

# Ipsos Global Trends 2021

**Aftershocks and continuity**

November 2021



After The Crisis

# How the New Normal Will Look Like the Old Normal

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

## The Pandemic Really Has Changed The World Forever



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Leadership Strategy  
*Teaching and consulting in the innovation field since 1990*

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

*Simon Tisdall*



PEW RESEARCH CENTER | FEBRUARY 18, 2021

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

As global demand truly radical age  
Coronavirus

Our cities may never look the same again after the pandemic

Pandemic-proofing: Insurance may never be the same again

**Life will never be the same for people over 60**

The Pandemic Will Change Everything

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

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

**WUV RALI WILL NEVER BE TAIN AFTER COVID**

# Signals of a changing world

**China ends funding for coal**



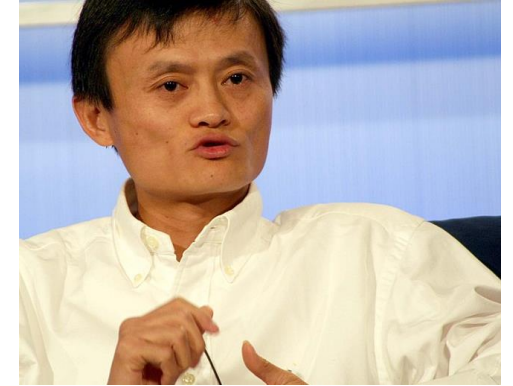
**Soaring used car prices**



**Global labour shortages**



**China's tech crackdown**



**AlphaFold makes the case for AI**



**AUKUS awkwardness**



**COVID's long tail in the developing world**

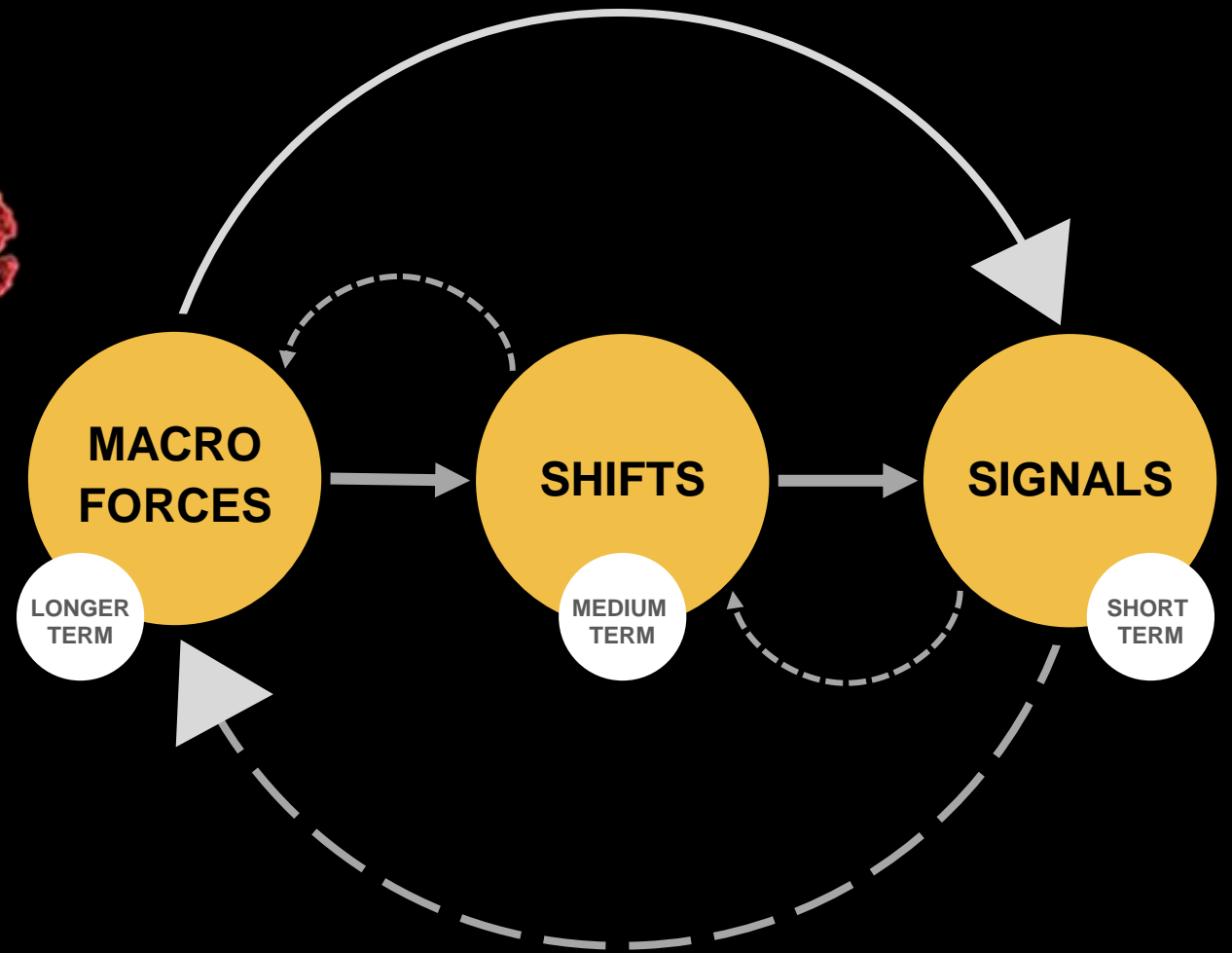
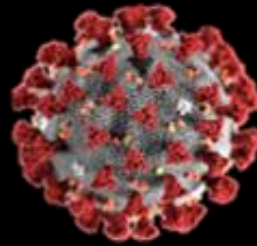


