



GLOBAL TRENDS

FRAGMENTATION

COHESION

& UNCERTAINTY



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FOREWORD



BY BEN PAGE
Chief Executive, Ipsos MORI

Welcome to our latest Global Trends report. While we live in a world of uncertainty, some trends ARE certain – we have covered these in our **Megatrends** section. Beyond known technology, demographic and environmental changes, we have found eight global master trends looking across our 18,000 interviews in 23 major countries.

In the West, we see the self-explanatory **Crisis of the Elites** and **Generation Strains** – the growing gulf between the young and older generations in terms of opportunity.

Everywhere we can see the **Battle for Attention**. With only so many hours in a day, consumers face being bombarded across more and more channels and are reacting by blocking and switching off. The **Search for Simplicity and Control** is in part a reaction to feeling overwhelmed, but is a global phenomenon – how business and public services provide this seems as big a challenge as ever. Another area in which we want to take control is in regard to our own health – a theme we explore in **A Healthier World**.

A decline in growth in living standards in the West, and pessimism about the future are now triggering two related trends: **Uncertainty is the New Normal** and the **Rise and Rise of Tradition**.

Much of this depends on where you are sitting as you read this. **The Optimism Divide** shows how living in Shanghai, Mumbai or Jakarta will give you a completely different perspective than if you are reading this in London, Chicago or Rome. This is an important corrective for international businesses – while the world is more connected than ever, it is not the same everywhere, and consumers remain dramatically different in their outlook.

The underlying sense is of increasing fragmentation across many spheres of life. Differences are growing, complexity increasing, positions embedding.

What this latest in-depth global study should remind us is that despite increasing longevity, rising incomes in emerging markets, more connectivity, computing power and storage than we could ever have imagined, the human condition is one of anxiety and striving for more – at least if you read the media. Understanding the manifestations of that seems ever more vital for politicians and business.

In this report, we outline an overall structure for organisations to use to frame their analysis about key trends in consumer and citizen opinion globally – for the full set of charts, data and more go to: www.ipsosglobaltrends.com.

Do let us know what you think.
ben.page@ipsos.com

TECHNICAL NOTE

The 2017 Global Trends survey is an Ipsos survey conducted with 18,180 adults aged 16-64 [in the US and Canada 18-64] between 12 September and 11 October 2016. This is the second wave of the Global Trends survey – a previous version was run in 2013 with 20 countries and the report was published in 2014.

The survey was carried out online using the Ipsos Online Panel System in 23 countries - Argentina, Australia, Belgium, Brazil, Canada, China, France, Great Britain, Germany, India, Indonesia, Italy, Mexico, Japan, Peru, Poland, Russia, South Africa, South Korea, Spain, Sweden, Turkey and the United States of America. The 2014 wave covered the same countries, except for Indonesia, Mexico and Peru.

Approximately 1000+ individuals were surveyed in Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Japan, Spain, Great Britain and the United States of America. Approximately 500+ individuals were surveyed in Argentina, Belgium, Poland, Mexico, Peru, Russia, Saudi Arabia, South Korea, Sweden and Turkey.

In established markets with a higher level of internet penetration [more than 60% online], the results can be taken as representative of the general working age population. However, in emerging markets where internet penetration is lower, the results should be viewed as representative of a more urban, affluent and 'connected' population.

The results are weighted to ensure that the sample's composition reflects that of the adult population according to the most recent country census data, and to provide results intended to approximate the sample universe. Total global data have not been weighted by population size, but are simply a country average.

Where results do not sum to 100, this may be due to computer rounding, multiple responses, or the exclusion of don't knows or not stated responses. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error, and measurement error.

Certain questions were not asked in China, so where this is relevant, the base information on each chart refers to 22 countries and 17,180 adults.

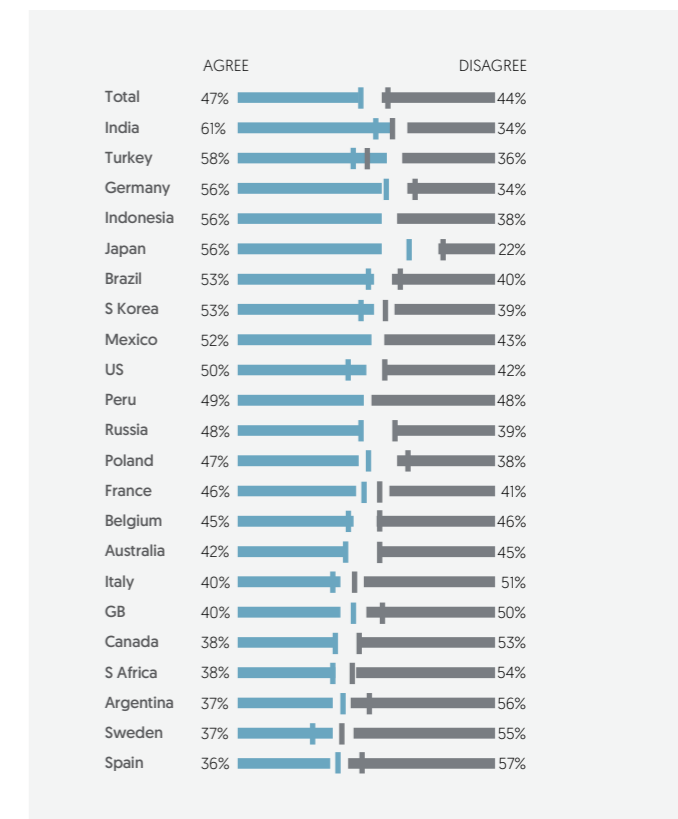
HOW TO READ THE CHARTS

The charts showing data across all countries surveyed in our Global Trends survey are represented as follows in our report.

The solid horizontal bars represent the % who agree [a combination of 'strongly agree' and 'tend to agree'] or disagree [a combination of 'strongly disagree' and 'tend to disagree'], at a total level as well as by individual country.

Where trend data from our fieldwork undertaken in 2013 exists, this is represented by the vertical bars to give an indication as to whether agreement has gone up or down in the last three years.

Mexico, Peru and Indonesia are new to this study, which should be noted when comparing the global trend indicators.



MEGATRENDS: LONG-TERM TRENDS SHAPING THE WORLD IN 2017 AND BEYOND



BY ROBERT KETTRICK
Associate Director, Ipsos Loyalty

Before exploring key trends from our research, it's worth reminding ourselves of the underlying demographic, economic and social changes that provide the backdrop to this report. These 'megatrends' act like the earth's major tectonic plates, with their movements and interactions having the power to reshape how governments, businesses and societies think and behave.

**THESE
MEGATRENDS
ACT LIKE
THE EARTH'S
MAJOR
TECTONIC PLATES**

1.

TECHNOLOGICAL ACCELERATION

One of the most distinctive characteristics of the near future will be the role of technology in an accelerating digital era.

Technological advances will continue to rapidly transform the ways we live and work. At least in digital terms, the world will be even more connected, with current projections suggesting that from 29% in 2010, over half of the world's inhabitants will have internet access by the end of the decade.¹ More ambitiously in advanced markets, the 'Internet of Things' (IoT) offers 'smarter' ways to manage everything from our health to our homes.

Amazon's Echo is now in over 11 million homes (mostly US but now also in the UK and Germany) with its voice-controlled personal assistant 'Alexa' simulating a human touch for a digitally co-ordinated experience.² Those enjoying a night in can, with just a few verbal commands from the comfort of their sofa, control everything from their TV screen, to the hallway lighting and kitchen kettle. Whilst Fitbit users can also ask Alexa to update them on their daily activity goals and order a guilt-free pizza if they feel it's been well earned.

In the workplace, developments in Artificial Intelligence (AI), robotics and sharing economy platforms – to name but a few technologies – hold the potential to spawn a 'Third Industrial Revolution'. In the US, it's globalisation that has become a primary target of blame for manufacturing job losses. However, the consistent growth of domestic manufacturing output and its seemingly inverse correlation with employment, suggests that more is being produced with fewer people and automation is the more likely culprit.³ Whilst an 'America First' policy might please a large number of voters, it remains to be seen whether it will succeed in reversing this trend. Forrester grabbed headlines with the prediction that 16% of US jobs will disappear due to automation technologies by 2025 and, even sooner and showing the change is far from isolated, 25% of all work tasks will be offloaded to software robots, physical robots or self-service technology by 2019.⁴

In 2004, the US Department of Defence offered one million dollars to the driverless vehicle that could complete a secure 150-mile track and not a single vehicle made it past the seventh mile. Just over a decade later, Google's self-driving cars have amassed over a million miles on city streets in the last two years alone.⁵ This potentially paves the way for a world where taxi and truck driving are no longer occupations and car ownership becomes a hobby akin to horse riding. But although technological leaps can be huge, predicting the rate of regulatory and societal adjustment is difficult. So whilst new stories and predictions will continue to grab headlines, only with retrospect will come certainty as to whether technologies such as driverless cars have passed the 'turning point', to use Carlota Perez's language, or 'crossed the chasm' as Geoffrey Moore termed it.⁷

BY 2020 THERE WILL
BE CLOSE TO SEVEN
TIMES THE NUMBER
OF CONNECTED
DEVICES AS PEOPLE
ON THE PLANET⁵

THE VOLUME OF HEALTH
DATA WORLDWIDE IS
PROJECTED TO BALLOON
TO 2.3 EXABYTES

[2.3 BILLION GIGABYTES]

BY 2020 – GROWING

48%

PER YEAR AND
OUTPACING THE
GROWTH OF

BIG DATA OVERALL⁸

2.

DEMOGRAPHIC CHANGE AND DYNAMIC POPULATIONS

The trend varies widely by country, but the total world population will continue to grow. However, this growth will be driven more by life expectancy than birth rates – although a combination of the two will see Africa represent the bulk of the growth and make it a potential engine of the global economy. Whilst many developed countries remain either stable or shrinking, Africa's population is set to double by 2050, with Nigeria overtaking the US in that time – a rapid rise considering its population was just over half the US's in 2010.

As booming populations increase the economic potential of some markets, for the wider world population aging, mass movement and urbanisation will continue to force questions around economic, social and environmental sustainability. These questions are not only for politicians with straining social welfare systems in mind, but also for marketers looking to appeal to the needs of the older (and often more affluent) customer and design products and services suitable for an increasingly cramped urban environment.

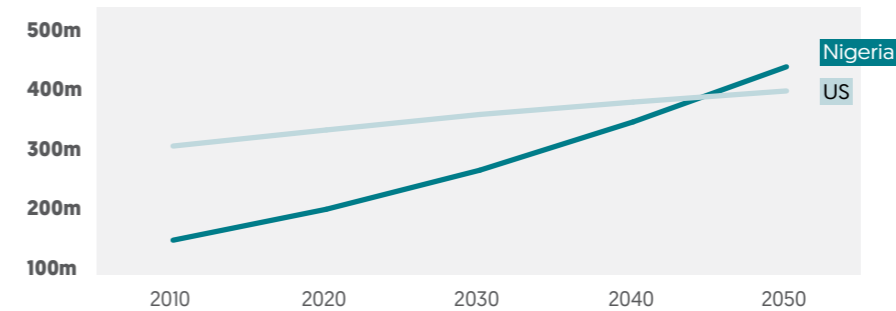
The migration of people and their concentration in urban centres, for reasons of opportunity or security, shows no sign of reversing. In virtually every country we see people more negative than positive about immigration but, despite public opinion, the forces behind it remain strong, if not unstoppable.

Topics like immigration, job creation and welfare spending already dominate the political agenda in many countries, but an increasing number in the science, business and political communities are calling for climate change and resource management to be given greater priority status. If Nigeria is to translate its population growth into a similarly rapid economic development, then the risk that the majority of its largest city, Lagos, could be underwater by 2100 is no doubt a concern that has informed its joining the '100 Resilient Cities' programme – a global network of cities working together, with funding from the Rockefeller Foundation,¹⁰ to overcome the sustainability challenges the 21st century presents.

BY 2050 THERE WILL BE JUST TWO WORKING AGE PEOPLE PER ONE ELDERLY PERSON IN EUROPE⁹

BIG CHANGES AHEAD

Estimated population growth from 2010 to 2050 in US and Nigeria



Source: Pew Research <http://www.pewresearch.org/fact-tank/2014/02/03/10-projections-for-the-global-population-in-2050/>

THE MIGRATION OF PEOPLE AND THEIR CONCENTRATION IN URBAN CENTRES SHOWS NO SIGNS OF REVERSING

AFRICA'S POPULATION IS SET TO DOUBLE BY

2050

1.5 MILLION PEOPLE ARE ADDED TO THE GLOBAL URBAN POPULATION EVERY WEEK¹¹

3.

MULTI-POLARITY

After the fall of the Soviet Union, some saw a US-dominated unipolar world. Drops in commodity prices have prompted the growth of a number of emerging economies to slow and, in Brazil and Russia's case, reverse. However, the overall trend suggests emerging markets will continue to outpace and eventually overtake many developed economies.

GDP forecasts suggest that India *could* overtake the US as the world's second largest economy by 2050 and *should* be the third largest economy ahead of Japan by 2030.¹² More strikingly, the same forecasts show the 'E7' economies (China, India, Brazil, Russia, Indonesia, Mexico and Turkey) overtaking the G7 by 2030 in terms of both size and purchasing power.¹³

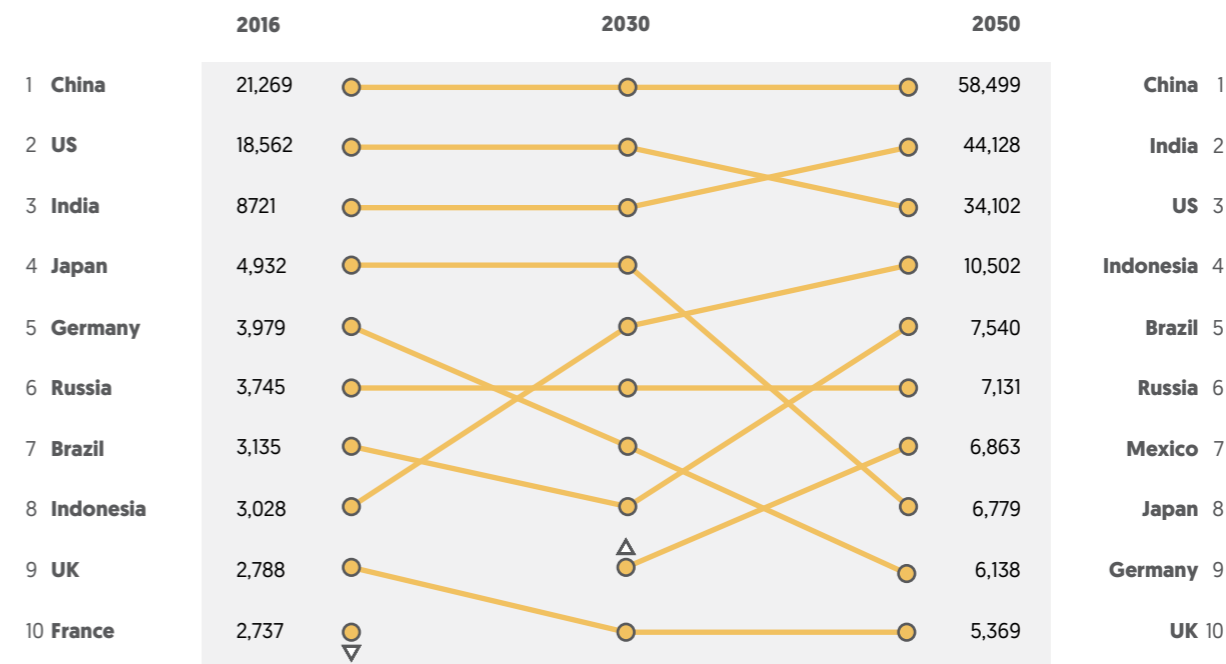
Whether this economic power shift gives rise to a new paradigm in terms of international relations is difficult to predict. But the opportunity for brands with a global outlook and appetite for growth is undoubted. In 2030, two-thirds of the world's middle class will be living in Asia and 107m of the remaining one-third will be based in sub-Saharan Africa.¹⁴ Targeting this audience will likely be a priority for global products ranging from Apple iPhones to Hollywood films. However, the opportunities offered by this multipolar world will, of course, be wide-ranging.

Whilst China has struggled to translate a number of its dominant local brands into global players, heavy investment in overseas acquisitions has achieved a similar goal. Alongside a flow of products also comes ideas and societal influence if China successfully transitions from an 'innovation sponge' to an innovation leader as some analysts predict, or if South Korea continues its growth as an exporter of culture.¹⁵

THE E7 ARE
PREDICTED TO
OVERTAKE THE
G7 BY 2030

PREDICTED CHANGES IN THE RANKINGS OF THE MOST POWERFUL ECONOMIC PLAYERS

Projected global Gross Domestic Product (GDP) rankings in Purchasing Power Parity (PPP) terms (US\$ bn at constant 2016 values)



Source: PWC <http://www.pwc.com/jp/en/japan-press-room/press-release/2017/world-in-2050-170213.html>

BY 2030
TWO-THIRDS OF THE WORLD'S
MIDDLE CLASS WILL BE LIVING IN ASIA

4.

SUSTAINABILITY

With each wave of change, sustainability becomes more pressing. It remains to be seen whether a multipolar world will provide balance and the global infrastructure to address supra-national problems, or create instability. While economic growth is fairly certain, an even distribution of the benefits is not. Global population rises, the mass movement of people and their concentration in urban centres are adding to well-documented resource pressures – creating social tensions, as well as environmental concerns.

Although not without its disputes, most scientists agree that climate change is happening faster than predicted. Lagos is not alone – 75% of the world's large cities are located on coasts and sea level rises threaten fellow megacities from New York and Tokyo to Cairo and Mumbai. Far from being a future problem, the World Health Organization estimates that one in four child deaths (1.7 million a year) are already attributable to environmental threats such as air pollution and unsafe water.¹⁶

In the face of these mounting challenges, technology offers some promise of a panacea – from renewable energy that will responsibly meet growing demands, to graphene-oxide that potentially offers a scalable way to desalinate seawater. There are also 'cities of the future' which are aiming not only to be more energy efficient, but more liveable too.

Competing for recognition as 'cities of the future', Europe currently reigns in the 'Sustainable Cities Index',¹⁷ but reinforcing the multi-polarity theme, it's China that looks set to dominate renewable energy. With major investments, at home and abroad, it already owns five of the world's six largest solar-module manufacturing firms and the largest wind-turbine manufacturer.¹⁸ And its citizens are most likely to cite climate change as a key concern in Ipsos' monthly *What Worries the World* series.

However, for society, technology also brings its own tensions as a connected world grapples with privacy concerns and it remains to be seen whether powerful AI systems will pave the way for flourishing knowledge economies or rising unemployment and social polarisation.

**CLIMATE CHANGE IS
HAPPENING FASTER
THAN PREDICTED**

**75%
OF THE WORLD'S
LARGE CITIES ARE
LOCATED ON COASTS
AND SEA LEVEL
RISES THREATEN
MEGACITIES FROM
NEW YORK AND
TOKYO TO CAIRO
AND MUMBAI**

LOOKING TO THE FUTURE: THE PROBLEM WITH PREDICTIONS

These megatrends are constantly evolving but, as root causes of change, we can be certain of their influence even if the precise chain of effects remains a matter of speculation. How governments, businesses and societies respond – either proactively or reactively – to megatrends and the sustainability tensions they bring to the fore, will dictate much of the history that's eventually written.

After 2016-2017, few – especially those in the polling industry – would argue that the world is becoming more predictable. Uncertainty remains and is potentially as prevalent as ever. Catastrophic events such as geopolitical conflict, environmental disaster or economic crises have the power to disrupt any trend. So whether it's straining US-Russia relations or the lingering dangers of a global debt crisis, a number of catalysts remain far from dormant and with the potential to cast doubt on even the most conservative of trend predictions.

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**CATASTROPHIC
EVENTS SUCH AS
GEOPOLITICAL CONFLICT,
ENVIRONMENTAL
DISASTER, OR ECONOMIC
CRISES HAVE THE POWER
TO DISRUPT ANY TREND**



1. THE CRISIS OF THE ELITES

THE CRISIS OF THE ELITES



BY BOBBY DUFFY
 Managing Director, Ipsos MORI Social Research Institute

The rise of populism has become a global obsession in the last year, driven by the major upsets in Brexit and Donald Trump's Presidential election victory, but with echoes in many other countries throughout the world.

In particular, there is a very clear and growing sense that regular people feel they are being left behind by establishment and political elites that don't understand or care about them. These themes come through incredibly strongly in the Global Trends survey. Firstly, it is the majority view in every single country in the study that the economy is rigged to the advantage of the rich and powerful. This is even the case in Sweden, which typically feels more at ease with itself. It is most extreme in Mexico, where 94% think the economic system is rigged, but Spain and Italy come next in the list: these two western European democracies have over 80% of their populations who think the economic system is rigged against them.

