labour shortages



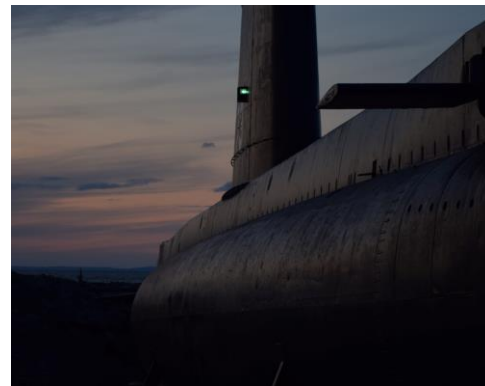
China's tech crackdown



AlphaFold makes the case for AI



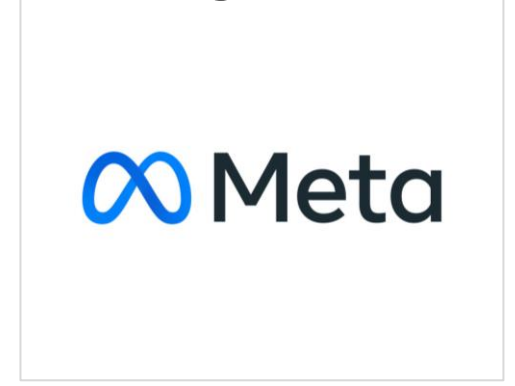
AUKUS awkwardness



COVID's long tail in the developing world

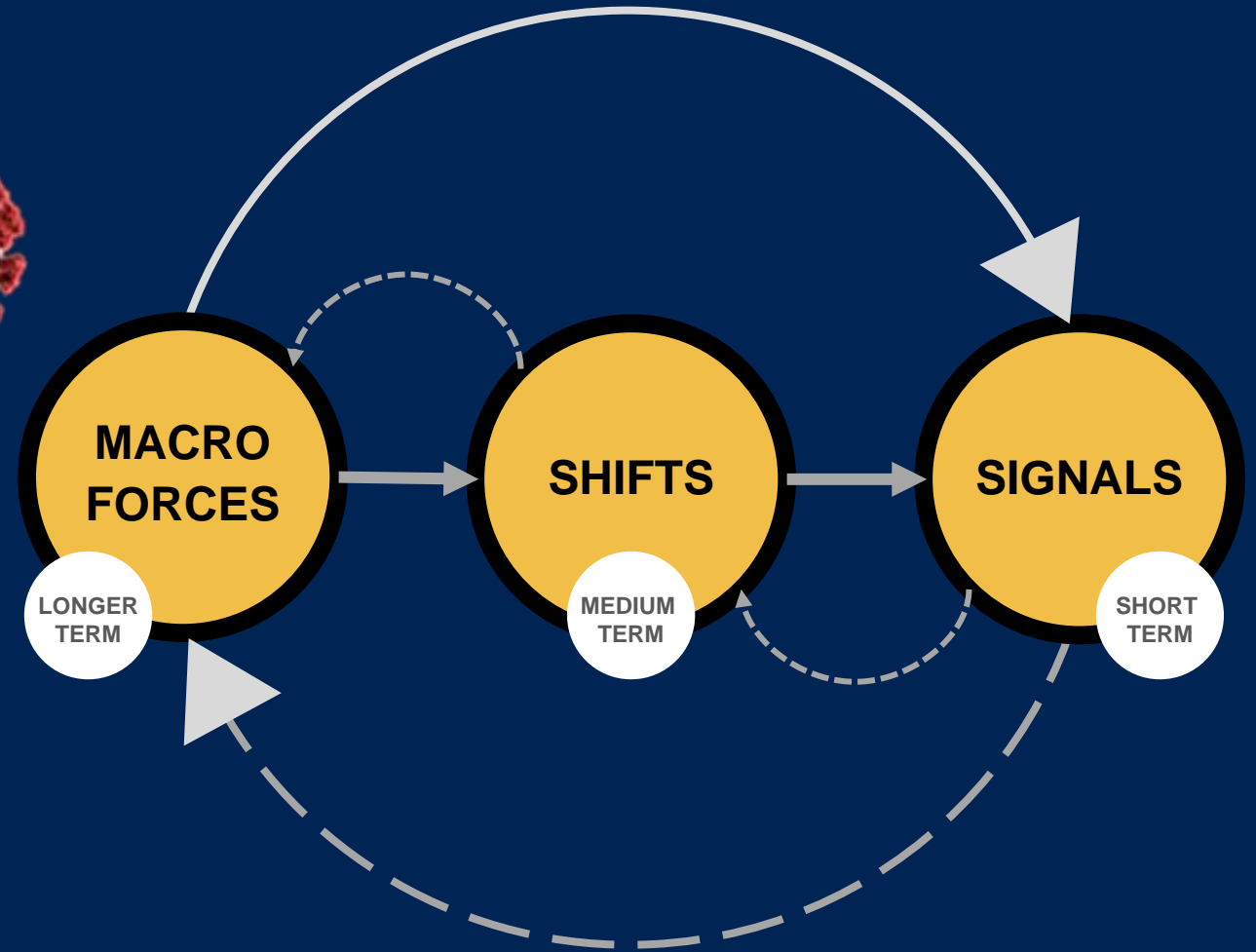
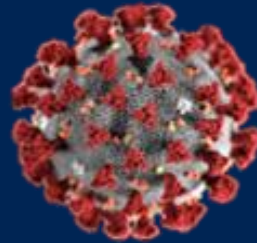


Social media challenges



OUR THEORY OF CHANGE:

After the initial shock,
the impacts of
COVID-19
echo through
the system



THE MACRO FORCES REFLECT THE IMPACT OF COVID-19

**Dynamic
populations**



**Growing inequality
and opportunity**



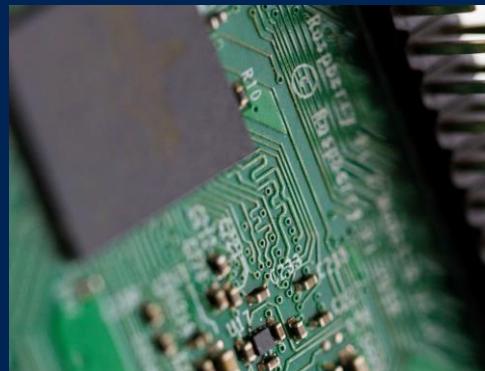
**Geopolitical
tensions**



**Data
world**



**Technology
tipping points**



**Our fragile
planet**



DYNAMIC POPULATIONS

A shifting world

Developed world birth rates have fallen under COVID – but greater economic disruption in emerging world means birth rates there likely to rise

But migration on the rise as travel is eased and likely to rise further in an era of extreme climate



OUR FRAGILE PLANET

Coping with extremes

The pandemic hit to carbon emissions was small – and total CO2 output is rising again

Global carbon emissions must peak by 2025 to meet the 1.5C target set in Paris



GEOPOLITICAL TENSIONS

Multipolarity and unilateralism

'Vaccine diplomacy' as rich countries provide jobs to others to burnish their credentials

Areas of contest shift; the US leaves Afghanistan and shuns France for Australia



GROWING INEQUALITY AND OPPORTUNITY

Winners and losers of COVID

Global income inequality fell under the pandemic as more advanced nations experienced bigger economic impacts

Yet signs within-country inequality has risen; recessions produce winners and losers – with younger people and those in weaker positions often on the losing end



TECH TIPPING POINTS

A government techlash?

Shift to living online further empowered tech firms like Facebook, Tencent, Alibaba...

Yet many governments are now acting strongly against these firms – the cautionary tale of Jack Ma

OECD agreement on a minimum global corporate tax rate for big tech



DATA WORLD

Instant aggregation

Data sharing and analysis has underlined testing and vaccination efforts in many countries

Yet fake news can spread just as quickly –
Covid has been an accelerant for conspiracies





ONE AND A HALF YEARS IN – WHERE DO PUBLIC VALUES STAND?

OUR TRENDS FROM 2019...



OUR TRENDS FROM 2019

CHOICES OVER HEALTHCARE

Views on the medical profession sit within this trend: faith in the advice of doctors on one side and a desire to take control of personal healthcare and seek second opinions on the other.

CONSCIENTIOUS HEALTH

This trend reflects the values of those who are actively thinking about their health and also see good health as a wider concern for the planet as well as themselves.

THE ENDURING APPEAL OF NOSTALGIA

Nostalgia and an imagined past offers a comfort to citizens in many countries – especially those who feel left behind by the pace and nature of change.

REACTIONS TO UNCERTAINTY AND INEQUALITY

This trend explores the common responses to a world that feels dangerous and unequal: fear of the future, radical populism and a retreat to nationalism and tradition.

CAPITALISM'S TURNING POINT

This trend looks at opposing forces in modern capitalism: those who seek greater redistribution of wealth and proponents of conspicuous consumption.

A DIVIDED WORLD?

The divided world trend explores divides in personal values – individualism, support for democracy, attitudes to religion and spiritualism, as well as an emerging front around attitudes towards issues of sexuality.

OUR TRENDS FROM 2019

CLIMATE ANTAGONISM

This trend speaks to the division between those who see dealing with climate change as the challenge of our time versus those who are more sceptical. 2021 has seen the balance tip decisively towards the former.

SEARCH FOR SIMPLICITY AND MEANING

Seeking simplicity – and even seeking to be alone – is a trend in its own right, with many feeling that the world is increasingly loud and fast-moving and alarming.

AUTHENTICITY IS KING

This trend encapsulates the consumer view that brands need to appear authentic – whether that is in their values, the provenance of their goods, or how they are reviewed online.

DATA DILEMMAS

Data dilemmas tracks the balance of different public responses to an increasingly data-hungry world: mostly we see anxiety and fatalism, but also a small but rising group who are actively comfortable sharing their data.

THE TECH DIMENSION

This trend examines the varying responses to technology – ranging from technophiles who demand the latest in everything, to those who want to unplug.

PEAK GLOBALISATION?

We examine evolving attitudes to globalisation, including interest in foreign products and content as well as how open people are to experiencing life in another part of the world.

BY SEPT 2020 WE SAW MORE CHANGE IN SOME AREAS

Healthcare, brands, climate, globalisation and reactions to inequality



2021 IS SIMILAR – EXISTING TRENDS CONTINUE

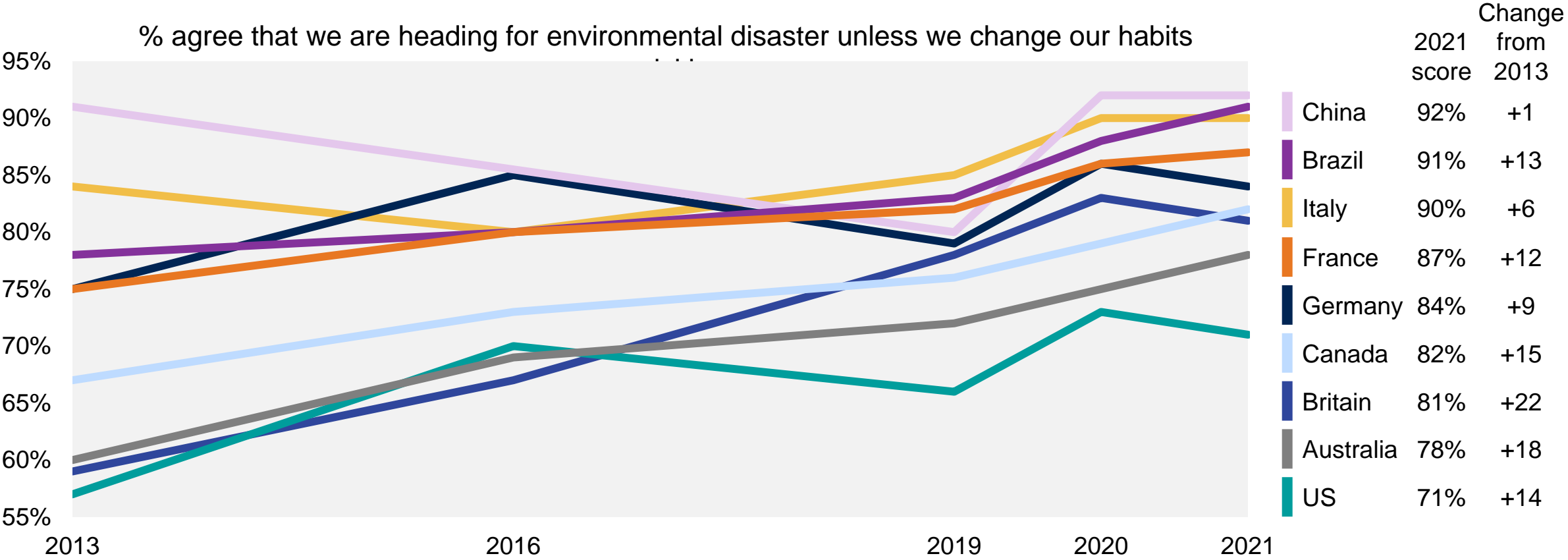
Continuity in trends on climate, purpose and health

Change for brands, globalisation and online/offline world



WHERE DO WE SEE CONTINUITY IN TRENDS?

