Ipsos MORI

GLOBAL TRENDS 2014

NAVIGATING THE NEW

The Blue Marble:
NASA Goddard Space Flight Center Image by Reto Stöckli

THE **FRENCH**, **ITALIANS** AND **SPANISH** ARE LEAST OPTIMISTIC ABOUT THE FUTURE PROSPECTS FOR THEIR COUNTRY; 9%, 10%, 12% COMPARED TO 53% AND 47% IN **INDIA** AND **CANADA** • THE **TURKISH** ARE MOST LIKELY TO THINK THAT OLDER PEOPLE SHOULD HAVE TO MAKE SACRIFICES TO HELP YOUNGER PEOPLE MAKE A LIFE FOR THEMSELVES (70%) - **GERMANS** ARE LEAST LIKELY (9%) • 71% OF THE **CHINESE** AGREE THAT 'I MEASURE MY SUCCESS BY THE THINGS I OWN' COMPARED TO ONLY 7% IN **SWEDEN** • IN **BRITAIN**, 52% AGREE THAT 'I HAVE ENOUGH TROUBLE WORRYING ABOUT MY OWN PROBLEMS WITHOUT WORRYING ABOUT OTHER PEOPLE'S PROBLEMS' - IT WAS 39% IN 1997 • 65% OF PEOPLE AGREE THAT 'PEOPLE ACROSS THE WORLD HAVE MORE THINGS IN COMMON THAN THINGS THAT MAKE THEM DIFFERENT' - THE **TURKISH** ARE MOST LIKELY TO AGREE, THE **JAPANESE** TO DISAGREE • MORE PEOPLE ACROSS THE 20 COUNTRIES DISAGREE THAN AGREE THAT 'GIVEN THE CHOICE I WOULD PREFER TO LIVE IN A BIG CITY' (53% VS 39%) • 80% OF **SWEDES** DISAGREE THAT 'FULFILMENT IN LIFE IS ACHIEVING A PROMINENT POSITION IN YOUR CAREER' - 29% OF **INDIANS** SHARE THIS VIEW • EXCEPT FOR **CHINA** AND **RUSSIA**, MORE PEOPLE IN EVERY COUNTRY SURVEYED THINK IT BETTER TO HAVE A SECURE JOB THAN A WELL PAID ONE • THE **BRITISH** AND **AMERICANS** ARE MOST IN FAVOUR OF DECISIONS ABOUT PUBLIC SERVICES BEING MADE LOCALLY RATHER THAN NATIONALLY - THE LATTER IS, ON BALANCE, FAVOURED ONLY BY **ARGENTINIANS**, **SWEDES** AND **SOUTH KOREANS** • THE **CHINESE** ARE MOST LIKELY TO AGREE 'WE ARE HEADING FOR ENVIRONMENTAL DISASTER UNLESS WE CHANGE OUR HABITS QUICKLY', THE **AMERICANS** LEAST LIKELY (BUT MORE AGREE THAN DISAGREE IN ALL 20 COUNTRIES) • ACROSS THE WORLD, PEOPLE ARE SPLIT ON 'EVEN THE SCIENTISTS DON'T REALLY KNOW WHAT THEY ARE TALKING ABOUT ON ENVIRONMENTAL ISSUES' (48% VS 42%) • STRONG MAJORITIES ACROSS ALL 20 COUNTRIES AGREE THAT 'WOMEN HAVE THE SAME RIGHTS AS MEN AND SHOULD HAVE THE SAME POWER' • **RUSSIANS** ARE EIGHT TIMES MORE LIKELY THAN **SWEDES** TO AGREE THAT 'THE ROLE OF WOMEN IN SOCIETY IS TO BE GOOD MOTHERS AND WIVES' (73% AGAINST 9%) • PEOPLE ACROSS OUR 20 COUNTRIES ARE MORE LIKELY TO AGREE THAN DISAGREE THAT 'THERE IS LITTLE DIFFERENCE SOCIALLY BETWEEN BEING MARRIED AND LIVING TOGETHER WITHOUT BEING MARRIED' BUT ALSO TO DISAGREE RATHER THAN AGREE THAT 'IT IS BETTER FOR PARENTS OF CHILDREN TO BE MARRIED RATHER THAN UNMARRIED' • IN **JAPAN** ONLY 17% AGREE THAT 'MY RELIGION/FAITH IS IMPORTANT TO ME' - **BRAZIL**, THE FIGURE IS 79% • **SOUTH KOREANS** ARE LEAST SATISFIED WITH THEIR WEIGHT •44% OF PEOPLE AGREE THAT 'EVENTUALLY ALL MEDICAL CONDITIONS AND DISEASES WILL BE CURABLE' - 43% DISAGREE • BY 2 TO 1, PEOPLE AGREE RATHER THAN DISAGREE THAT 'WE NEED MODERN TECHNOLOGY BECAUSE ONLY THIS CAN HELP SOLVE FUTURE PROBLEMS' • 59% OF PEOPLE AGREE THAT 'THE INTERNET IS MAKING YOUNG PEOPLE'S EXPECTATIONS ABOUT SEX UNREALISTIC' • TWO-THIRDS, 66%, AGREE THAT THEY ARE 'MORE LIKELY TO TRUST A NEW PRODUCT IF IT'S MADE BY A BRAND I ALREADY KNOW' - IN **CHINA** 87% AGREE

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By **Ben Page**
Chief Executive
Ipsos MORI

FOREWORD

Ten global trends and what they mean for government, brands and business

Change is the old new. In his 2001 essay, The Law of Accelerating Returns[1], Ray Kurzweil suggested "…we won't experience 100 years of progress in the 21st century – it will be more like 20,000 years of progress (at today's rate)". Almost certainly over-blown, this statement still captures business and social anxiety about the future.

What kind of capitalism do we want, what sort of 'information age' do we want to live in, and what is an acceptable balance between personalisation and privacy? Some argue that the control is now with connected consumers, not governments and business, although consumers feel differently!

Recognition of this prompted Ipsos MORI's first ever Global Trends Survey. The 200+ question survey covers 20 countries featuring everything from marriage to mealtimes, from personal ambition to advertising, from society to social media. It provides valuable insights to help our clients navigate the complex, sometimes contradictory nature of human attitudes and behaviours around the world.

We have used survey findings alongside other sources to highlight ten key trends. The intention here is to spark a conversation about 'what next'.

In the short-term, there is much to be gloomy about, including how downbeat people are at a global and national level (less so locally and personally). We harbour real anxieties about the future, not just in the west where growth is slow, but also now in emerging markets. There are concerns about inequality and doubts about globalisation, especially in established economies. The world is considered a dangerous place despite evidence of a trend towards less violence in most spheres of our lives today[2]: your chances of being murdered in the UK are now the lowest since 1978, although events in the Middle East and Ukraine make us anxious – rightly or not.

These perception gaps between reality and our fears are familiar to us here in Britain, where the public tends to focus on the things that worry them and media hype bolsters these concerns. On a global level, there are risks of social polarisation, climate and resource strain, but life expectancy is rising, more people are enfranchised than ever before and, for the first time, the majority of people alive today are literate[3]. For every 'the end of the world is nigh' prophesy, there perhaps ought to be one proclaiming 'the end of the world is far from nigh'.

Against a pessimistic backdrop, this report shows the global public's tendency towards nostalgia, allied to a strong sense that traditions are important, and a desire for a slower pace of life and simplification. How do brands and governments offer this?

Nostalgia should not be over-stated though; in both established (42%) and emerging (47%) economies, many do not want their country to be the way it used to be. But most think the world is changing too fast and half often feel overwhelmed with life choices. Nostalgia possibly comes from the faux certainty of the past; we think that most people do not want to go back, but they do want more clarity about what the future holds. They also want help in navigating the choices available.

For people in power in government, brands and business, this implies providing authentic, convincing reassurances about the future (even though those in charge have no better predictive power than astrologers). Creating and facilitating collaborative communities of citizens and customers is a global trend. All are easier said than done, but the pressure to manage change and to innovate is relentless.

Full survey results for each of the 20 nations are available at www.ipsosglobaltrends.com. Let us know where you think we are wrong or what we have missed!

Best wishes

Ben Page

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MEGATRENDS

Global trends in 2014 and what they mean for brands and governments

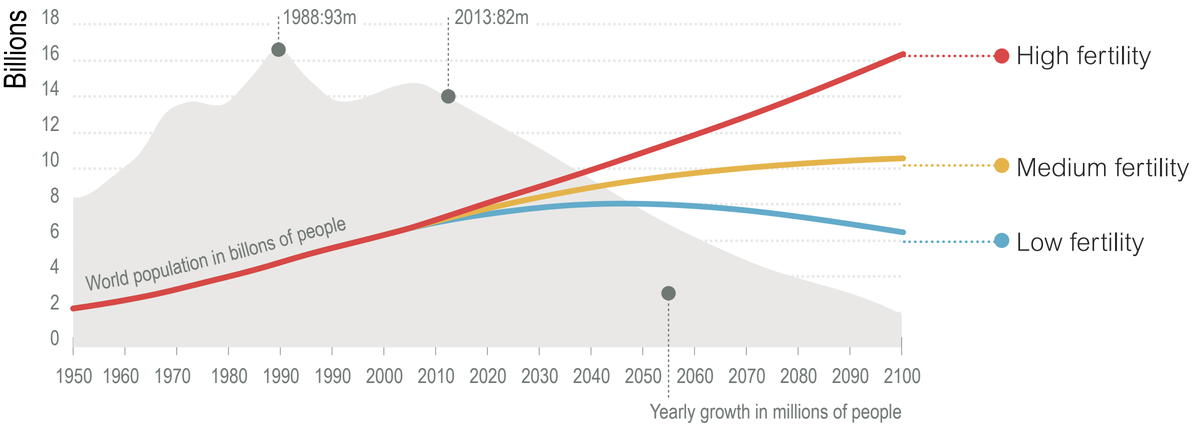
By **Nathan McNamara**
Head of Trends
& Futures
Ipsos MORI

Before thinking about the results of our survey, it's worth quickly reminding ourselves of the demographic, economic and social megatrends that form the backdrop to this report.

MEGATREND 1: Population change

At the time of writing, there are 7,245,189,833 people on this planet with estimates for the end of this century at 11 billion, or 16 billion at the higher end of the scale[4]. Whilst fertility rates are falling, life expectancy across the globe is increasing, which raises questions for social welfare systems, overcrowding and competition for resources in the future. Angela Merkel likes to point out that Europe has 7% of the global population, 25% of GDP and 50% of welfare and social security spending, which looks unsustainable.

Population growth predictions



Source: UN Popultation Division 'World Population Prospects: The 2012 Revision'

For centuries, futurists, essayists and predictors of social change have declared population growth to be Malthusian; overpopulation sparking wars over resources far more important than oil, with famine and environmental degradation. Yet recent social commentators have shone a light in the dark morass of extreme population growth, staking claims for sustainability and a utopian vision of shared resources[5].

MEGATREND 2: Uneven economic growth

Western economies in 2014 are slowly pulling out of a deep recession. However, despite Britain's economy reaching new levels of output, real wages lag behind and only 19% predict they personally will benefit from growth in 2014.

China's GDP growth of 7.3% is far higher than any western economy, but this dynamism is not set to continue in the BRIC markets[6]. Instead, growth will be faster in smaller economies like Vietnam, Chile and Malaysia as more economies compete for a place on the global stage. Sub-Saharan Africa is booming – a sentence unimaginable a few decades ago. While growth seems certain, its distribution and benefits are not.

MEGATREND 3: Globalisation and migration

The UN has forecast that by 2030 almost two-thirds of the world's population will live in cities[7]. This urbanisation produces social and economic mobility, but also hugh pressure on resources and government; will the 21st century be about slums and dystopian high rises or something better? KPMG has issued a call for governments to develop integrated, long-term infrastructure plans for cities based on population growth not just in the next 20 years, but in the next 50[8]. With the number of megacities set to grow from 20 to 37 in the next ten years, creating more liveable cities at scale is becoming a global challenge for governments, with big opportunities for the private sector. Migration generally is creating all types of tensions globally as well as social change among both host and migrant communities. For governments this poses all sorts of challenges, and for brands a real need to keep innovating to reflect changes.

MEGATREND 4: Climate change

According to the Intergovernmental Panel on Climate Change (IPCC), climate change is happening faster than predicted. Most scientists agree, even if the short term impact is unclear.

Half the world lives in urban areas breathing dirty air which fails to meet WHO's air quality standards, including many developed countries. Yet is the change really that we are now able to measure it accurately[9]? With the rise of Nest and Hive in western markets, it remains to be seen whether the tipping point lies between consumers changing their habits, or governments enforcing or 'nudging' behaviours, although Ipsos MORI's view is that some heavyweight 'shoving' may be needed!

MEGATREND 5: Technological change

As the world goes online, new, rapid access to massive data storage will have large impacts on society, technological development and monitoring. Coupled with nano technology, mass and pervasive sensors will give us more data about ourselves, customers and society than ever and issues around privacy and technology will increase, with Snapchat to be monitored for the next 20 years after a recent Federal Trade Commission settlement[10].

In 1999, Ira Matathia and Marian Salzman posed the question: 'how long will it take for the internet to become a truly global medium?' referencing that less than one percent of Italians were using the internet, as it made them 'uncomfortable and scared them away'[11].This figure is now a quaint relic.

MEGATREND 6: Political and individual change

In principle at least, democracy has been on the march for the last two decades. Advances in technology and education are driving a desire for more transparent governments, empowering the previously impoverished and swelling the middle classes, but with very many exceptions: the Arab Spring has de-materialised and the Middle East is an evolving hotbed of different factions. The 'End of History' remains nowhere near. As the 20th Century Chinese politician Zhou Enlai apocryphally replied when asked about the impact of the French Revolution (1789-92), "it's too soon to tell". Even recent history shows prediction is hard – but the megatrends above are ones we can be certain of!