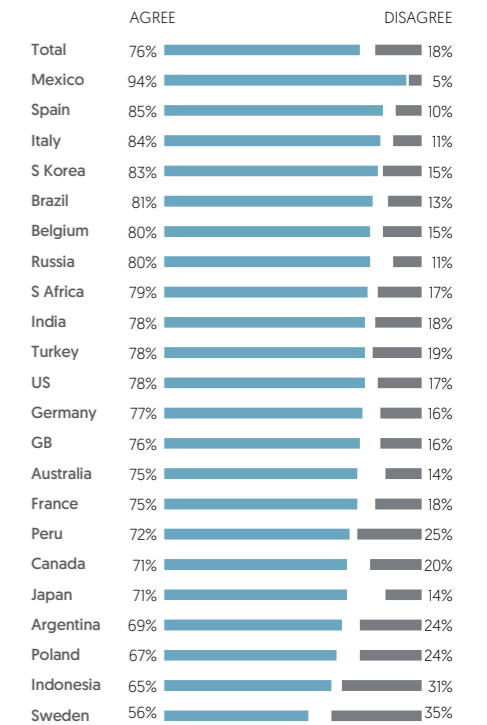
If people think the economic system is rigged against them, governments don't fare much better, with half or more in EVERY country agreeing that their government doesn't prioritise the concerns of people like them.

In fact, there are very similar levels of agreement and country ranking as the previous question – Mexico, Spain and Italy at or near the top, Sweden at the other end, but still, even there, over half of Swedes agree their government doesn't care about them. The exercise of political and economic power to the advantage of the elites is effectively fused in people's minds.

There is an interesting global pattern here. Unlike other trends in this volume, we don't see an 'old' versus 'new' world split. There is no 'multipolar' view on how power is rigged against ordinary people – it's one of the few globally unifying trends!

ECONOMY IS RIGGED

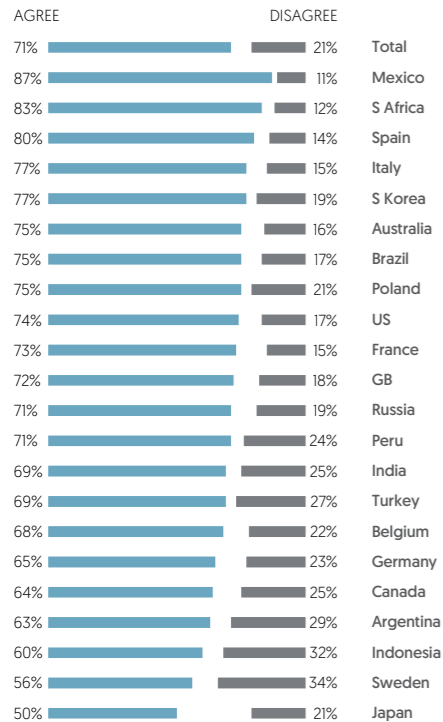
The economy of my country is rigged to advantage the rich and powerful



Ipsos Global Trends Survey, 17,180 adults across 22 countries, online, 12 Sep – 11 Oct 2016

**THE LEFT
BEHINDS**

Our government does not prioritise the concerns of people like me



Ipsos Global Trends Survey, 17,180 adults across 22 countries, online, 12 Sep – 11 Oct 2016

So how do we understand these trends and where they might go next?

In 2015 before Trump and Brexit, Mark Zuckerberg of Facebook's first pick for his new book club was *The End of Power: from Boardrooms to Battlefields and Churches to States, Why Being in Charge Isn't What It Used to Be*, by Moisés Naim. It seemed an unusual choice [not very Oprah Winfrey], but it makes perfect sense given the disruptive events now unfolding. Its hypothesis is that

power is now easier to get, harder to use and easier to lose. In many ways this is a good thing. There is a lower chance of dictators and despots, as people can't hold on to power for as long, or as deeply as they used to.

This description of less concentration of power among the few seems at odds with other 'big idea' books of recent years, including Thomas Piketty's *Capital in the Twenty-First Century*, which outlines the incredible concentration of wealth and economic power at the top of most societies over the last 40 years.

But the two can be reconciled. Power can become less stable, more fleeting, but still be concentrated, and in some ways more dangerous. As Naim says, the loss of 'superpowers' of global authority could mean greater instability. The combination of these conditions – less stable control of power but growing inequality and alienation – make the darker side of Naim's thesis, possible paralysis of power or anarchy – in effect, fragmentation – more likely or important.

So how should governments and business respond to this more dangerous context? The political context looks very unstable, with talk of a "super-cycle of disruption". It's hard to tell when you're in the middle of such a cycle, and we'd be more circumspect about declaring that's what's happening quite yet: for example, the 2017 Dutch general election did not provide the reinforcement of a populist swing that many predicted.

But in all this, we need to bear in mind the positive potential of disruption if it gets us to a more even distribution of power. Already there has been a sea-change in politics away from ignoring or even trying to silence the economic and cultural concerns of the 'left behinds'. This really is as much about culture as economics: we can predict a lot about people's overall outlook and mindset simply from knowing their views on the death penalty, whether they think human rights protect the criminal rather than the victim, and whether they believe political correctness really has "gone mad". But we're a long way from reconciling these concerns with existing political and economic systems.

Trust in business is much higher than belief in the 'system'

For businesses and brands, the first point to note is that consumers do not automatically group them together with the 'elite'. Trust in business is much higher than belief in the

'system', as the chart opposite shows. True, the world is divided on whether business can be trusted or not – with some particularly negative views again in France and South Korea – but it's also not the wholesale rejection seen with politics in much of the world.

This is maybe because 'business' is so much more varied than the economic 'system' in people's minds, made up of individual companies and brands that they do connect with. Many business leaders left Davos recently with a nagging dilemma: do they maximise profits for shareholders or bend more towards people's demands for better jobs, responsible tax behaviour and local investment?

IPSOS THINKS

But as *The Economist* points out, the options are not nearly as monolithic: "wiser executives know that shareholder value comes in shades of grey". Corporations in the West have a range of approaches to this question, from corporate fundamentalists at one end [who only care about profit, and seldom succeed for long] through to corporate kings [who make so much money they can afford to do both]. But there are steps in between, including corporate oracles, who bend in advance of anticipated changes coming from politics and the people.

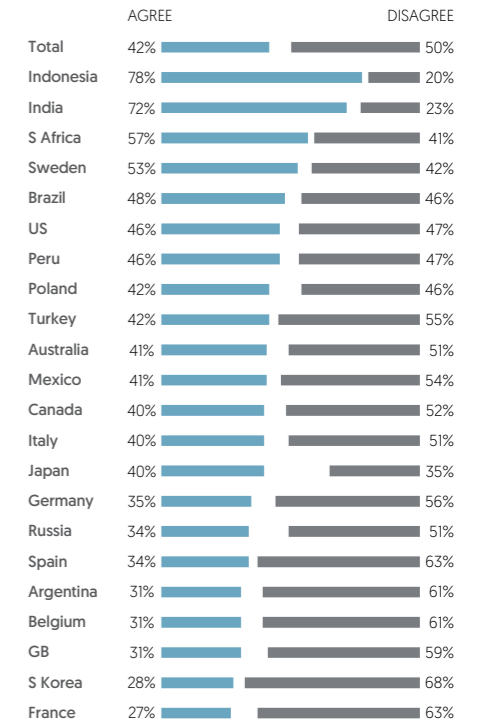
The system is therefore more adaptable than it appears, and businesses should be more confident and forward-looking in their positioning. Those that are seen to be on the side of ordinary people, in small ways as much as big, as employers and contributors to society, as much as generators of profit, can thrive. Time and time again supermarkets emerge as the most trusted of all businesses – they are tangible, provide basic necessities cheaply and in their marketing communications show they are 'on your side.'

Mark Zuckerberg was very prescient to pick out *The End of Power* in 2015. A lot has changed since, but the themes identified are key to understanding the shifts still to come. Ironically, the book completely sold out on Amazon within hours of Zuckerberg announcing his choice: the economic and cultural power of the elite hasn't entirely disappeared. And, of course, many populist 'revolts' are led by just a different flavour of elite – not least, a billionaire in the US and a public school educated son of a stockbroker in the UK. But this doesn't make the underlying trends any less significant, and business and government need to understand the deep-rooted anxieties they tap into.

To get in touch with Bobby, please email bobby.duffy@ipsos.com

**TRUST IN
BUSINESS**

I have a high level of trust in businesses in general



Ipsos Global Trends Survey, 17,180 adults across 22 countries, online, 12 Sep – 11 Oct 2016

JUST HOW MUCH DO SUSTAINABILITY AND BRAND PURPOSE MATTER?



BY MARLOES KLOP
Research Director, Ipsos MORI Reputation Centre

Corporate responsibility is now a minimum requirement for any respectable business. But how much does it really matter to people?

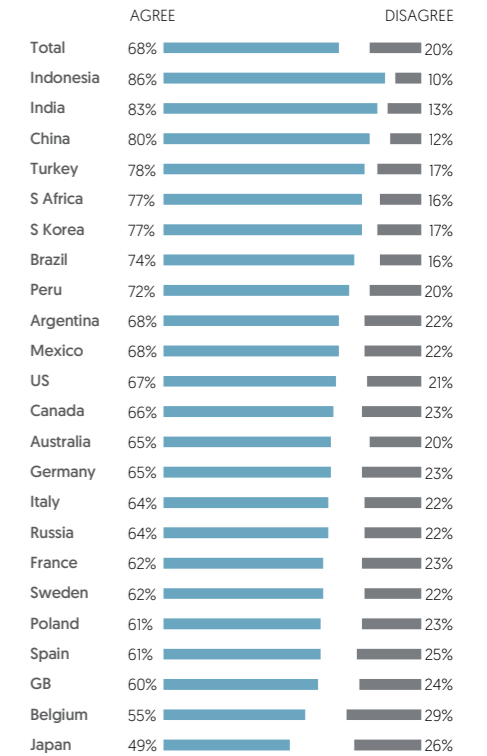
Most big companies have embraced some form of corporate citizenship, acknowledging they have social and environmental responsibilities beyond just financial duties to shareholders.

Corporate Social Responsibility (CSR) has evolved into the broader, more strategic concepts of sustainability and brand purpose. Although these are distinct concepts, they are linked in the sense that businesses are looking to connect to people's values, and give clarity about what they aim for above providing good products and services. Consumer expectations are also evolving: socially responsible behaviour now includes not just environmental and social issues, but taxation too.

This signals a transition from being ad hoc and project-based to becoming fully aligned with business strategy. Young companies such as Tesla, Toms and Patagonia built sustainability into their DNA from scratch, with targets and behaviours rooted in a sustainability purpose. Among established brands, Unilever is often lauded for its success in integrating sustainability into its core business model. The launch of the United Nations Sustainable Development Goals (SDGs) in 2015 also helped to provide organisations with a new framework for 'doing good'.

FUTURE IMPORTANCE OF BRAND PURPOSE

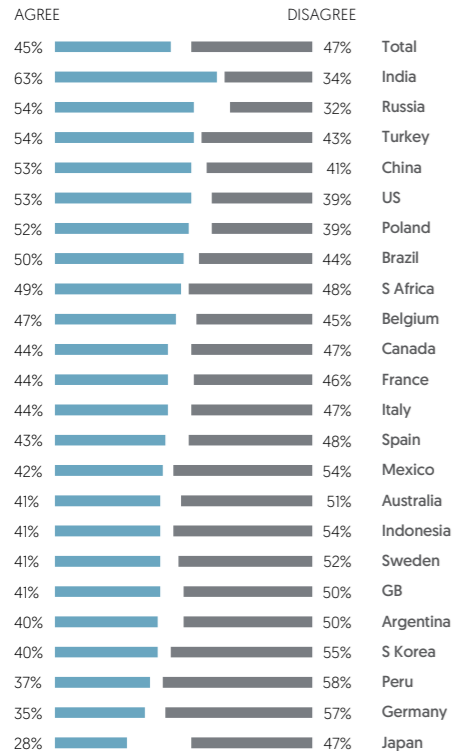
In the future, the most successful brands will be those that make the most positive contribution to society beyond just providing good services and products



Ipsos Global Trends Survey, 18,180 adults across 23 countries, online, 12 Sep – 11 Oct 2016

ARE RESPONSIBLE BRANDS IMPORTANT TO ME?

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



Ipsos Global Trends Survey, 18,180 adults across 23 countries, online, 12 Sep – 11 Oct 2016

We all say we want brands that make a positive difference ...

This study shows that globally, 67% of people agree that it has become *more important* that the brands they choose make a positive contribution to society, beyond just providing a good service or product. This is the majority view in virtually all countries we surveyed.

In some ways more importantly, a similar proportion across the world (68%) think that companies who make a positive difference will be the most successful brands of the future. This rises to 80% or more in key emerging economies like Indonesia (86%), India (83%) and China (80%), where environmental issues and labour relations have a higher profile than in many western countries.

... and there is of course a risk if companies behave irresponsibly

Social media is amplifying reputation problems: if unethical behaviour, accidents or malpractice come to light, even in a far-off jungle or a remote factory, it is shared instantly with millions of potential customers, leaving companies increasingly vulnerable and under attack – something United Airlines is well aware of, after video footage of a passenger being forcibly removed from an airplane in Chicago went viral around the world.

However, does sustainability and purpose really matter to us?

But while the public say they choose 'good', sustainable brands with a social purpose over those that lack it, there is plenty of evidence that indicates that our actual behaviour doesn't always follow through. 'Virtue signalling' in surveys and on social media does not always link to buying behaviour!

Globally, 61% say they try to buy products from brands that act responsibly, even if that means spending more, but this is not the view taken by the majority in several countries, including Canada, Britain, Russia and Japan. Millennials (64%) say they are more ethically driven than Baby Boomers (54%), but not overwhelmingly. Bearing in mind that there is a likelihood that some people will give a socially desirable answer here, the figures are much lower when it comes to what people do in practice. Another insight into people's thinking can be drawn from their response to the statement, 'I don't care if a brand is ethically or socially responsible, I just want them to make good products'. Opinion is evenly split here, with 45% agreeing and 47% disagreeing (and no differences between generations).

Such opinions may go some way to explaining examples in the marketplace. After Volkswagen experienced difficulties around emissions in 2015, the company went on to publish record sales figures a year later. Also, for all the debate about sustainability and brand purpose, globally price still tops people's stated reasons for purchasing decisions (68%), with reputation coming in third place (44%).

So, we say responsible behaviour is increasingly important to us, and

while there is a clear reputational risk in dodgy supply chains or environmental damage, the question is: are people likely to change their behaviour?

All other things (such as price and quality) being equal, people will choose the brand that 'does good' over the others available to them. This reputational benefit may well be on the margins, but can still result in millions of additional revenue. The challenge that we all face is to make sustainability and 'better' business an even more central part of customer decision-making.

IPSOS THINKS

What I want is a sustainable and equitable capitalism. Why can't we have that as a model?

– Paul Polman, CEO of Unilever

Sustainability in particular should be seen as not only doing the right thing, but as an *opportunity* for business. Despite mixed evidence

on the impact it has on customers, it is sensible to improve on and invest further in sustainability. Why? First of all, it's in companies' own interest. Building a sustainable business by definition increases the likelihood of long-term success. This can manifest itself in many ways: from the way you manage your buildings (e.g. the famous 'lights out' motto), handling your natural resources in a responsible way, or developing relations with local communities. Companies should not underestimate the reputational benefit of doing the right thing.

If we want to make the world a better place, [big] business, with all the resources it can bring, is uniquely placed to play a role in this. Think about the scale, abilities to innovate, capabilities in implementing effective new business models, and sheer resources of the big companies. As many as 79% of the public believes it is possible for brands to make money *and* support good causes at the same time.

This doesn't mean sustainability investments – like any other investment – shouldn't be critically reviewed. They should be responsible and prudent in their own right, giving shareholders a return on investment. As with any other process, this should be carefully monitored and inform decision-making – the literature hasn't shown any conclusive impact on the bottom line.

Finally, if business doesn't do the right thing, all over the world consumers say government should regulate business more. While there is general public support for free trade across the world – as our 2017 study on the limits of populism¹⁹ shows – there is plenty of appetite for more regulation of big business, with 60% globally saying they want more action by government.

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IN BRIEF

PRINCIPLES OF UNCERTAINTY
– THE PUBLIC AND
ENVIRONMENTAL SCIENTISTS

BY MICHAEL CLEMENCE

Research Manager, Ipsos MORI Social Research Institute

Scientists tend to enjoy high levels of public trust, but on the environment, the global public is finely split – 47% agree that “even the scientists don’t really know what they are talking about on environmental issues”, and 44% disagree. This is unchanged from 2014, and comes despite a global near-consensus²⁰ amongst scientists that temperatures are rising, and that human activity is a major cause.

Despite greater faith in scientific progress more generally, the fact that trust in scientists to know what’s going on in the environment is lukewarm at best should be worrying – especially as scepticism of these scientists is wider in emerging markets such as India [61%] and Indonesia [56%] where

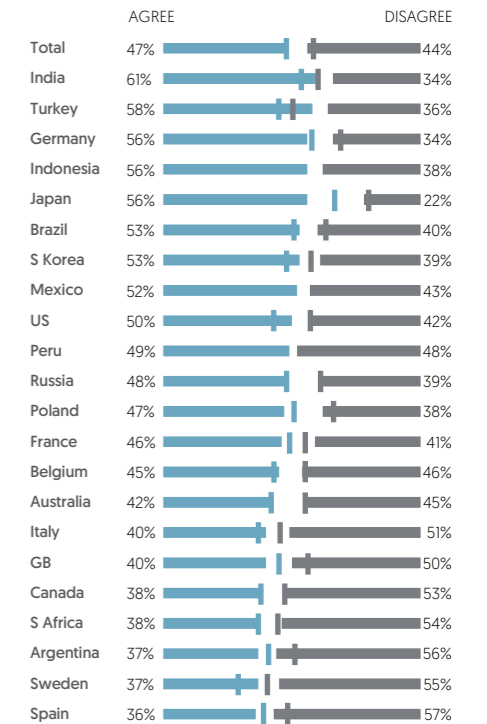
populations are at greater risk from the effects of climate change.

The strongest support for scientists comes from those with a university-level education; 47% with a ‘high’ level of education disagree, compared to 38% of those with the fewest educational qualifications. This is hardly a ringing endorsement. The fact that there is a perception of a muddled message on the environment, even amongst the university-educated, presents a stern challenge to those tasked with communicating the risks of an ever more unpredictable global climate.

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TRUST IN
SCIENTISTS
IS SPLIT

Even the scientists don’t really know what they are talking about on environmental issues



Ipsos Global Trends Survey, 17,180 adults across 22 countries, online, 12 Sep – 11 Oct 2016

THE CRISIS OF THE ELITES AT A GLANCE



SUPERMARKETS ARE THE MOST TRUSTED ORGANISATION GLOBALLY

Some 69% globally say supermarkets can be trusted to be fair – only 36% say their OWN government can be similarly trusted. What does that mean for retailers?

DESPITE ITS DISCONTENTS, MOST PEOPLE PREFER DEMOCRACY

Russians are least enthusiastic globally, but even there, more agree than disagree that it is the best system.



EUROPEAN GOVERNMENTS ARE THE LEAST TRUSTED GLOBALLY AMONG CONNECTED CITIZENS

Whereas 56% of Canadians [44% of Americans] say their government is fair, that figure is under 20% in Italy, France and Spain, despite having far more generous welfare states than many other countries.



WELL BEHAVED BRANDS?

Two thirds of people want brands to do more than just provide good services – and say that brands' social impact will become more and more important. Yet some 45% also say they don't care about ethical behaviour of brands – they just want good products. At the same time more [62%] want brands to help them make a difference in the world, and say they are more likely to recommend brands that do.

2. THE RISE AND RISE OF TRADITION





UNCERTAINTY – AND TRADITION



BY BEN MARSHALL

Director, Ipsos MORI Social Research Institute

People have always been sensitive to change and it is sometimes said that it is the only constant. We all view it differently, sometimes seeing it as a threat, sometimes an opportunity. As this study shows, all over the world we strive for a better future, but often yearn for the past.