CLIMATE CONCERN REMAINS KEY



Ipsos Global Trends Series: 500-1,000 adults aged 16-75 (18-75 in US and CA) per market per year

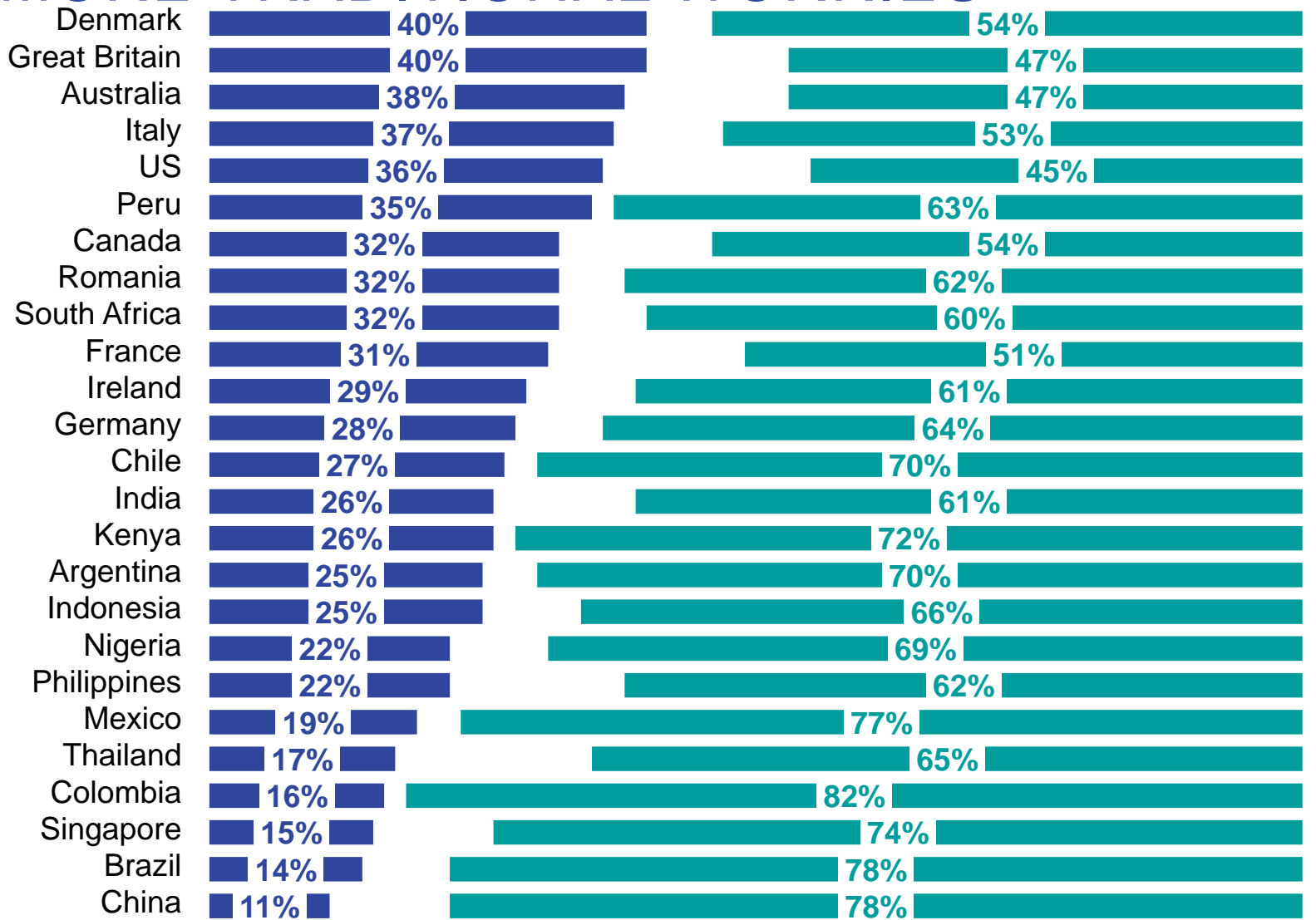


IN FACT, IT TRUMPS MORE TRADITIONAL WORRIES

Which of the following, if either, is more important to you personally:

Companies paying the correct amount of tax?

Companies doing as much as they can to reduce harm to the environment?



Base: 24,332 adults aged 16-75 (18-75 in US and CA) in 25 markets interviewed August - September 2021

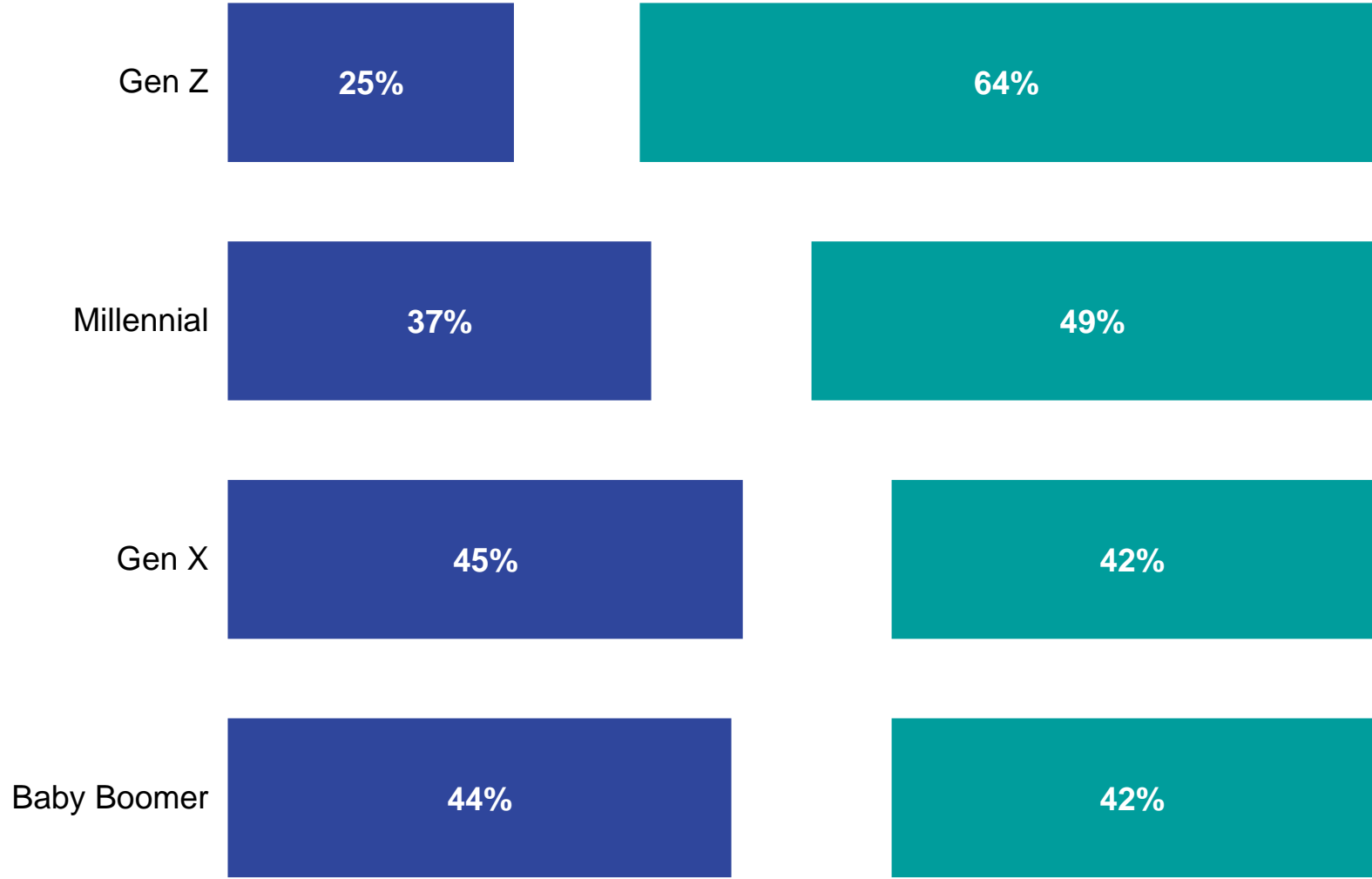
WITH A STRONG GENERATIONAL SKEW

Great Britain

Which of the following, if either, is more important to you personally:

Companies paying the correct amount of tax?

Companies doing as much as they can to reduce harm to the environment?



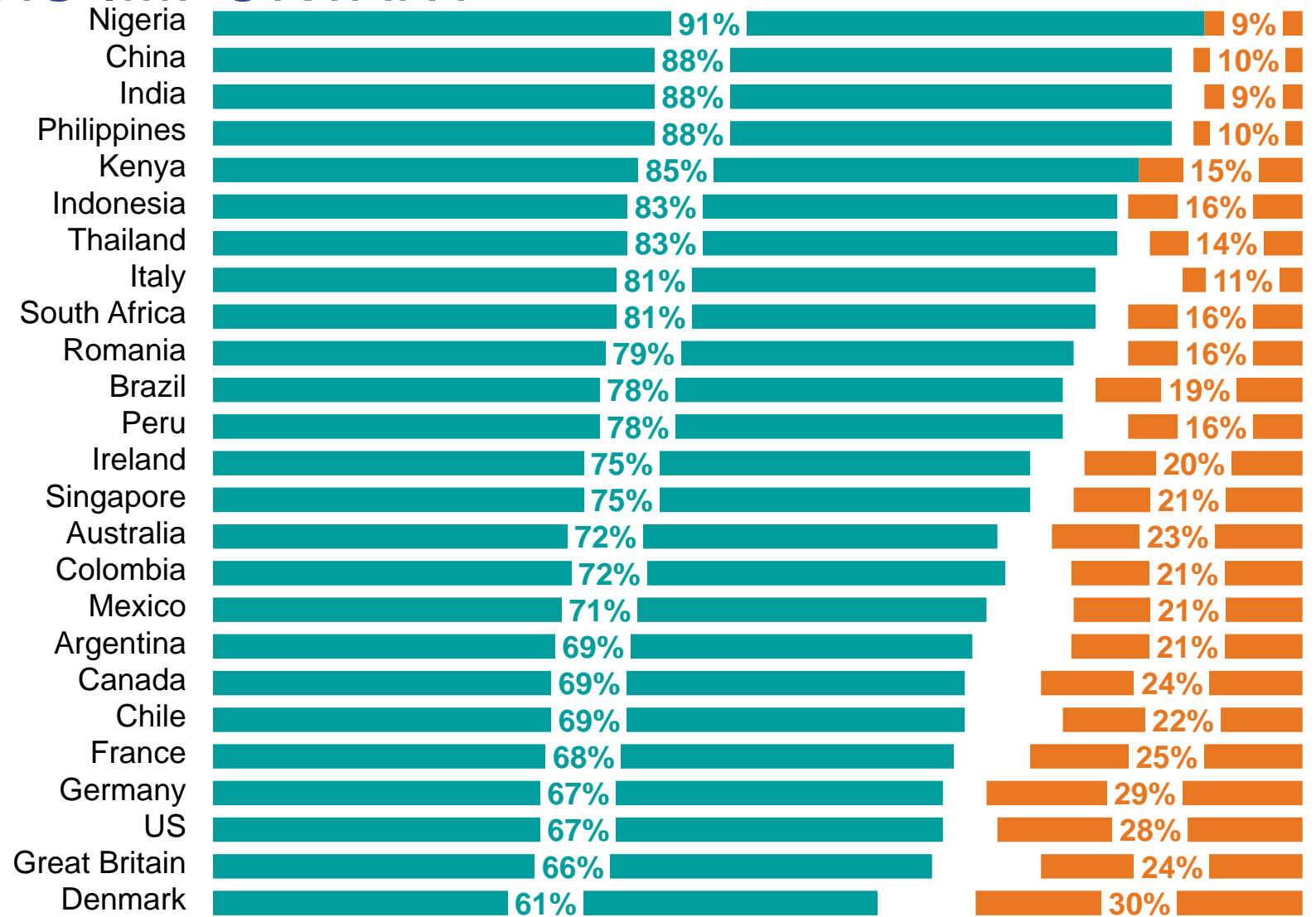
Base: 1,080 British adults aged 16-75, interviewed online 23 – 26 July 2021



OUR HEALTH REMAINS IMPORTANT

I will sacrifice convenience if it means getting healthier products

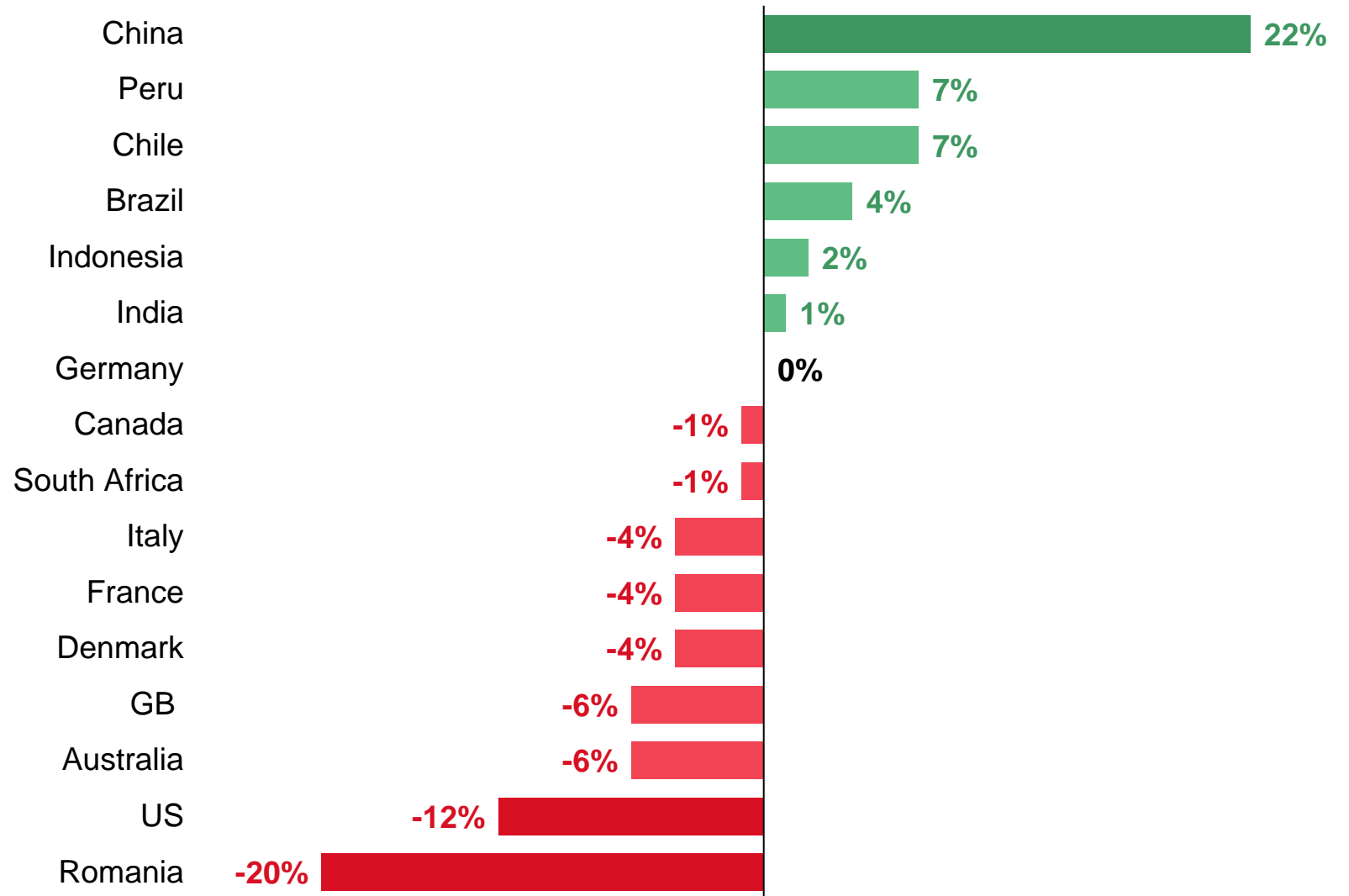
■ % agree
■ % disagree



Base: 24,332 adults aged 16-75 (18-75 in US and CA) in 25 markets interviewed August - September 2021