OUR TEN TRENDS

Our trends are grounded in data on public and consumer views and are deliberately focused on people's attitudes, ambitions and concerns. They also represent what we believe are important components of a zeitgeist in a state of flux. Change, and managing it, is a key theme of this analysis.

The ten trends featured here are designed to give a flavour for some of the themes which emerge from our vast data set and should provide a basic starting point for leaders and strategists within businesses, brands and governments to build on.

1: TECHNOLOGY
The culture of now

This trend examines the attitudes of the world's population towards technology, particularly in the emerging economies where we see different patterns of behaviour developing. What are the implications for society – will the age of digital snacking create an attention deficit?

2: PRIVACY
The big data debate

The survey reveals a massive disconnect between what people say and how they act on the subject of privacy. There are notable differences in attitudes to privacy across established and emerging economies and we see a situation where greater understanding can actually cause greater concern.

3: TRADITION
More forwards than backwards

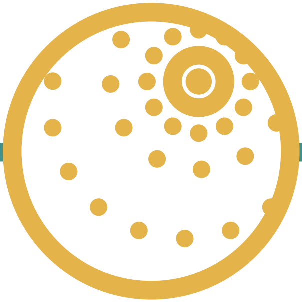
Individuals want to live life on their own terms and are less likely to defer to the traditions and values of the past. But tradition lives! In a world that feels like it is moving too fast, there is a nostalgia for the past seen in attitudes to life, family and religion.

4: HEALTH
Personal and preventative

We reflect on attitudes to health across the world. Costs are rising rapidly, often because of prosperity. Why do people in the country with the world's highest BMI feel satisfied with their weight and is it the individual or the government's responsibility to support individuals to lead healthier lifestyles?

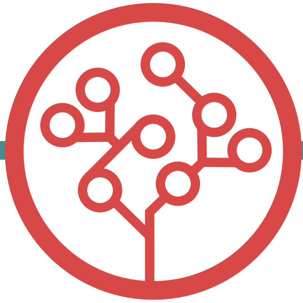
5: SIMPLICITY
Choice about choice

The public across the world hanker after simplicity. Whilst they are flexible, they want to slow down the pace of life and feel overwhelmed by choice. In a rapidly changing world, how can brands and businesses respond to reassure their consumers and citizens?



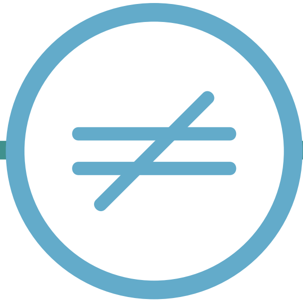
6: GLOBALISATION
Global village

We live in a world which generally favours globalisation, but which is notably more optimistic about the future closer to home. We explore the implications for how brands and governments can harness this spirit of localism within a global landscape.



7: GENERATIONS
Generations apart?

The survey highlights two clear divisions regarding attitudes to the future – both between young and old, and between established and emerging economies. What happens when the assumption of an automatically better future for the next generation is gone?



8: INEQUALITY
Sharing success

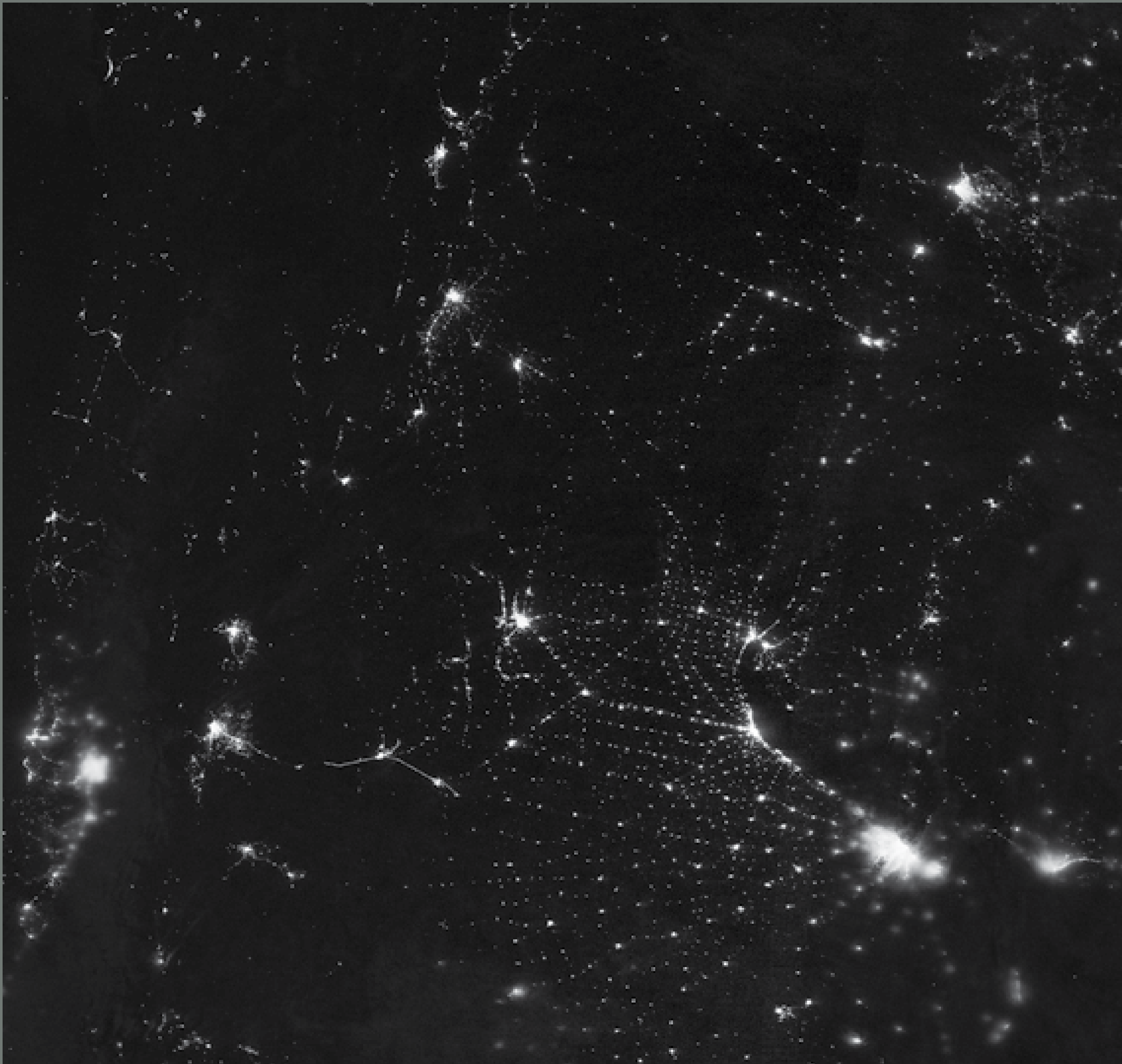
While people around the world are keen to improve their personal lives financially, with just under half feeling under pressure to 'make money', they are against economic growth at the expense of social wellbeing. How materialistic are the different countries and at what expense?

9: TRUST
Eroding authority

People around the world have little confidence in authority, with scepticism about government, business and scientists virtually everywhere. They are also pessimistic about the future direction of their own countries often believing it is heading on the wrong track. So, who do they trust instead?

10: BRANDS
Experience is the new brand

What role do brands play in consumers' lives? And do they have the same power in established and emerging economies alike? How do today's consumers make their purchase decisions and are they being swayed by a vocal minority?



TECHNOLOGY

Brazil at night: NASA image by Marit Jentoft-Nilsen and Robert Simmon

By **Tom Cross**
Research Manager
Ipsos MediaCT

1: TECHNOLOGY

The culture of now

If patience is a virtue, then nobody has told today's consumer. Smartphones encourage more immediacy and spontaneity in communication and the consumption of news, music, films and other media than ever before. People now expect to be able to access almost any information with a swipe of a smartphone screen. Households have multiple devices that all connect to the internet. Using several screens simultaneously is normal.

I am constantly looking at screens these days

	Agree(%)	Disagree(%)
China	78	19
S Africa	77	19
Australia	71	22
GB	71	24
US	67	23
Brazil	64	21
India	63	29
Turkey	63	34
Canada	62	30
Russia	60	30
Total	60	33
Japan	59	34
Germany	57	36
Sweden	56	39
Poland	50	42
Italy	50	44
S Korea	49	46
Belgium	48	42
France	47	49
Argentina	42	46
Spain	39	54

16,000 online adults, 500-1,000 per country.
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DIGITAL SNACKING AND ATTENTION DEFICIT

There is an argument that the smartphone has changed our behaviours more than anything else in recent years. We now have a device with us at all times that enables us to consume and share in bite-size pieces. We are in the age of digital snacking, rather than reading. Some commentators, such as Baroness Susan Greenfield, suggest that the increasing trend of being exposed to so many rapid stimuli and digesting so much digital information is sure to be having a significant impact on the development of the human brain in childhood, given that it evolves to its surroundings so easily. She asserts that there are enormous implications for society in terms of how we process information, the degree to which we take risks, how we socialise and empathise with others and even how we view our own identity[12]. This is contested, but even Eric Schmidt, Chairman of Google, is quoted as saying "I still believe sitting down and reading a book is the best way to really learn something".

78%
of Chinese say they are 'constantly looking at screens these days'

These technological changes are everywhere, but arguably they have been most keenly felt in emerging economies, where their arrival has

On average across Brazil, Russia, India and China, 19% are watching TV on their smartphones compared to 11% in Britain

coincided with rapid economic growth. This Global Trends Survey is online only in methodology and so in emerging economies the results are representative of more affluent, connected populations. However the findings are still telling. The country that agrees most with the statement 'I am constantly looking at screens these days' is China (78%). Many consumers in emerging markets have skipped desktop and laptop computers and use smart devices as their primary route to the internet. As such, their activities on these devices are slightly different to those in more established economies. For example, when asked about their uses of mobile phones, an average of 19% across Brazil, Russia, India and China say that they watch full TV shows live, or on demand, on their phones. This compares to 11% in Britain. Due to the increased size of the screen, this same 'BRIC' group are even more likely to watch TV on their tablets (60% compared to 47% in Britain). These markets represent a pointer to the future.

Emerging markets are also more positive about technology in general. As a group, Brazil, Russia, India, China and Turkey are consistently more positive than elsewhere when it comes to 'wanting to know more about new technology' (80% vs. 66%), 'needing technology to solve future problems' (73% vs. 61%), 'trying to keep up with technology' (74% vs. 65%) and 'technology generally making life better' (78% vs. 73%), amongst others. Perhaps this confidence in technology is reflective of the fact that consumers in these markets have more economic confidence too. There is a growing middle class who have far more options than their parents did, and they are more excited about technology than their counterparts in more established economies who have spent the last few years growing used to life in a recession.

THE CULTURE OF NOW

2013 saw social media becoming more visual – a direct result of the increase in both the sophistication and penetration of smartphones, which has

We need modern technology because only this can help to solve future problems

	Agree(%)	Disagree(%)
China	80	16
Turkey	79	17
India	72	21
Russia	70	17
S Africa	67	28
GB	62	25
Brazil	62	24
Japan	62	24
Total	61	28
Poland	60	27
Italy	58	31
S Korea	58	34
Australia	58	30
Germany	57	31
Spain	57	33
US	56	30
Argentina	54	33
Belgium	52	33
Canada	51	35
Sweden	49	42
France	47	43

16,000 online adults, 500-1,000 per country.
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now hit 64% in the UK and even higher elsewhere. This trend was epitomised by the ‘selfie’ (the word of 2013). Why describe what you can see or how you feel when you can capture it instead? 2014 has continued in a similar vein, and as 4G connections become more accessible, it will be even easier for people to share video and other content ‘in the moment’.

The more that people across the globe become accustomed to connecting via smart devices, the more they will expect to be able to consume and share on the go, without waiting. People are embracing social media sites that have been designed with the smartphone in mind. Photos can have a filter applied to them and be uploaded in seconds on Instagram. Messages can be sent instantly to different groups of friends on Whatsapp. Snapchat has found success with younger users in particular because of both its encouragement of immediacy and spontaneity, as well as its ephemeral nature – messages automatically get deleted after they have been viewed (or at least users are told they do!).

The key thing for brands is to understand that people are going to be increasingly comfortable not just consuming and sharing, but spending in the moment too

WHAT IPSOS MORI THINKS

1. Clearly brands and government need to adapt to a consumer who is increasingly likely to expect content whenever they desire it. Brands are embracing sites such as Vine, Twitter and Instagram already, keen to tap into the fact that consumers are digesting vast amounts of visual information on the move. Brands like Puma and VW have already created short, innovative adverts on Vine which have captured people’s attention[13]. Twitter’s recent layout changes point to a format that is looking to embrace immediate, visual updates as well as those within 140 characters.

2. The key thing for brands to understand is that people are going to be increasingly comfortable not just consuming and sharing, but spending in the moment too. The more that the smartphone becomes our technological nerve centre, the more likely it will be that people will be happy using it for everything. More than a quarter of British adults are already using their smartphone for online shopping[14]. More and more people spot a reference to a product in one medium – like a news site –

and then click and purchase it within Amazon or eBay.

3. Brands should see emerging economies as a perfect place to test their mobile marketing too. Consumers there are more likely to see their smart devices as the way to get online, but they are also more materialistic and associate their increasing purchasing power with technological trends that have improved their lives.