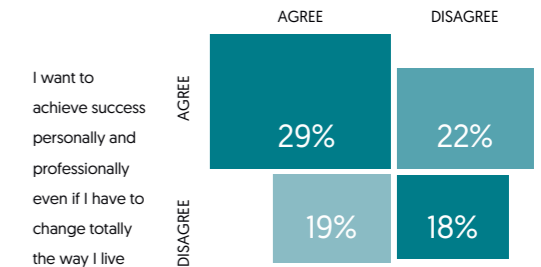
We detect persistent concern about the direction of change, especially at global and national levels. The world is considered an increasingly dangerous place by 82%, more than in 2013 [despite suicide killing more people than all wars, terrorism and crime]. A similar 79%, another increase, think that the world is changing too fast, a trend which sits alongside a shift towards a

desire to slow down and simplify life.

As well as a sense of detrimental change, there is greater conviction that “people led happier lives in the old days when they had fewer problems to cope with”. Nostalgia is also evident in 50% wanting their country to be the “way it used to be”. Traditions remain universally attractive; eight in ten see them as an important part of society with relatively little variation across continents.

NATIONAL NOSTALGIA/ PERSONAL CHANGE

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



Ipsos Global Trends Survey, 18,180 adults across 23 countries, online, 12 Sep –11 Oct 2016

NB: 12% of respondents answered 'Don't know' for either or both of the questions.

The world is considered an increasingly dangerous place

50%
AGREE THAT
THEY WOULD
LIKE THEIR
COUNTRY
TO BE LIKE IT
USED TO BE

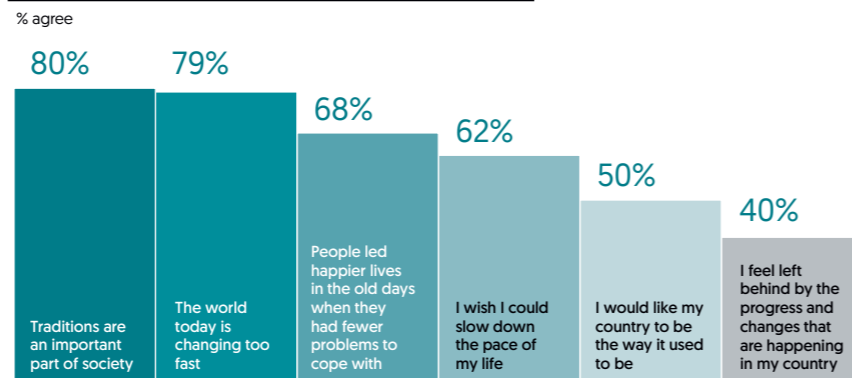
Globally, 59% say that “more and more” they don’t identify with what their country has become and 46% admit to “feeling like a stranger”. A sizeable 40% say they feel “left behind” by progress and changes: all this is a common denominator underpinning Brexit, the rise of Trump and Western Europe’s right-wing parties. Even more significant, immigrants have become “the bogeymen for populist adventurers who take advantage of voter fear and uncertainty about the future”.²¹

Change and threat in all its guises is unnerving significant segments of every population; while the world is better, safer and improving in many respects,²² it doesn’t feel like that. Most people in most countries think their country is going wrong. This isn’t, though, a new phenomenon and nor is sentiment headed in the same direction. For example, most do not see their country’s decline as irreversible,²³ and there has been a shift towards seeing globalisation as “good for my country”.

Is the personal different to the political? We find a recognition that risk-taking is ever more necessary to achieve things in life and a majority countenance “total change” to the way they live if it allows them to achieve personal and professional success. Nearly half, 46%, agree that the pace of life allows them to achieve more, while those nostalgic for the past do not automatically rule out change themselves; 29% agree that they would like their country to be like it used to be, but also countenance “total change” to the way they live for personal and professional success (the largest quadrant in our graphic on the previous page). At the same time, traditionalists and those who are open to personal change differ little in their views on key social issues.

CHANGE AND
THREAT IN ALL
ITS GUISES IS
UNNERVING
SIGNIFICANT
SEGMENTS
OF EVERY
POPULATION

THE CHANGE CONTINUUM



THE APPEAL OF TRADITION...

Ipsos Global Trends Survey, 17,180 - 18,180 adults across 22 - 23 countries, online, 12 Sep – 11 Oct 2016

IPSOS THINKS

People have a complex relationship with change. At present, many of us can’t live with it, or live without it. Traditionalism and nostalgia are appealing and powerful.

Modern technology makes the past even more accessible. And as uncertainty lingers alongside disappointment and scepticism, some will want to escape into other more comfortable worlds, be they alternative [and virtual] realities or just more familiar ones. As anxiety and mental disorders rise, we will seek solace and our own form of Danish *hygge*.

People want a ‘pick ‘n’ mix’ society – traditional but also progressive – creating challenging territory requiring careful navigation by governments, businesses and brands. How can they absorb forward and backward change, providing the excitement of the new with the reassurance of the past?

One thing they will have to change is the narrative around change, presenting its upside, providing comfort while being honest about downsides, equipping populations and consumers with the skills and confidence to embrace it, while not ‘nannying’. The same could be said of traditionalism.

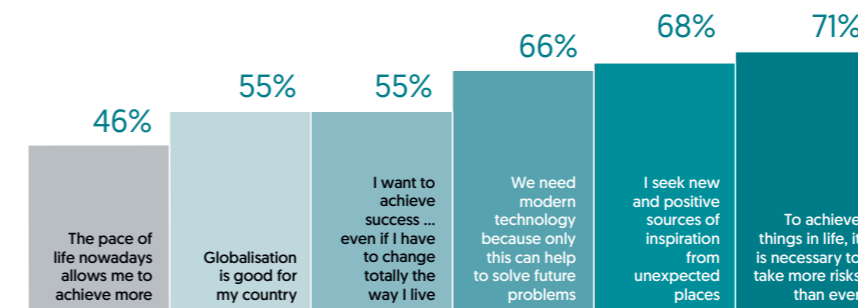
Complication also comes in the variety of contexts and concerns. As an example, populations in emerging economies are more likely than their counterparts in established economies to say they want to achieve success personally and professionally even if it means totally changing the way they live. This story of change anxiety certainly isn’t a tale of two worlds; there are important generational and other demographic differences cutting across geography. Time will tell if these are lifecycle or period effects.

To borrow the models used by change management consultants, perhaps we are in the ‘Crisis’ phase and will work through to ‘Acceptance’²⁴ of change. But this seems overly optimistic and hard to reconcile with what our research has shown to be a fairly warped sense of reality and key social trends,²⁵ plus profound disconnection with democracy.²⁶ It is also conditional on the nature of future change and the extent to which it is managed, or not.

For established economies, the challenge is how to secure sustainable growth again. In emerging economies, it is how to manage growth. Across the world there is an imperative to share the benefits of change better.

If change is the new normal, change management needs to be too. That means leaders taking control in a way which gives people control. That really would be a break from tradition, a change worth having.

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AND BELIEF IN PROGRESS

Ipsos Global Trends Survey, 17,180 - 18,180 adults across 22 - 23 countries, online, 12 Sep – 11 Oct 2016

ME VERSUS US: IS THE WORLD GETTING MORE OR LESS LIBERAL?



BY AALIA KHAN
Senior Communications Executive,
Ipsos MORI Social Research Institute

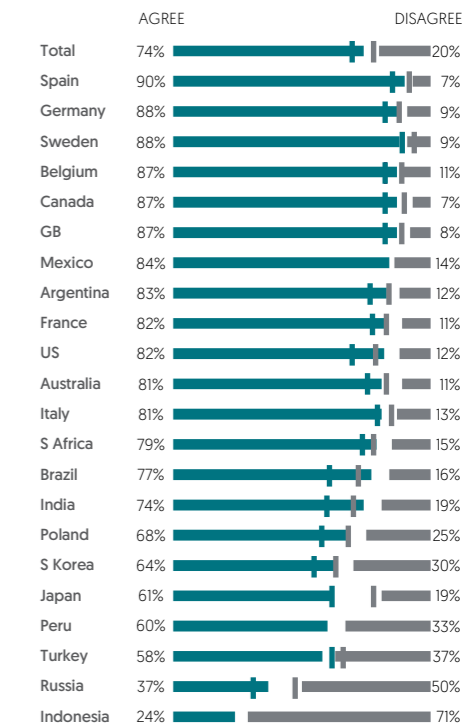
Is the liberal dream of societies open for trade with religious and sexual freedoms, the right to equality and personal autonomy now dead? India has seen a rise in popularity of extreme nationalist groups that have campaigned against the rights of women. In 2015, Turkey's government won a majority despite criticism for its raids against 'hostile' media and mass arrests and in 2017 centralised more power in its authoritarian president via a narrow referendum victory. And the most recent blow – 46% of Americans voted for a protectionist leader who wants to block immigrants through “a beautiful wall” and enact a ‘Muslim ban’.

Is the world getting more or less liberal? If we define the term 'liberal' in the context of social values across the countries we have surveyed, the data paints a complex picture. Ipsos' new Global Trends survey suggests a distinction between our attitudes towards ourselves and our perception of the world around us. We still tend to favour traditional social structures like marriage and community, but when it comes to individual freedoms such as gay rights and gender equality, we have become increasingly more liberal.

Most of us want to live our lives on our own terms. Globally, eight in ten [76%] of us say we want to be personally autonomous and depend less and less on any kind of external authority. This is particularly attractive to the emerging economies: for citizens of China [88%], Peru [87%] and Brazil [84%]. But it's also important to Europe and North America – Spain [83%], Italy [77%], Canada [70%], US [67%] and Great Britain [63%] all agree. And we believe that things are getting better. Over half [52%] of us across the world think that we have a greater opportunity to be free and true to ourselves than our parents did.

WE ARE INCREASINGLY LIBERAL ABOUT GAY RIGHTS

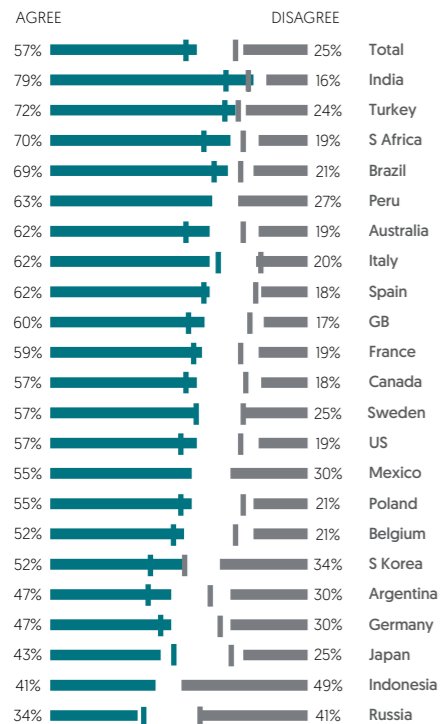
Gay men and lesbians should be free to live their own life as they wish



Ipsos Global Trends Survey, 17,180 adults across 22 countries, online, 12 Sep – 11 Oct 2016

WOMEN IN POWER

Things would work better if more women held positions with responsibilities in government and companies



Ipsos Global Trends Survey, 17,180 adults across 22 countries, online, 12 Sep – 11 Oct 2016

Across the world, our support for individual lifestyle choices of others is high and increasing, particularly in emerging economies

– Spain leads with 90% of its citizens in agreement, followed by Germany [88%], Belgium, Britain and Canada [all 87%] and the US [82% up from 70% in 2014], but also in emerging economies such as Mexico [84%] and Argentina [83%]. Out of the 22 countries in the survey, 17 have seen an increase since 2014 – with biggest movements in the emerging economies: Brazil [61% to 77%], India [60% to 74%] and Poland [58% to 68%].

Attitudes towards gender equality have also improved since 2014. On average, 57% of people across the world agree that things would be better if more women held positions of responsibility in government and companies – up from 53%. India, Turkey and South Africa have the highest agreement [79%, 72% and 70% respectively], indicating major social shifts in the emerging markets.

If our expectations of individual freedoms are becoming more liberal across both traditionally individualistic and collective cultures, how do we feel about our community and the world around us? Modern liberalism embodies new ideas, a tolerance for individual choice, and an acceptance of a diverse society.²⁷ The data suggests that this vision hasn't entirely extended to our own backyards. Seventy-two percent of us want to live in a community among people who share the same views and values as us. As expected, this is high among more collective cultures including China [83%], Peru [83%] and India [81%], but is also prevalent in established economies: US [79%], GB [76%] and Germany [71%].

This is perhaps not altogether surprising when considering people's modern anxieties – 82% across the world believe that we live in a dangerous world, with little disparity between emerging and established economies, and over half [55%] of us globally believe there are too many immigrants in the country we live in – a view that doesn't sit comfortably with a desire for an open and tolerant society.

Our belief in marriage as an institution remains steady – over half [57%] of us say it is better for parents of children to be married. As expected, this is higher in more religious societies, with Indonesia [85%], India [78%] and Turkey [77%] agreeing the most. Despite much lower levels of agreement, Italy [54%], Britain [51%] and Australia [49%], have generally remained steady – and have in fact risen slightly since 2014 in Germany [from 43% to 47%].

We are also harsh judges when it comes to crime and punishment in society. Across the world, 61% of us support the death penalty. In 17 countries, over

half the population believe the death penalty is acceptable for serious crimes. Naturally, support is high in countries where it is legal – Indonesia [86%], India [81%] and the US [74%]. However, it is also popular in France [62%] and Belgium [57%]. Even Canada's shiny image as the 'last of the liberals'²⁸ doesn't preclude 55% of its population from saying they support capital punishment.

The world back in 2014, when we last published this report, may feel like a totally different place, but the data suggests that our attitudes are part of a long term trend, beyond immediate events. Our liberal attitudes may not extend to the comforting familiarity of the community and society we live in, but when it comes to personal freedoms, we have more in common with each other than we think.

IPSOS THINKS

It is important for both governments and businesses to determine how liberal our attitudes are, but for very different reasons. As well as serving in the best interests of its citizens, the policies of democratically elected governments must reflect the views and outlook of its citizens to some extent.

In order to successfully decipher between the two, policymakers must understand how people form their views. Ipsos' Perils of Perception²⁹ study reminds us that our perceptions are not always accurate or based on reality, and there are a number of reasons why people are often wrong about their community and world view.

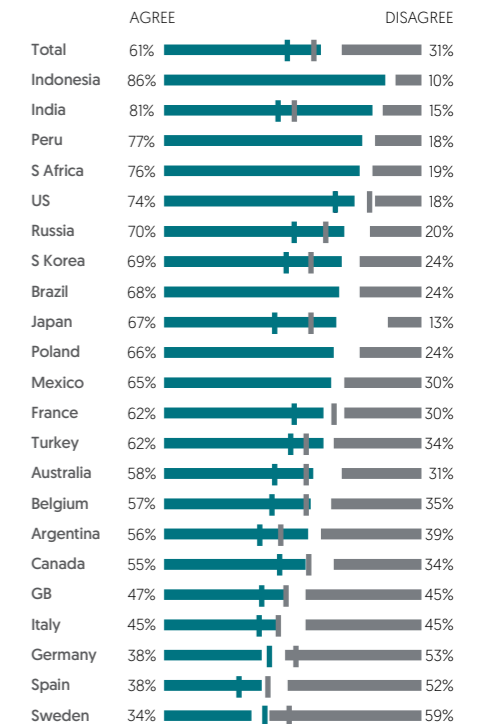
For example, our analysis shows that Britons think there are twice as many immigrants in the UK than the reality. The biggest overestimations in the world tend to be in countries with relatively low levels of immigration – such as Argentina, Brazil and South Africa.³⁰

Understanding your population even when they are 'wrong' is vital for all successful politicians and brands.

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SUPPORT FOR THE DEATH PENALTY IS STILL HIGH

I support the death penalty for the most serious crimes



Ipsos Global Trends Survey, 17,180 adults across 22 countries, online, 12 Sep – 11 Oct 2016

SHOPPING LOCAL – WHERE IS IT GOING?

BY ELLIE BROOKE

Marketing and Communications Executive, Ipsos Marketing

GARETH PUGH

Senior Director, Ipsos Marketing

Where is your next meal coming from? Around seven in ten (68%) of us globally say that we are more likely to purchase products that are locally grown and in 19 of the 23 countries surveyed, two-thirds or more want local. *Where* the food is grown is even more important to us than *how* it is grown: only 47% of us make it a priority to eat foods that are organic.

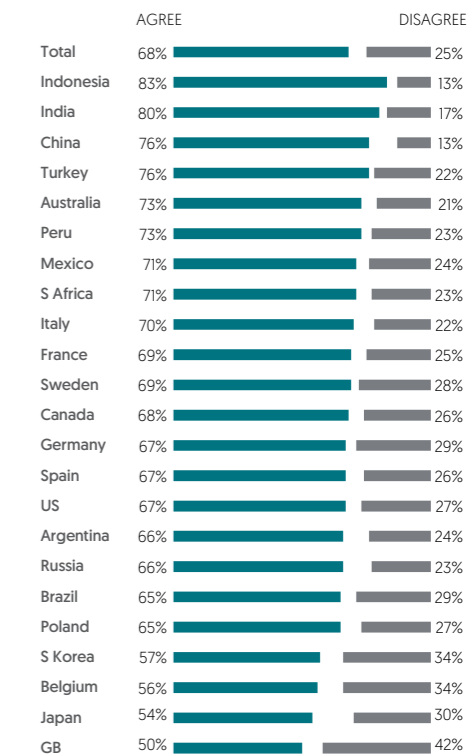
Part of this is almost certainly related to the increasing levels of concern about the environment, explored in more detail in *Uncertainty is the New Normal*. Discussions of food miles – the distance our food has travelled to get to our plates – are becoming more common, and half of us (53%) say we are willing to pay more for packaging that will help food stay fresh for longer – an innovation that is good for our pocket and the environment as it reduces food waste. Forty-two per cent of us say we are willing to pay more for packaging that is biodegradable and good for the environment. Though environmentalism, and arguably patriotism and quality assurance, may be factors in driving the desire for local, there are other, less obvious, factors at play too.

Welcome to the rise of the ‘Locavore’

We will explore simplicity elsewhere in this report at a broader level. Fiona Moss’ article acknowledges that consumers are increasingly looking for others to help guide their decisions, offering a filter for the vast quantities of information we are faced with, whilst still ensuring the autonomy of the decision remains with the consumer themselves. The exploration and discovery of local food provides a different type of curation and choice editing process than that traditionally offered by the superstore or big online retailer.

LOCALLY GROWN MATTERS

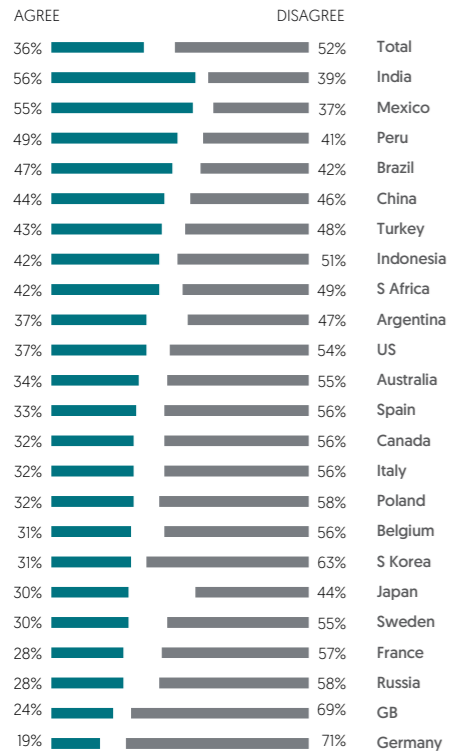
I am more likely to buy products that are locally grown than those that are grown elsewhere



Ipsos Global Trends Survey, 18,180 adults across 23 countries, online, 12 Sep – 11 Oct 2016

ONLINE MAKES SHOPPING EASIER

I find shopping online more difficult than shopping in traditional stores



Ipsos Global Trends Survey, 18,180 adults across 23 countries, online, 12 Sep – 11 Oct 2016

The online rebellion

Uptake of online shopping still varies by country, but it is growing everywhere. 16% of UK purchases are made online each year, 14% of purchases in China and 12% in Norway.³¹ Over half of us [52%] find online shopping easier than shopping in a traditional store (consumers in Germany and Britain are particularly positive about the ease of online shopping). A common reaction from grocery retailers towards online retail has been to reduce labour, cut costs and sacrifice customer service. You can argue this is turning bricks and mortar stores into an 'offline online'.

The farm shop (which has a presence in Europe and North America), on the other hand, guarantees provenance and typically serves local and sustainable produce in an authentic environment, coupled with a personal service. The product can be smelt, touched and tasted – there is a physical and emotional connection between the consumer, the farmer and the land. The consumer becomes a kind of connoisseur, discovering a local delicacy and gaining a little personal pride. Big or online grocery retailers may well struggle to better this kind of experience.

So, what does local mean?