FAITH IN VACCINES FELL IN 2020 BUT HAS REBOUNDED FOR MOST

I believe all recommended vaccines are beneficial for me and my family
– % change in agree from 2019 to 2021



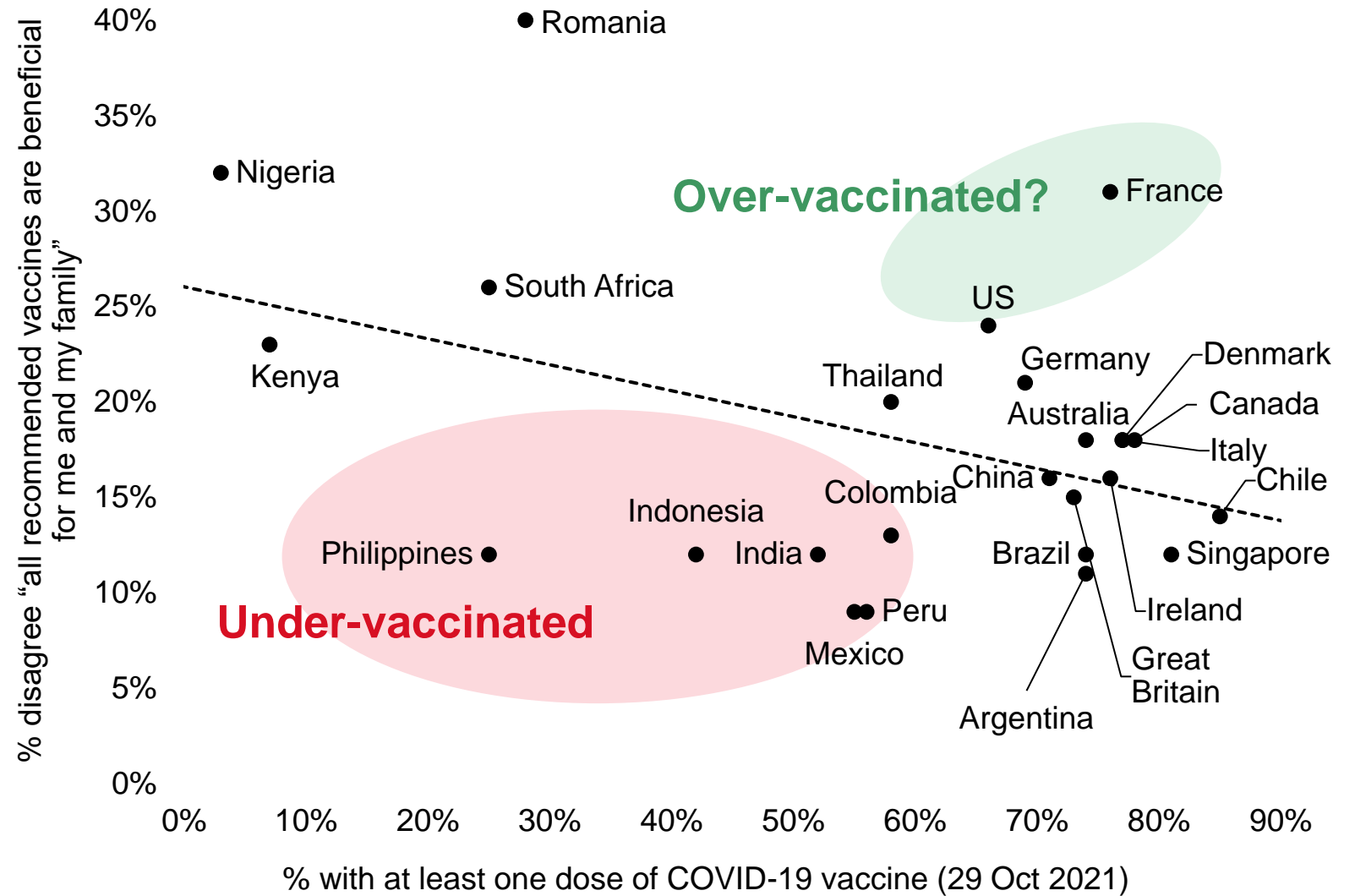
Ipsos Global Trends Series: 500-1,000 adults aged 16-75 (18-75 in US and CA) per market per year

SCEPTICISM IS HIGHER IN LESS VACCINATED COUNTRIES

% received at least one dose of a COVID-19 vaccine

X

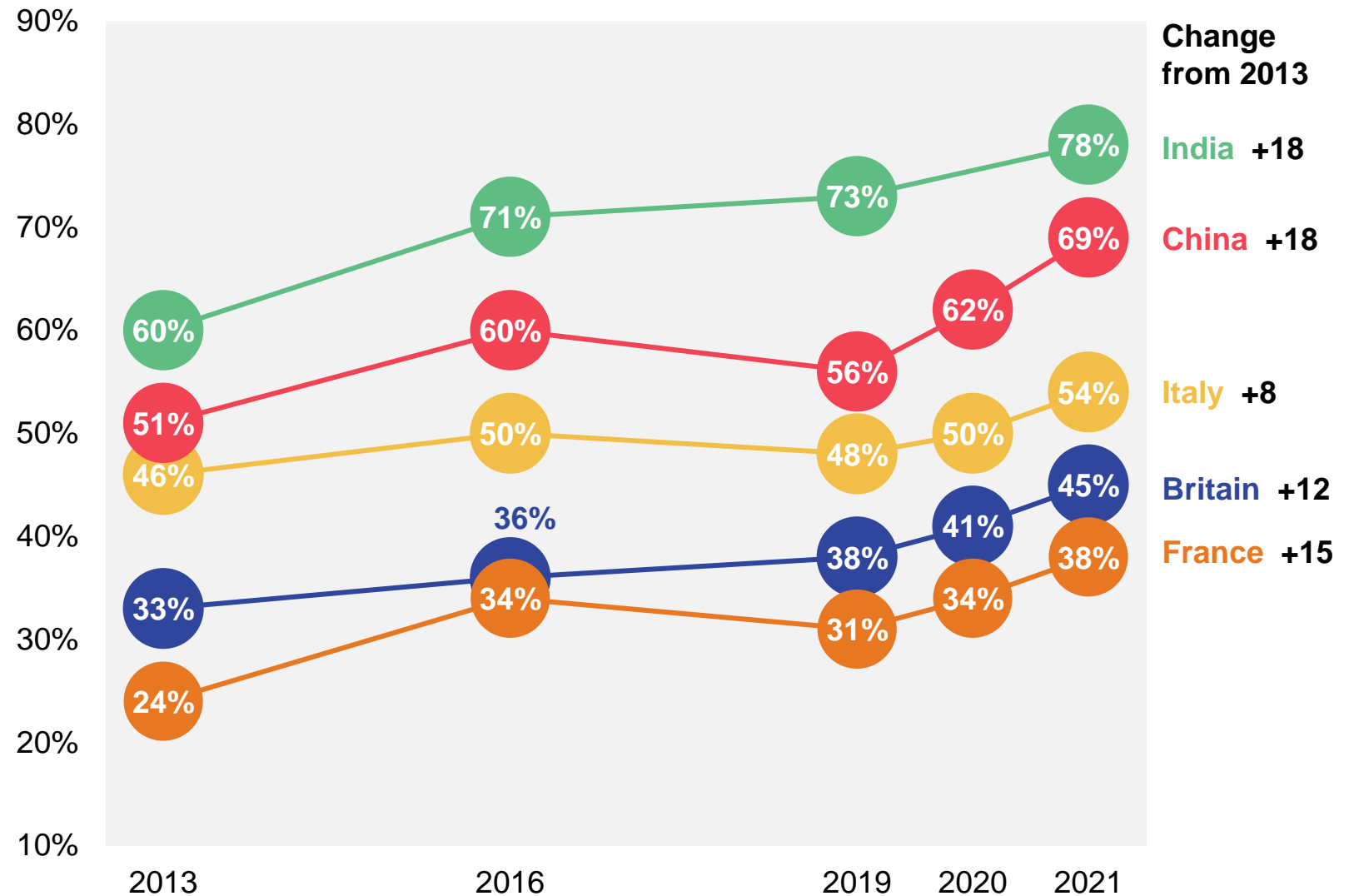
% disagree that all recommended vaccines are beneficial



Ipsos Global Trends Series: 500-1,000 adults aged 16-75 (18-75 in US and CA) per market per year
Vaccination statistics collected from Our World In data. Romania figure from 26 November 2021 and China figure from 18 September 2021

BUT OVERALL: RISING OPTIMISM IN THE POWER OF SCIENCE

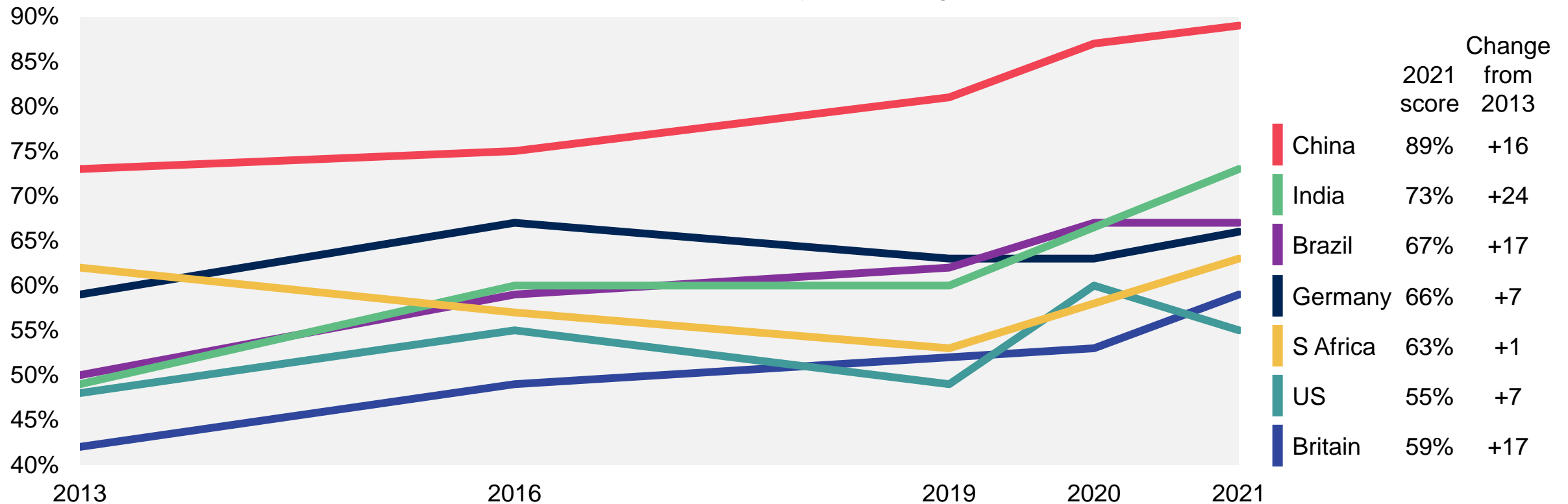
% agree that eventually all medical conditions and diseases will be curable



Ipsos Global Trends Series: 500-1,000 adults aged 16-75 (18-75 in US and CA) per market per year