There is an ongoing revolution in transparency online, self-service and DIY solutions for citizens all of which appeal to the many governments with big deficits. In theory at least, empowered citizens will eventually have more agile and responsive public services

4. For governments around the world there is an ongoing revolution in transparency online, self-service and DIY solutions for citizens – all of which appeal to the many governments with big deficits. In theory at least, empowered citizens will eventually have more agile and responsive public services. However progress is slow. The challenge for middle-aged civil servants is to fully embrace digital channels like Twitter – to be where more and more citizens are – while retaining offline back channels, and use this to give feedback and services more immediacy.


PRIVACY

2: PRIVACY
The big data debate

By **Bobby Duffy**
Managing Director
Ipsos MORI Social
Research Institute

Alongside the technological revolution is a growing privacy debate. On the one hand privacy is seen as the next key consumer rights issue[15] – and on the other, Mark Zuckerberg of Facebook pronounced it dead over four years ago[16].

Our surveys tell us the greatest sin a company can commit in the eyes of the public is losing their personal data, followed by selling that data, even if it's anonymised – much worse than exploiting foreign workers or even charging more than competitors.

What's behind these starkly different perspectives? At least part of the explanation is that the public themselves have pretty mixed-up views.

THERE IS NO ONE PUBLIC OPINION ON DATA PRIVACY

First, there are a variety of levels of concern. There is remarkable consistency on this in established markets: we tend to find 10% are 'privacy unconcerned', c60% are 'privacy pragmatists', where concern depends on the circumstances, and 30% are 'privacy fundamentalists'.

But, this gives a false sense of certainty in opinion. In practice, all these groups can shift their views on privacy, depending on what they are offered or the risks highlighted[17].

Stated concern about data privacy and how people actually behave are barely nodding acquaintances. We can see the massive disconnect between what people say and how they act in this survey. For example, nearly half of people across the 20 countries say they are willing to pay for increased levels of privacy for their data. But at same time, in the same survey, only a quarter of the same people say they have taken the free, basic steps to increase the privacy settings on their browser. This means that three quarters of those who say they would pay for additional privacy haven't changed a simple setting on their computer.

In established markets:

10% are 'privacy unconcerned'

c60% are 'privacy pragmatists'

30% are 'privacy fundamentalists'

DO YOU REALLY READ TERMS AND CONDITIONS?

We also asked the softest question possible on whether people read terms and conditions or user agreements on websites – giving people the best chance to come clean and admit they don't always. But still a third of people insisted they do always read them. This ranged from a quarter of (marginally most honest) Canadians to over four in ten in Spain, Brazil and India.

The evidence suggests a lot of people are kidding themselves or us: server-side surveys show that barely 1% actually read them. And this is no surprise, when some service agreements are over 30,000 words, longer than Hamlet[18].

There are many examples of people being tested on how much attention they pay to what they're signing up to – and failing. The best of these is probably Gamestation's famous clause which they included in their terms on 1 April 2010 and which gave the computer game retailer the "non-transferable option to claim now and forever more your immortal soul". 88% of people signed up[19].

I often don't bother fully reading terms and conditions on a website before accepting them

	Agree(%)	Disagree(%)
Sweden	88	12
Canada	86	14
Australia	85	15
S Africa	83	17
Belgium	83	17
US	83	17
Brazil	81	19
France	81	19
India	81	19
Turkey	80	20
Poland	78	22
Total	77	23
GB	76	24
China	75	25
Germany	75	25
Italy	73	27
Argentina	70	30
Russia	66	34
Japan	65	35
S Korea	64	36
Spain	59	41

16,000 online adults, 500-1,000 per country.
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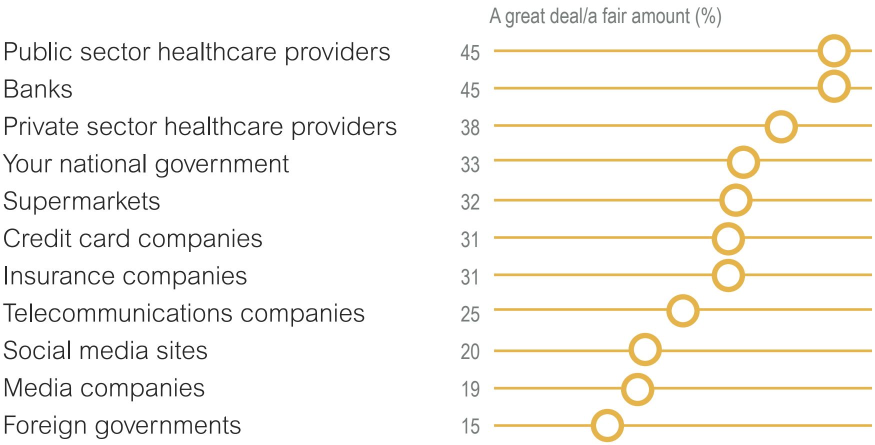
DIFFERENT COUNTRIES ARE AT DIFFERENT STAGES ON DATA PRIVACY

Our study also highlights the different stages the public are at around the world, and gives some clues to likely futures. In particular, people in more established markets are more focused on privacy, at least in stated attitudes – and less likely to want to give it up for greater personalisation, as the chart opposite shows. This seems to be mostly a function of exposure to personalised recommendations, which people often find more irritating than helpful. People in established markets are also more focused on anonymity: promising privacy seems to have little impact on views in countries like Brazil, India and China, but it shifts views in the west.

SOME INDUSTRIES HAVE A REAL TRUST DEFICIT ON PRIVACY

The survey also shows the real problems that some industries have developed in a short space of time. Social media and media companies are only slightly more trusted with our data than foreign governments.

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



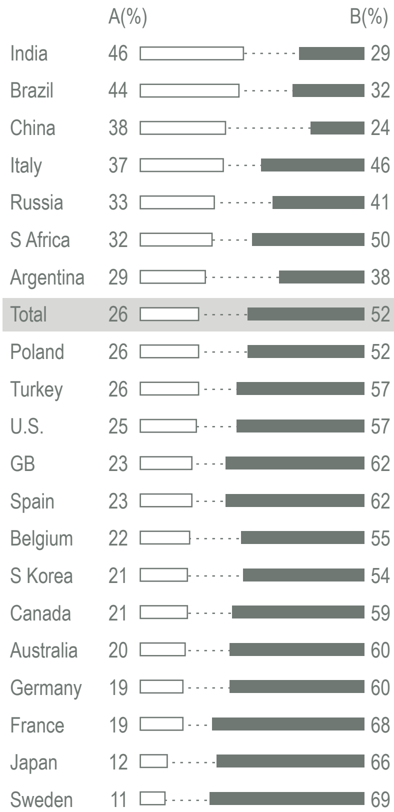
It's clear from this and previous work that revelations about the scale of security service surveillance, including the recent examples of US and UK mass data-sifting leaked by Edward Snowden, does set some of the tone. But even here, with the significant media coverage it gained[20], it's not as direct an effect on opinion of data privacy as we might expect.

More important are the everyday interactions, where people are surprised by how easily their online activities can be tracked so that recommendations follow them around the web. Indeed it's that sense of connection that unsettles people the most – the world and our data may be linked in ways that we couldn't imagine a few years ago. That worries many of us, as we like to keep different aspects of our lives separate.

This provides a hint of the tricky future ahead. In particular, greater understanding of what can be done with our data doesn't make us any more comfortable – in fact, for many of us it increases our concern.

A. I am happy sharing information about my interests and past activities online so that I get personalised services and relevant recommendations even if it means organisations knowing more about me

B. I would rather keep my interests and past activities online private even if it means I do not get personalised services and relevant recommendations



16,000 online adults, 500-1,000 per country.
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Companies need to be clear about where on the spectrum they stand, but be flexible in how they act and communicate – and be careful not to be too clever

IPSOS MORI THINKS

Both business and government have decisions to make. How open should they be about what happens to our data, and how far do they chase the benefits of knowing more about us? It seems blindingly obvious that honesty will be the best policy, but things are not so straightforward.

First, we shouldn't kid ourselves that openness will automatically lead to trust. Technological capabilities have raced so far ahead of public knowledge that the implications of greater transparency are unpredictable – many consumers get more worried as they find out more.

While there is great concern, there is still little action by most individuals to protect their privacy or control their data. Being a first mover, highlighting concerns that people don't really have at the front of their mind and encouraging them to restrict access to their valuable data, is a dubious advantage.

Of course, while business and governments have similar incentives, they have very different interests – and a key dynamic will be the extent to which one shifts attention to the other. We're already seeing how legal and legislative bodies are acting to protect citizens by enforcing people's 'right to be forgotten' online[21], while internet companies are championing their role in protecting our data from government intrusion[22].

But as we have seen, there is also such variety in views across situations, individuals and countries, that there is no one 'right' response. Companies need to be clear about where on the spectrum they stand, but be flexible in how they act and communicate – and be careful not to be too clever.

For example, there is talk in the academic and think tank

Getting the legislative balance right is going to be tough. In the end, it's important to remember that what we're trading our privacy against is not so much personalised services or recommendations, as all the wonders of an internet provided (largely) for free

worlds about 'personalising privacy' – defaulting people to what we think they'd prefer. But many will find it particularly creepy that decisions on our preferences for privacy (of all subjects) can be made for us.

There seem to be two factors that will unsettle this uneasy balance – events and legislation, which will be closely linked. It is difficult to see many events gaining sufficient public attention to topple governments or companies – but as we've already seen, they are leading to regulatory change[23].

Getting the legislative balance right is going to be tough. In the end, it's important to remember that what we're trading our privacy against is not so much personalised services or recommendations, as all the wonders of an internet provided (largely) for free: "Surveillance is the business model of the internet" as one technology commentator describes it[24]. Governments and legislators need to be mindful that we could end up viewing the medicine as worse than the disease.

Aerial view of a traditional Masai village

By **Fiona Moss**
Associate Director
Ipsos Loyalty

3: TRADITION

More forwards than backwards

In 2014, most people want to live life on their own terms, without traditional limits. But tradition is far from dead; in a world that can feel like it is moving too fast, there is a nostalgia for the past in attitudes to life, family and religion, whether a real or imagined one.

The notion of tradition itself remains universally attractive: globally eight in ten (78%) see traditions as an important part of society (17% disagree), with relatively little country variation.

Traditions are an important part of society

	Agree(%)	Disagree(%)
China	90	8
Russia	82	13
GB	80	13
US	80	12
Italy	80	16
Canada	80	15
Australia	79	15
Turkey	79	20
Argentina	78	14
Total	78	17
India	77	18
Poland	77	16
France	77	18
S Korea	76	20
Germany	76	19
Japan	75	15
S Africa	74	22
Spain	73	21
Brazil	72	18
Sweden	70	25
Belgium	69	23

16,000 online adults, 500-1,000 per country.
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LIVING ON OUR OWN TERMS

Most agree that it is ‘up to everybody to work out their own personal set of principles to guide their decisions’ (79%) – although this falls to 61% in Japan.

Across our 20 countries, around half of those interviewed (47%) say religion/faith is very important to them, while 45% disagree. Religion now divides the world – into countries where faith dominates, like Brazil, South Africa and Turkey, and those that are more secular, like Japan and Sweden.

47%
say religion/faith is very important to them, while 45% disagree

Turning to family values, we see other divisions emerging across the globe: almost six in ten globally agree that there is little difference between being married and living together without being married (56%, although 38% disagree). Variation between countries is considerable: agreement rises to 74% among the Belgians, but drops to 25% in South Korea.

However, when it comes to children, there is a marginal swing towards a more traditional view: 59% agree it is better for parents of children to be married than unmarried (32% disagree). The disparity between countries is even greater here, with China (90%) most likely to agree by some margin, and France and Spain (both 30%) least likely to do so.

We already see governments responding to this apparent paradox. In the UK, David Cameron's call for a 'Big Society' may not be news to any of us, but it is rooted in the belief that there should be a shift to a more traditional model of local action away from central government that also equips people to deal with choices in their own lives.

TRADITION OFFERS US COMFORT

For many, the appeal of tradition reflects a rose-tinted nostalgia for the past as a reaction to the stresses and strains of the modern world: over two thirds (68%) of those believing tradition is important agree that 'people led happier lives in the old days when they had fewer problems to cope with'. This rises to 90% among supporters of tradition in Turkey, and falls to 50% in Japan. Regardless of the level of support, a quick look at the history books raises questions about this view.

For others, notions of tradition are comforting in a world that makes them feel insecure: most (82%) supporters of tradition say the world today is changing too fast (lowest in Sweden and highest in Turkey and China), and half (49%) say they would like their country to be the way it used to be (lowest in China and highest in the US).

It is perhaps for these reasons that there is a resurgence of religious belief in many countries: in America and Israel, for example, young people in non-religious families are turning to Orthodox Judaism[25], while in the UK young Muslim women are wearing the hijab even where their mothers do not.

Ultimately then, tradition – particularly when steeped with nostalgia – may represent a 'way out' of having to face the future at a time of rapid social and technological change and economic uncertainty. It is nevertheless a potent force.

68%
of those people believing tradition is important agree that 'people led happier lives in the old days when they had fewer problems to cope with'

A TENSION BETWEEN FREEDOM AND TRADITION

Inevitably, most people (72%) claim to want freedom to make choices themselves; only 7% say they like experts to make choices for them. In no

72%
claim to want freedom to make choices themselves

country in the study does the proportion wanting to make their own choices drop below half (South Korea is lowest at 53%).

Perhaps as a result of this, about half (48%) globally feel 'overwhelmed by the choices they have to make about how they live their lives'. This pressure is particularly acute in South Korea, India, Turkey, Poland, Italy and South Africa.