If it's the *experience* of shopping for local food – the curation and discovery attracting the consumer – the meaning of 'local' cannot be limited to a single definition. It is easy to see the term extending beyond literally where you are. Take for instance, 'local' farmers' markets in central London and other cities around the world. The attraction is not the 'local' in the immediate geographic sense; we know there are no farms in the city to supply the markets. This is 'local on tour'. The farmers travel into the city to connect their produce with the consumer. City dwellers know the produce isn't from London or indeed in many cases, its close surroundings. However, just knowing where the produce is from, and connecting with the farmer in a physical sense, is enough for some shoppers to classify the experience as satisfyingly local.

One major British supermarket introduced new 'farm food' ranges in 2016, attributing British sounding farm names to its produce, despite being sourced from manufacturers with no relation to the created names on the packaging. The ranges proved popular with consumers, partly for keen pricing, but partly due to the perceived provenance (despite mostly being sourced from abroad). Was this 'alternative facts' food? Well, in fact, this was not necessarily about connecting with those fictional farms as a real place, but the emotional satisfaction of feeling the food came from *some* place. Indeed, if consumers believe they are discovering new and exciting produce, their need for feeling in control, and 'editing' their choices is met, and the purist definition of 'local' may become irrelevant.

Online and Local – are they really in opposition?

A desire to engage – and shop – in a more connected way with country, region, town, village or street may in part be a reaction to the rise of the globalised, homogenised online world – a third of people globally [32%] do not believe that globalisation is good for their country. But are these two strands always necessarily pulling in a different direction? We might in fact see them running together in the near future.

UK company Hubbub³² tried and failed at online conveyancing of local produce. But maybe in the spirit of going second to come first, companies with scale and expertise on efficient systems could make it work. Consider Amazon. Forays have been made into the delivery of (first) ambient groceries with Prime Pantry and now perishable goods with Amazon Fresh. As they have broadened their inventory, so they have continued to dial up the speed with Prime Now – getting you many of your goods within an hour or two of desire; achieved via a network of local warehouse hubs. Could they move from local delivery mechanics to local product and produce? If they can get the supply logistics right, they could use their local infrastructures to become champion of local in *what* they deliver, not simply *how*. Not just *being* in your locality, but *bringing you* your locality. Bringing truly local product, but at scale.

IPSOS THINKS

When many shoppers are looking to cut down their choices, and get help with navigation of these, it's tempting to think this is a desire to disengage, to turn grocery shopping into something efficient and functional. And for some categories, it is.

But alongside a desire for functional, there can be a desire for fun. We suggest the wish for speedier shopping experiences for some cupboard items is in part to actually *gain* time and emotional focus to spend engaging with the types of food and products that do excite and enliven us. Simplifying the mundane shopping creates more room for the emotionally rewarding shopping – just hand me the flour so I can spend time browsing the flowers.

Within this, there is both fragmentation – the reasons why shoppers in different parts of the world express such a strong stated desire to purchase local produce vary from quality reassurance (Indonesia) to connoisseurship and sense of status (India) – and cohesion, in the ways seemingly different strands might in fact run together as much as run into one another.

There are challenges and opportunities for several players in this dialogue:

- **For the big multiple grocers** – if they are to embrace and champion the best of a locality, what might this mean for the traditional mega-sourcing buying arrangements of the past twenty years?
- **For the online mega-retailers** – can they use their new infrastructures to grow, not only getting into your locale to deliver, but bringing you your locale in what they deliver?
- **For local producers and brands** – how can they take advantage of the bigger potential partners, taking care not to be taken advantage of?
- **Global brands and products** – at the beginning of 2017 Kraft Heinz made an unsuccessful bid to buy Unilever; where once companies might have acquired each other chiefly for scale and presence, to bring their brands into given countries, could they now think about not just being in new countries, but being 'of' those countries in what they sell, and celebrate?

Plenty more to debate and consider. But for now, it seems that increasingly, how we as shoppers identify ourselves and identify with each other is not just a question of where we're 'at', but the 'where' that we eat.

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IN BRIEF

THE CHANGING ROLE OF WOMEN?

BY CLAIRE EMES

Senior Director, Ipsos Marketing

In line with a broader shift towards nostalgia and tradition in the survey, there are signs that the move towards more liberal attitudes on the role of women in society may be slowing. Whilst the majority of people across the world agree that things would be better if more women held positions of responsibility in government and companies (57%, up from 53% in 2014) and most also disagree that women's *raison d'être* is domestic (58%), we see a significant increase in agreement that "the role of women in society is to be good mothers and wives" in 12 of the 22 countries surveyed on this measure, with just five registering increased disagreement.

Turkey, where last year President Erdogan described women who "refuse maternity and give up housekeeping" as "lacking" and "half [a person] no matter how successful she is in the business world", has seen an 11 percentage

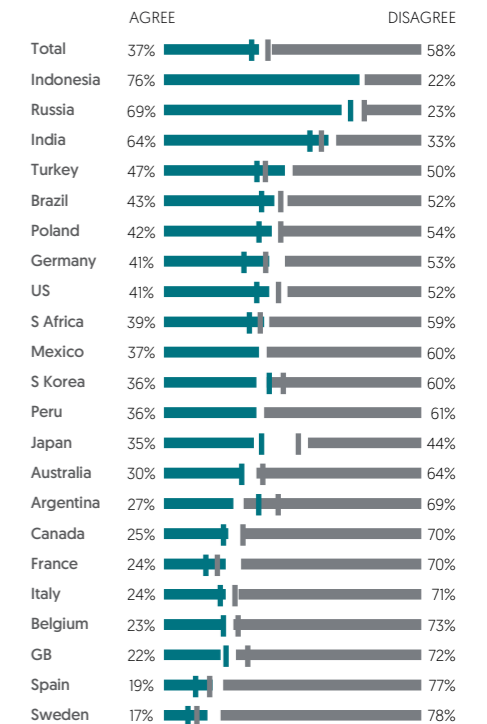
point increase in agreement with the statement that women's role is to be good mothers and wives. Perhaps more surprisingly, Germany sees the next biggest shift – with 41% of respondents agreeing with this more traditional definition of what a woman should be, up from 32% in 2014. Sweden and France follow close behind (both up 7 percentage points), although in all three cases it should be noted that a majority still disagree with this statement.

Men are more likely than women to think women's role is to be wives and mothers (by 41% to 34%, on average), but there is an even greater divide by religious belief. Those with religious beliefs are almost twice as likely to side with the traditional view on gender roles than those who describe themselves as agnostic or atheist (by 42% to 24%).

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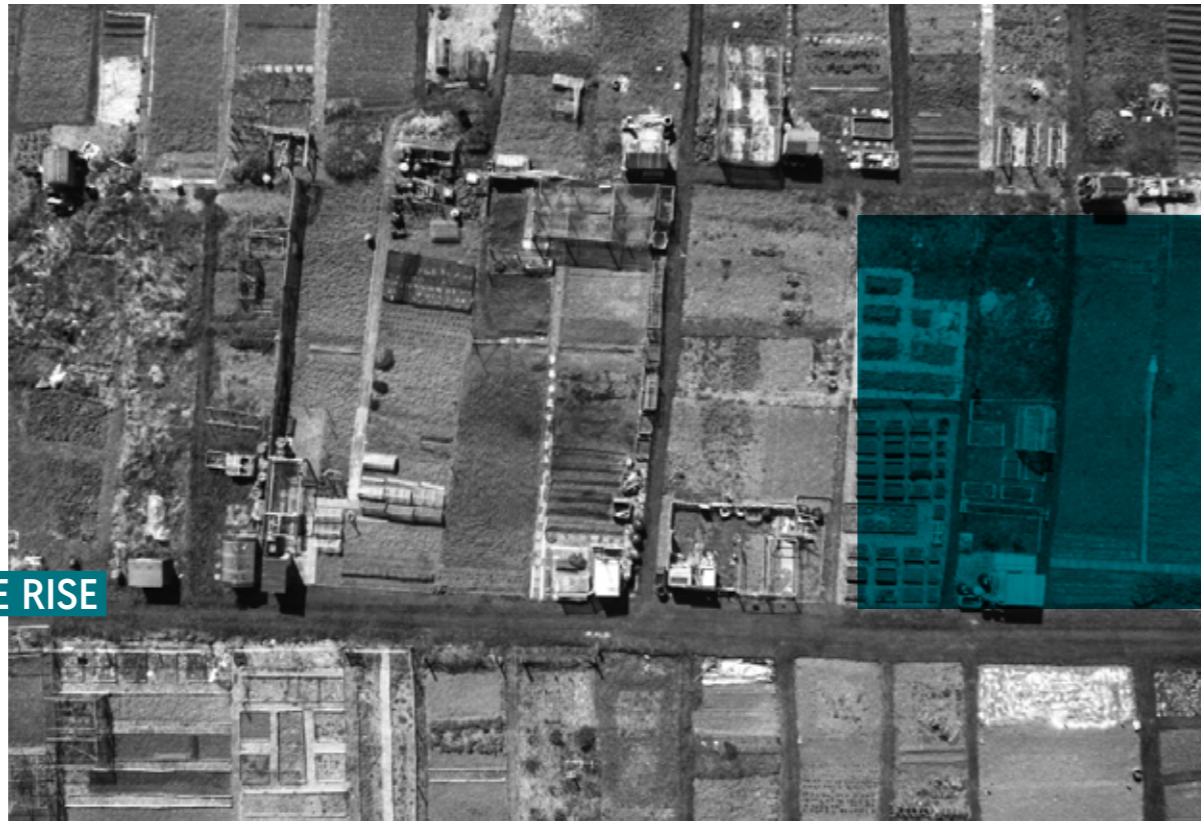
THE ROLE OF WOMEN

The role of women in society is to be good mothers and wives



Ipsos Global Trends Survey, 17,180 adults across 22 countries, online, 12 Sep – 11 Oct 2016

THE RISE AND RISE OF TRADITION AT A GLANCE



LOCALISM ON THE RISE

All over the world consumers say they will pay more for locally produced brands (59%), up from less than half a few years ago (45%). Stressing local credentials matters more than ever.



BACK TO THE FUTURE

A GAY FRIENDLY WORLD?

One of the biggest polarities is the gap between countries like Russia and Indonesia and most others on gay rights. In the West, gay rights have risen in acceptability over the last few years – not so in Muslim countries.

More than ever, people want their country to be “the way it used to be” – especially Americans, Indians and the French. In contrast, few Chinese or Peruvians hold this view. In every country people feel traditions are an important part of society – this has risen again to a new high this year.



3. THE OPTIMISM DIVIDE



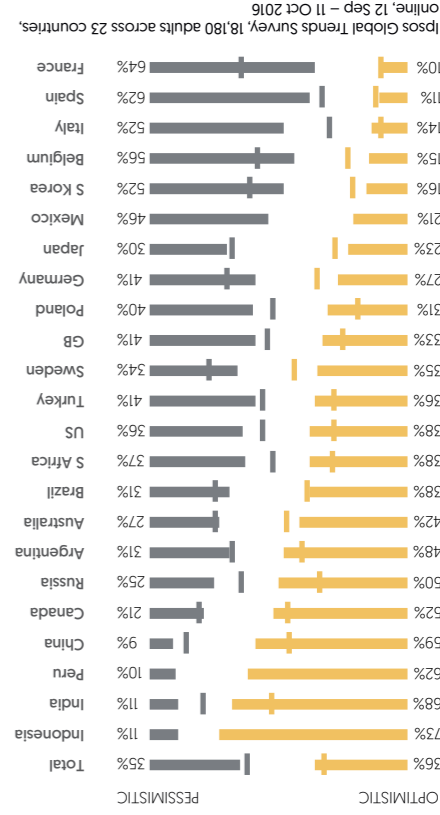
IF YOU LIVE IN CHINA,

INDONESIA, INDIA OR ANY OTHER

FAST GROWING ECONOMY...

THE OPTIMISM DIVIDE

Looking ahead to the next 12 months, are you optimistic or pessimistic about your country?



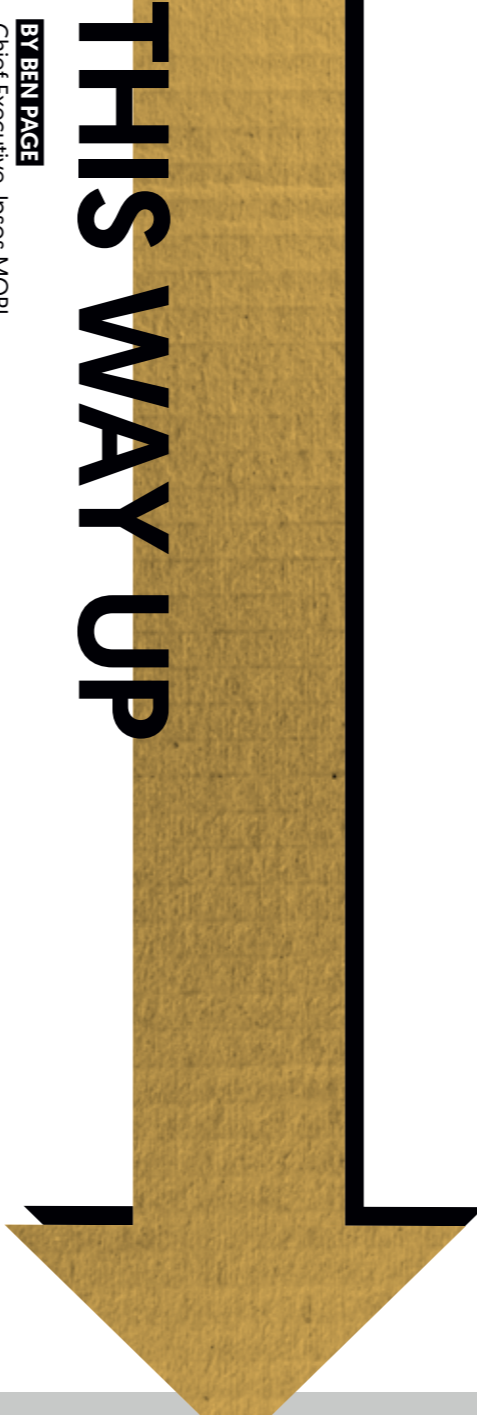
Ipsos Global Trends Survey, 18,180 adults across 23 countries, online, 12 Sep – 11 Oct 2016

In Asia the world looks very different than it does in the West – here most people feel that globalisation has benefited their country.

They expect to be better off in future, and most are optimistic about their young people's futures. They are far more likely than any western country (except Canada) to feel optimistic about their country.

There are some downsides – they feel under pressure to make money and be successful – especially in China, India, and South Africa. But they value success so much that they say are willing to completely change how they live to achieve it. Of course, moving from what many in the West would regard as virtual starvation [c. US\$2,000 per capita GDP in China in 2005] to incomes that they would merely regard as miserable economies are keen to see further growth and make great personal efforts to achieve it.

Overall, as we see throughout this analysis, country matters more than generational cohort. Markets – even those adjacent to each other – are not always alike when it comes to understanding consumer and citizen sentiment, but the prevailing media narrative in the West, of decline and fragmentation, is literally a world away from connected citizens in India and Indonesia, who see a bright future.



BY BEN PAGE
Chief Executive, Ipsos MORI

IF YOU LIVE IN AMERICA, WESTERN EUROPE OR MOST OTHER ESTABLISHED MARKETS...

The overall view in mature economies is relatively negative. People are pessimistic about the future of their country.

When it comes to globalisation they are either divided or negative, reflecting widespread feelings in many western European countries and the US about being 'left behind', and having seen real wages stagnate or fall. In particular Western European nations, including Britain, France and Spain are the most pessimistic. Whether it's their economy, or the chances of the next generation to own a home, or the future of their health system, they expect deterioration.

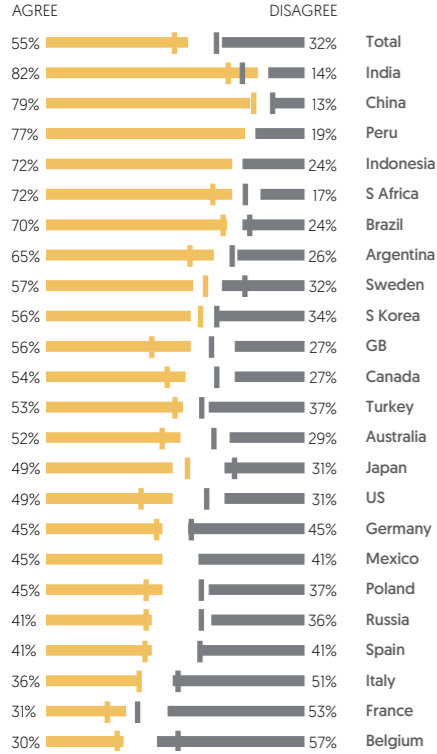
However, living in a mature economy may have some benefits. First, people feel under less personal pressure to succeed than in developing economies [which often have a much more minimal or non-existent welfare system]. Whereas Brazilians, Indians and Mexicans say fulfilment comes from a prominent position at work, in Europe and America far fewer people see life as being all about work.

In the West, people tend to be much less overtly materialist – now of course it may be easier to 'want' less if you already have a lot – but fewer people in Western Europe or America agree they measure their success by the things they own.

One solution for the West – given relative affluence - is to rediscover traditional religion or philosophy. However western Europeans, feeling pessimistic about the future, are much less likely than more optimistic countries to say they would like a more spiritual dimension in their lives [c 40% or less in Britain, France, Germany versus over 80% in more optimistic India, China and Indonesia]. The challenge here is that what has replaced traditional religion in many Western societies – what Yuval Noah Harari calls 'humanism' in 2016's *Homo Deus* – does not seem to guarantee happiness.

A GLOBAL OUTLOOK

Globalisation is good for my country



Ipsos Global Trends Survey, 18,180 adults across 23 countries, online, 12 Sep – 11 Oct 2016

THE OPTIMISM DIVIDE



BY SIMON ATKINSON
Chief Knowledge Officer, Ipsos

One of the overarching themes emerging from this year's report is a sense of anxiety. Globally, we find 79% saying the "world is changing too fast". The British are the least likely to say this, but even here there are still six in ten who are worried about the pace of change.

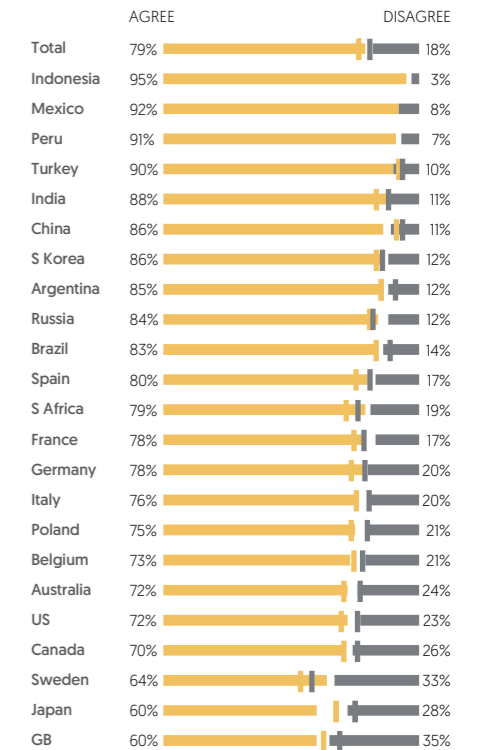
This is not just a matter of things moving so quickly that we can't keep track with, say, the latest fashions or smartphones. People are actually worried. As many as 82% of us feel we "live in an increasingly dangerous world". This feeling can be observed across many countries – and it is accelerating. Such sentiments are held even more widely than they were in the 2014 survey, even as actual violence remains in decline.

On the face of it, it's hard to feel too positive. Looking ahead to the coming year, just 28% feel optimistic about prospects for the world in general.

79%
SAY THE WORLD IS
CHANGING TOO FAST

WE'RE CONCERNED ABOUT THE PACE OF CHANGE

The world today is changing too fast



Ipsos Global Trends Survey, 18,180 adults across 23 countries, online, 12 Sep – 11 Oct 2016

**OPTIMISM
ABOUT THE
WORLD IN
GENERAL**

When we crunch the numbers, we do find big differences in the data in terms of who is feeling positive, and who is not. Here are five patterns.

1. Location, location, location: rural vs the big city

The world continues to see a shift to urban centres. This is not necessarily to say that rural populations are the 'left behinds', but they are certainly gloomier than their counterparts in the big cities. In both Britain and America, Brexit and Trump were victories for small towns and rural areas against metropolitan areas.

	RURAL	SMALL CITY	MEDIUM CITY	SUBURB	LARGE CITY
Optimistic	21%	25%	26%	32%	30%
Pessimistic	47%	42%	37%	36%	34%

2. Marital status

Those who are married are more likely to have a sunnier outlook on the world, particularly when compared with those who are coping with divorce or becoming widowed. This is entirely consistent with hundreds of other studies, but reminds us how much of a role having a significant other in our lives can play.