FEELING OVERWHELMED HAS RISEN IN MANY MARKETS SINCE 2013

I wish I could slow down the pace of my life – % agree

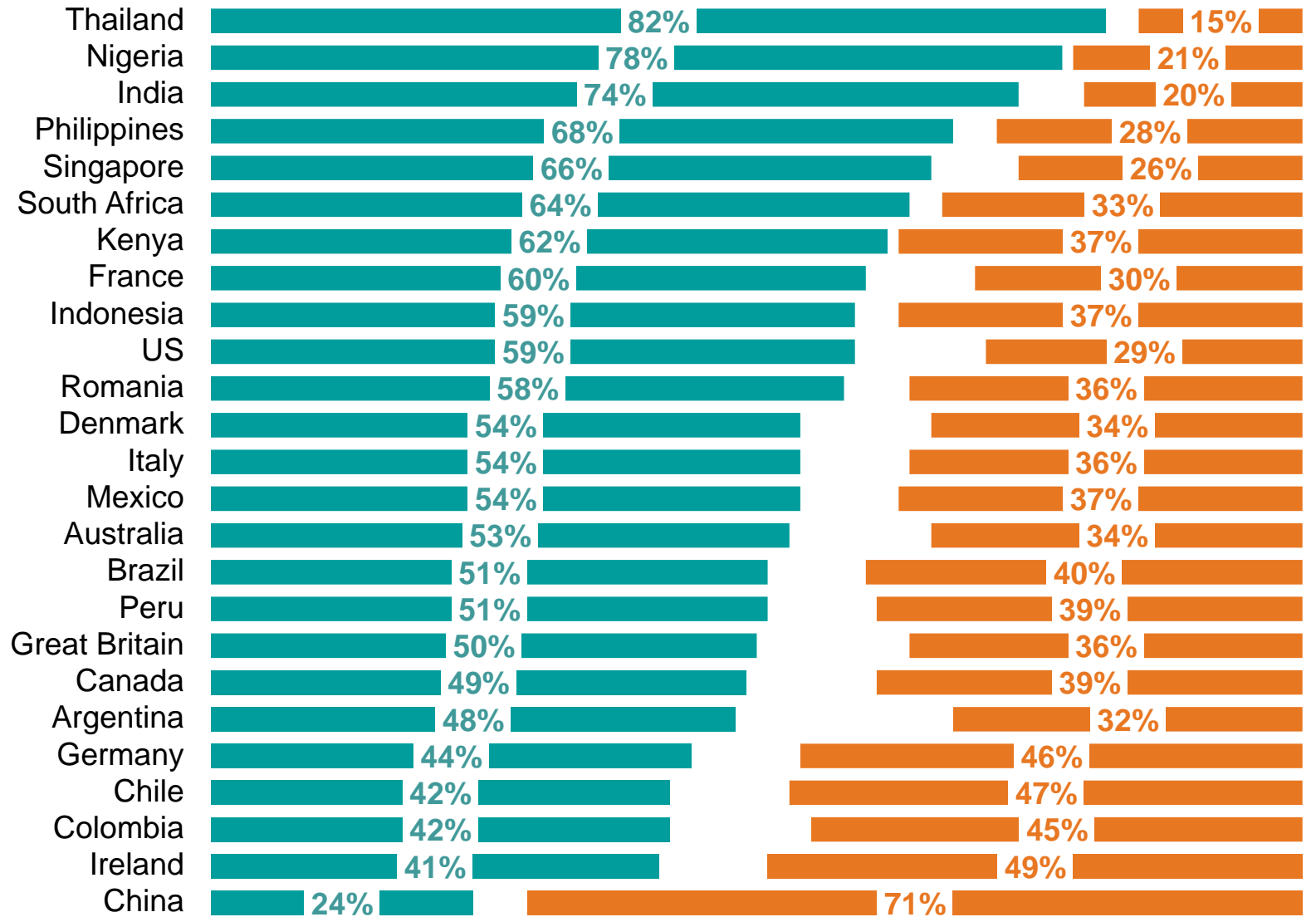


Ipsos Global Trends Series: 500-1,000 adults aged 16-75 (18-75 in US and CA) per market per year

NOSTALGIA VARIES MARKEDLY

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

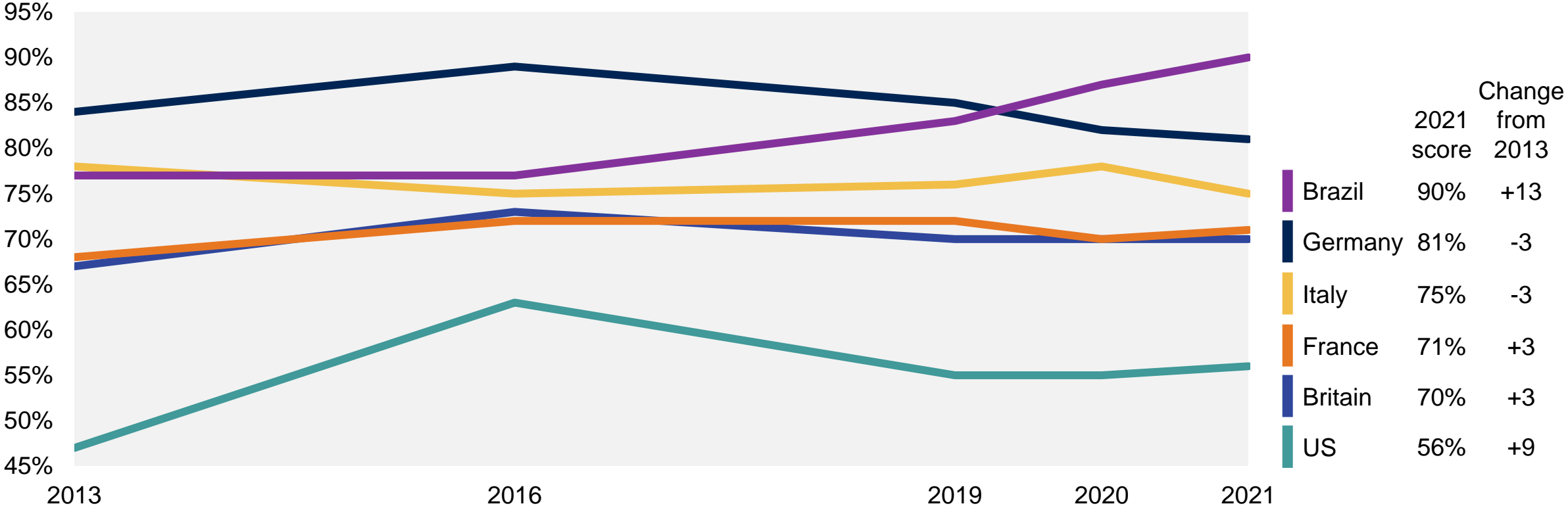
■ % agree
■ % disagree



Base: 24,332 adults aged 16-75 (18-75 in US and CA) in 25 markets interviewed August - September 2021

AS DO VIEWS ON THE IMPACT OF INCOME DISPARITIES

% agree that having large differences in income and wealth is bad for society overall

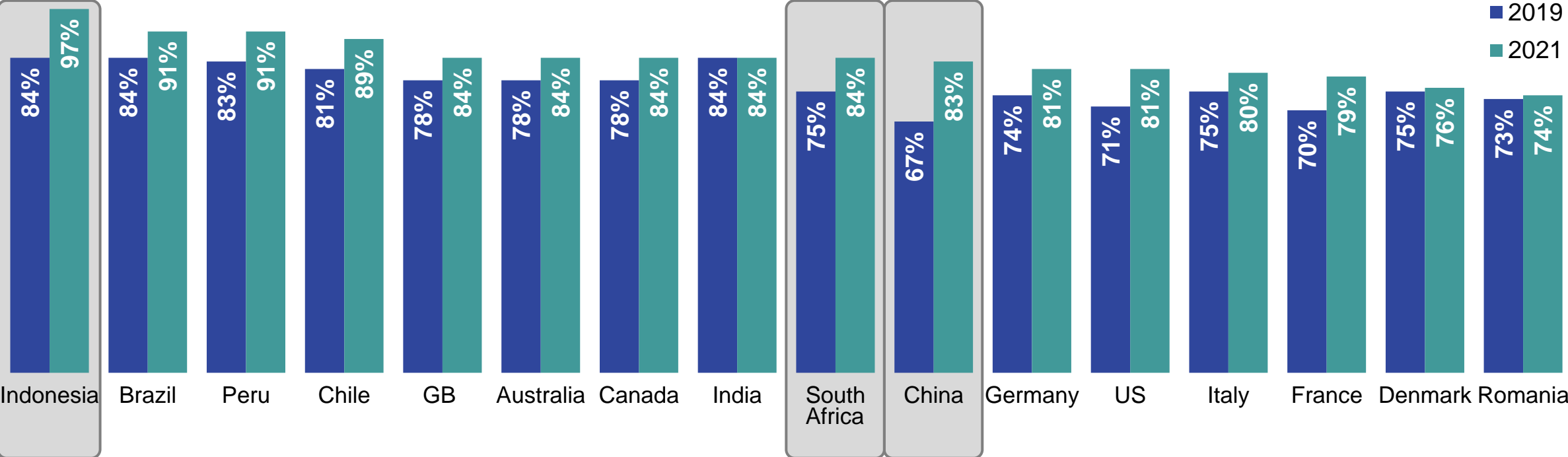


Ipsos Global Trends Series: 500-1,000 adults aged 16-75 (18-75 in US and CA) per market per year



SOCIAL MEDIA FIRMS STILL HAVE 'TOO MUCH POWER' – MORE NOTABLE GROWTH IN SOME EMERGING MARKETS

Social media firms have too much power - % agree 2019 and 2021



Ipsos Global Trends Series: 500-1,000 adults aged 16-75 (18-75 in US and CA) per market per year



YET ANXIETY AND APATHY REMAIN THE KEY REACTIONS TO THE DATA DILEMMA

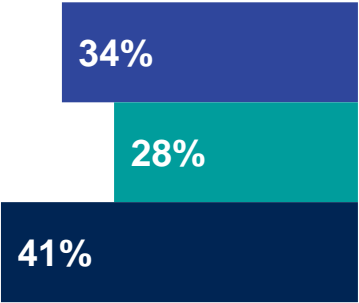
% agree with data values statements in 2021



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



I am concerned about how information being collected about me when I go online is being used by my own government



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

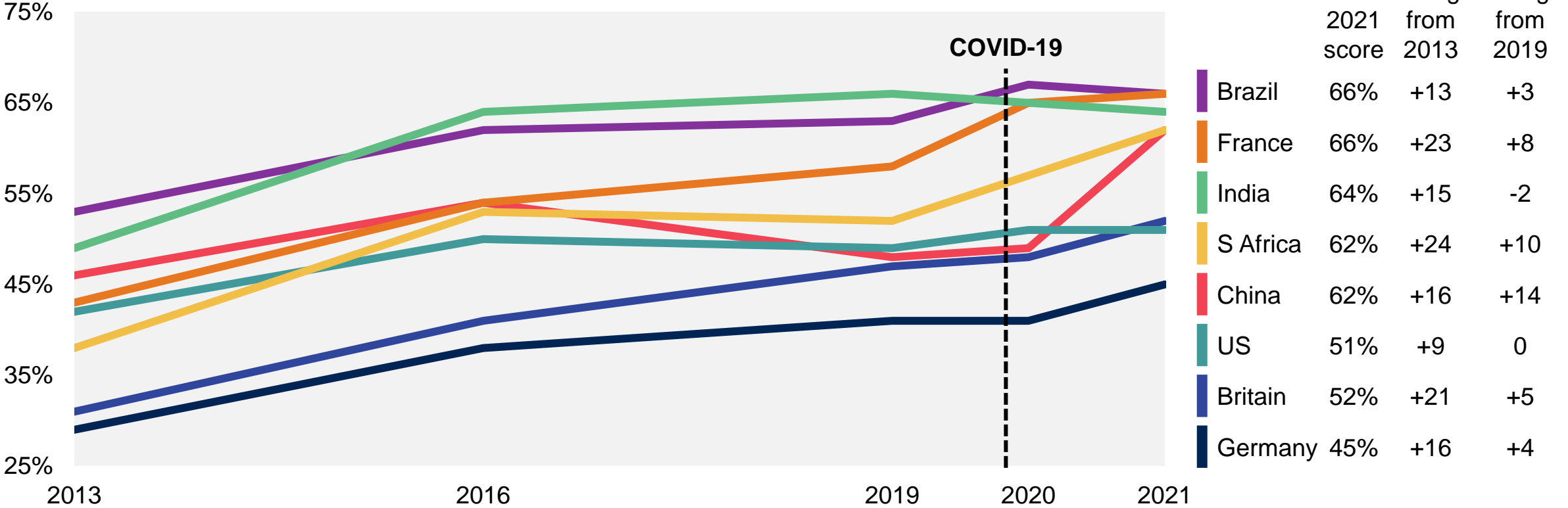
- Britain
- US
- Brazil

Ipsos Global Trends Series: 500-1,000 adults aged 16-75 (18-75 in US and CA) per market per year



CONCERN ABOUT TECH ROSE MORE PRE-COVID FOR DEVELOPED MARKETS

I fear that technical progress is destroying our lives – % agree 2013-2021



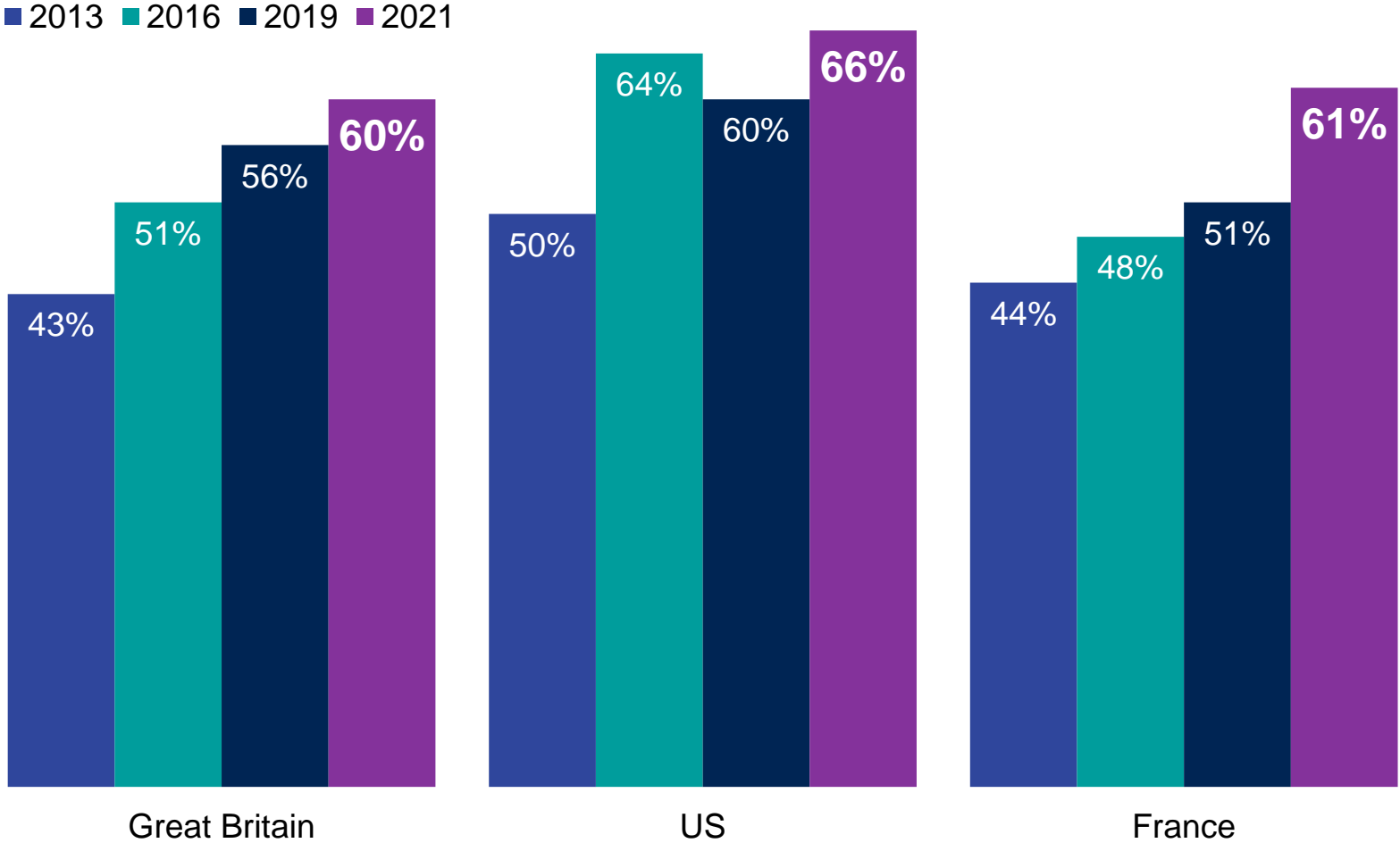
Ipsos Global Trends Series: 500-1,000 adults aged 16-75 (18-75 in US and CA) per market per year



AND WHERE IS THERE EMERGING CHANGE?