The notion of living for the moment appeals: globally, half (51%) agree that 'the important thing is to enjoy life today, tomorrow will take care of itself' (45% disagree). Japan and Poland are least likely to agree – only about three in ten do so, while at least double that proportion disagrees. This underlying philosophy is important to remember – while anxious about the future, our reaction is to avoid planning too much.

Ultimately there is a balance to be found between self determination and tradition, which the public needs to make sense of their lives and their place in the 'order of things'

In established markets, where people's material needs are often met, we see wealthier consumers turning towards experiences over possessions. This is typified in the Experience Economy[26], for example, where the consumer is paying as much for the experience of buying their coffee (provided by a café) as the coffee itself. The popularity of on demand media such as Netflix and Spotify is also testimony to the desire to experience the film or music immediately, rather than own the DVD/CD etc.

Ultimately there is a balance to be found between self-determination and the comfort found in tradition, which the public needs to make sense of their lives and their place in the 'order of things'. Business and governments will need to manage both autonomy and tradition in order to ensure their success.

A. I like to make choices myself

B. I like to have experts make choices for me

	A(%)	B(%)
France	81	3
Turkey	78	9
Germany	77	3
Argentina	77	7
Belgium	77	5
Spain	76	5
US	76	6
GB	75	5
S Africa	74	8
Canada	74	4
Australia	72	5
Poland	72	7
Total	72	7
Sweden	71	4
Italy	71	7
Russia	68	9
Brazil	67	12
Japan	63	8
India	60	19
S Korea	53	15

16,000 online adults, 500-1,000 per country.
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WHAT IPSOS MORI THINKS

In an uncertain and changing world, tradition matters. It takes vastly different forms in different countries – reminding global businesses that other markets are most definitely not like home.

Businesses and brands should consider, if appropriate, offering reassurance of time-tested quality via 'retro' styling or service offerings – even where materials or approaches may be cutting edge. We can see this in car design, pack design and restaurants.

Also, there is the potential to follow a 'same-but-different' communications approach when launching a new product or service if the market is among those keenest on tradition; while we don't want to provoke conservatism among marketeers developing new products, tradition can be tweaked brilliantly – as Paul Smith has done.

For government, this may mean understanding framing and context around policies and knowing when to ignore it. But also providing reassurance to citizens by showing a willingness to build on the past and traditions rather than break with them – using the 're-invention' of tradition.

Harmful bloom in Lake Atitlán, Guatemala: NASA Earth Observatory image by Jesse Allen

By **Emma Cain**
Research Manager
Ipsos Healthcare

Sunny Sharma
Senior Research
Executive
Ipsos Healthcare

How would you rate the quality of healthcare that you and your family have access to in…?

	Good(%)	Poor(%)
Belgium	76	6
GB	67	7
US	65	9
Australia	64	8
Sweden	63	6
France	63	7
S Africa	59	8
India	58	8
Canada	57	8
Argentina	53	6
Spain	50	9
Germany	50	9
Total	47	11
Japan	43	10
Turkey	35	10
S Korea	34	13
Italy	26	15
Brazil	19	12
Poland	10	13
Russia	9	19

16,000 online adults, 500-1,000 per country.
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4: HEALTH
Personal and preventative

HOW WE FEEL ABOUT OUR OWN HEALTH – ARE WE DELUDED?

Currently, Belgium and Britain have the highest public satisfaction with healthcare. Despite spending nearly double what the UK does as a percentage of GDP, the American healthcare system has only a similar level of satisfaction. Overall, over half of the world's population (59%) globally rate their health as 'good' with highest ratings in South Africa (79%) and the US (76%) and lowest ratings in Russia (36%) and South Korea (30%). Perhaps there is a self-image gap between perception and reality? From the 20 countries we covered, 42% in the US report that they are satisfied with their weight, just above the average global score, but Americans are fattest with a Body Mass Index (BMI) at approximately 29. Conversely, the Japanese have the second highest level of dissatisfaction with their personal weight (50%), but one of the lowest average BMI globally (22.5).

> **Over half of the world's population (59%) globally rate their health as 'good'**

The US supports the assertion made by England's Chief Medical Officer, that in certain societies, being overweight is increasingly seen as the new norm. With the alarming increase in childhood obesity, one US analyst made the dire prediction that "our children could be the country's first generation destined to have a shorter lifespan than previous generations"[27].

It's not just developed nations who are suffering from the obesity epidemic. The World Health Organisation reports a double burden of disease in low-medium income countries where they continue to deal with the problems of under nutrition amongst the poorest, whilst also experiencing a rapid upsurge of obesity and overweight people in the more affluent and usually more urban populations.

ATTITUDES TOWARDS HEALTHCARE SYSTEMS

This disparity between how we feel about health and the changing norms comes at a time when individuals are starting to take more responsibility for their own health. While the majority continue to trust their doctor and believe they should follow their advice (71%), we are now moving towards more patient autonomy. It is becoming reasonable to question the doctor's expert opinions, with over four fifths globally (85%) willing to seek a second opinion if they have doubts about their doctor's diagnosis and little variation by country.

85%
are willing to seek a second opinion if they have doubts about their doctor's diagnosis

The global public say they want more control over their healthcare decisions (72%), but feel they cannot do this alone and want access to reliable, simple information and support from a variety of partners to make informed choices. Over half (58%) believe they can find the right information to make their own decisions and choices about their health (but it ranges between 35% in Italy and 76% in China).

WHOSE RESPONSIBILITY IS HEALTH ANYWAY?

Within this trend, there are big national differences in who people turn to for support. In Russia, for example, most see it as the government's responsibility to support the population to live healthy lifestyles (52%) – but only a minority (12%) believe this in the US. These differences in attitude may be driven partly by the history of local healthcare systems. In Russia, basic medical care is provided free of charge[28],

In Russia
52%
see it as the government's responsibility to support the population to live healthy lifestyles but only
12%
in the US

I would ask for a second opinion if I had doubts about my doctor's diagnosis

	Agree(%)	Disagree(%)
Italy	91	6
China	90	7
Turkey	90	9
S Africa	89	8
Germany	89	6
US	88	7
Spain	87	8
Belgium	86	8
Russia	86	8
Argentina	86	6
Australia	85	9
Canada	85	9
France	85	11
Total	85	10
GB	83	10
Sweden	81	13
India	80	15
Brazil	80	12
Poland	78	13
S Korea	77	19
Japan	76	13

16,000 online adults, 500-1,000 per country.
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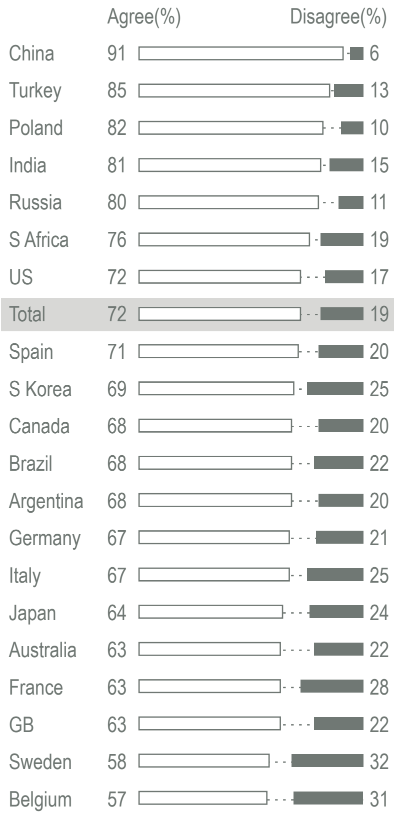
I would like more control over decisions about my health



16,000 online adults, 500-1,000 per country.
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but historically the quality has been low and spending poorly allocated; by comparison, in the US, the onus is on the individual to acquire health insurance[29]. Attitudes and expectations are highly conditioned by experience.

Either way, nearly all healthcare systems face challenges. They are not geared towards preventing chronic diseases like diabetes; they can only tackle illness once it is severe. In the UK, only 4% of the national health budget is spent on disease prevention. The more partners that can support patients the better.

Pharmaceutical companies have noticed latent demand to support the public, with many larger companies establishing patient support programmes and working with local charities/non-governmental organisations to promote self-management of chronic conditions, which of course, is also good marketing.

A recent example is for Multiple Sclerosis (MS) sufferers. Genzyme has partnered with the Multiple Sclerosis Association of America to develop a campaign to raise awareness of the benefits regular swimming can yield for those with MS[30]. The campaign focuses on the individual's ability to take control of their disease and impact their own quality of life, which will likely resonate with the American MS population, given that the majority don't want the government to interfere with their health.

Drug company initiatives in the UK are more focused on mobile-based technology or the web to promote medication adherence and self-management. For example, AstraZeneca has recently established a working partnership with Vodafone to develop a range of services for patients with cardiovascular conditions[31]. Part of this will be delivering personalised education materials and monitoring changes to treatment plans through data sharing, via mobile direct to doctor.

In Russia, recent support programmes have been developed between the country's healthcare system and Aerotel Medical systems[32] for patients with heart disease to enable them to better access appropriate medical care, particularly important in a country where huge distances limit access to specialised care.

IPSOS MORI THINKS

These examples showcase the challenges facing healthcare systems and pharmaceutical companies as patients behave more like consumers, but money remains tight. We see three areas to focus on:

1. For individual conditions there will be a need to clarify the boundary between self-management and reliance on a medical system. Government and pharmaceutical companies will need to consider developing targeted support programmes that help patients on both sides of that boundary, rather than only acting once problems are serious.

2. As patients begin to use more online tools to manage their health and data about many more aspects of their lives becomes increasingly available, there is likely to be concern amongst some about losing control of personal information and how it may be used – as we show in our trend on privacy issues. A balance needs to be established where patients feel comfortable sharing information with providers and are clear about how their data is used. This is going to be far from straightforward, but co-creation communities of patients with the same condition will be a good place to start.

3. As patients take more responsibility for their medical conditions, compliance (taking medication as it is prescribed) with medical advice is becoming a specialised topic. Pharmaceutical companies need to understand specific patient needs and attitudes to develop more sophisticated approaches to enable greater compliance and help treatments become more effective.

Governments are facing huge financial pressures on their health systems – for them, collaborating with drug companies and independent providers can be a mechanism to alleviate some of this financial burden, but most important of all will be better behaviour change programmes to get people to manage their 'wellness' from early in life, and for health spending to shift from illness to prevention. This is more easily said than done, but has to happen.

A. It is the government's responsibility to influence people's behaviour to encourage healthy lifestyles

B. The government should not get involved with interfering in people's lifestyles

	A(%)	B(%)
Russia	52	20
S Korea	48	14
Argentina	47	29
India	46	31
Spain	45	28
Italy	41	32
Brazil	40	28
Germany	39	27
Poland	36	30
Total	35	34
S Africa	34	36
Sweden	32	36
GB	30	35
Turkey	30	55
Belgium	30	36
Japan	29	35
Australia	27	37
France	26	39
Canada	24	40
US	12	63

16,000 online adults, 500-1,000 per country.
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Tropical Cyclone Cristina: NASA image courtesy of the LANCE/EOSDIS MODIS Rapid Response Team at NASA GSFC.

5: SIMPLICITY

Choice about choice

By **Ben Marshall**
Director
Ipsos MORI Social
Research Institute

While "technological change can be safely predicted to accelerate in an exponential manner"[33], where does this leave citizens and consumers? Uncertain and a little overwhelmed.

As an example, researchers at the University of Southern California estimated that in 1986 we received around 40 newspapers worth of information every day, but by 2007 this had rocketed to the equivalent of 174 newspapers[34]. IBM has calculated that 90% of the world's digital data has been created in the past two years[35]. In the last 40 years there has been a fivefold increase in the number of items carried by the average American supermarket[36].

Overwhelmed with information and choice, across the developed world the public hanker after simplicity. We detect a desire for deceleration and simplification in both established and emerging economies.

ADAPTABLE, BUT WANT A SLOWER, SIMPLER LIFE – AT LEAST IN THEORY

It's not that people hate change; six in ten across our 20 countries say they often change their plans to take account of new conditions. This proportion is even higher among younger people and especially those in emerging economies. Overall, a third say they are usually the first among their friends to try out new things, rising to more than half in India, Turkey, China and South Africa (partly reflecting the younger nature of our sample in these countries as well as their online status).

As well as finding people confident in their ability to adapt, our survey highlights the extent to which they have embraced social and technological change, reflected, for example, in ownership, use and attachment to mobile technology. People have confidence in technology and its problem-solving potential, while feeling some of the flipsides too, including the pace of change and implications for privacy.

I wish my life was more simple

	Agree(%)	Disagree(%)
China	78	19
Poland	76	17
Italy	70	25
India	69	26
Argentina	64	29
S Africa	64	35
France	63	33
Russia	63	29
Belgium	61	33
Total	60	35
US	59	35
Turkey	57	41
Canada	56	39
Germany	55	40
Japan	55	37
Australia	54	40
GB	53	40
S Korea	50	47
Spain	49	44
Sweden	48	48
Brazil	45	48

16,000 online adults, 500-1,000 per country.
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People led happier lives in the old days when they had fewer problems to cope with

	Agree(%)	Disagree(%)
Turkey	85	13
China	75	22
S Africa	74	23
India	72	22
Italy	70	25
Brazil	70	24
US	69	24
Australia	67	25
Russia	66	27
Poland	65	28
Total	64	30
Belgium	63	28
Argentina	62	30
GB	61	30
France	60	35
S Korea	60	35
Canada	59	34
Germany	54	38
Spain	48	45
Japan	43	42
Sweden	35	55

16,000 online adults, 500-1,000 per country.
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Notably, we see a reaction to the speed of change and a desire to slow down the pace of life. Globally, 77% agree that 'the world is changing too fast' and 55% that 'I wish I could slow down the pace of my life'. Simplification appeals too; 60% agree 'I wish my life was more simple' (and 20% strongly agree with this), although just over a third (35%) disagree and while 78% agree in China, this falls to 45% in Brazil.