	MARRIED	PARTNERS	SINGLE	DIVORCED	WIDOWED
Optimistic	30%	26%	27%	21%	18%
Pessimistic	37%	42%	37%	40%	43%

3. The optimism of youth

The older you become, the more pessimistic about the future of the world you'll get – a pattern that is common everywhere, although personal happiness rises in old age.

	16-24	25-34	35-44	45-59	60-64
Optimistic	31%	32%	30%	23%	19%
Pessimistic	32%	33%	37%	44%	49%

4. North versus South

This is the big divide: despondency in established economies is tempered by a generally optimistic state of mind in the emerging markets. The difference is stark.

	ESTABLISHED	EMERGING
Optimistic	18%	42%
Pessimistic	48%	22%

5. Religion matters

Those who say religion matters to them are far more optimistic than atheists and agnostics. However, optimists may be attracted to religion, and pessimists cynical towards it, but it is, of course, more complicated than that. It certainly suggests that in the West (which contains most of the world's atheists), rediscovering religion – or perhaps philosophy – might help people feel more positive and confident.

	RELIGIOUS	ATHEIST/AGNOSTIC
Optimistic	31%	16%
Pessimistic	36%	47%

All is not lost

As we've seen, many people are actually positive about how the world is changing. And with all this change comes new possibilities.

For example, 76% agree that "technology is making our lives better". Half the world's population believe that "eventually all medical conditions and diseases will be curable". What's more, when we get people to think about their own lives, they are much more positive.

**LOOKING AHEAD TO THE NEXT 12 MONTHS,
ARE YOU OPTIMISTIC OR PESSIMISTIC ABOUT:
% OPTIMISTIC**

64%
YOU AND YOUR FAMILY

45%
THE TOWN/CITY/VILLAGE
WHERE YOU LIVE

36%
YOUR COUNTRY

28%
THE WORLD IN GENERAL

76%
**AGREE THAT
TECHNOLOGY
IS MAKING OUR
LIVES BETTER**

**THOSE WHO
ARE MARRIED
ARE MORE
LIKELY TO HAVE
A SUNNIER
OUTLOOK ON
THE WORLD**

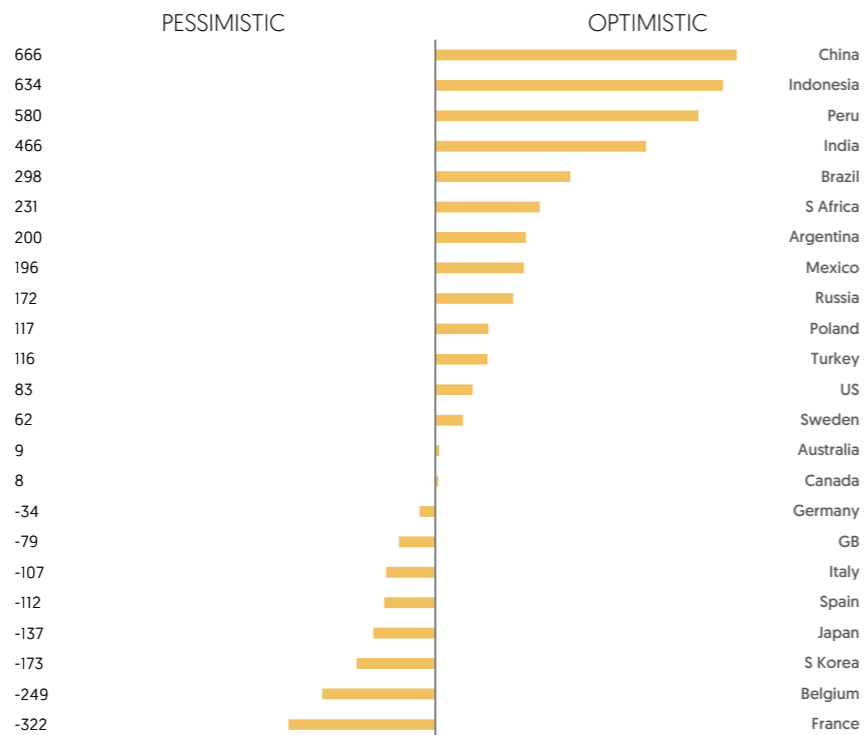
**EMERGING
MARKETS ARE
CONSISTENTLY
MORE POSITIVE
THAN THE MORE
ESTABLISHED
MARKETS**

The ‘Lost Generation’ to come

This year’s survey includes a dedicated section looking at how people think the experiences of “today’s youth” will compare to those of their parents. These questions explicitly look to the future, while getting people into a more analytical frame of mind – by getting them to compare the likely experience of today’s younger generation with those of their parents. We have distilled these findings into a ‘Future Optimism Index’. This is calculated by aggregating country-level responses to a suite of questions on the extent to which people felt “today’s youth” could expect a better standard of living than their parents.

FUTURE OPTIMISM INDEX

Aggregate net better score on optimism for “today’s youth”



Ipsos Global Trends Survey, 18,180 adults across 23 countries, online, 12 Sep – 11 Oct 2016

The questions in the index cover a range of domains, including employment, access to information and education, safety from crime, opportunities for travel and home-ownership.

This shows that, if we get people to look to the future, thinking about what it might look like for their own families and communities, things are by no means as bad as some of the overall ‘global indicators’ suggest.

The world may be worried about many things, but, for many people, certainly in the emerging markets, the road ahead is still – on balance – one that brings rather more good things compared with what went before.

IPSOS THINKS

These three themes will have important implications for both politicians and marketers:

1. Understand people in their context: the more they think about their family and the local area, the more happy they are about how things are going. It’s the national and ‘world’ context that is causing the most anxiety.
2. A two-speed world: emerging markets are consistently more positive than the more developed markets.
3. Countries still matter: even accounting for emerging vs developing markets, there are big differences by country. The US is more optimistic than the UK, for example. And the Germans, while by no means excited about what the future may hold for their children, are in a very different place to their despondent French neighbours.

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IN BRIEF

YOUNG, HEALTHY AND HAPPY?

BY FIONA O'CONNOR

Marketing & Communications Manager, Ipsos MORI

Around the world, a majority of us say that the older we get, the more we worry about our health – a 14 percentage point increase since we last asked the question three years ago. Generation Xers, perhaps no longer feeling as fit and healthy as they once did, are the most likely to agree that they worry more about their health as they age.

But, there has also been a major shift in the youngest group (those aged 16-24), from 57% in 2014 to 68% now saying they worry more about their health as they get older. This is in spite of two-thirds [66%] reporting that their current health is good. A sign of more health conscious attitudes globally?

Though they may be increasingly pessimistic about their own health, half of the under-44s globally think all

diseases will eventually be curable, in line with gerontologist Aubrey de Grey's prediction³³ that the first person to live to 1,000 has already been born. Older people are somewhat more realistic.

Given that obesity now kills more people than starvation and technology continues to drive treatment improvements, our futures are literally in our hands.

To get in touch with Fiona, please email fiona.oconnor@ipsos.com

VIEWS ON

FUTURE HEALTH

The older I get the more I worry about my health - % agree

16-24	25-34	35-44	45-59	60-64
68%	75%	76%	76%	72%

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

16-24	25-34	35-44	45-59	60-64
50%	50%	50%	45%	41%

Ipsos Global Trends Survey, 18,180 adults across 23 countries, online, 12 Sep – 11 Oct 2016

THE OPTIMISM DIVIDE AT A GLANCE



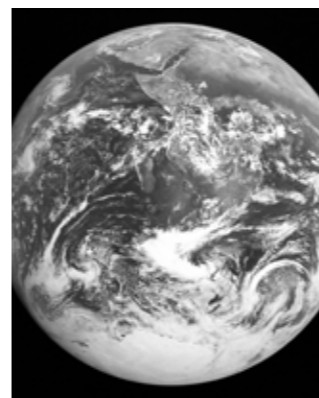
MISERABLE RUSSIANS

Russians are least satisfied with their standard of living of all countries surveyed, and are least likely of any country to be satisfied with what they have achieved in life [14% vs 56% in Germany and 61% in China].



THE PRESSURE TO SUCCEED

People in developed nations – especially Europe and Japan – are much less likely to feel under pressure to be successful, compared to Russia, India and China. What does this say about the dynamism of their economies?



GLOBALISATION DIVIDES THE WORLD

Overall a majority see globalisation as positive for their country, but views vary markedly. Rapidly growing markets like China, Indonesia and India are most enthusiastic, whereas citizens in mature economies are split – those in near recession like Italy and France are negative, but Britain and Sweden are more positive.



WORK LIFE BALANCE

All over the world, everyone agrees a good work life balance is important. There is virtually no difference from 88% in Germany to 81% in China. However, there is a sharp divide on the importance of success at work: Brazilians, Indians and Mexicans say fulfilment comes from a prominent position at work – Germans, Japanese, Swedes and Spaniards all disagree. Indeed only in emerging economies do people say they are willing to totally change the way they live to be successful.

4. THE BATTLE FOR ATTENTION



THE BATTLE FOR ATTENTION (A DIGITAL REALITY CHECK)



BY JON HARPER
Head of Client Offer, Ipsos Connect

Globally, the time we spend looking at media is increasing and fragmenting simultaneously. Six out of ten people in major economies say they are constantly looking at screens – even higher among 16-24 year olds and high income households and higher still in some markets like China [74%].

As a result, ad spend is moving where the people are spending more of their time – online. On YouTube alone almost 400 hours of content are uploaded every minute.³⁴ Indeed, our survey shows over half [55%] of people globally claim to use mobile devices at least daily while watching TV (higher among females, younger generations and those with children).

All of this may make you think digital is the best place to spend your advertising money. In theory digital advertising offers data-driven targeting to precisely identify the right person, with the right message, at the right time. With some 50% of money spent on digital set to be bought via programmatic trading by 2019³⁵ (estimated rising to \$37 billion up from \$14 billion in 2015), surely digital's compelling purpose to deliver cost efficient and real time targeting and thus ultimately better return on investment will become ever more appealing? The problem is that consumers feel overwhelmed and are often resorting to ad blocking and disengaging.

Hard questions and more realistic expectations

Our latest survey coincides with some real questioning of the digital promise by marketers who are now challenging whether the digital dream represents the digital reality. As Mark Pritchard, Chief Brand Officer at P&G says, "The days of giving Digital a pass are over. It's time to grow up, it's time for action." Given the fact that digital advertising is now 30 years old [or at least banner ads are]³⁶, perhaps it is unsurprising that digital is being expected to grow up.

WHAT MEDIA ARE WE CONSUMING?

	2016 vs 2011 change in average minutes per day media consumption	2016 vs 2011 difference in minutes per day media consumption
NEWSPAPERS	-30%	-5.6
MAGAZINES	-43%	-4.7
TV	-6%	-10.8
RADIO	-11%	-6.6
CINEMA	-19%	-0.3
OUTDOOR	-6%	-4.3
INTERNET	105%	+62.8
DESKTOP	-2%	-0.7
MOBILE	277%	+63.5

Zenith Optimedia Media Consumption Forecasts 2016

THE BATTLE FOR ATTENTION

AT A GLANCE



WHO EMBRACES ONLINE RECOMMENDATIONS?

Indian, Chinese, Indonesian and Brazilian shoppers are twice as enthusiastic about online recommendations by stores based on their shopping history than the British, French and Germans – a consistent pattern.

DISSONANCE ABOUT TECHNOLOGY

People globally think that while technology improves life, and they can't imagine life without it, it is also affecting them in a wide range of negative ways. For many, most conversations are now online, 62% say they are constantly staring at screens and 63% say young people's expectations of sex have been made unrealistic!



BROADBAND AND UTILITY COMPANIES GLOBALLY HAVE THE BIGGEST GAP BETWEEN WHAT THEY PROMISE AND WHAT THEY DELIVER ACCORDING TO CONSUMERS

5. THE SEARCH FOR SIMPLICITY AND CONTROL



OVERWHELMED BY LIFE? WHAT CHANGES IN CONSUMER BEHAVIOURS CAN TELL US ABOUT NAVIGATING MODERN LIFE



BY FIONA MOSS
Director, Ipsos Loyalty

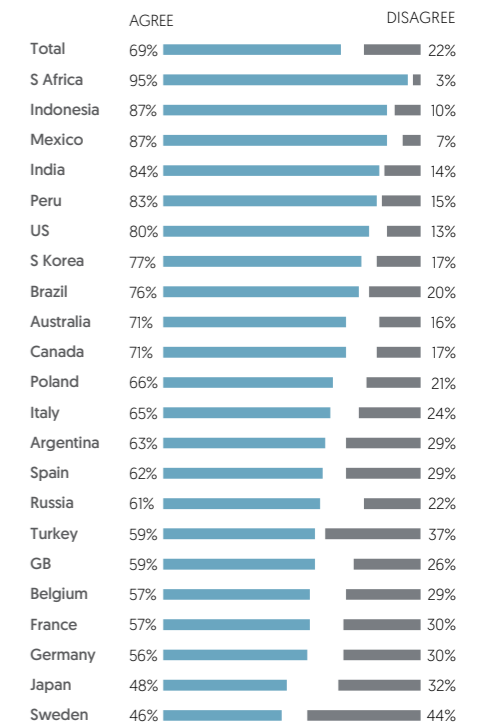
This year's Global Trends survey is a potent reminder of the pressures humans now feel. While our brains may be the driving force behind our evolving world, we are curiously little changed from our cave-dwelling ancestors: designed to assess just enough of our surroundings to keep us alive, and ignore the terabytes of information that come at us daily from a multitude of sources. The volume of information and choices can overwhelm. But exactly how does this struggle play itself out? What – if anything – are we doing to find shortcuts through the maelstrom of everyday life?

There is plenty of evidence of the challenges of modern living:

- The majority of us feel the world is moving too fast: eight in ten [79%] agree this is the case. Across the world, this figure never drops below 60%.
- Eight in ten of us agree there is so much contradictory information that it is hard to know who or what to trust.
- About half [54%] of us claim to be overwhelmed by the choices we have to make in our lives [but 42% of us disagree].

WHERE DO WE LOOK FOR GUIDANCE?

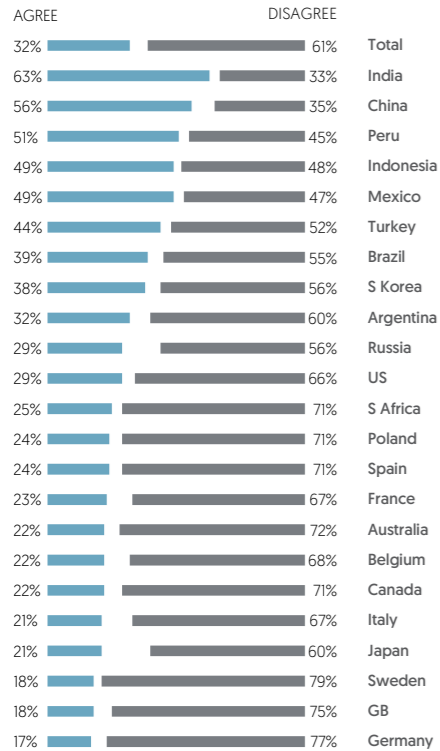
Today, we need guides and mentors more than politicians



Ipsos Global Trends Survey, 17,180 adults across 22 countries, online, 12 Sep – 11 Oct 2016

ABDICATING DECISION-MAKING

I would rather have a company or expert choose products and service options for me rather than make the decisions myself



Ipsos Global Trends Survey, 18,180 adults across 23 countries, online, 12 Sep – 11 Oct 2016

Our response is a tension between autonomy and guidance-seeking. Three-quarters [76%] say we want to get more autonomy in our lives, and depend less and less on any external authority. But 69% also say that today we need guides and mentors more than we need politicians

Tension between autonomy and guidance is a key area for politicians and brands to focus on

[a view that is generally more prevalent in developing than developed countries]. This tension between autonomy and guidance is a key area for politicians and brands to focus on. So far, so existential. But these tensions are not limited to our own internal angst.

Interestingly, they are also played out in our behaviours as consumers – and in a way that is increasingly evident. To take an example: in our 2014 report half [49%] said that we often feel overwhelmed by all of the choices we have as consumers. By this report, the figure had risen to three-in-five [59%].³⁸

In response, and symptomatic of that tension between autonomy and guidance, some 32% of us globally would rather have a company or expert choose product and service options for us, than make the decisions ourselves. Sixty-one per cent disagree.

Consumers in emerging markets, where purchase options may be proliferating most rapidly, tend to be more likely to say that they would rather a company or expert makes the choice for them, than in established markets. Notwithstanding, across all markets, even if a clear majority are in favour of owning our own purchasing decisions, a significant portion are willing to abdicate our rights to make our own choices, and of course good retailers carefully curate what they offer us.

We can also see a new relationship to information when it comes to purchase decision-making. Historically the only information that we had available to help our decision-making was that which was available to us in the shop, plus advertising, offline guides and our own prior experiences. We often relied on mental shortcuts like habit and brand to guide our decisions – and still do for some categories like chocolate.

73% of us look at online reviews when not confident about purchase decisions

But, for other purchases the ground has shifted. Information seeking has always been part of decision-making, but apps make this more and more frictionless and abundant. 73% of us look at online reviews when not confident about purchase decisions, up from 69% three years

ago. Moreover, 76% of us now say that if a product gets a lot of good reviews, we will try it – a majority view held in every country, although again emerging markets tend to be more positive here. For purchases that warrant prior research, peer review has a growing role in the decision-making process – albeit in a way

that is tinged with suspicion for some.

So what does this shift in our purchase decision-making behaviours tell us about how we are responding to the modern world? Firstly, it highlights our need to simplify our lives by finding new shortcuts to decision-making. This is potentially emphasised by the fact that two-thirds of us wish our lives were more simple. Brands and governments can both help here.

Secondly, by making manifest the tension between autonomous decision-making, trust, and the influence of ‘the other’, it illustrates how hard establishing those shortcuts actually is. How can we make our own decisions when we don’t know which information sources to trust to inform them? But how can we follow the advice of others if, again, we don’t know who to trust? Hence we become caught in a vicious circle that can rapidly become overwhelming.

IPSOS THINKS

All over the world people are experiencing tension between autonomy and expert (and non-expert) guidance. New technologies can provide support with ‘favourites’ mechanisms and algorithms that make suggestions based on previous purchases, and functions that help us to make decisions more easily. These let us preserve our sense of autonomy while also aiming to cut out some of the ‘noise’.

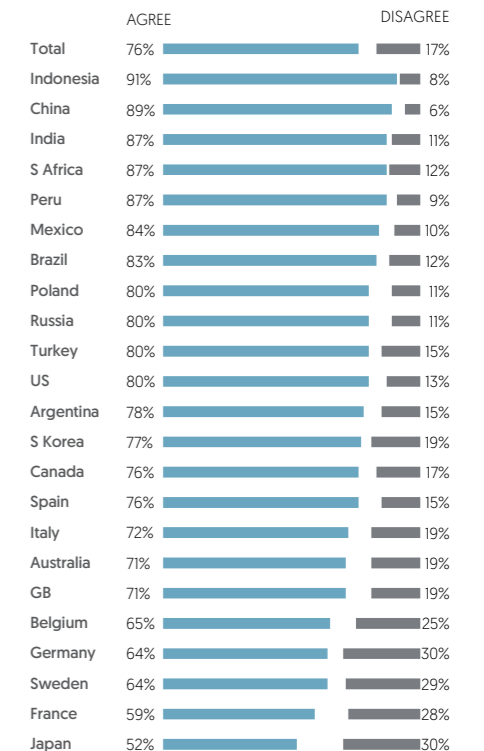
But, equally, there is evidence that the amount of information around us does not always make it easier for us to live our lives. The proliferation of fake reviews online, as well as the rise of the ‘fake news’ phenomenon, raise an interesting question – will we reach a point where we no longer trust any data source? What happens if we do? It is perhaps for this reason that 83% of us say that today it is vital to trust one’s own intuition/judgement when making decisions.

For anyone working from the customer experience industry to government policy, it has never been more important to understand the combination of influences³⁹ that drive our final decisions. As the range of influences increases, getting a deeper understanding of the weight of each factor in consumer decisions becomes more and more important.

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THE OPINIONS OF OTHERS ARE IMPORTANT TO US

If a product or service gets a lot of good reviews, I will try it



Ipsos Global Trends Survey, 18,180 adults across 23 countries, online, 12 Sep – 11 Oct 2016

BRANDS IN THE AGE OF MISTRUST



BY TARA BEARD-KNOWLAND
Team Head, Ipsos Connect

One of our key trends this year is the *Search for Simplicity and Control* – and this is where, in a confusing and complex world, brands remain vital for consumers. Eighty per cent of people across the world believe that “there is so much contradictory information it’s hard to know who to trust”. People are overwhelmed by the choices – big and small – that are facing them every day. Despite scepticism about big business, 65% feel “brands I trust are more important than ever to me”. Brands remain useful mental shortcuts, helping us navigate the bewildering choices available to us.