THE RISE AND RISE OF BRAND PURPOSE

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



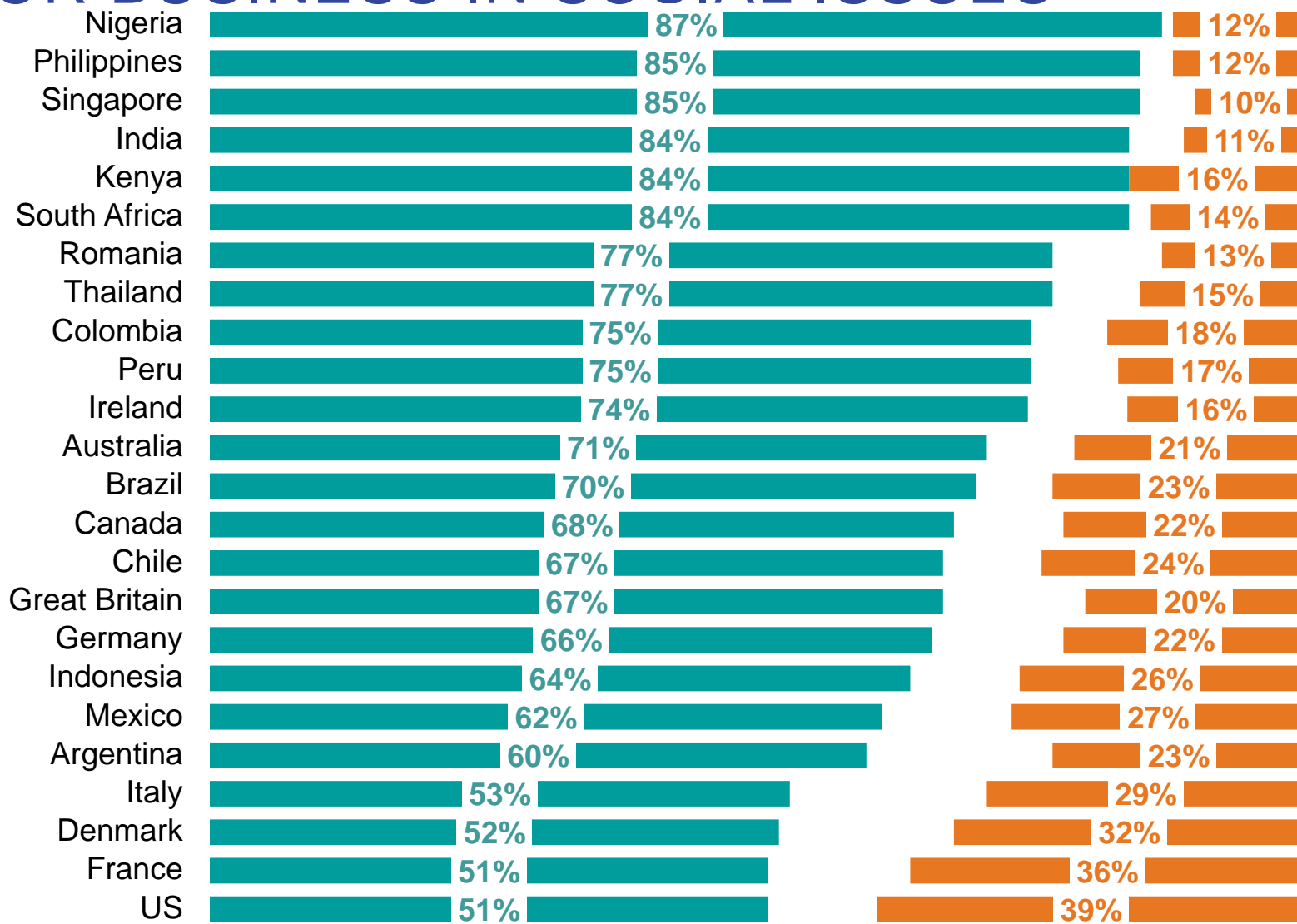
Ipsos Global Trends Series: 1,000 adults aged 16-75 (18-75 in US and CA) per market per year



MANY SEE A ROLE FOR BUSINESS IN SOCIAL ISSUES

Business leaders have a responsibility to speak out on social and political issues affecting my country

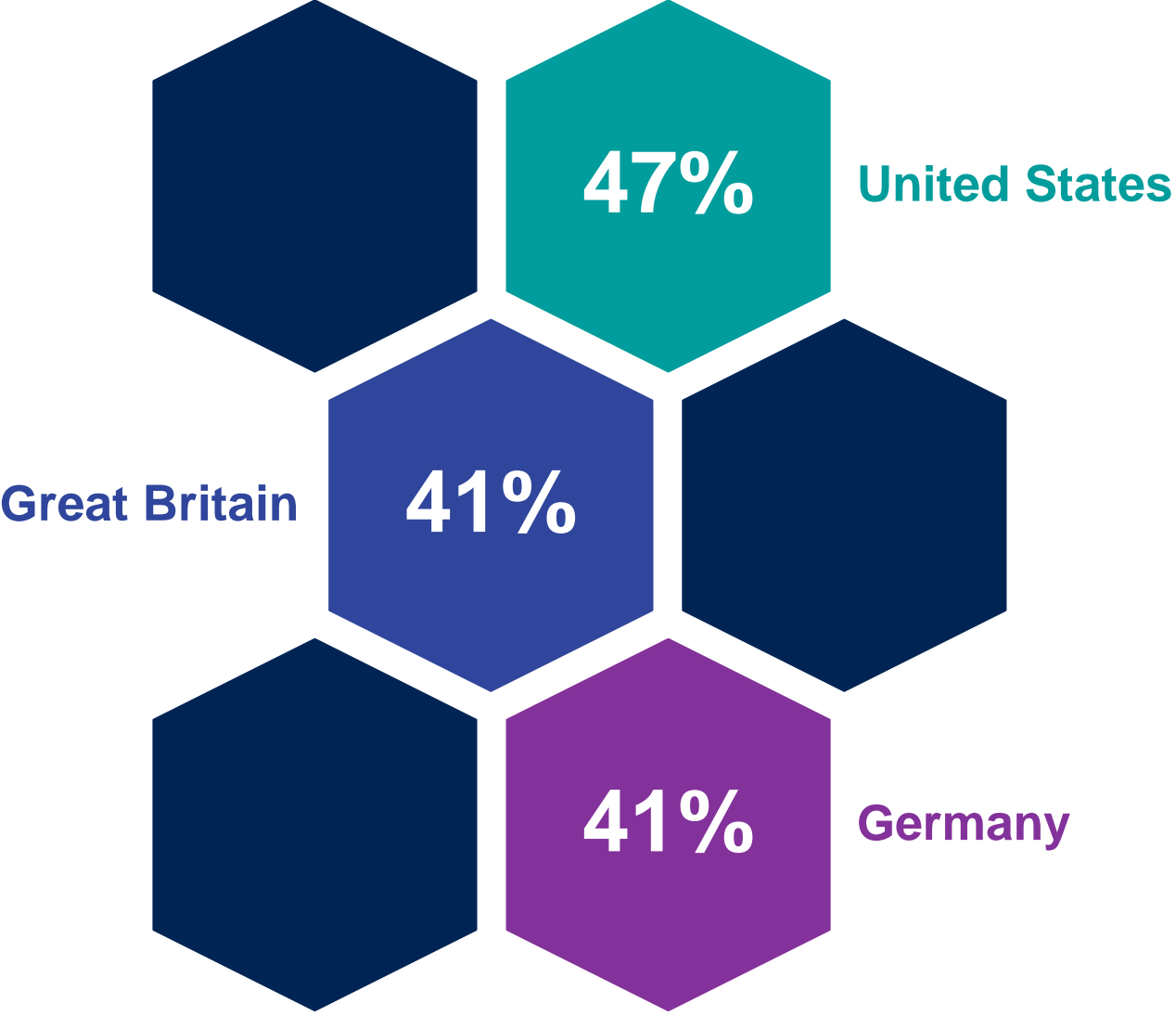
■ % agree
■ % disagree



Base: 24,332 adults aged 16-75 (18-75 in US and CA) in 25 markets interviewed August - September 2021

ALTHOUGH NOT EVERYONE AGREES THIS IS A PRIORITY...

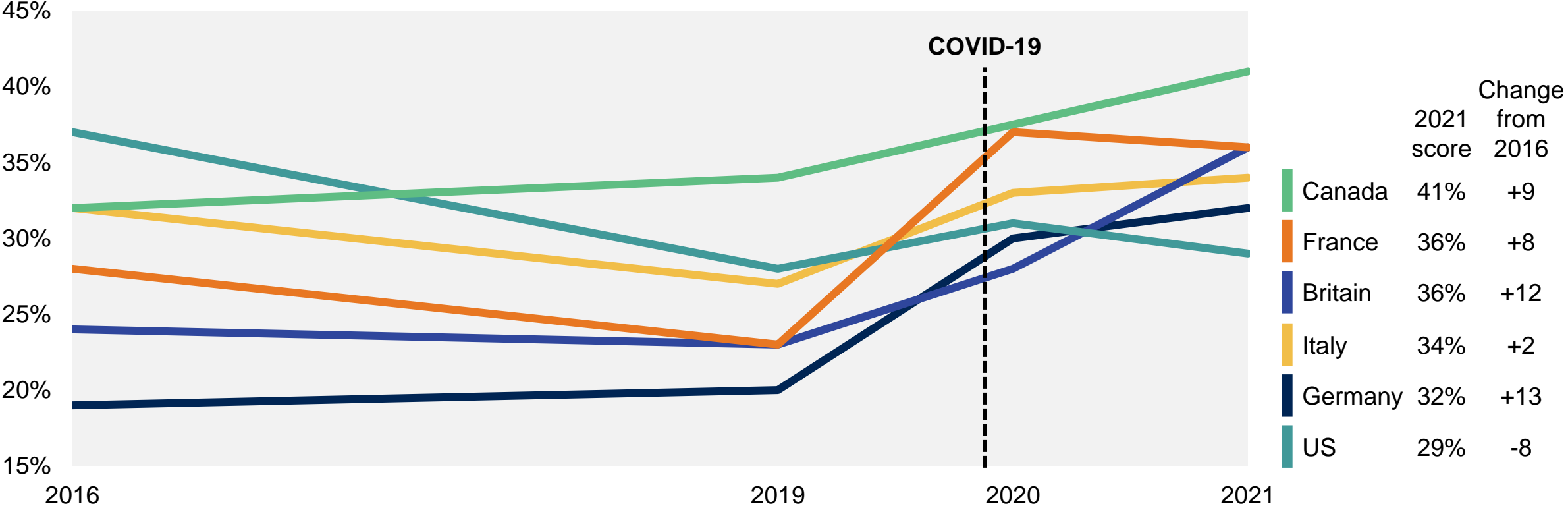
I don't care if a brand is ethically or socially responsible, I just want them to make good products – % agree



Base: 24,332 adults aged 16-75 (18-75 in US and CA) in 25 markets interviewed August - September 2021

ONLINE FRICTION HAS RISEN SINCE COVID-19

I find shopping online more difficult than shopping in traditional stores – % agree



Ipsos Global Trends Series: 500-1,000 adults aged 16-75 (18-75 in US and CA) per market per year