By a margin of four to one (80% to 18%), those aged 55-64 think that the world is changing too fast and, while the gap is narrower among 16-24 year olds, it is still prevalent. And while 68% of those who feel under pressure to succeed want to slow down the pace of life, this is also the case among 46% of those who don't feel pressurised to reach the top. Similarly, 'too fast'/'slow down' and 'simpler' are the majority viewpoints among those who are dissatisfied with life as well as those who are satisfied and appeal to everyone – optimists and pessimists alike!

OVERWHELMED BY CHOICE

Just under half 'often feel overwhelmed by all the choices I have as a consumer' and by 'all the choices about how to live my life'. There is some variation across countries but South Koreans and Indians are in the top two on both measures, the Germans bottom for both. Younger age groups feel much more overwhelmed with life choices than middle aged and older groups, as we might expect.

On both consumer and life choices, the feeling of being overwhelmed is more keenly felt in emerging markets, reflecting pace of change, although there is variation here too. For example, while 65% of Indians feel overwhelmed by life choices, 41% of Russians do too. Overall however, populations in our seven emerging economies are all more likely than average to think the world today is changing too fast and to want to slow down their lives.

Accelerating change and the proliferation of information and choice may be affecting us in ways we have not yet fully understood. Google's Eric Schmidt worries that "the level of interrupt, the sort of overwhelming rapidity of information…is in fact affecting cognition", while, according to Cass Sunstein, in the social sphere "choice, complexity, and let's call it limited attention span" can lead to behavioural market failures[37].

These phenomena have unwelcome consequences, costing government and society in many ways, including financially. For business and brands, the cost could be the bottom line; studies have repeatedly shown that an extensive array of consumer choices is highly attractive to consumers but can actually reduce motivation to purchase[38].

A need to respond to consumer choice, combined with the 'rights revolution', and a pragmatic (and ideological) push towards 'any willing provider' in the public sector, has led many governments to extend and facilitate consumer choice in public services – in Sweden for example, a system of school vouchers encompasses private for-profit as well as state schools with open government and data helping consumers make informed choices[39]. This model is now mainstream in UK public policy and elsewhere.

There are also opportunities for brands. There is business in helping simplify choice – Trip Advisor is an obvious example and personal shoppers have been around for years, while the likes of Amazon and online retailers use algorithms to provide consumers with recommendations and short-cuts to making decisions. Simplification also works for advertising, and is a feature of many highly successful adverts such as Land Rover's 'More Pull' campaign[40].

For businesses and brands the benefits of framing products in terms of modernity, speed and convenience look set to endure, but so too will echoes of tradition and the past. Witness, as a simple example, some food product lines which offer convenience, deliberately over-engineered to give consumers a sense that they are 'contributing', by adding extra ingredients, and finishing details, while still remaining essentially pre-cooked/prepared.

IPSOS MORI THINKS

For many years we have impressed on government and business clients that their target audiences are busy, distracted and often tired. These challenges have intensified.

It is vital brands are consistent and clearly stand for something – preferably something that people care about. When decisions in front of a shelf in store are made in just a few seconds, brands end up acting as heuristics for choices. Those brands that are most salient and distinctive at the point of purchase are most likely to be bought. Consistent use of iconography

For business and brands, the benefits of framing products in terms of modernity, speed and convenience look set to endure, but so too will echoes of tradition and the past

This means that simplification of choice – whether relating to accessing public services or branded products – is likely to help, while giving reputational and competitive advantage to those who can offer it

On both consumer and life choices, the feeling of being overwhelmed is more keenly felt in emerging markets, reflecting pace of change

and messaging in advertising can play a big role – look at Coca Cola, Mars and Heineken.

This means that simplification of choice – whether relating to accessing public services or branded products – is likely to help, while giving reputational and competitive advantage to those who can offer it. With the onus being on simplification, one option for government and brands is, in effect, to take away choice, with curation of choices and ranges and expert or crowd-sourced endorsement. 'Nudging' citizens and consumers to a 'better choice' remains popular and is reflected in the establishment of a 'global network' of behavioural insight teams based in governments[41].

Another option is to give consumers the choice over choice, helping those who feel overwhelmed and empowering those who don't. Smart disclosure has appeal; 71% in our survey agreed that they would 'like to have access to the data that companies hold about me, as it could really help me make better decisions – for example about how I spend my money'.

So, when we reflect on what the world thinks, perhaps this isn't a call for 'a simple life' but for the seemingly simple, with better, complex algorithms being used to present simple choices that are right for individuals, but also brands editing and curating ranges to offer the perfect, but more limited, set of choices for individuals.

City lights of the Americas: NASA Earth Observatory image by Robert Simmon

By **Eleanor Thornton-Firkin**
Director
Ipsos ASI

6: GLOBALISATION

Global village

Looking ahead six months from now, do you expect your personal financial situation to be much stronger, somewhat stronger, about the same, somewhat weaker, or much weaker than it is now?

	Stronger(%)	Weaker(%)
Brazil	84	4
Argentina	58	14
India	51	13
S Africa	46	14
China	42	14
Sweden	36	9
US	34	12
Australia	34	15
Canada	33	10
Turkey	33	21
Total	32	18
Russia	32	16
S Korea	28	19
Germany	26	15
Spain	24	20
GB	20	21
Poland	20	30
Belgium	16	21
Japan	15	30
Italy	11	27
France	9	34

16,000 online adults, 500-1,000 per country.
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STOP THE WORLD I WANT TO GET OFF...

There are several issues the world's population agrees on – and it's not positive. The global population thinks that the world is changing too fast and that it's becoming increasingly dangerous (77% on both measures). There is a widespread feeling that there are too many immigrants – pretty much everywhere, with some notable exceptions (South Korea, Sweden, Poland and Japan). Essentially, it's a sign of 'fear of the unknown'. But the contradiction

Globalisation is good for my country

	Agree(%)	Disagree(%)
China	81	12
India	71	23
Brazil	68	22
S Africa	66	23
Sweden	62	23
S Korea	60	34
Argentina	56	28
Japan	55	27
Total	50	34
Turkey	50	40
Canada	47	34
Australia	45	35
Germany	43	44
GB	41	36
Poland	39	39
Spain	38	41
US	37	38
Italy	36	49
Belgium	31	49
Russia	27	41
France	24	65

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68%

of Brazilians say globalisation is good as opposed to just 50% globally

84%

of Brazilians say their personal financial situation will get better in the next 6 months vs only 32% globally

lies in the fact that despite these anxieties, people feel that they have more in common with others around the world than they do differences. Only France, South Korea and Japan are outliers here with relatively low levels of agreement that they share values with the rest of the world. Are they *all* really exceptional?

Despite these doubts about the world at large, increased globalisation is seen by the majority to be a good thing, particularly in the emerging markets who have seen the most dramatic changes. For Brazil with the global circus of the World Cup and Olympics, they see that this might bring them some immediate benefits, despite failings in public services, especially health and transport, which have provoked demonstrations at venues (Brazil is also the only country where the vast majority of people expect their personal financial position to be better in the coming year). Interestingly, the outlier here is France, the only country where the majority disagree that globalisation is a good thing (65%).

CONTROL BRINGS HAPPINESS

Whilst the world might seem scary, and individuals are generally dissatisfied about their personal financial situation – half have some anxiety about not having enough money to buy everything they want and most don't see this improving in the next six months – ultimately the majority (77%), wherever they live in the world, are happy. Why?

Ultimately there is a feeling that people should take control over the things that are closest to them

A lot has to do with the things in people's immediate control: family and local area. All over the world people are optimistic that things are going to get better for their family in the next year. The optimism for their own immediate family's future is underpinned by a feeling of satisfaction with their local area as a place to live (with a few exceptions – Brazil, Italy and South Korea). But optimism fades as people move further from their own sphere of influence, with pessimism on the increase as they go from family, to local area, to country, to global issues. It is this more general pessimism that creates worries for the long-term future of their families.

77%

of people, wherever they live in the world, say that they are happy

Taking all things together, would you say you are happy or unhappy…?

	Agree(%)	Disagree(%)
Sweden	88	12
Canada	86	14
Australia	85	15
S Africa	83	17
Belgium	83	17
US	83	17
Brazil	81	19
France	81	19
India	81	19
Turkey	80	20
Poland	78	22
Total	77	23
GB	76	24
China	75	25
Germany	75	25
Italy	73	27
Argentina	70	30
Russia	66	34
Japan	65	35
S Korea	64	36
Spain	59	41

16,000 online adults, 500-1,000 per country.
Full details page 70

So, if people are happiest and most optimistic closer to home, what sort of involvement do they want in their local community? Ultimately there is a feeling that people should take control over the things that are closest to them. We see people making an effort to 'do my bit for recycling' (80% globally), while still feeling that environmental disaster is looming (73% globally, with the US least worried at 57%). There is a preference in most countries for local issues to be resolved at a local level, despite, or because of, the belief that the country overall is going in the wrong direction. Only China and Canada are likely to think that their country is going in the right direction.

Levels of optimism seem to correlate with the feeling of control and the scope individuals have to influence their environment and future. Across the world people seek control and responsibility and are confident that local decisions are best. Organisations need to think and act local; 'what are you doing for me here? How is this connected to the things that matter in my local community, my traditions, my local expertise, my past? Most importantly, how will this help my community that I love to become the vibrant, economically healthy place that I believe it once was?'

Levels of optimism seem to correlate with the feeling of control and the scope individuals have to influence their environment and future

A great example of a brand tapping into this desire for the local is seen in Pernod Ricard's 'Our/Vodka' brand. It's the same recipe across the eleven global cities where it is distilled, but each uses local ingredients and takes the name of the city for its local version i.e. Our/Berlin, Our/New York. Åsa Caap, founder of Our/Vodka, says: "In every city, we partner with local entrepreneurs who love their city and, together, we open boutique distilleries with a grass roots approach, that represents the local community". Ultimately, it embraces the best of local, while connecting to a global network in its own way. It makes where you live better by putting something back into the local economy and building on pride in that community.

IPSOS MORI THINKS

Brands and governments that empower and create a local sense of pride while opening up a connection to the rest of the world will be the ones that thrive. With the rise of the megacity, what we mean by acting 'local' can no longer be thought about in the old 'glocal' way – ie where global is the world and local is a region or at best a country. Increasingly, local will be defined as my state or city. We have seen greater local and global as opposed to national convictions in the UK in the last decade.

Governments and brands will need to reflect this new reality. Think local empowerment – the perception of control or 'made for me' makes people more comfortable. At a time of rapid change and mistrust in business, authenticity is prized above all, so demonstrating local credentials and local heritage matters.

Governments, under pressure to grow and with additional strains from urbanisation and the need for modern infrastructure to cope with 'resource stresses' (food, water, energy etc.) will need to plan at a city/regional level. But they will also need to make their citizens feel empowered at this level by upping devolution and the use of mechanisms such as participatory budgeting, which has now featured in over 1,500 cities in Latin America, North America, Asia, Africa and Europe. Using the speed and easy reach of effective digital media will be vital in demonstrating *how* policies have changed as a result of participation: this remains a key challenge.

At a time of rapid change, and rising mistrust in business, authenticity is prized above all, so demonstrating local credentials and local heritage matters

Brands too can help in developing a sense of 'pride in place' through their sustainability and community programmes. Brands' behaviour needs to reflect the values and practices of their local community and should be done in an altruistic way if they are to benefit rather than meet increased cynical criticism.

We will also see the formation of more virtual 'local' communities – a virtual network of like-minded individuals who people feel closest to no matter where they are physically located. A recent study by Ipsos MORI on behalf of the BBC[42] showed that 31% of British 15-34 year olds feel more connected to people across the world than they had previously and, of course, their primary means of connecting to the rest of the world is the internet. We also discovered that the most important elements of peoples' identities are related to activities or identities they choose or that mark them out as individuals, rather than factors they are born with, or born into.

Brands who can facilitate these communities in a seemingly altruistic way will gain credibility. A recent great example is Sony's creation of a global 'village' of fervent football fans to share opinions on all things football in the build up and through the World Cup[43].

GENERATIONS

By **Bobby Duffy**
Managing Director
Ipsos MORI Social
Research Institute

7: GENERATIONS

Generations apart

To what extent, if at all, do you feel that your generation will have had a better or worse life than your parents' generation, or will it be about the same?

	Better(%)	Worse(%)
China	82	8
Brazil	52	27
India	51	32
Turkey	50	33
Japan	47	27
Total	42	35
Russia	42	29
S Africa	42	40
Argentina	40	27
Australia	40	34
S Korea	40	35
Sweden	40	29
Germany	38	31
GB	36	40
Poland	35	41
Italy	34	49
Canada	33	38
US	29	46
Spain	25	51
France	25	55
Belgium	24	49

16,000 online adults, 500-1,000 per country.
Full details page 70

The last few years have seen a renewed interest in generational issues in both established and emerging economies.

In a number of established economies the focus is on how young people are experiencing a particularly tough start to their adult life due to the economic crisis and a very uncertain future (a staggering 54% of young people in Spain are unemployed – globally the under 30s make up 40% of the total unemployed population)[44]. Books and papers abound pointing out the potentially bleak consequences and dangers from a trend of 'the outraged young'[45].