Nearly three-quarters (73%) say they are more likely to trust a new product if it is from a brand they already know. Above all, consumers see branded products and services as signs of consistent quality (globally at 50%) and reliability (48%).

Of course, before the internet and a proliferation of channels, brands were more in control of their image and message – our impressions of them came from their carefully constructed communications, their literal branded products. The internet has had a democratising effect, with consumers challenging them at every turn. A proliferation of contradictory sources has, in part, contributed to the phenomena of ‘post-truth’ – 2016’s word of the year – where no one owns the truth and where the presence of ‘multiple truths’ and ‘alternative facts’ have exacerbated cynicism about the organisations that serve the public. In this time of uncertainty, ‘facts’ are often less influential in shaping public opinion than appeals to emotion and personal belief.⁴⁰

Of course, marketers know the value of emotion. Over the course of the last thirty years we have seen a shift in advertising towards emotional appeals at the expense of facts. The change has been subtle: many adverts are still based on tactical offers and claims of superior features – “washing whiter”, “going faster”, “living well for less”. But while rational appeals have a strong short-term impact on the public, all our evidence concurs with the findings in Binet & Field’s

OVER THE
COURSE OF THE
LAST THIRTY
YEARS WE HAVE
SEEN A SHIFT IN
ADVERTISING
TOWARDS
EMOTIONAL
APPEALS AT
THE EXPENSE
OF FACTS

71%

SAY THEY ARE CONCERNED ABOUT HOW INFORMATION COLLECTED ABOUT THEM ONLINE IS BEING USED BY COMPANIES

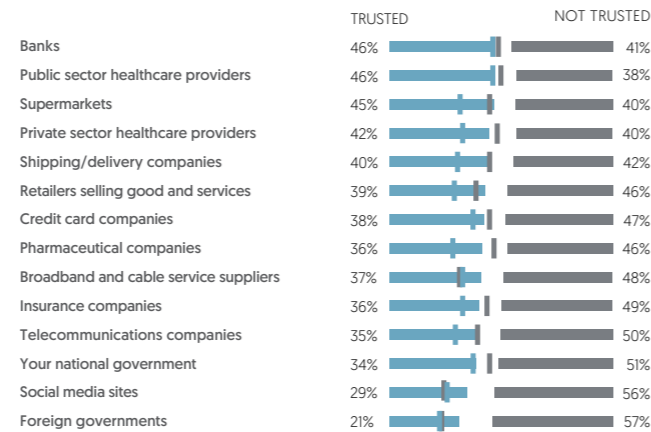
The Long & the Short of It,⁴¹ that building emotional connections is the key to long-term performance, exemplified by brands and campaigns from John Lewis, Dove, Coca-Cola, Nike and Guinness.

But trust underpins all of this. Brands provide a promise or guarantee to customers about what to expect from the product or service they're about to buy. It may simply be a promise of low prices, rather than quality, but it should offer something consistent (even if it is consistent innovation). Our latest global data shows that brand trust is most important in two categories: high investment products like smartphones, cars and household appliances and those that affect people's well-being such as food or personal health products. However, trust can be easily destroyed – it is vital that companies and brands ensure what they promise is what people experience.

But while plenty of critics will say brands are more challenged than ever, in fact globally most consumers say they trust businesses to deliver on their promised standards of goods and services [57%]. There is plenty of room for improvement,

WHO DO WE TRUST?

To what extent, if at all, do you personally trust the following to use the information they have about you in the right way?



Ipsos Global Trends Survey, 17,180 adults across 22 countries, online, 12-11 Oct 2016.

and huge variation by sector, but global businesses operate to much higher standards today than in the past. Consumers still have rising expectations of how businesses should behave generally in society, as Marloes Klop explores earlier in *Crisis of the Elites*.

In terms of threats to public confidence in business, one of the key drivers of mistrust is how companies deal with individuals' personal data, following security breaches from organisations as diverse as TalkTalk, Pharmacy2U, Yahoo, Tesco Bank, Target and the NHS. Given that it is now a case of when, not if, companies get hacked, while holding more data on individuals than ever, the public is anxious. Globally, nearly three-quarters of people (71%) say they are concerned about how information collected about them online is being used by companies [Sweden is the least concerned, at 54%]. In fact, people are more worried about how companies use this information than what their government is doing with their data [66% concerned globally, but especially high in emerging economies like India and Brazil].

The public is particularly dubious of certain sectors. If we look at the trust deficit for various sectors (agree minus disagree), we see social media sites are least trusted to use personal information correctly (trust deficit of -24). The deficit is especially large in established European markets like Spain [-56], Germany [-55], France [-47] and Britain [-45].

Other sectors with challenges are telecoms [-15 trusted globally, and -29 in Britain] and insurance [-13 globally, but -33 in Britain]. Now of course, lack of trust doesn't necessarily stop people using social media or telecoms. But it may limit what information people provide or share.

IPSOS THINKS

Despite brands still signalling quality and reliability to most people, real trust in business is – at best – a work in progress.

To succeed in gaining and retaining trust, brands need to not only flawlessly and consistently deliver day-in and day-out, they must do this across dimensions beyond just the goods and services they provide. Data security must be impeccable.

Interactions with the broader world need to be regular and conducted with integrity. Honesty should be a watch-word – and that means it's much better to admit something has gone wrong than to let it simmer for years before addressing it, or allow it to appear in a newspaper, blog or on a social media site first.

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PEOPLE ARE MORE WORRIED ABOUT HOW COMPANIES USE THEIR PERSONAL INFORMATION THAN WHAT THEIR GOVERNMENT IS DOING WITH THEIR DATA

IN BRIEF

MOBILE PAYMENTS TAKING OFF GLOBALLY

BY SURAYA RANDAWA

Head of Financial Services,
Ipsos Loyalty

Half the people on the planet now say they couldn't live without their smartphone [54%].

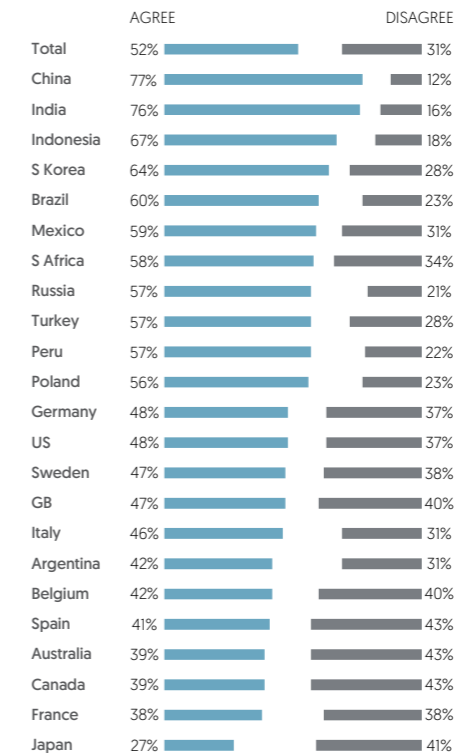
One in five consumers [20%] now make digital [online, app, SMS] payments with mobile devices at least weekly, rising to two in five [43%] on a monthly basis, with emerging market consumers far more likely to pay this way compared to Western European consumers, as banking by mobile takes off and young populations are leap-frogging established markets in adoption.

Digital wallet providers [Apple Pay, Android Pay, Samsung Pay etc.] have won the first battle – consumer awareness. Now 52% overall say they know which types of mobile payment services are available today. They just need to educate more on acceptance – only 40% know which shops and retailers will accept contactless payments via a smartphone.

To get in touch with Suraya, please email suraya.randawa@ipsos.com

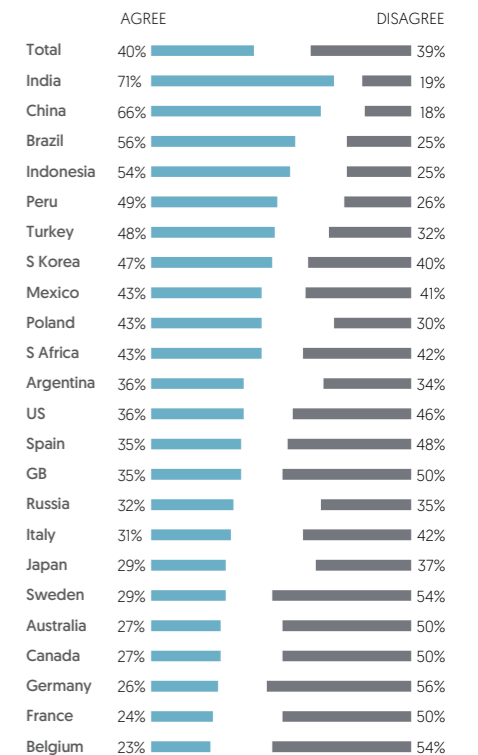
AWARENESS OF PAYMENT OPTIONS

I know which types of mobile payment services are available to me today



SHOPS USING CONTACTLESS

I know which shops and retailers will accept contactless payments using a mobile phone



Ipsos Global Trends Survey, 18,180 adults across 23 countries, online, 12 Sep – 11 Oct 2016



IN BRIEF

**PERSONALISATION
VS. PRIVACY**

BY JIM NEEDELL

Managing Director, Ipsos Marketing

Would you be willing to give up some of your privacy to simplify your life? Globally, 43% of us say we are comfortable providing information about ourselves to companies in return for personalised services and products. We are less keen, however, if we are not in control of what data companies are receiving – only a third [33%] of us are happy for companies to use information about us, such as location or browsing history, that is provided automatically when we go online.

The young [18-24 year olds] are, perhaps unsurprisingly, most positive about providing information in return for personalised products and services [51% compared to 43% average]. But even they have increasing concern in how these companies are using the personal data they collect online – 68% compared to 60% three years ago.

Their concern about how their own government is using their data has increased even more – a nine percentage point increase, from 58% in 2014 to 67% today.

However, given that only 15% of us claim to read all the terms and conditions before downloading an app, dropping to only 11% of 16-24 year olds, our concern is not being translated into a change in behaviour. This 15% is almost certainly over-claim, considering it took four months and more than 3,000 downloads for someone to claim the \$1,000 prize hidden in an End User License Agreement (EULA) by PC Pitstop.⁴²

There is an uneasy stalemate where the public are worried, but still find the convenience of apps and devices like Amazon Echo addictive.

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**THE YOUNG MORE
WILLING TO SHARE**

I am comfortable providing information about myself to companies who are online in return for personalised services and products - % agree

18-24	25-34	35-44	45-59	60-64
51%	47%	41%	38%	31%

Ipsos Global Trends Survey, 18,180 adults across 23 countries, online, 12 Sep – 11 Oct 2016

43%

**OF US ARE COMFORTABLE
PROVIDING INFORMATION
ABOUT OURSELVES TO
COMPANIES IN RETURN
FOR PERSONALISED
SERVICES AND PRODUCTS**

THE SEARCH FOR SIMPLICITY AND CONTROL AT A GLANCE

SERENDIPITY MATTERS

Most people say they would rather discover things for themselves than have online recommendations. The challenge for online retailers is to keep improving algorithms so that people can feel in control.



WHISPER IT BUT THERE IS GROWING CONFIDENCE IN ONLINE SECURITY



Compared to 2014, in most countries more people say they are confident about how businesses use their online information, although there are still plenty of concerns. But a majority [just] say they do not mind what happens to their data provided it is analysed anonymously and cannot be linked back to them. Resistance to companies knowing one's location and browsing history remains strong but is declining.

THE DECLINE OF PRIVACY

Part of the global desire for control and transparency is a feeling of powerlessness – two thirds say the web means loss of privacy is inevitable.

BRANDS REDUCE CHOICE – AND THAT'S GOOD

Most people agree that having brands they trust helps them choose when they have more choice than ever. Consumers are most enthusiastic about buying trusted brands in China, India, Indonesia and other emerging markets compared to Europe.





6. A HEALTHIER WORLD?

HEALTH – EMPOWERED AND KNOWLEDGEABLE



BY LEANORA VOLPE
Research Executive, Ipsos MORI Social Research Institute

Humanity is healthier than ever – and more able to control and choose its treatments than ever before. The World Health Organisation⁴³ describes health literacy as a cornerstone of health promotion. People are beginning to take advantage of increased access to information; we shop around for healthcare that meets our expectations, with a majority internationally saying they would ask for a second opinion if they had doubts about their doctor’s diagnosis [86%].

The importance of our lifestyles when it comes to our health is clearer to us than ever – a majority globally say that the most important thing they can do for their health is to eat well [80%] – despite more of us dying from obesity-related conditions than ever.

In a world where we have access to more and more information, we still face challenges in using that information. The Global Trends survey highlights how confused people are – 80% say they don’t know who to trust.

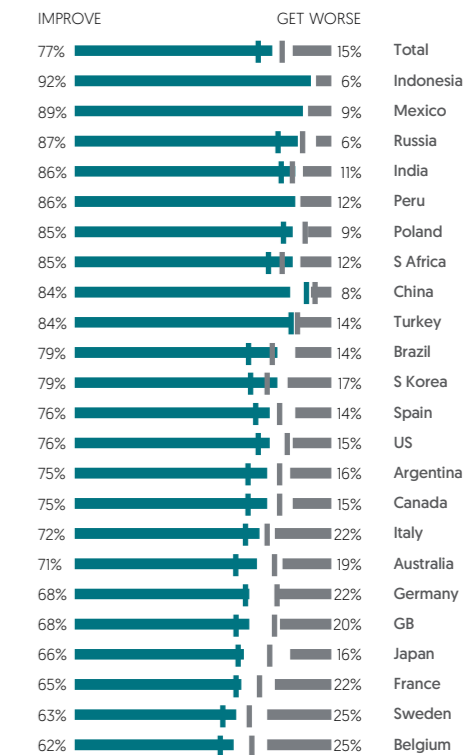
Health in our hands

There’s a mixed picture in terms of how empowered the world’s population feels when it comes to their health. Globally, more of us are looking for control when it comes to making decisions about our health [77%], and this is strongly linked to perceived quality of the healthcare available; countries that are most positive about their healthcare are least likely to want more control over their health. For example, Belgians rate their healthcare most highly [70%] and are least likely to want more control [62%], in Poland 11% say their healthcare is good but 85% want more control.

This pattern is also evident in Great Britain: satisfaction with healthcare is among the highest globally, and this comes with an implicit level of trust in our doctors. Fewer of us than the global average want more control over our choices [68%],

DESIRE TO CONTROL HEALTH DECISIONS

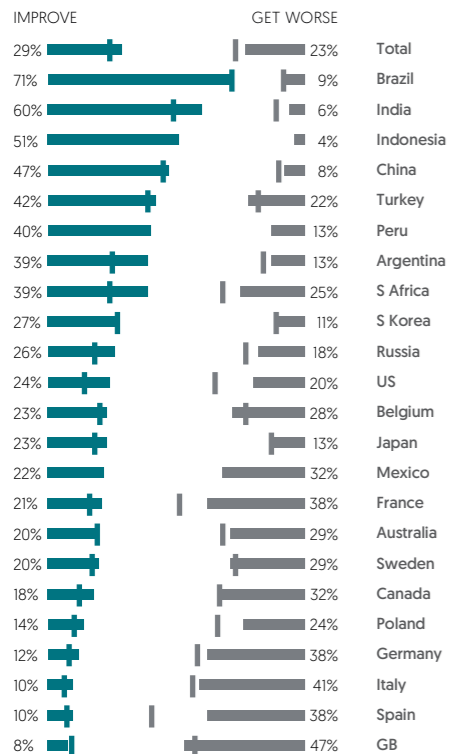
I would like more control over decisions about my health



Ipsos Global Trends Survey, 18,180 adults across 23 countries, online, 12 Sep – 11 Oct 2016

FUTURE EXPECTATIONS FOR THE QUALITY OF HEALTHCARE

Over the coming years, do you expect the quality of healthcare that you and your family will have access to locally will improve, stay the same or get worse?



Ipsos Global Trends Survey, 18,180 adults across 23 countries, online, 12 Sep – 11 Oct 2016

and we are among the least likely to say we would look for a second opinion if we doubted our doctor's diagnosis [81%]. But with the Ipsos MORI *Issues Index* showing the highest levels of concern about the NHS in over a decade, with 45% seeing it as the biggest issue facing Britain today, there are signs of pessimism – almost half expect the quality of our healthcare to decline in the coming years [47%], the highest level globally – and yet we are comparatively passive when it comes to our own health.

Overall, as Simon Atkinson discusses in *The Optimism Divide*, there is a big divergence between developing countries like Brazil, India and Indonesia, and Europe on the future of healthcare. Is a hallmark of a good health service that it empowers its patients, or do people only take things into their own hands when they aren't satisfied? For example, only 16% of Russians rate their healthcare as good, and fewer than average [64%] say it's best to follow a doctor's advice. While this appears to paint a picture of people taking responsibility for their health when they feel their needs aren't met, it isn't so clear cut in countries such as Peru – another country with low levels of satisfaction with healthcare – where 83% feel it's always best to follow the doctor's advice.

Knowledge is power?

In this context, what does greater empowerment mean for countries with differing views on the role individuals should play in their health? We are increasingly equipped with information to manage our health; globally, a majority feel they can find the right information to make their own decisions and choices about their health [65%]. This ranges from 43% [Japan] to 87% [Indonesia], and the more clued-up we are, the healthier we feel – more than twice as many in Indonesia [88%] say their health is good as in Japan [40%]. Perhaps this is unsurprising; this link chimes with the WHO's assertion of the importance of health literacy when it comes to health promotion. But for others, perhaps ignorance is bliss; three in five globally [61%] say they always look up information about their health, but this falls to 34% in Spain, where nine in ten [87%] say it's best to follow the doctor's advice. In her article on *Connected Health* overleaf, Reena Sangar describes the "seismic shift" in the way people access information about their own health. But in spite of a race for 'big data', and the burgeoning market for connected health devices, just over one in ten [12%] are current users of a health device – the same as the proportion saying they used to use one, but don't now. At present the relative complexity of using current wearables is deterring many people who experience them, and cost is deterring some non-users [27%].

Looking forward

So what defines a good health service? Is it about empowering patients to participate in their own healthcare, or is it one that can be relied on to know what's best? In India, the connected citizens in our surveys have high levels of satisfaction with healthcare [69%], and good self-reported health [78%] – but unlike similar countries, their appetite for information [79%] and control [86%] remains high. France's health system is considered one of the best in the world, but its population ranks among the lowest for having access to information to help them make healthy decisions [48%].

In spite of evidence of increasing control over their health, people harbour inevitable anxieties about the future; the majority say they worry more about their health as they get older [75%]. In Japan, there are lower than average levels of long-term conditions, but the Japanese consider their health to be among the poorest [40%], as in our last Global Trends study. The Japanese are also dissatisfied with their health service, but in the context of their lower than average desire for control over their health [66%], empowering them more may not be the answer to their worries – they are in fact relatively healthy.

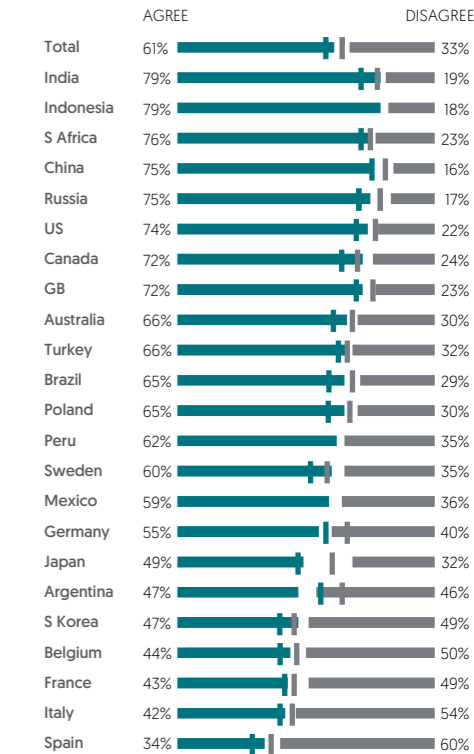
IPSOS THINKS

It's clear that the way we participate in our own health is changing, but there's no one size fits all solution. There are clear cultural differences in how populations of different countries approach their own health, and local health services will need to employ different strategies in the future to keep anxieties at bay, and harness appetites for control and information about health to meet their populations' needs.

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DESIRE TO SEEK OUT HEALTH INFORMATION

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



Ipsos Global Trends Survey, 18,180 adults across 23 countries, online, 12 Sep – 11 Oct 2016

A Healthier World?