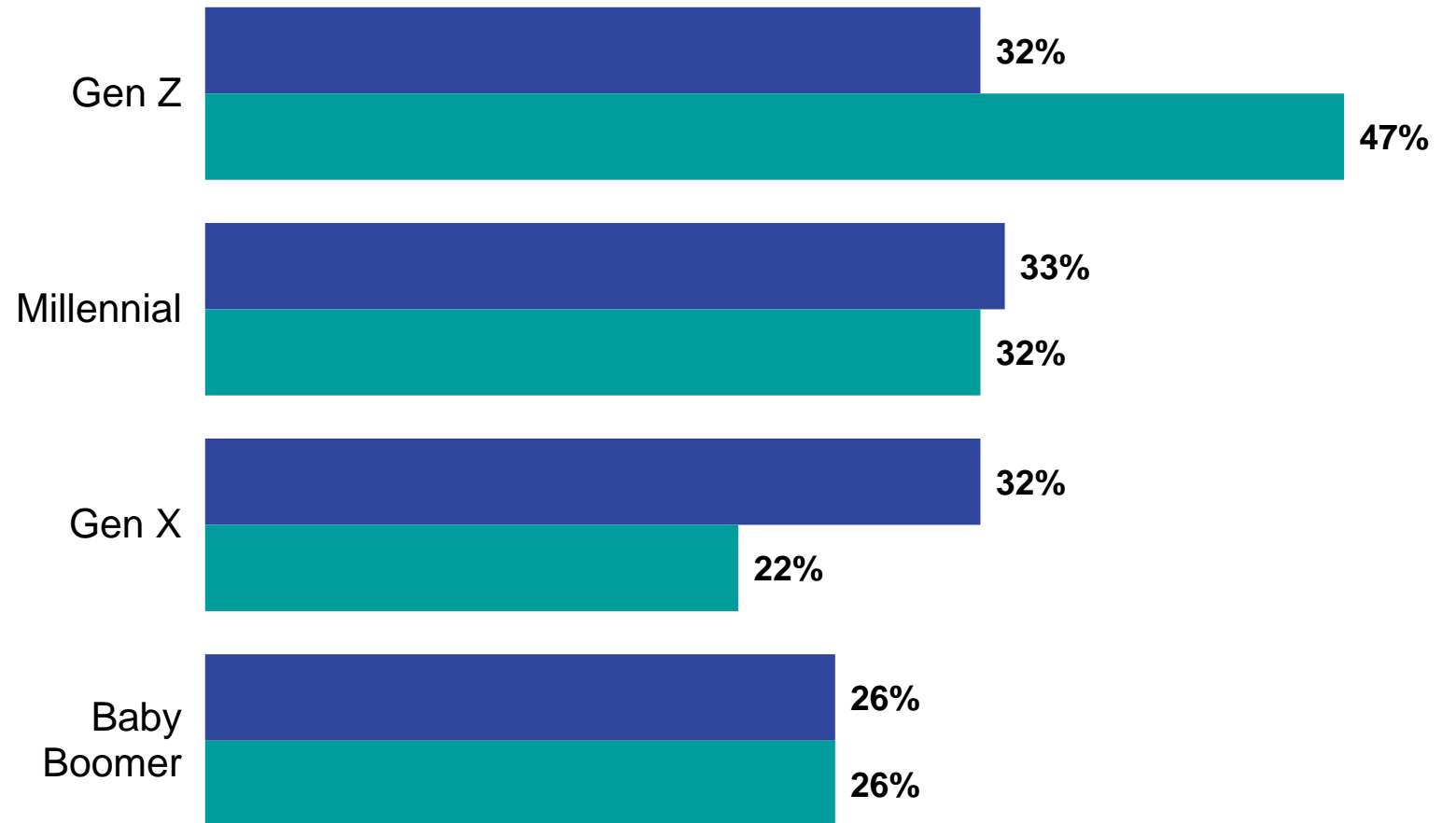


BUT WHO IS EXPERIENCING THE MOST FRICTION?

■ 2020 ■ 2021

United States



I find shopping online more difficult than shopping in traditional stores – % agree

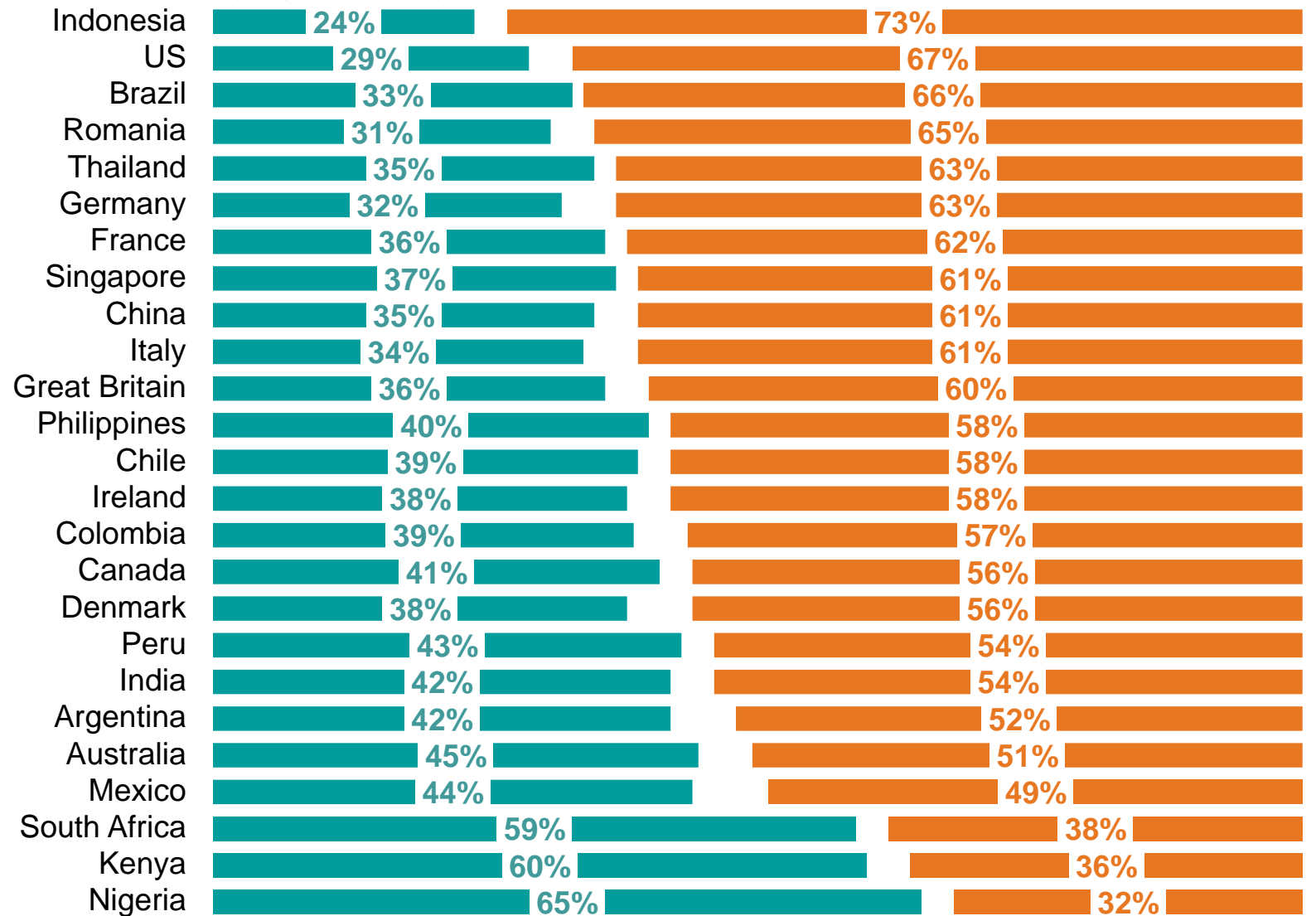


Ipsos Global Trends Series: c. 1,000 US adults aged 18-75 interviewed per wave

IT REMAINS EASIER FOR MOST HOWEVER

I find shopping online more difficult than shopping in traditional stores

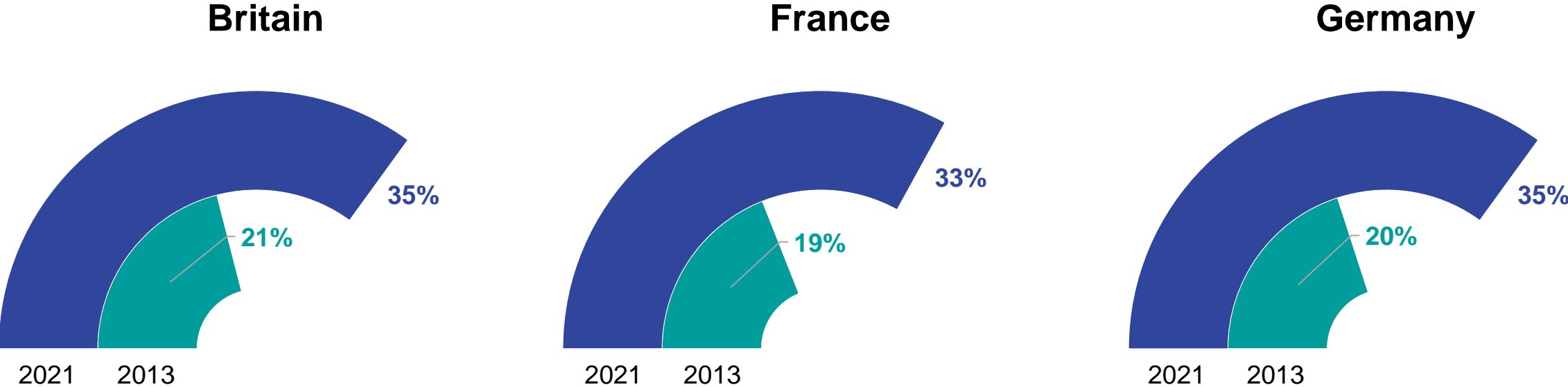
 % agree
 % disagree



Base: 24,332 adults aged 16-75 (18-75 in US and CA) in 25 markets interviewed August - September 2021

AND WE ALSO SEE SOME GROWTH IN COMFORT WITH SHARING DATA

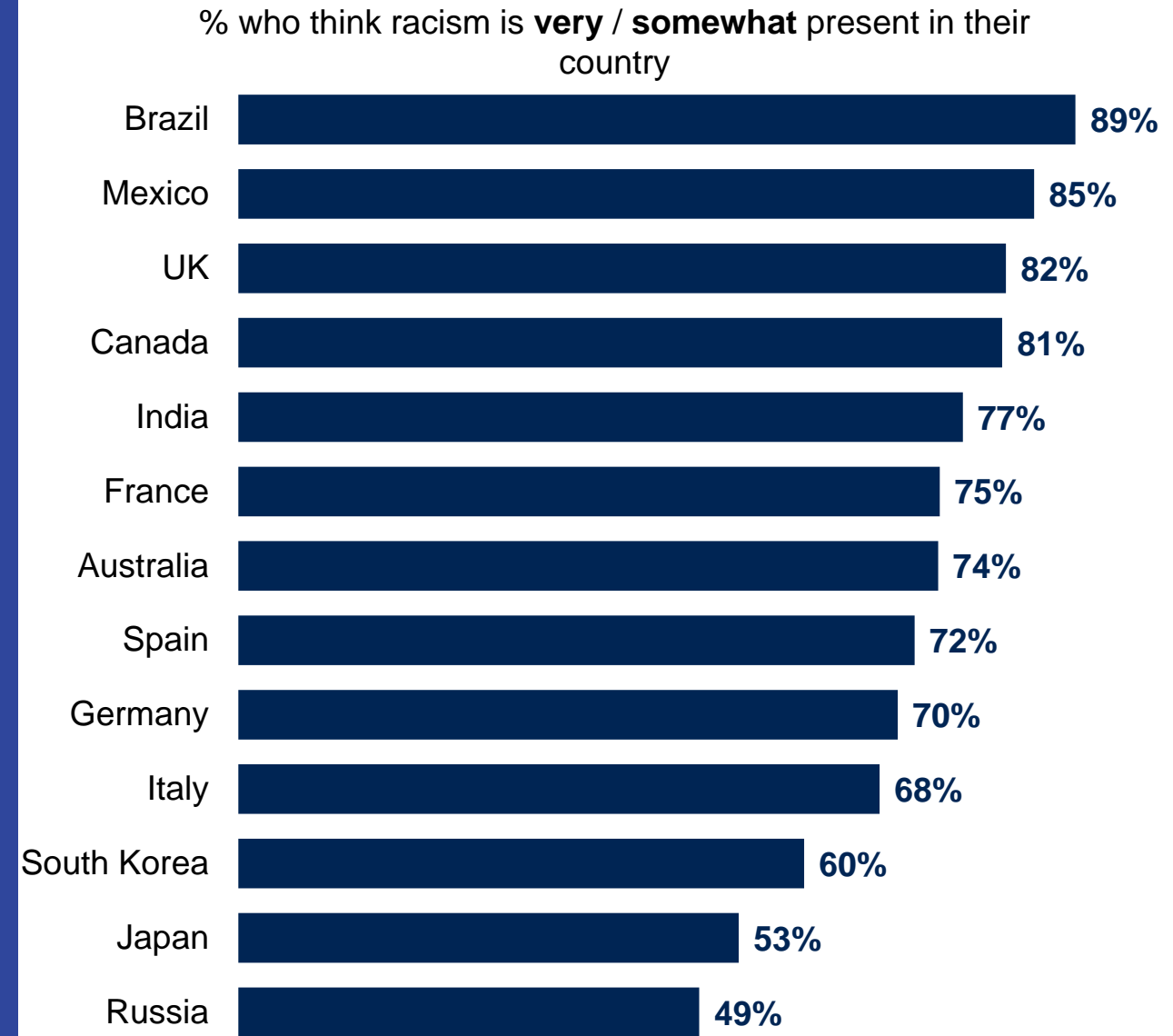
People worry too much about their privacy online - I'm not concerned about what companies or the government know about me - % agree



Base: 24,332 adults aged 16-75 (18-75 in US and CA) in 25 markets interviewed August - September 2021