The Organisation for Economic Co-operation and Developement (OECD) Secretary-General Ángel Gurría, summed this up in a Guardian article on the release of our survey results[46]:

"Nothing is more politically explosive, more dangerous and more destabilising than having a whole generation of frustrated young people… What would be tragic is if the very trait that we count on the young to infuse into our societies – optimism – were to somehow become permanently scarred. We can't afford that."

Globally the under 30s make up 40% of the total unemployed population

There has also been a focus on young people in emerging markets – but this has been less about the economic constraints they face, and more about the pressures that economic growth brings. Many emerging economies are working through a remarkable 'youth bulge': 71% of Nigerians are under 30, in India 240 million youths are coming to working age in the next 20 years and by 2020 the average Indian will be only 29 years old[47]. This brings what economists call a 'demographic dividend' – but also rising expectations and stress on education and training systems struggling to match labour market supply to demand.

It can also bring under-representation in the political process and wider establishment: accusations of an increasing gerontocracy are seen in emerging and established markets alike, with baby boomers hanging onto jobs, power and assets for longer than ever.

The survey highlights these strains, and in particular the interaction between two very clear schisms – both between young and old, and between established and emerging economies.

GENERATION GLOOM – AND BOOM?

Overall, it's not a happy picture: across the 20 countries, more think the future for the young will be worse rather than better (42% vs. 34%). This hides wide variation and a split between established economies on the one hand and emerging on the other.

China (in particular), India, Brazil and Russia are all more optimistic than pessimistic about their young – but other countries are more likely to think things will be worse rather than better

China (in particular), India, Brazil, Turkey and Russia are all more optimistic than pessimistic for their young – but all other countries are more likely to think things will be worse rather than better. This includes hugely pessimistic views in some countries in Western Europe; in France seven in ten people think young people will have a worse future than their parents.

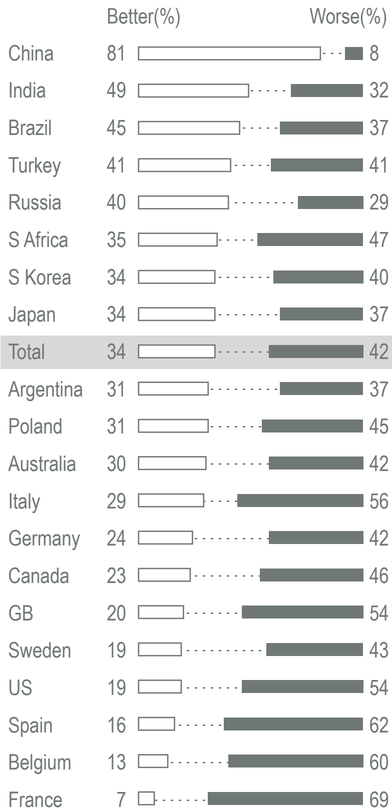
Even countries with relatively successful economies over recent years, such as Sweden and Germany, are around twice as likely to be pessimistic than optimistic for their young people.

WHERE'S THE OPTIMISM OF YOUTH?

Looking at the views of young people (aged under 30) themselves on this question, there is a similarly massive range, from 78% thinking their life will be better than their parents in China to just 16% in each of Spain and France and just 12% in Belgium.

Young people in some countries are more pessimistic for their generation than the population as whole – including in Belgium, South Korea, Italy and

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?



16,000 online adults, 500-1,000 per country.
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Britain. In fact, the biggest gap is in Britain: only 22% of younger people in Britain think they will have a better life than their parents, compared with 36% of the whole population.

The pattern is very different for older groups (aged 50+) in the established economies: despite the pressures of the recent economic crises (and the decline in happiness seen universally in middle age), they are much more likely to recognise that they've had it better than their parents.

IPSOS MORI THINKS

Our survey findings reflect a significant shift in global optimism. In some ways, this should be no surprise, coming after more than five years of dire economic conditions in many established economies. But the data suggests something more deep-seated. Even those western economies that have fared pretty well are far from brimming with confidence for their younger generations.

What happens when the assumption of an automatically better future for the next generation is gone? The potential for significant unrest seems clear, or at least fractious politics.

For now, there is little sign of real generational war in the west, and the 'outraged young' seems a weak trend, beyond isolated protests

In fact, for now, there is little sign of real generational war in the west, and 'the outraged young' seems a weak trend, beyond isolated protests on particular issues. In addition, there are good reasons to think it may not develop: many of our strongest ties are between generations (through families) so when it comes to it, a lot of sympathy flows up and down the age cohorts.

Young people may be angry, but they're not forming many significant, sustained protests or broad-based political movements in the established economies (unlike in a number of countries like Chile and Egypt, where the political context is very different)[48].

This is partly because of individualising pressures from the huge cultural and technological shifts that we've outlined. The current generation of young people are not uncaring or inactive (far from it)[49] – they just have the tools and mindset to coalesce around particular issues and then dissolve and move on to the next issue; buying into a broader ideology or manifesto is much less attractive.

But even where there is not outright generational conflict, the implications for government are massive. They need to find ways to engage young people that don't just result in lip service to online engagement, youth parliaments and single issue movements.

For business, the need will be to reflect the different trajectories that young people's lives are now taking. The enforced delayed choices of living with parents longer and starting a family, establishing a career and paying off debts later shift their needs and create new demands. In the UK £2 billion is now transferred each year from the 'bank of mum and dad' to young people for housing deposits and the need for more innovative mortgage financing backed by parents' assets is growing[50].

The contrast with developing countries is stark, but we need to be careful to avoid a view of unbridled hope in emerging economies – as our data makes clear, beyond China, there are significant minorities who think the future will be worse. Young people (and their parents) see the coming pressures from growth and the scramble to get on, which will leave many behind (one million young people in India will enter the labour market each month for the next 20 years)[51].

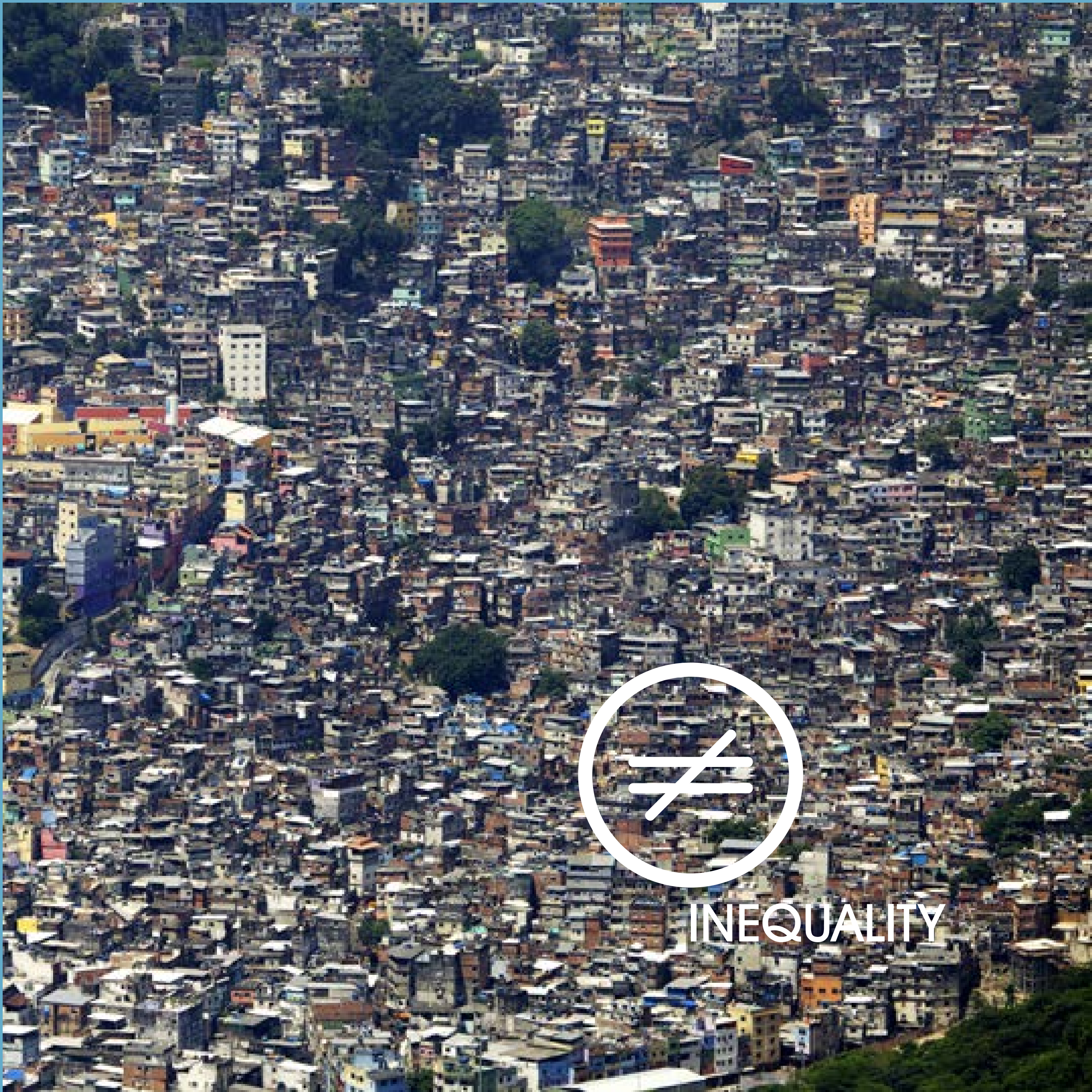
Niall Ferguson, the Harvard historian, also reflected on our data and his own work when we released the results:

"While it is once again fashionable to think of inequality in terms of class (or income), the reality is that many of the most salient conflicts of interest in western democracies are now between generations rather than classes."

This may be true, but it hides a key point: in both emerging and established economies, the real strains will increasingly be where the imbalances between social classes and generations interact. In the US this is seen in the work of another Harvard professor, Robert Putnam, on the "the crumbling American Dream", which suggests "America is heading towards a caste society"[52]. In parallel, one of the biggest challenges that emerging economies will continue to face is breaking the intergenerational transfer of poverty.

While our data highlights the very different perspectives, this seems to be one global trend that – unfortunately – could bring us all together.

The current generation of young people are not uncaring or inactive (far from it) – they just have the tools and mindset to coalesce around particular issues and then dissolve and move on to the next issue: buying into a broader ideology or manifesto is much less attractive



Favela da Rocinha, Brazil

8: INEQUALITY

Sharing success

By **Ben Marshall**
Director
Ipsos MORI Social
Research Institute

Our analysis shows that globally while people are keen to improve their personal lives financially, with just under half feeling under pressure to 'make money', they are intrinsically against prioritising economic growth at the expense of social wellbeing, at least overtly.

This is a very contemporary trend, with an emerging debate about 'successful growth' characterised by a broad range of measures beyond GDP[53] and encompassing wellbeing. Economist Thomas Piketty's 2014 challenge to contemporary capitalism follows on in the tradition of 'The Spirit Level'[54], and we are seeing calls for governments in the northern hemisphere to engineer a sustainable, shared recovery with 'inclusive capitalism'[55], and in the southern hemisphere to better handle the growing pains of fast growth capitalism.

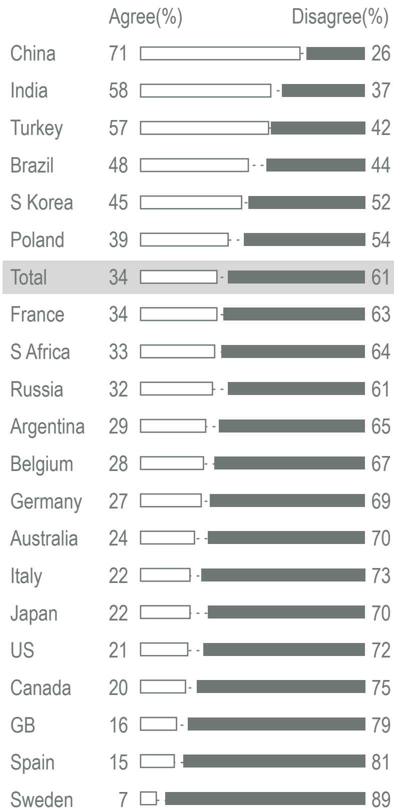
> **Studies show that while inequality in education and health are declining, income inequality is doing the opposite**

While these tensions may not be new – capitalism has been continually challenged by inequality for centuries – it is potentially gaining momentum. Globally, studies show that while inequality in education and health are declining, income inequality is doing the opposite[56]. Furthermore, the stakes are high; in emerging markets like Brazil, China, India and South Africa, for example, strong economic growth, supported by labour and social policies, have helped to reduce extreme poverty but, in these four countries alone, it still blights the lives of a combined 630 million people[57].

THERE IS AN IMPERATIVE FOR GROWTH AND MONEY-MAKING

Just under half of the public across our 20 countries feel dissatisfied with life because they cannot afford much financially. A third are negative about

I measure my success by the things I own



16,000 online adults, 500-1,000 per country.
Full details page 70

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

	Agree(%)	Disagree(%)
China	91	7
Spain	86	9
Turkey	84	12
Germany	84	12
Russia	83	9
S Korea	81	16
Italy	78	13
Brazil	77	13
India	77	18
Total	74	19
Belgium	73	16
Poland	72	17
France	68	23
Canada	68	24
GB	67	22
Argentina	67	23
S Africa	64	32
Australia	64	28
Sweden	63	32
Japan	60	29
US	47	41

16,000 online adults, 500-1,000 per country.
Full details page 70

their standard of living (including one in ten very dissatisfied). Optimism in western established economies often remains hard to come by, especially when people are asked about the future for their young people. Our polling shows that concerns about unemployment and jobs are widely held and persistent at a time when the public see some signs of economic recovery.