IN BRIEF

CONNECTED HEALTH: ARE YOU READY FOR THE REVOLUTION?

BY REENA SANGAR

Head of Digital and Connected Health, Ipsos Healthcare

Health and healthcare is on the cusp of a seismic shift. In less than two years your Fitbit may be replaced by a patch, much like a sticker, tracking your health metrics.

Your GP surgery can be connected to an artificial intelligence [AI] app, and you will only need to see your primary care physician if the answer cannot be provided by the app – the app is 95% accurate. You will be able to make video calls to doctors from anywhere in the world, your voice-activated in-home device will give daily, personalised health tips and can order your prescription with a voice command. Amazon Echo or Google Home will provide a myriad of useful services – the ability for carers to ‘check in’ to make sure your loved one is safe, a ‘falls service’ for the elderly – all based on voice commands and AI.

One in ten Britons already owns or uses a connected health device (wearables, smartphone apps, etc.).

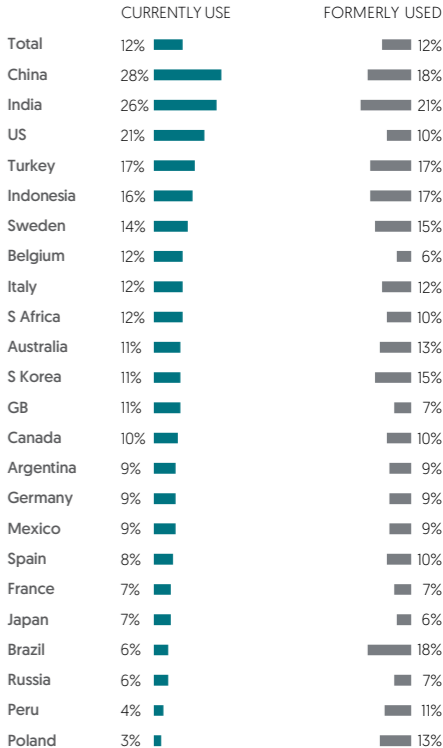
However, among internet-connected people in China and India, usage is even higher. Thanks to lower regulatory constraints (for now), these countries are leapfrogging established markets in using technology for health. In China, healthcare app *Ping An Good Doctor* provides medical consultation and treatment, and allows users to consult doctors through text, pictures, and video. It also contains healthcare-related articles, a forum for healthcare topics, and an online store that sells healthcare products. This provides 250,000 consults a day and has a user-base of 77 million users.

With healthcare services around the world under increasing cost pressure, a connected health future may be sooner than we think, if only because of increased productivity.

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WHO IS USING A CONNECTED HEALTH DEVICE?

Do you currently, or have you ever, use(d) a connected health device or tool to manage your health?



Ipsos Global Trends Survey, 18,180 adults across 23 countries, online, 12 Sep – 11 Oct 2016

IN BRIEF

SWEET DELUSIONS – WHY OUR PERCEPTIONS OF SUGAR CONSUMPTION MATTER

BY HANNAH SHRIMPTON

Research Manager, Ipsos MORI Social Research Institute

We all know that eating right is an important part of a healthy lifestyle – globally, 80% of us think that, of all the things we can do to maintain good health, eating right is the most important.

But in every country in our study, except China, people believe that the majority of their fellow countrymen and women eat more sugar than the recommended daily limit. Australia, Britain and South Africa top the list, believing that nearly three quarters of people (72%) in their country eat too much sugar.

While we may think that the majority is eating too much sugar, we are of course less likely to view ourselves as part of this over-consuming majority. In every country we surveyed, the number of people admitting to eating more than the recommended daily limit of 50g of sugar was less than the percentage of the

population they estimated was doing it. In some countries the difference was significant – the French believe that 64% were eating too much sugar, but only 36% admitted to doing it themselves – a difference of 28 points! Indonesia, Britain and Argentina were not far behind.

But does it matter that we think the rest of the country is consuming more sugar than us? Yes. As Robert Cialdini’s work shows,⁴⁴ we are very much influenced by social norms, so what we think everyone else is doing matters. We are more likely to have that sugary drink if we think that not only everyone else is too, but actually they are having many more.

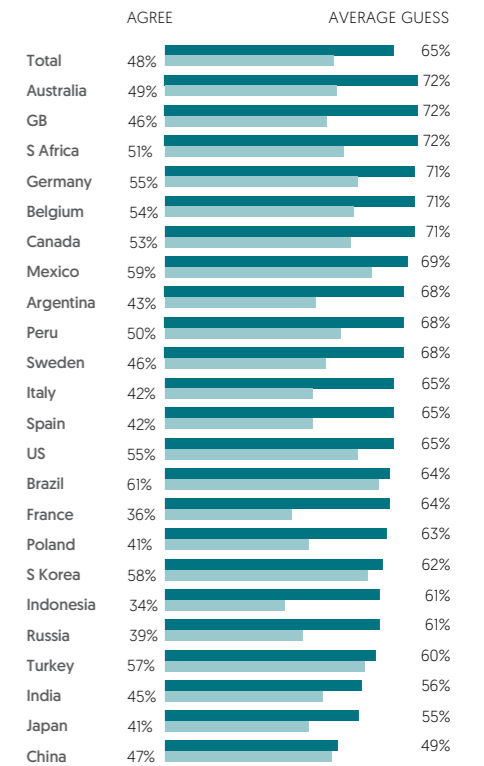
Just like with fake news, perception is often more important than reality.

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SUGAR ABUSE

Percentage of people in my country who eat more sugar than the recommended daily limit (average guess)

I do eat more sugar than the recommended limit (% agree)



Ipsos Global Trends Survey, 18,180 adults across 23 countries, online, 12 Sep – 11 Oct 2016



A HEALTHIER WORLD AT A GLANCE



DO WE RECOGNISE OUR OWN OBESITY?

Despite rising obesity globally, when asked whether they are satisfied or dissatisfied with their weight, 44% are satisfied compared to 33% who are dissatisfied. Most satisfied are the Indonesians [75%] and Indians [65%] with the most dissatisfied being the South Koreans [51%] and Japanese [46%].

A WORLD THAT WANTS TO BE FITTER

Everywhere most people want to be fitter [86%]. They also know what they need to do to achieve it – for example most also say they are constantly looking at screens [62%]. The challenge is making the change.



SPLIT OVER AUTONOMY OR NUDGING

In many markets the public want government to intervene to help them be healthier, but overall the world is divided. The US remains the least enthusiastic about government intervention in lifestyle choices.





7. GENERATION STRAINS



GENERATION STRAINS



BY MICHAEL CLEMENCE

Research Manager, Ipsos MORI Social Research Institute

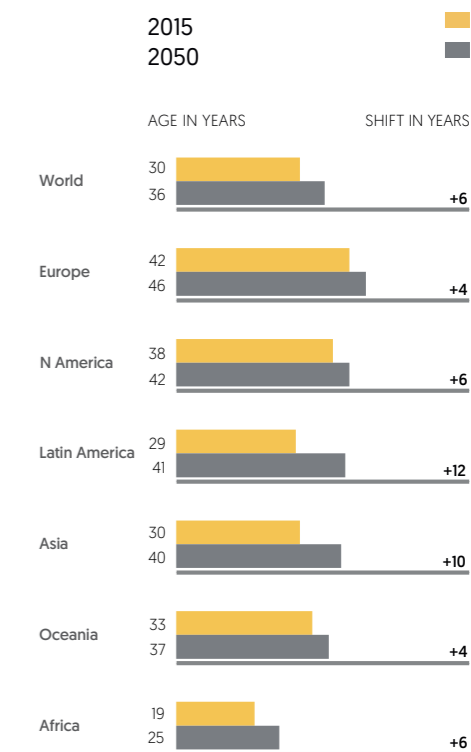
One certainty is that the world is ageing. The UN estimates that the median age of the world will reach 36 in 2050.⁴⁵ This may not sound much, but western societies are already seeing rapid rises in the number of centenarians – in 2016 the Japanese government down-graded the sterling silver sake cup presented to citizens in their hundredth year to a silver plated one, as the 32,000 people eligible to receive the gift that year made the tradition financially untenable.⁴⁶

Yet the greatest challenge will be in those emerging economies where the shift will be felt – especially in Asia and Latin America – and this is where marketers will have to make major adjustments. With an older population increasing in size, power and wealth, the scene could be set for a generational struggle between old and young of the type described in David Willetts’ book *The Pinch*.⁴⁷ The presumed combatants are the Millennials (or Generation Y), born between 1980 and 1995 (now aged 22-37), and the Baby Boomer generation, born 1945-1965 and currently aged 52 to 72.

But how accurate is this interpretation? Is global society fractured between old and young along the two key axes of perception and expectation? To put it bluntly – are Baby Boomers hostile towards Millennials? And are they more or less positive about Millennials’ life chances?

What do people think of Millennials? They are tech-savvy [54%], materialistic [45%] and arrogant [33%] – it appears that generational antipathy is real. Individual countries have particular gripes: 38% of Brazilians brand Millennials “ageist” (double the global average), Poles pigeonhole them as “materialistic” [62% against an average of 45%], and Italians consider them “entitled” and “sheltered” [57% versus 27%, and 36% against 19% respectively].

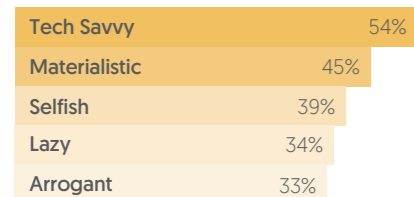
MEDIAN AGE BY WORLD REGION



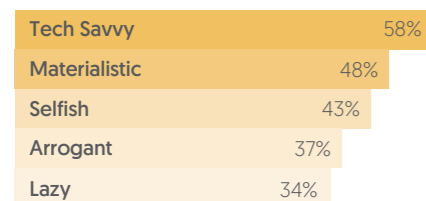
United Nations Department of Economic and Social Affairs, World Population Prospects: The 2015 Revision

WORDS THAT APPLY TO MILLENNIALS

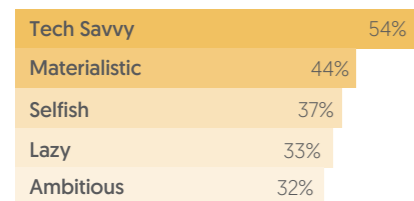
Global views of Millennials



Baby Boomers views of Millennials



Millennials views of their own generation



You might expect Millennials to give themselves an easier ride, but the top three attributes Millennials ascribe to themselves are also “tech-savvy” [54%], “materialistic” [44%] and “selfish” [37%! That this reads like an anthology of Millennial memes⁴⁸ hints at a disconnect in identification between “real” Millennials and the plaid-clad stereotype – a finding echoed in a previous Pew study that found most Millennials resisted the “Millennial” label being foisted on them.⁴⁹

Criticism of the youth contrasts strongly with the reverential tones used globally to describe Baby Boomers – by popular acclaim the “respectful” [47%], “work-centric” [41%] and “community-oriented” [32%] cohort. Some countries are especially complimentary; 49% of Turks consider Baby Boomers tolerant (versus 29% globally) and 56% of Argentines assume they are well-educated (against 31% overall). There are some flies in the ointment – just 9% of the French consider Baby Boomers ethical (against 30% overall), but it is clear who has won the generational PR battle.

CRITICISM OF THE YOUTH CONTRASTS STRONGLY WITH THE REVERENTIAL TONES USED GLOBALLY TO DESCRIBE BABY BOOMERS

Ipsos Global Trends Survey, 18,180 adults across 23 countries, online, 12 Sep – 11 Oct 2016

What are Millennials’ expectations?

‘The optimism of youth’ has long been a truism of research. However, our data suggests that in some contexts this axiom is being severely tested. It exists at a global scale: when considering prospects for “today’s youth” (i.e. themselves), 42% of Millennials believe that they will enjoy a better life than their parents. This compares favourably to the 34% score for people generally, and is also nine percentage points higher since 2014.

But this overall figure masks a gulf in optimism by geography. Established market Millennials are far gloomier than their peers in emerging economies overall – in fact Millennials in the West are barely more optimistic than older generations, only two percentage points above Baby Boomers. By contrast, in emerging markets Millennials are much more upbeat about their chances, but this cheerfulness is in fact shared by all generations. When it comes to optimism, where you live matters much more than which generation you belong to.

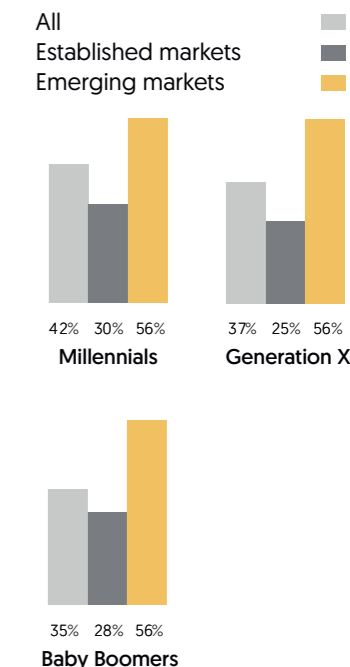
This emerging-established market difference is maintained over a diverse range of issues. Almost everywhere we find emerging market Millennials are much more optimistic than their established-market counterparts. They are close to agreement about their prospects in only two cases, while in five areas the difference is huge – around thirty percentage points. These are the really important ones too: having a secure job; being able to live comfortably when they retire; being able to own their own home; having enough money to live well; and having a successful career (all where American and European young people are markedly more pessimistic).

Of course in absolute terms, Millennials in the West have far more security and comforts than the same age group in emerging markets. Part of the difference may be caused by the survey methodology – internet panels in the West are broadly representative. In emerging markets, our respondents by definition are more affluent, urban and better connected than average. Nevertheless, we suspect that the large differences we are seeing here between emerging and developed markets are the result of disappointed expectations surrounding the slow-down in living standards in western economies, compared to dramatic improvements in a few decades in countries like China.

Over time, as growth in emerging markets slows to western levels, we may see less difference. But for now, the biggest difference is not generational, but geographical.

OPTIMISM ABOUT THE FUTURE

To what extent, if at all, do you feel that today’s youth will have had a better or worse life than their parents’ generation, or will it be about the same? – % better



Ipsos Global Trends Survey, 18,180 adults across 23 countries, online, 12 Sep – 11 Oct 2016

NO GENERATION SHOULD BE TREATED AS AN ATTITUDINAL MONOLITH

The implication of this – for governments and marketers – is that no generation should be treated as an attitudinal monolith. Context is king; any campaign will need to take local conditions into account, especially the wide difference in optimism that exists between emerging and established markets. Any advert that targets or references ‘Millennials’ would be wise to be mindful of the rather negative connotations attached to the term by most of society.

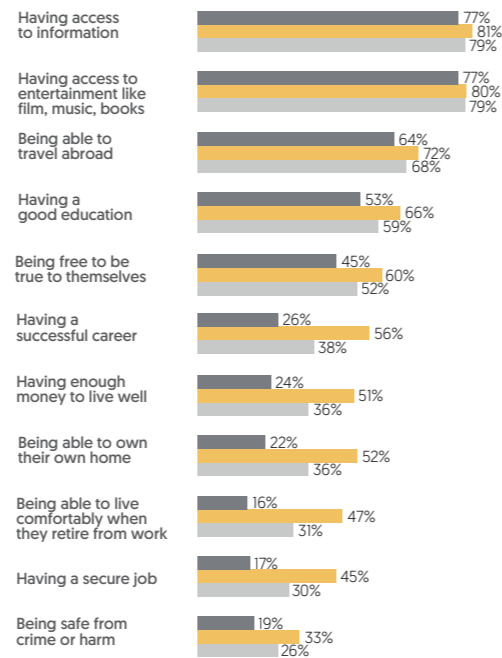
To understand the true Millennial mindset, characteristics that are (and have always been) inherent to younger people – such as higher optimism and trust – must be separated from those that are specific to this particular current group of young-ish people. This requires the careful analysis of long-term data, but once the characteristics unique to Millennials around the world are understood, it opens a window onto what Millennials may think, want and do in the future.

GENERATIONAL OPTIMISM

Which of these do you think is or will be better or worse for today’s youth than for their parents?

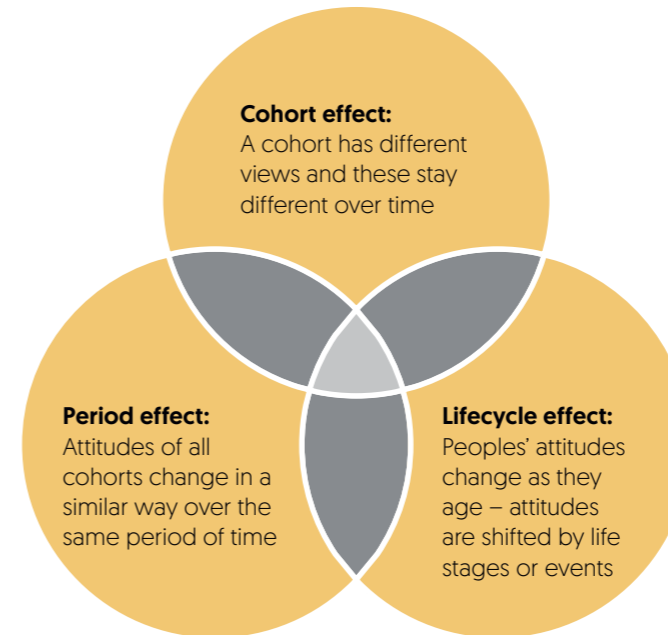
Millennials – Established
Millennials – Emerging
Millennials – All

% better



Ipsos Global Trends Survey, 18,180 adults across 23 countries, online, 12 Sep – 11 Oct 2016

MILLENNIAL CHARACTERISTICS HAVE THREE MAIN DRIVERS:



IPSOS THINKS

Ultimately, our data shows two separate conclusions.

1. Firstly, antipathy towards ‘Millennials’ is real, but shared across society (even by Millennials themselves) rather than being the preserve of Baby Boomers. This finding poses questions about the extent to which young people identify with the Millennial term, especially in emerging markets where the cultural context is very different.
2. Secondly, on future expectations we witness the triumph of geography over cohort. In emerging markets, positivity for young people’s chances is much broader than just youthful optimism, while established market citizens of all ages are more downbeat, stuck in a context of low growth since the 2008 crash – or before.

More broadly, the use of generational terms to explain Millennials’ behaviour needs to be considered carefully. It is not simply that common stereotypes are incorrect – Millennials are different in some ways. But, the differences between generations are simply subtler than commonly made out.

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IN BRIEF

**WILL TECHNOLOGY
KILL US ALL?**

BY HANNAH MILLARD

Head of Media Relations, Ipsos MORI

“Most of the threats we face come from the progress we’ve made in science and technology. We are not going to stop making progress, or reverse it, so we must recognise the dangers and control them. I’m an optimist, and I believe we can.” – Stephen Hawking, 2016

Today, half of global citizens fear that technological progress is destroying our lives. Can this be blamed on lack of awareness, a fear of unknown? Perhaps, in established markets concern is certainly lower at 45%, compared to 58% in the emerging markets.

But there is something bigger at play and that is the increasing concern amongst the younger generations, those that have experienced the most exposure to technology and all that it entails. In 2014, 37% of Generation Z respondents globally were concerned that technological progress was destructive. However,

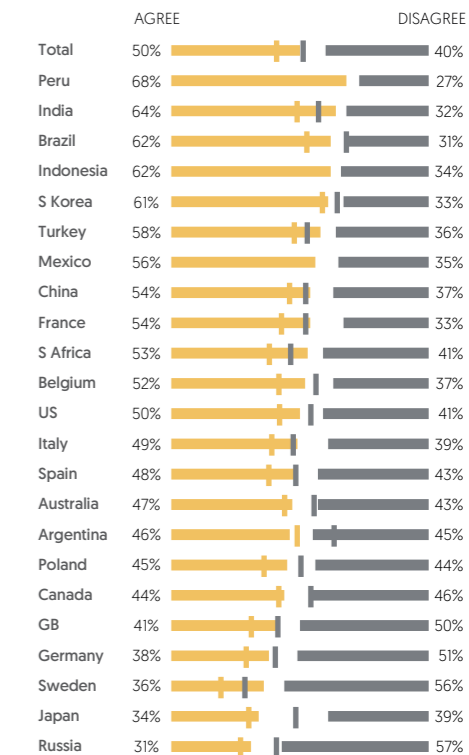
just three years later, that has jumped 13 percentage points to 50%, compared to an increase of seven percentage points for Baby Boomers, nine percentage points in Generation X and 11 percentage points for Millennials.

With heightened awareness of cyber-bullying, online shaming and revenge porn, it appears the younger generation are well aware of, perhaps having witnessed it first-hand, the destructive power of technology.