BLACK LIVES MATTER HAS ALSO CHANGED THE NARRATIVE

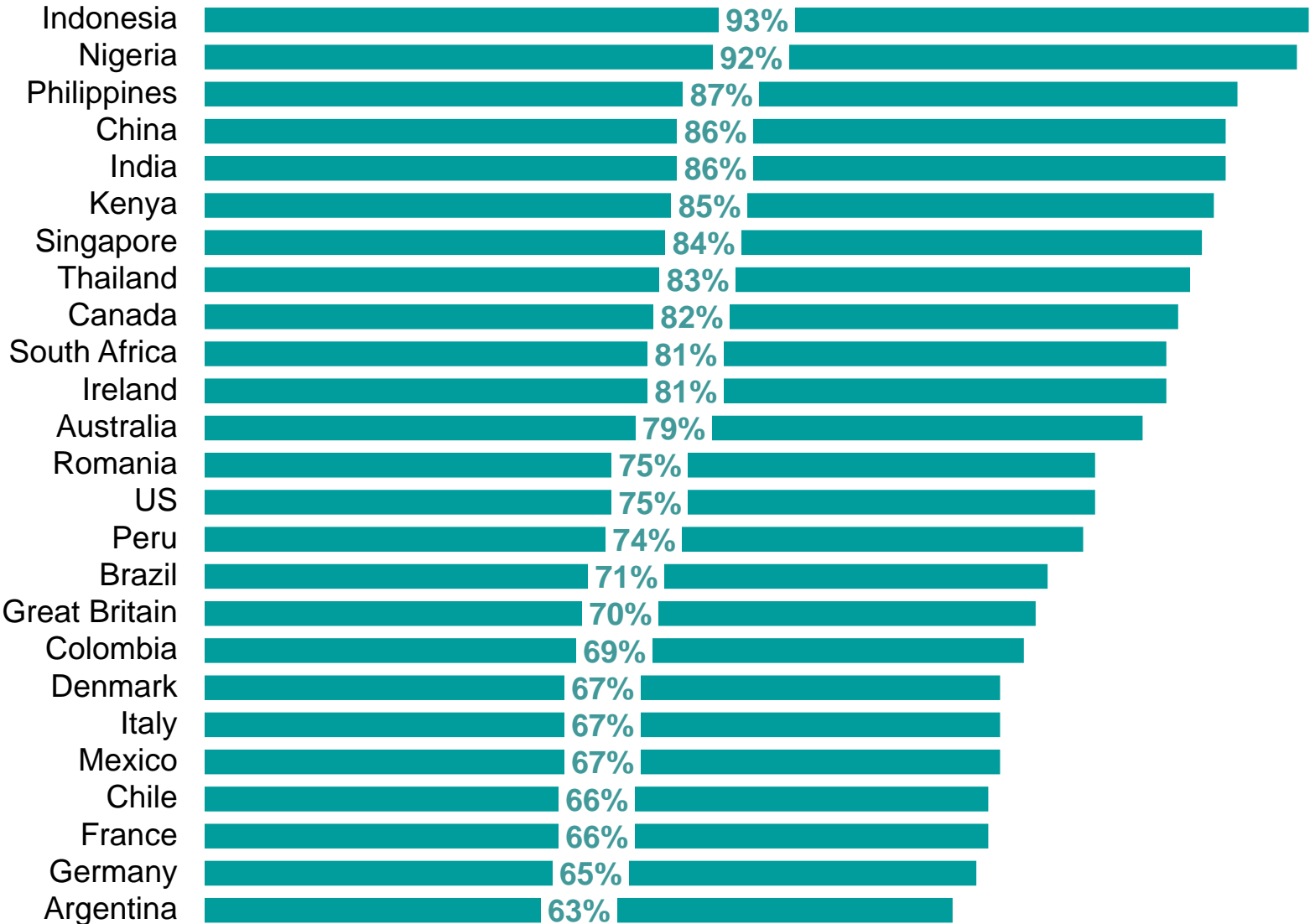
To what extent if at all do you think that racism and other forms of intolerance which is the base of the protests in the United States is present in your country?



Ipsos Global Advisor: 15,908 adults aged 16-75/18-75 in 13 countries, interviewed online June 2020

WHILE MOST THINK THEY LIVE IN COHESIVE NEIGHBOURHOODS

My local area is a place where people from different backgrounds get on well together – % agree



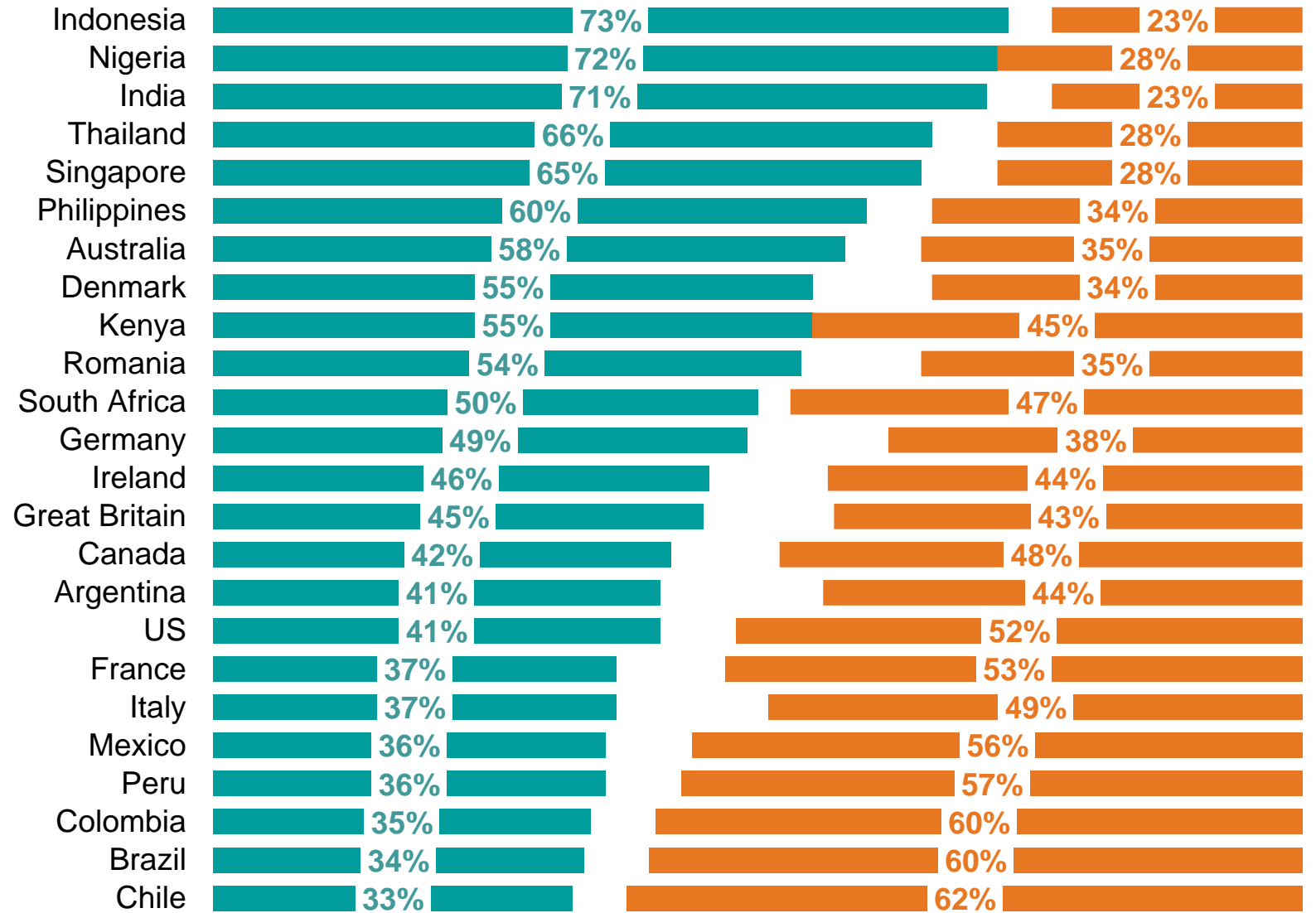
Base: 24,332 adults aged 16-75 (18-75 in US and CA) in 25 markets interviewed August - September 2021



THEY AGREE LESS ON HOW MINORITIES ARE TREATED

“People from different backgrounds and ethnic minorities in my country are treated fairly”

■ % agree
■ % disagree

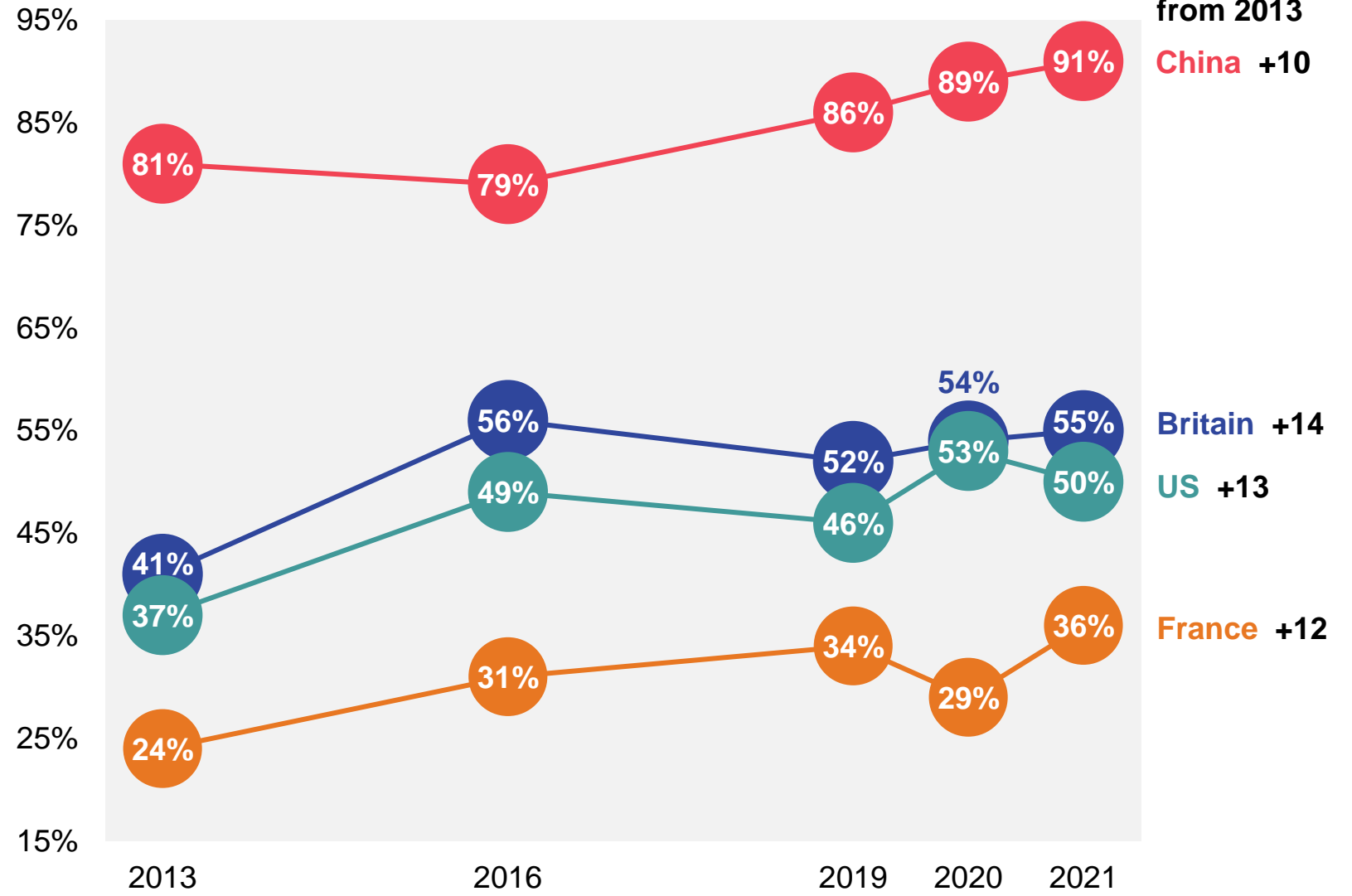


Base: 24,332 adults aged 16-75 (18-75 in US and CA) in 25 markets interviewed August - September 2021

A GLOBALISATION PARADOX

VIEWS OF GLOBALISATION CONTINUE TO IMPROVE

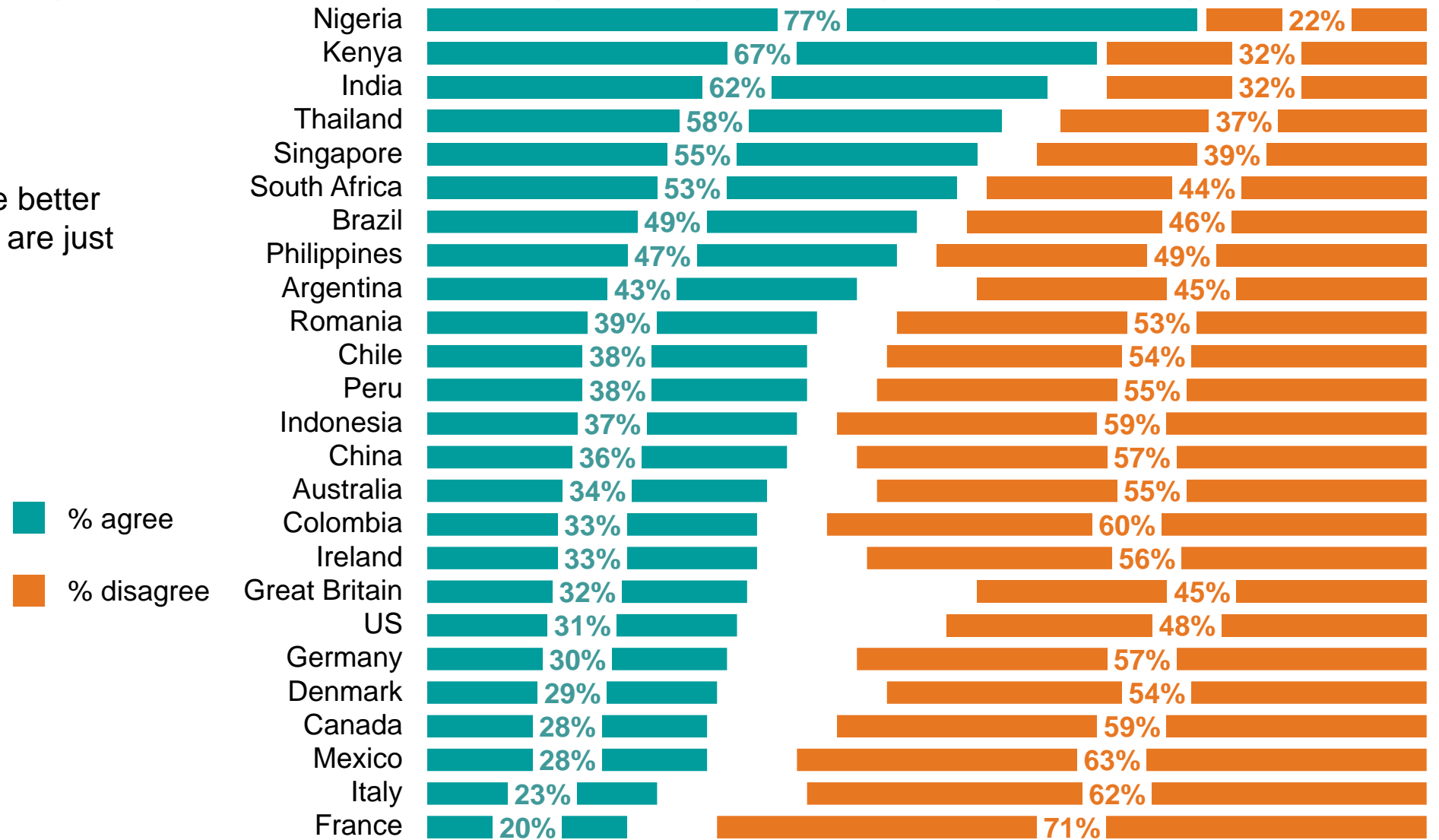
Globalisation is good for my country
– % agree