66%

of those who are 'dissatisfied with life because of what they can afford', are still able to say they are personally happy

According to our 20 country study, the public are split on whether they 'feel under pressure to be successful and make money' – 49% disagree but nearly as many (46%) agree. There are some sharp differences on this measure across the countries. As is to be expected, where people have relatively less in the emerging economies, there is heightened pressure to have more.

While the three happiest nations – Sweden, Canada, Australia[58]– are also the least likely to be dissatisfied with life because of what they can afford, this seems to have a relatively weak relationship with happiness, as has been well rehearsed in the 'wellbeing' literature for decades. For example, 66% of those who are 'dissatisfied with life because of what I can afford', are still able to say they are personally happy.

There is little difference on these measures by age, but while people in emerging economies are more optimistic about future prospects, they are less satisfied with their current standard of living; 35% of the public in these countries are positive, lower than the equivalent 42% in established economies.

APPARENTLY NOT MATERIALISTIC

Globally, 61% disagree that they 'measure success by the things I own'. And, nearly half as many feel under pressure to make money, be successful and self-identify as materialistic, than reject both notions (22% against 37%). Such sentiments could, though, be in a state of flux – has recession in the west temporarily conditioned aspirations, or even made them unfashionable, and will recovery prompt a renewed desire for (conspicuous) consumption?

51%
put enjoying today first, but
45%
would not

Across the 20 countries more people favour improving people's happiness and wellbeing over the country's economic growth and performance (38% against 31%)

While the young are more materialistic than older age groups – or at least recognise it in themselves and are willing to admit it – the striking divide is between emerging and established economies. In the younger emerging markets, four times more agree strongly that they are materialistic.

If people are fairly circumspect about prioritising today over tomorrow – 51% would put enjoying today first, but 45% would not – strong majorities across all our countries agree that 'it is more important to have a good work-life balance than to have a successful career'. Most are sure that they would put work second if it interfered with personal life.

But the culture of modern consumerism seems more angst-ridden than in the past. While it may be the case that at the point of purchase "there is no such thing as altruism in consumption…[it] is all about pleasure"[59], brands continue to be scrutinised for more than the pleasure their products provide, with some such as (Paul) 'Newman's Own' and H&M becoming famous for what they 'give' as much as what they sell[60].

SOCIAL WELLBEING WINS (JUST) AND INEQUALITY LOSES

But what about society and government? Across the 20 countries more people favour improving people's happiness and wellbeing (38%) over the country's economic growth and performance (31%). This aggregate position does, though, mask the fact that the emerging economies are relatively more in favour of growth.

More clearly felt is the global conviction that inequality of income and wealth is a bad thing. Our monthly polling across these countries finds issues of poverty and inequality are worries for countries as different as Russia, Germany, South Korea and Poland, while our Global Trends Survey found

Successful governments will need to encourage innovation and recruit entrepreneurs within a competitive 'global race' while also meeting public demands for equality

strong stated distaste for inequality nearly everywhere. This occurs among all age groups and regardless of peoples' satisfaction with their standard of living, or attitudes towards the economic situation.

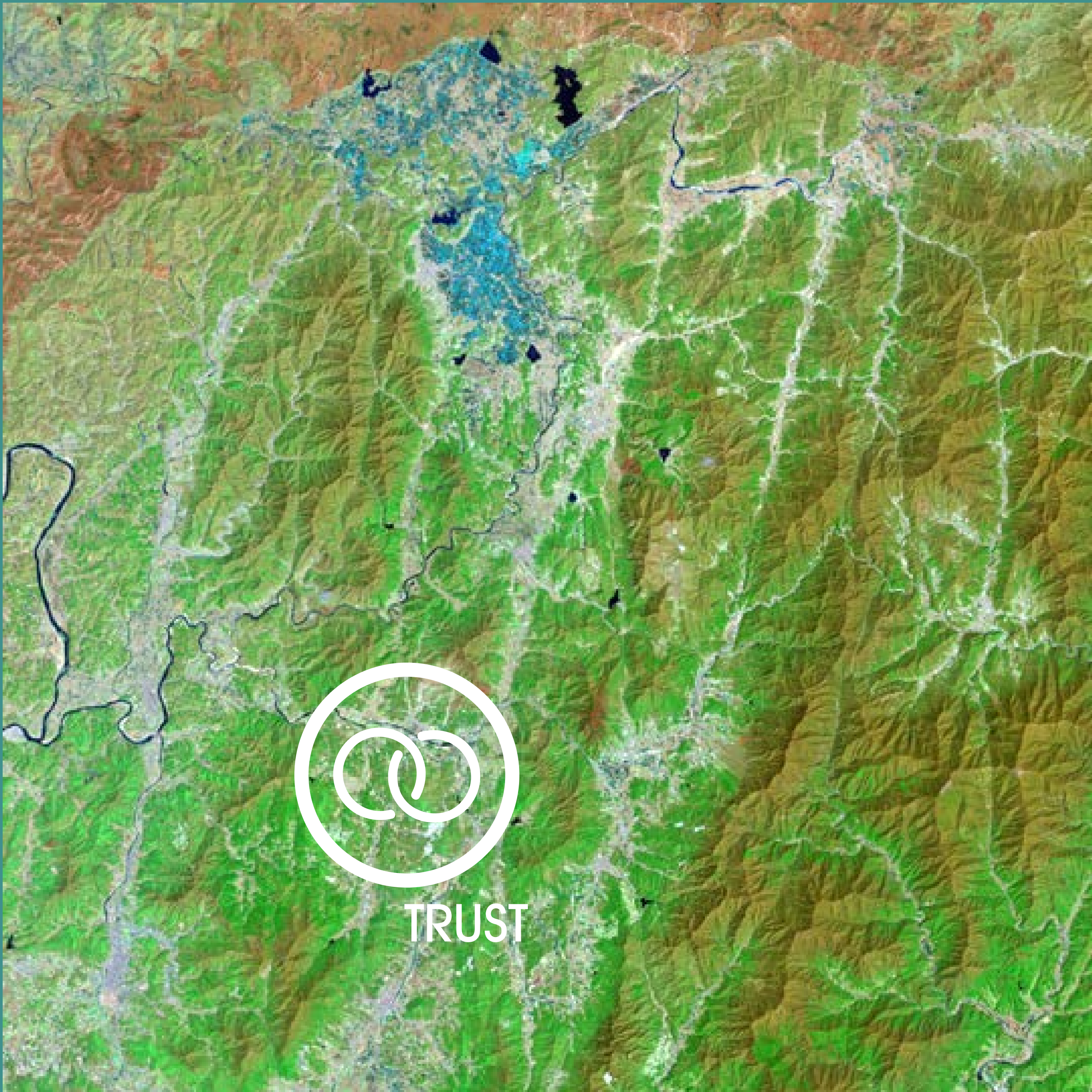
It is, though, relatively more strongly felt in our seven emerging economies, including countries as diverse as China, Russia and Turkey. As we have seen, populations in such countries put relatively higher emphasis on growth, but 45% also *strongly* agree income and wealth inequality is bad for their societies.

IPSOS MORI THINKS

These findings pose exacting challenges. For brands and business, economic growth and the expanding middle classes, plus the 'I want more' sentiments in both emerging and established economies, offer opportunity. So too do niche 'luxury' products and brands targeting the burgeoning super-rich or wealthy[61]. But for mass markets, there is likely mileage in having more subtle, nuanced stances on materialism and acquisition – think IBM's Smarter Planet campaign[62].

Successful governments will need to encourage innovation and foster entrepreneurs within a competitive 'global race' while also meeting public demands for equality – witness Denmark's 'flexicurity' employment policies[63,64]. The Organisation for Economic Co-operation and Development (OECD) highlights the need in emerging markets in particular to improve education and health services to break intergenerational transmission of poverty[65].

Governments of all hues and types will need to be transparent about the tough choices ahead given competing pressures to secure growth, spend on welfare systems and public services and manage debt and deficit, while forging a modern, sustainable, more equal form of capitalism.



Korean Demilitarized Zone: NASA image created by Jesse Allen

By **Jonathan Weeks**
Director
Ipsos Marketing

9: TRUST
Eroding authority

If citizens and consumers feel overwhelmed by choice they also have little confidence in authority, trusting instead themselves and their fellow consumer-citizens.

Across our 20 countries
31%
is the highest level of satisfaction with the way the government is running the country

PEOPLE ARE SCEPTICAL ABOUT GOVERNMENT, BUSINESS AND SCIENTISTS

Across our 20 countries, 31% is the highest level of satisfaction with the way the government is running the country (this occurs in Sweden where 45% are dissatisfied). Populations in emerging and established economies have similar levels of low satisfaction with their governments. The Italians – somewhat predictably – trust their government less than anywhere else. Regardless of geography, economy and the political composition of government, citizens feel let down, expecting more from those in power. This could be both a cause and effect of pessimism about their national future – around seven in ten (68%) think that their country is heading 'off on the wrong track'.

This should not, though, be over-stated; for example, many countries' governments have rarely been popular, nor ever had high trust[66]. But the past 25 years have seen a trebling in the proportion answering negatively to the question 'How much do you trust a British government of any party to place the needs of this country above the interests of their own political party?', and this mistrust of central institutions is now more widespread.

Globally, other evidence suggests that trust in government is falling, as it is for government officials. Regulators and technocrats are often preferred to politicians[67]. However, science is no longer immune to criticism – if it ever was – with our survey showing older age groups more likely to think scientists often try things without thinking about the consequences, although detailed analysis shows rising confidence amongst the young[68]. This decline in trust in institutions globally is real but can be over-stated – in the UK trust in civil servants and scientists has risen although few trust politicians; it's not universal.

Neither media nor CEOs fare well either[69] and a majority across the world want business to be more regulated[70]. The moral authority of business is questioned in a world ever more aware of practices such as tax avoidance, 'sub-prime' lending and unfair or unethical trading.

...BUT CONSUMERS DO TRUST FELLOW CONSUMERS

The one thing that consumers trust in is the impartiality of other consumers; there has been a rise in trust in a 'person like yourself', leading some to say that "the locus of control is shifting from organisation to individual"[71]. This, and the power of the social networked communities, has for the first time created a revolutionary power capable of disrupting, even toppling, brands and governments.

More than ever, consumers look to their peers to guide them, particularly in shopping choices. This is particularly the case when consumers don't feel confident in making a choice – in Britain, for example, 74% agree that 'if I don't feel confident making a purchase decision I will look at online reviews', but it is a majority nearly everywhere.

NEW MEDIA COULD ACCELERATE THESE TRENDS

Mobile technology, and especially social media, is empowering citizens in new ways, catalysing events and campaigns so that they attract global attention very quickly – witness, for example, the 'Occupy' movement, the Arab Spring and the rape and death of a student in New Delhi in 2012 – creating associated challenges and pressures for governments. In Turkey, when the government banned Twitter, users fought back, deploying other means such as SMS or changing the setting of domain names to conceal their geographic location.

Governments in established and emerging economies will need to cope with larger, more vocal, better (tech) connected middle classes. So too will brands, with the stakes being raised higher still by the importance people attach to them; while 41% of consumers in established markets agree that 'brands bring meaning', it is 62% in emerging markets.

If I don't feel confident making a purchase decision I will look at online reviews

	Agree(%)	Disagree(%)
China	92	6
Turkey	79	18
Russia	76	17
GB	74	19
S Korea	72	24
Poland	71	19
Germany	71	25
India	71	23
S Africa	70	25
US	69	24
Total	69	25
Sweden	69	27
Italy	66	28
Canada	65	28
Brazil	65	25
Australia	64	28
Spain	63	29
France	60	35
Japan	60	31
Belgium	53	38
Argentina	47	39

16,000 online adults, 500-1,000 per country.
Full details page 70

In Turkey, when the government banned Twitter, users fought back, deploying other means such as SMS or changing the setting of domain names to conceal their geographic location

Online reviews and the sharing of social media mishaps and missteps have become a means for consumers to really let the world know what they think. Where people have nothing to gain but much to lose (through ill-informed purchases), the camaraderie online gives a new framework to review our choices and will increasingly encourage questions of both brands and governments.

Our human bias towards negativity means we are predisposed to recall the negative more. Bad news travels fast, immediately and around the globe gaining momentum. If a customer is unhappy in Tokyo, it can create a negative reaction elsewhere in the world, while WikiLeaks (a strong brand itself) claims “we open government”. One 9 year old Scottish school girl, banned from taking pictures of her food at school, got Jamie Oliver and 80,000 others on her side in a few hours. Argyll and Bute council gave in.

Careful handling of reaction and feedback is crucial, and getting this right helps to build reputation, seen recently in the brand sphere through great customer service. Sainsbury’s sweet letter back to a child asking about the name of tiger bread[72] was inspired, as was Virgin Airways’ response to a complaint about their food[73]. In contrast, British Gas and Starbucks both got vilified when they did faux sincerity.

IPSOS MORI THINKS

For governments, honesty and transparency will be important in building trust in the emerging world where no government is likely to make serious dents in the backlog of economic problems any time soon. But given the low credibility of government, it will be by actions rather than words that trust will be earned. Stopping politicians making promises that undermine the credibility of institutions they are elected to will challenge any civil servant anywhere.

There is a strong chance that a brand will have a 'Ratner' moment, where their social media faux-pas is so extreme it destroys their brand and credibility, ultimately wiping hundreds of millions from a company's value (Ratner Jewellers lost £500 million in 1991 due to a single speech)[74].

Business and brands will similarly need to work very hard to gain trust. This is unlikely to be built by corporate communications and advertising alone and authenticity must be at the heart of customer service and strategies.