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**FEAR ABOUT
TECHNOLOGY**

I fear that technical progress is destroying our lives



Ipsos Global Trends Survey, 18,180 adults across 23 countries, online, 12 Sep – 11 Oct 2016

GENERATION STRAINS AT A GLANCE



A BETTER WORLD THAN OUR PARENTS?

Overall most people feel they are going to have a better life than their parents – but it's the emerging markets that feel this decisively. In France and Belgium, a majority disagree.



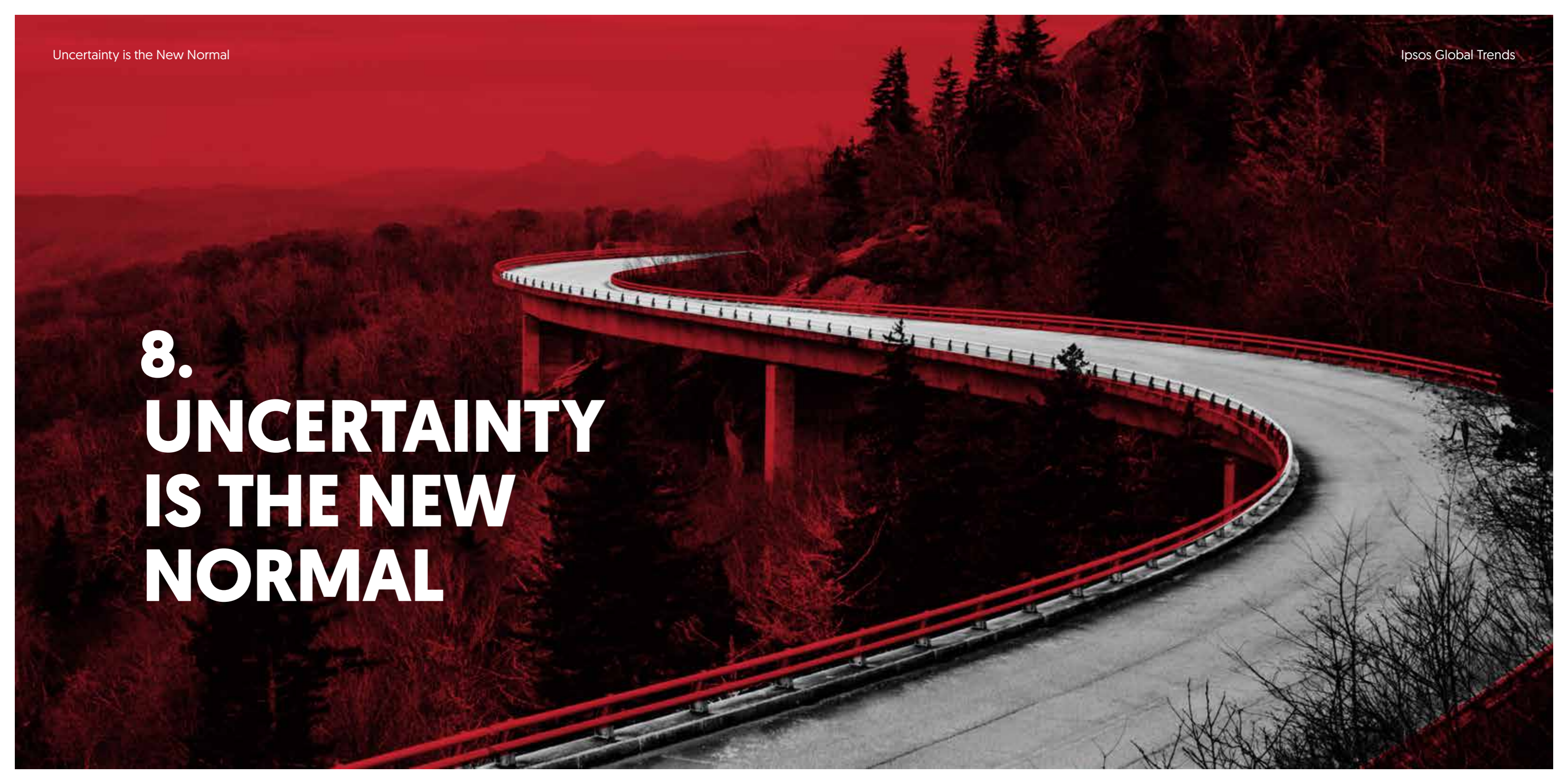
DIVIDED OVER YOUTH

Whereas emerging markets are optimistic about the future for young people, in mature economies views are completely the opposite – Western European nations – Britain, France and Spain are the most pessimistic on the planet.

EVERYONE IS RUDE ABOUT MILLENNIALS – INCLUDING MILLENNIALS



8. UNCERTAINTY IS THE NEW NORMAL





NO EASY ANSWERS: POLITICAL UNCERTAINTY IN A MIXED-UP WORLD



BY GIDEON SKINNER
Head of Politics, Ipsos MORI Social Research Institute

One of the clearest trends across the survey is a sense of feeling adrift from the past, discontent about our present and unease about our future. But when it comes to how governments or brands should respond to this, it seems that uncertainty breeds uncertainty – there is no single silver bullet that citizens are offering governments that could make them happier with those in charge.

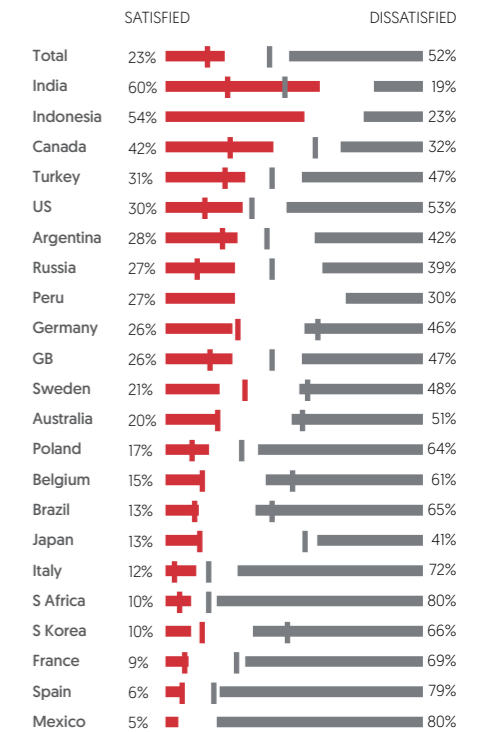
To start with, it's clear that many around the world see their government as a remote institution that they have little time for. On average, half across the 22 countries in the study say they are dissatisfied with their government, and in only three do the fans outnumber the critics: India, Indonesia, and Canada. In two of those [India and Canada] we have seen big improvements since the last wave which was before the elections in those countries – so the chances are they represent the impact of changes in government there (and while Prime Minister Modi's ratings remain strong, Justin Trudeau's honeymoon is already showing signs of stalling).

For the countries at the bottom of the scale, six stand out – South Africa, South Korea and Mexico, and three European countries – France, Italy and Spain. This matches findings we have seen elsewhere, and are of little surprise given the high levels of public discontent in those countries, especially since the financial crash of 2008, as demonstrated in President Hollande's low satisfaction ratings, Prime Minister Renzi losing the Italian referendum, and a variety of scandals in South Africa, Mexico and indeed France.

This unhappiness at the national level is despite most people feeling relatively happy with their local area [62% on average] – suggesting perhaps that national governments are seen as having little to do with many people's local, day-to-day lives. This gap is most noticeable amongst older citizens – they are the most

GLOBALLY, HALF ARE DISSATISFIED WITH THEIR GOVERNMENT

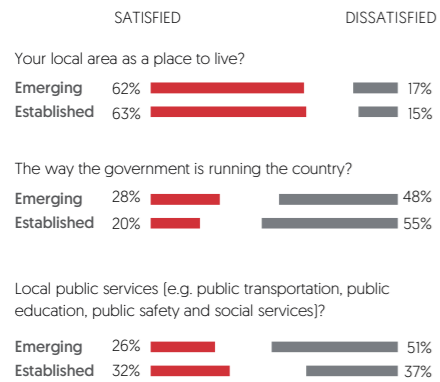
Overall, how satisfied or dissatisfied are you with the way the government is running the country?



Ipsos Global Trends Survey, 17,180 adults across 22 countries, online, 12 Sep – 11 Oct 2016

**EMERGING MARKETS
HAPPIER WITH THEIR
GOVERNMENTS, BUT
MORE DISSATISFIED
WITH PUBLIC
SERVICES, THAN
ESTABLISHED
MARKETS**

No difference in views on local area



Ipsos Global Trends Survey, 17,180 adults across 22 countries, online, 12 Sep – 11 Oct 2016

positive about their local area, but the most negative about their government. Relative unhappiness with governments is similar to views of local public services (where on average only 30% are satisfied), suggesting governments may be being held more responsible for these, but again the pattern is not perfect. When comparing emerging with established markets, for example, there is no difference between their views towards their local area, but while emerging markets tend to be happier with their governments, established markets are more satisfied with the quality of their public services.

What's driving this discontent with the way our countries are governed? Populism was the buzzword of 2016 as people tried to explain the successes of Trump, Brexit, the rise of Le Pen, the Italian referendum, and so on. In fact, it became a bit of a cliché, and our data suggests that while discontent may be common, the factors behind it are many and varied, and several are long-standing and mainstream currents of perception, rather than the sudden change implied by the latest media catchphrase. But that doesn't mean public opinion should be ignored, just that it can't be easily packaged into a single soundbite. So what does our data show?

To start with the good news, most people still believe in democracy (72% on average), and in 18 out of the 22 countries at least two in three think it's the ideal form of government (although, less than half in Russia!). But that may be as far as the good news goes, as it's clear that many in many countries are feeling let down and left behind by the current system.

Let's take some common attitudes that are associated with support for so-called 'populist' movements and see how they are doing (and remember, this is an online sample that does not include the oldest groups in each country):

- Anti-immigration feeling? Yes! 55% on average think there are too many immigrants in their country, and 64% feel that public attitudes are hardening.
- Feeling that your concerns are being ignored? Yes! 71% on average agree their government doesn't prioritise them. Feeling instead that the economy is rigged in favour of the rich and powerful? Also yes! 76% agree.
- Want a strong leader to replace the elected government, and even a revolution? Yes! 58% want a strong leader and 47% on average think a revolution is needed.
- Feeling left behind by changes in society? Yes! 59% don't identify with what their country has become, and 50% wish their country would go back to the way it used to be (and rising in countries like France, Belgium, Brazil, India, Germany and Sweden).
- Fear about the world? Yes! 82% think the world is becoming a more dangerous place, and this is higher than 2014. 57% think they are less safe from

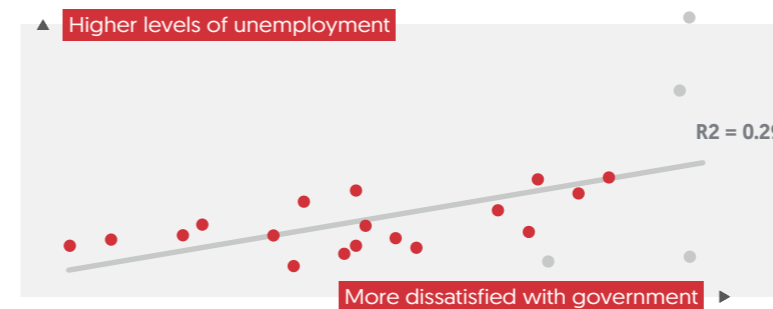
crime than their parents.

- Latent authoritarianism? Yes! On average, 61% support the death penalty – which has been shown to be related to support for Brexit. (Although, to be fair we should point towards majority support for women's and gay rights too.)
- Economic insecurity? Yes! Compared with their parents, 54% think they are less likely to have a secure job, and 53% that they are less likely to have a comfortable retirement.

So there is strong evidence of discontent around the world, but as the list above highlights, it's not so easy to boil that down to a single cause. And, unfortunately, there is no simple answer for what governments should do about it either.

Comparing government satisfaction ratings with real-world indicators such as GDP, inflation, unemployment and so on, clear patterns are hard to find.⁵⁰ First, look at the indicators that seem to make little difference to government ratings: absolute levels of GDP (in a version of the Easterlin paradox,⁵¹ while richer individuals are around twice as satisfied with their government as those on lower incomes, this doesn't apply to richer countries), inflation, or inequality. Although at first glance there does seem to be a relationship between satisfaction with government and the rate of GDP change (i.e. that faster growing countries are happier than those with more stagnant economies), this is mostly due to the outlier that is India – remove it, and the link is much weaker. Simply throwing money at the problem doesn't seem to work either. If anything, there is a negative relationship between the level of government expenditure as a percentage of GDP and government satisfaction ratings.

**GOVERNMENT DISSATISFACTION RISES
IN LINE WITH UNEMPLOYMENT**



Ipsos Global Trends Survey, 17,180 adults across 22 countries, online, 12 Sep – 11 Oct 2016. Unemployment data from IMF/estimate for India

**64%
FEEL THAT PUBLIC
ATTITUDES
TO IMMIGRANTS
ARE HARDENING**

**RICHER
INDIVIDUALS ARE
AROUND TWICE
AS SATISFIED
WITH THEIR
GOVERNMENT
AS THOSE ON
LOWER INCOMES**

THOSE LIVING IN BIG CITIES ARE MORE LIKELY TO PRIORITISE WELLBEING THAN THOSE IN THE SUBURBS

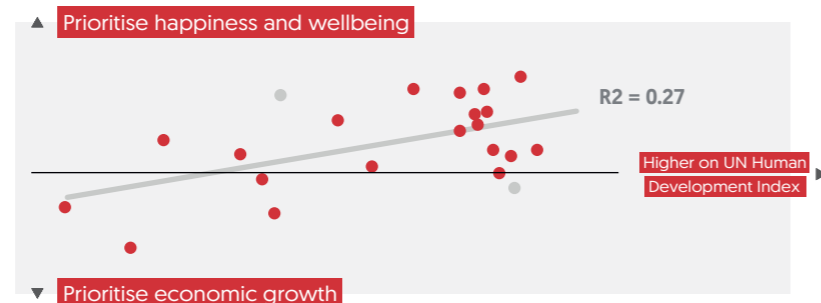
There is one real world indicator that does stand out as having a relationship with government dissatisfaction – the unemployment rate – but otherwise, perhaps not surprisingly, there is a much closer link with other perception measures, most notably current ratings of the economic performance of the country, and optimism for the future.

In an attempt to deal with this weak link between GDP growth and how happy people are with their government, a debate has grown up over whether governments should take a more holistic focus on wellbeing, rather than narrowly concentrate on economic growth. But even here, citizens of the world are divided in their preferences.

When asked to choose between economic growth or improving people's happiness and wellbeing, 30% prioritise economic growth, and 41% wellbeing. There is little difference by gender or age (apart from the very oldest who are slightly more likely to pick economic growth), education level or income, although there is more variation by geography. Those living in big cities are more likely to prioritise wellbeing than those in the suburbs, but there is an even stronger distinction between emerging and established markets.

In established markets, people are almost twice as likely to prioritise wellbeing over economic growth, while in emerging markets people are just as likely to say economic growth is as important as happiness. In other words, for poorer countries more money is chosen over 'well-being' – and will probably help with

ESTABLISHED MARKETS MORE LIKELY TO PRIORITISE WELL-BEING OVER ECONOMIC GROWTH – BUT STILL SOME EXCEPTIONS



Ipsos Global Trends Survey, 17,180 adults across 22 countries, online, 12 Sep – 11 Oct 2016
UN Human Development Index estimate 2015

well-being in any case. This could be interpreted as reflecting a simple hierarchy of needs – which is supported by strong links between the level of inequality in a country, and how low it is on the Index of Human Development, and its relative prioritisation of economic growth. Again, though, that isn't the whole story – for example, there is still little relationship between these two priorities and levels of GDP. Finally, whether or not people are satisfied with their government seems to bear little resemblance to their preference for wellbeing or growth, once again proving that while you may be able to please some of the people some of the time, pleasing all of the people all of the time remains as elusive as ever.

IPSOS THINKS

It's true that many publics around the world are united by a deep dissatisfaction with the way things are going, which can be seen in some of the big political upsets of the last year. But it would be a mistake to lump them all under a one-size-fits-all banner of 'the rise of populism' – many of these trends have existed for some time, and there are a diverse set of drivers for different people and different countries.

It's still important for governments to get the basics right, such as tackling unemployment, which remains a top priority around the world. However, perceptions are just as important as reality (at least reality as defined as standard GDP indicators), particularly optimism for the country's direction of travel. While it seems as if national governments get little credit whatsoever for how people feel about their local areas, administrations will need to work out exactly which are the key indicators in their own countries that will give citizens the sense that they are on the right track.

Even so, economic growth is not the be-all and end-all for citizens around the world. It is prioritised more in emerging markets, but in established economies people yearn for something more – which, given it will reflect a more diffuse set of cultural and identity values as well as economic concerns, will be even harder to define, and even harder to achieve. How brands and governments offer a sense of meaning becomes important.

While organisations need to exhibit extreme caution when attempting to use political and social movements (in particular those fuelled by anger, inequality or protest) to sell their product or reinforce their brand, the current instability and disconnect felt by many people around the globe cannot be ignored. In this age of uncertainty, brands may need to provide respite, reassurance and pleasant diversion to consumers.

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41% OF PEOPLE PRIORITISE WELLBEING

30% OF PEOPLE PRIORITISE ECONOMIC GROWTH

IN BRIEF

**ENVIRONMENTAL DISASTER:
RISING CONCERN FOR
EMERGING ECONOMIES**

ANTONIA DICKMAN

Director, Ipsos MORI Social Research Institute

While in the West public concerns about the environment are static, Indonesia, Mexico and South Africa lead the world in concern.

Globally, the majority of the public believe “we’re heading towards an environmental disaster unless we change our habits quickly” (78% and 85% in emerging economies). What this means in terms of consumer behaviour is less clear – 81% around the world say they are willing to pay more for products that use ingredients that do not harm the environment (fewer actually do of course).

At the same time consumers do not believe businesses are doing their part – only 39% of the global public feel they can trust business to care for the environment.

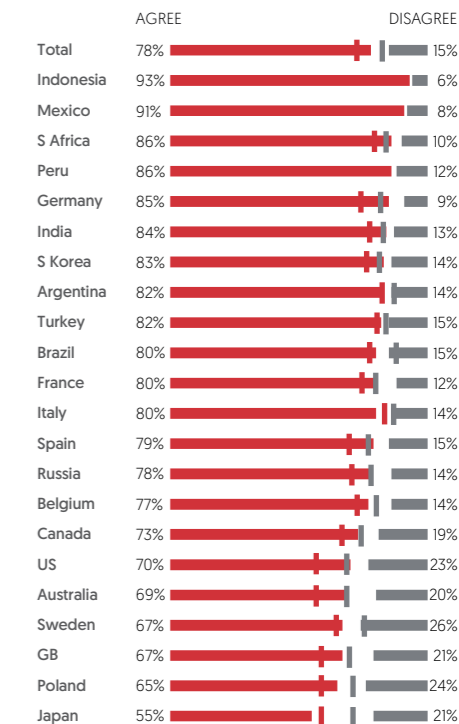
Legislative changes can make a big difference. Many countries have introduced charges for plastic bags over recent years, with 500 million fewer bags used in the first six months of the charge in England.⁵² Not only did the public become more supportive of the plastic bag charge, but also more supportive of other charges to tackle waste.⁵³

With public concern and willingness to act high, businesses and governments can be bolder in promoting green growth and clearer on strategies to help achieve this.

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ENVIRONMENTAL CONCERNS

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



Ipsos Global Trends Survey, 17,180 adults across 22 countries, online, 12 Sep – 11 Oct 2016

UNCERTAINTY IS THE NEW NORMAL AT A GLANCE

THE TRIUMPH OF FAKE NEWS

The world is united in the belief that there is so much contradictory information, it is difficult to know who or what to trust (80% on average). Perhaps because of this, in virtually every country, over three quarters believe it is important to trust your intuition. The difficulty is that behavioural science proves our intuition is wrong much of the time.



LEFT BEHIND BY PROGRESS

40% around the world feel left behind by the progress and changes that are happening in their country, rising to 58% in India.



WE'RE ALL ENVIRONMENTALISTS NOW – AREN'T WE?

In every country, most agree we are heading for environmental disaster unless we make big changes fast. Everywhere people say big companies aren't doing enough for the environment. But while most people agree climate change is caused by humans (80%, up from 75%), at the same time some 43% also agree it is a natural cyclical phenomenon. One interpretation of this is that people are confused.



UNAWARE WHAT INFORMATION COMPANIES HOLD

73% of people globally don't know what personal information companies hold about them, topped by Britain as the least informed at 83% and with Japan at the bottom, but still at 57%.



END NOTES

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GAME CHANGERS