Ipsos Global Trends Series: 500-1,000 adults aged 16-75 (18-75 in US and CA) per market per year

YET MANY SHOW A PREFERENCE FOR LOCAL / NATIONAL BRANDS

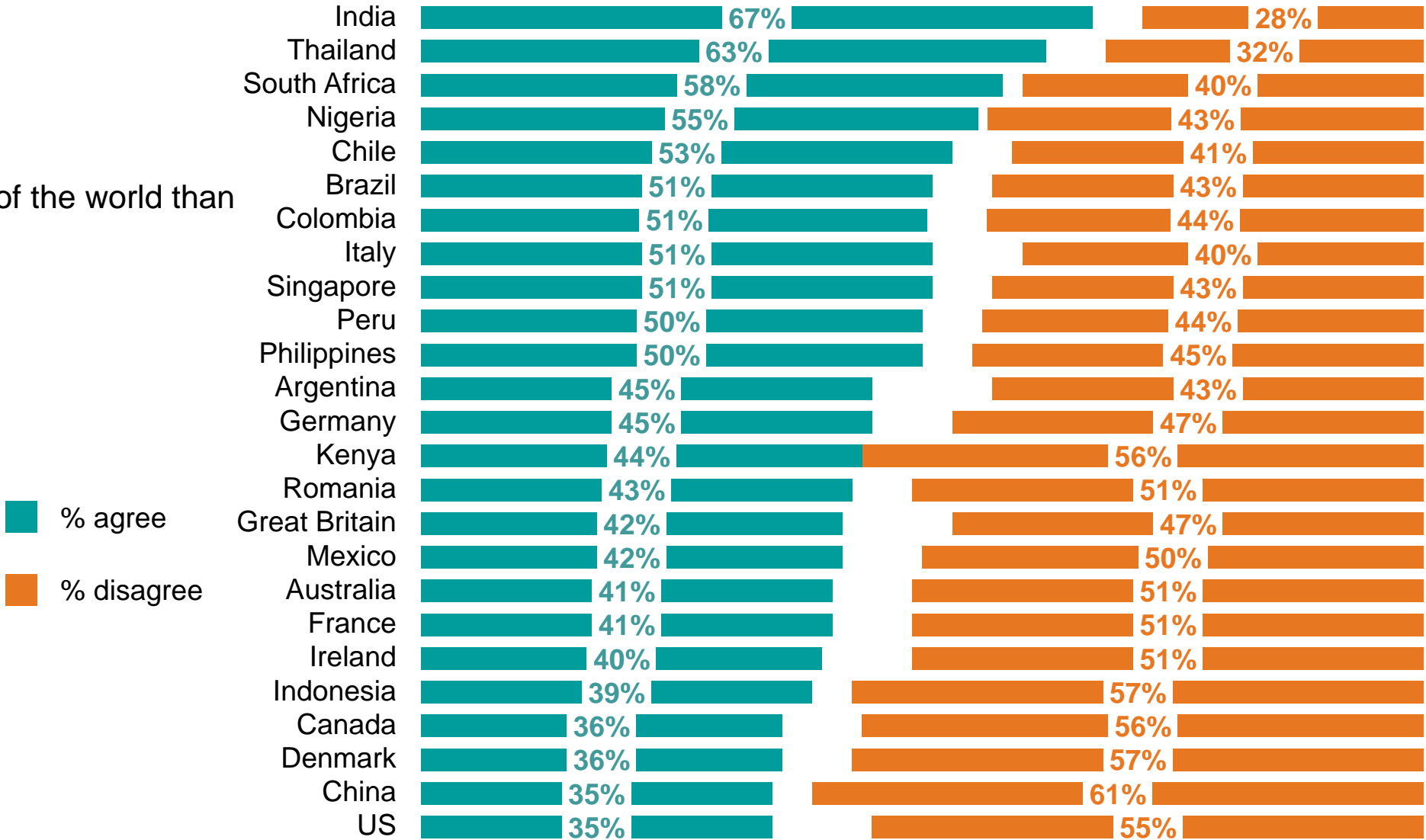
I think global brands make better products than brands that are just local to my country



Base: 24,332 adults aged 16-75 (18-75 in US and CA) in 25 markets interviewed August - September 2021

AND FEEL A CLOSER AFFINITY TO THE NATION

I feel that I more a citizen of the world than a citizen of my country



Base: 24,332 adults aged 16-75 (18-75 in US and CA) in 25 markets interviewed August - September 2021



VALUES REMAIN MOSTLY UNCHANGED 1.5 YEARS IN

Still more continuity than change

Climate concern was not interrupted by COVID-19

Link between brand and values/purpose

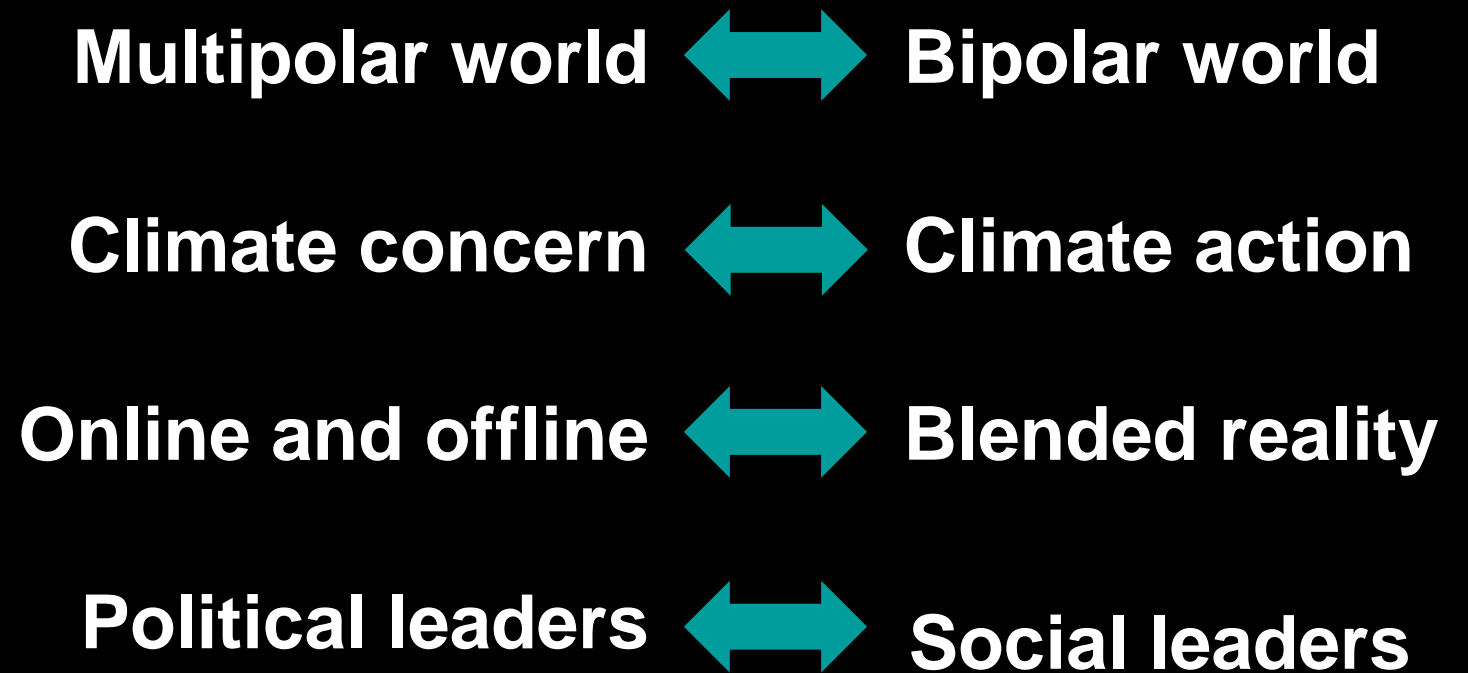
But we see potential for evolution in some areas

Attitudes to data and online/offline world

Rebalancing between global and local

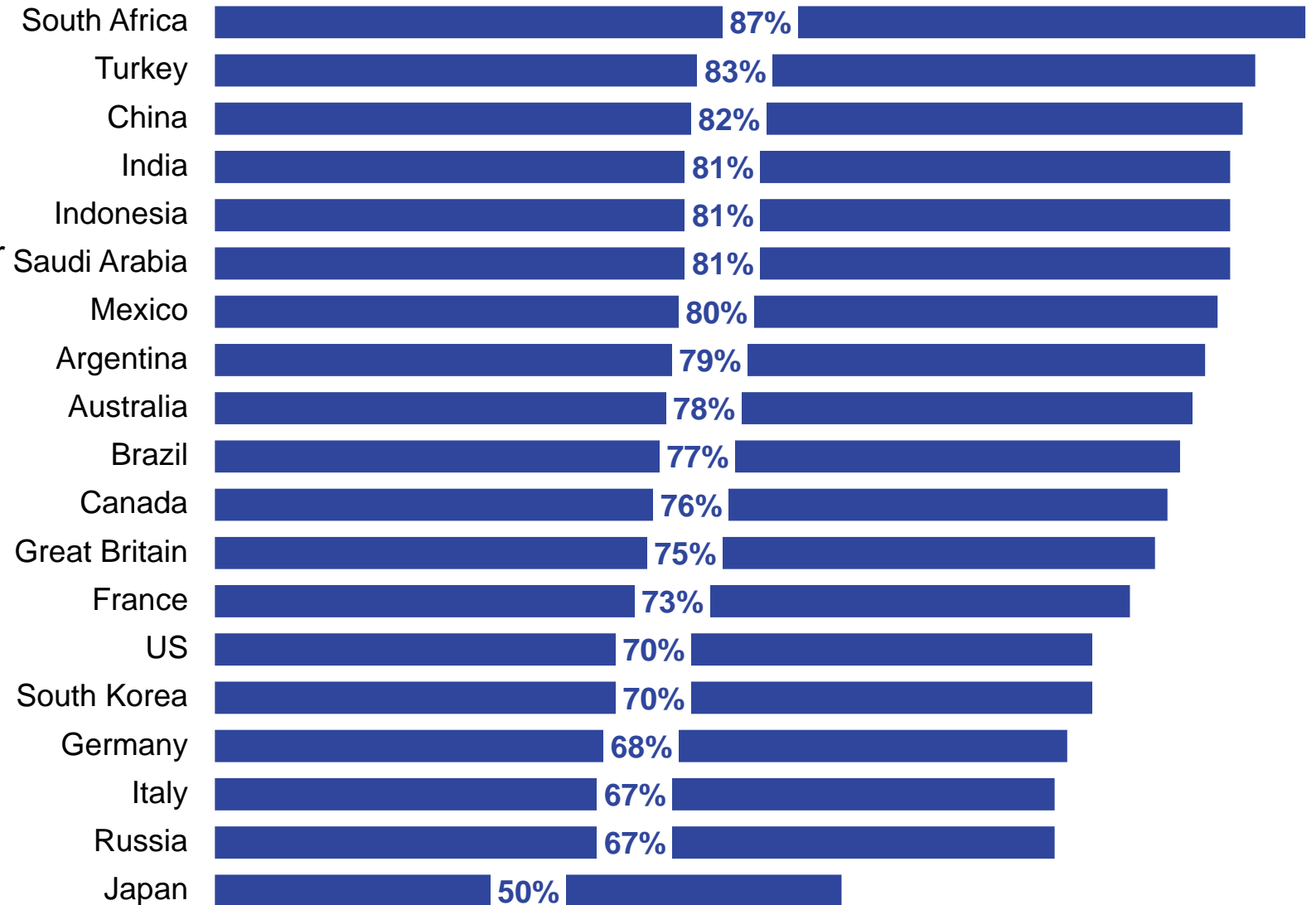


BUT WHETHER WE SEE IT OR NOT, THE WORLD IS CHANGING FAST



POST PANDEMIC, THE CAPACITY FOR CHANGE IS THERE...

The COVID-19 pandemic has shown how quickly people can change their behaviour in a crisis – % agree



Ipsos / Global Commons Alliance: 19,735 adults aged 16-75 in G20 countries, interviewed online April-May 2021

THE QUESTION FOR 2022 IS...

How will our slow-changing values clash with our changed world?

And who will lead the public to help them adapt?



ABOUT IPSOS

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Our research professionals, analysts and scientists have built unique multi-specialist capabilities that provide powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 business solutions are based on primary data coming from our surveys, social media monitoring, and qualitative or observational techniques.

“Game Changers” – our tagline – summarises our ambition to help our 5,000 clients to navigate more easily our deeply changing world.

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GAME CHANGERS

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 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.