The progress towards technology that enforces greater transparency will continue to expose all manner of scandals. Over time this forced emphasis on public bodies, brands and individuals who hold power will usher in a new era of openness and clarity. The evolution will be painful. There will be casualties. But playing the long game will eventually rebuild trust and we will all be better for it.


BRANDS

10: BRANDS

Experience is the new brand

By **Fiona Moss**
Associate Director
Ipsos Loyalty

Consumers have never had so many options. While this is positive, it does not facilitate easy purchase decisions. How do today's consumers navigate choice.

HOW ARE CONSUMERS MAKING DECISIONS?

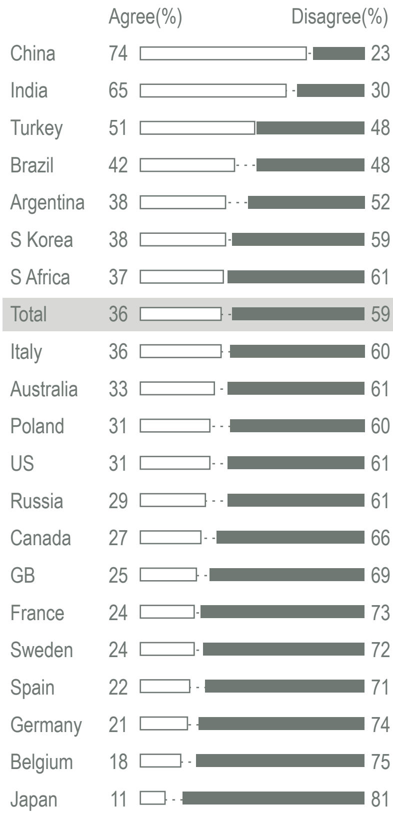
Brands continue to matter – but consumers almost consciously deny their emotional effectiveness. Apple and many others demonstrate that effectiveness daily – far beyond any functional aspects of their products. However, the lack of conscious identity with them points to the need to be savvier in marketing.

In China and India, most consumers agree that 'when I shop I always try to buy branded products'. On average though, around our globe, consumers are more likely to disagree that brands are key to their purchase decisions. We seem to not want to admit how much we are swayed by them!

Of course, much depends on which category we are talking about. We can already see the loss of the power of brands being played out in perceptions of quality with the rise of private/own label in FMCG ranges in the west. Across our 20 countries, half (48%) of consumers believe that, for the same types of product, private label/store brands and manufacturer brands don't differ in quality from the main brand leaders. This rises to 64% in Germany and falls to 37% in Russia.

In the UK, we see this with some consumers turning away from the Big Four supermarkets to the discount retailers such as Aldi. While this is spurred in part by freezes or even falls in real incomes, it also points to a reluctance on the part of consumers to pay more for named brands where viable alternatives exist. Brands are now part of a wider consideration set for consumers, and, for many, no longer a guarantee of superior quality, or worth paying a premium for.

When I shop I always try to buy branded products



16,000 online adults, 500-1,000 per country.
Full details page 70

Advertising retains its influence and we see emerging markets more willing to state its role in their purchase decisions: in China (61%), Turkey (55%) and India (50%) most agree 'I am more likely to buy products from brands that have great advertising'. Elsewhere, this lack of willingness to admit the impact of advertising is symptomatic of busy, disengaged, independent-minded consumers in more established markets, where consumer scepticism is more manifest and where advertising needs to continue to evolve and engage to have impact.

THE VOCAL MINORITY

A quarter of consumers globally say they have shared their views about a company or brand via social media in the last year, with considerable variation between countries (47% in South Africa, 4% in Japan). This minority has a very different profile from that of the 'average' global citizen, as they tend to be more engaged in socio-political activities, for example, volunteering with charities/campaigning organisations, presenting their views to a politician, taking part in demonstrations/marches, or donating money to charities/campaigning organisations. This vocal minority now holds increasing sway over a wide audience of consumers – which we can also see in the politics of many countries.

In particular, two thirds (67%) of the general public say that what they read about other people's good or bad experiences influences what they buy (rising to 86% in China). A similar proportion globally (69%) agrees that if they don't feel confident making a purchase decision they will look at online reviews (again China is top at 92%).

Moreover, consumers are acting on these views: a significant minority say they have actually avoided a company or brand in the last year because they heard or read about a bad experience, or have chosen one on hearing about a good experience. People in South Africa and Turkey are most likely to do both of these, with Swedes also more likely to act based on bad experiences. There is greater variation among the other countries.

I am more likely to buy products from brands that have great advertising

	Agree(%)	Disagree(%)
China	61	34
Turkey	55	42
India	50	45
S Africa	46	49
Brazil	45	44
S Korea	36	60
Total	35	56
Italy	34	59
Argentina	34	55
Japan	34	52
Germany	33	59
Spain	29	61
US	27	61
Poland	27	62
Sweden	27	67
France	26	68
Australia	26	65
Russia	25	63
Canada	24	67
GB	23	67
Belgium	18	73

16,000 online adults, 500-1,000 per country.
Full details page 70

WHAT IPSOS MORI THINKS

It's hardly news that social media is changing the brand-consumer relationship, but these findings emphasise just how much influence social media has over brands and purchase decisions. It is not enough to get branding and advertising right; the experience (be that product, service, or both) also needs to meet the expectation created by the brand. This is because a poor experience is no longer just a story for the recipient's friends and neighbours, it can also – very publically – reach millions at the touch of a button. Those brands whose misdemeanours have gone viral can testify to this all too well. Essentially then, 'experience' is the new brand and the tool by which consumers make their decisions.

For businesses, this means there's no room for complacency in terms of getting the basics of the customer experience right, from the quality of products through to in-store service levels. This means identifying where you need to delight your customers and where just delivering the basics is enough – as well as knowing to which customer this applies. Providing sufficient training and support for your staff is key, so that the whole organisation is focused on the customer. Do staff know what great service looks like? Do they have the tools to deliver it? Do they know why delivering it is important?

Brands should consider developing and cultivating brand champions: genuine consumers who want to triumph a brand on social media sites. Similarly, engaging with consumers online, fostering consumer communities that stress the way a brand is 'on the consumers' side'. Many businesses are already doing this – just look at supermarkets' Facebook pages. There are also other more complex examples; Burberry's The Art of the Trench[75] is an interesting case study.

For governments, many of the same implications apply and it is essential to remember that citizens are thinking, feeling individuals rather than a homogenous mass – and it is the individuals who are particularly politically engaged who are most likely to vent their views online.

There is huge scope to harness the public preference for consumer recommendation. As an example, in Britain, the Department of Health is using the 'Friends and Family' test within the NHS (a variant of Net Promoter Score) to collect feedback and drive local management attention to patient

Poor experience is no longer just a story for the recipient's friends and neighbours, it can also – very publicly – reach millions at the touch of a button

perception. There are already ‘Trip Advisor’ type systems for health and social care[76] which are gaining currency. These are increasingly common across the world. What will be intriguing is whether they remain a semi-passive route to vent views or morph into groups of service users challenging unpopular decisions in an organised way.

That's all folks. For more go to www.ipsosglobaltrends.com. We have left out the fact that virtually everyone agrees the internet gives kids the wrong idea about sex, that the Russians are among the most traditional on the role of women in society, whose public services are best and worst and much much more.

We hope you have found it interesting. For more details on any of the trends here please get in touch.

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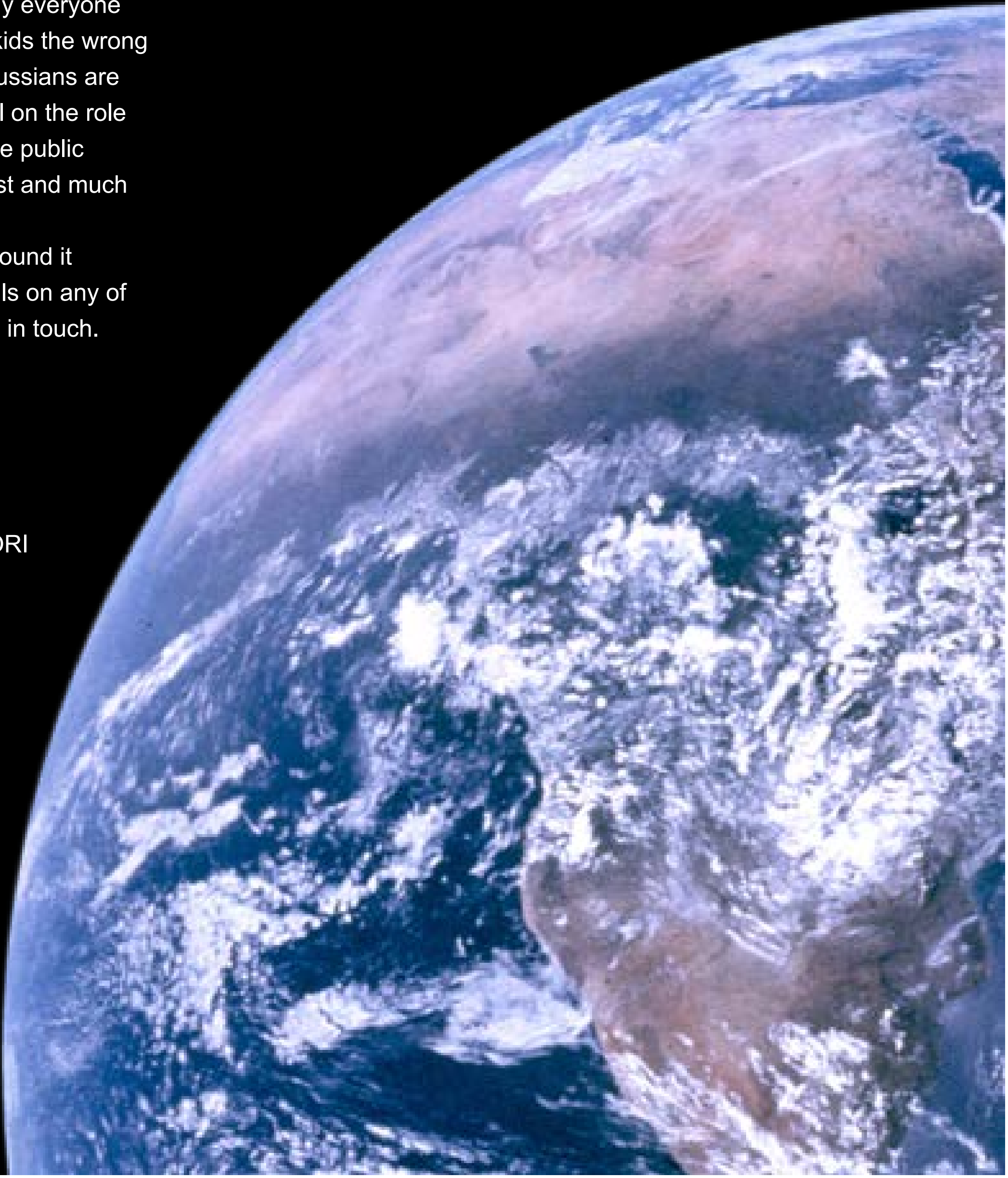

APPENDICES

THE METHODOLOGY FOR THIS STUDY

Our inaugural Global Trends Survey explores the post-recession world through the eyes of citizens and consumers in 20 countries around the world.

The Global Trends Survey was conducted in Argentina, Australia, Belgium, Brazil, Canada, China, France, Germany, Great Britain, India, Italy, Japan, Poland, Russia, South Africa, South Korea, Spain, Sweden, Turkey and the United States of America. It was conducted via Ipsos Global @dvisor with questions put to a total sample of 16,039 adults across the 20 countries between 3 and 17 September 2013 or to a sample of 16,167 between 1 and 15 October 2013.

Respondents were adults aged 18-64 in the US and Canada, and 16-64 in all other countries. We surveyed approximately 1,000 in Australia, Brazil, Canada, China, France, Germany, India, Italy, Japan, Spain, Great Britain and the United States of America, and approximately 500 in Argentina, Belgium, Poland, Russia, South Africa, South Korea, Sweden and Turkey.

The Ipsos Global @dvisor service uses online panellists in each country meaning that in some cases our respondents are likely to be representative of more affluent, connected populations. Data has, though, been weighted to the known national populations.

At the aggregate level each country has been given equal weight regardless of population size relative to others – meaning that China's 1,000 responses count for the same as Sweden's 500 despite its population being around fourteen times larger. As with all surveys, our findings are estimates, and subject to sampling tolerances.

The survey questions were translated from English into the main languages used in non-English speaking countries, with these back-translated and checked against the original questions. Some questions were not fielded in China.

For the purposes of analysis, we have grouped countries into categories with 'emerging economies' including seven – the four 'BRICs' (Brazil, Russia, India and China) plus Argentina, South Africa and Turkey – and the remaining thirteen included in an 'established' category.

Further detail including the survey questions and findings can be found at www.ipsosglobaltrends.com where a 'topline' summary can be downloaded. Also available are SlideShare presentations and a number of thematic releases and articles using the survey data. Future releases and uses of the survey data will be posted here and on Twitter using #IpsosTrends via @IpsosMORI.

IPSOS MORI TRENDS AND FUTURES

Ipsos MORI's Trends & Futures team is a cross-sector group of researchers who draw out key insights and identify emerging trends by combining Ipsos MORI data with external sources.

Ipsos MORI's Trends & Futures reports seek to both stimulate and engage, with an eye on how this will both impact the business of our clients and the market research industry of the future. For more information on how trends are impacting your industry, business or brand, please go to:

www.ipsos-mori.com
/trendsand futures

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