**Social media challenges**



# Our theory of change:

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





# The macro forces reflect the impact of COVID-19

Dynamic populations



Growing inequality and opportunity



Geopolitical tensions



Data world



Technology tipping points



Our fragile planet



# Dynamic populations

## A shifting world

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

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



# Our fragile planet

## Coping with extremes

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

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





# Geopolitical tensions

## Multipolarity and unilateralism

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

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





# Growing inequality and opportunity

## Winners and losers of COVID

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

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



# Tech tipping points

## A government techlash?

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

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

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





# Data world


## Instant aggregation

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

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





A large, moss-covered tree trunk in a forest with autumn foliage. The tree is the central focus, with its thick, gnarled trunk and sprawling roots. The background is filled with trees and foliage in shades of green and yellow, suggesting an autumn setting. The ground is covered in fallen leaves.

**One and a half  
years in – where  
do public values  
stand?**



# Our trends from 2019...



# Our trends from 2019

## CHOICES OVER HEALTHCARE

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

## CONSCIENTIOUS HEALTH

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

## THE ENDURING APPEAL OF NOSTALGIA

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

## REACTIONS TO UNCERTAINTY AND INEQUALITY

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

## CAPITALISM'S TURNING POINT

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

## A DIVIDED WORLD?

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



# Our trends from 2019

## CLIMATE ANTAGONISM

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

## SEARCH FOR SIMPLICITY AND MEANING

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

## AUTHENTICITY IS KING

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

## DATA DILEMMAS

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

## THE TECH DIMENSION

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

## PEAK GLOBALISATION?

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

# By Sept 2020 we saw more change in some areas

Healthcare, brands, climate,  
globalisation and reactions to  
inequality





# 2021 is similar – existing trends continue

Continuity in trends on climate,  
purpose and health

Change for brands,  
globalisation and online/offline  
world

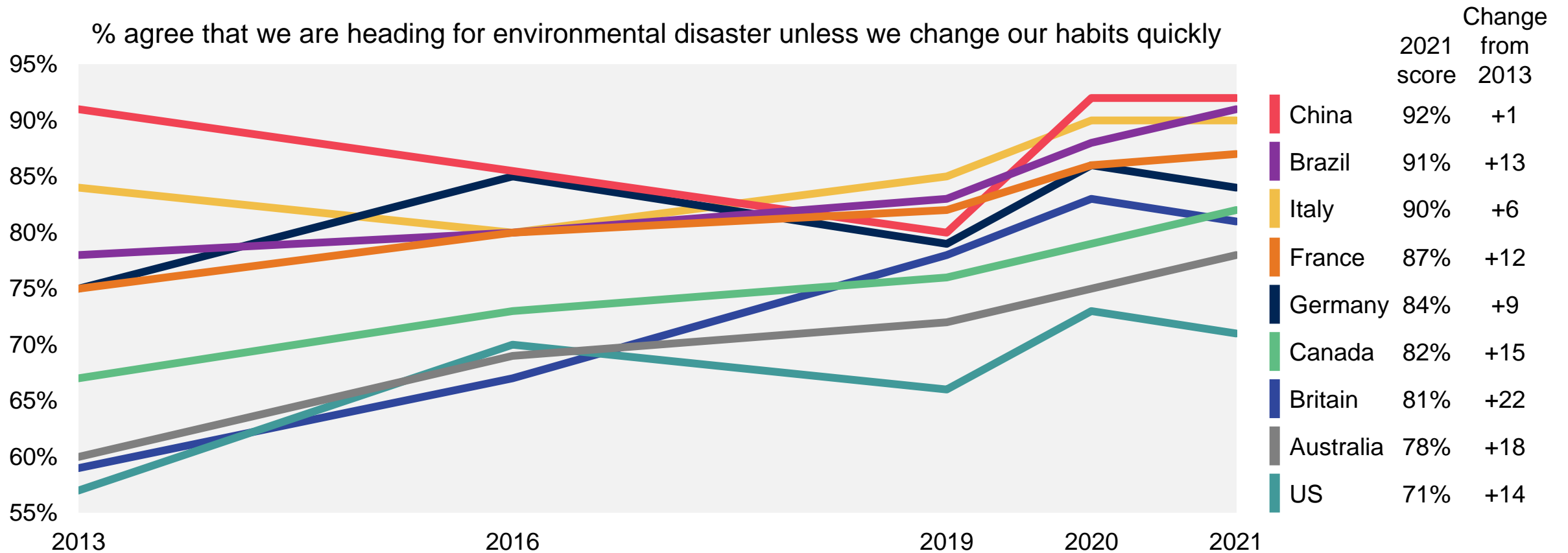




# Where do we see continuity in trends?



# Climate concern remains key



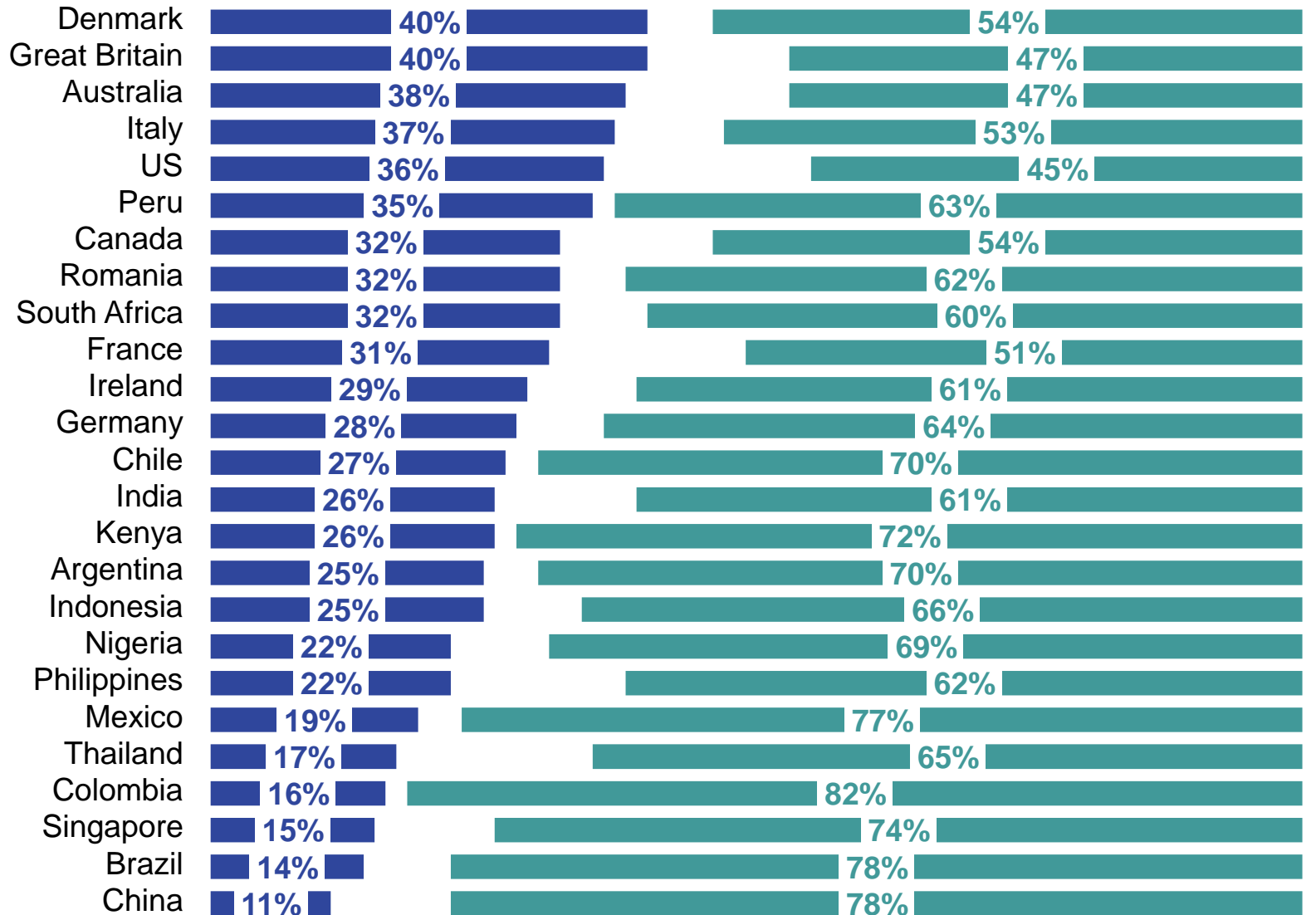
Ipsos Global Trends Series: 500-1,000 adults aged 16-75 (18-75 in US and CA) per market per year

# In fact, it trumps more traditional worries

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

**Companies paying the correct amount of tax?**

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



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



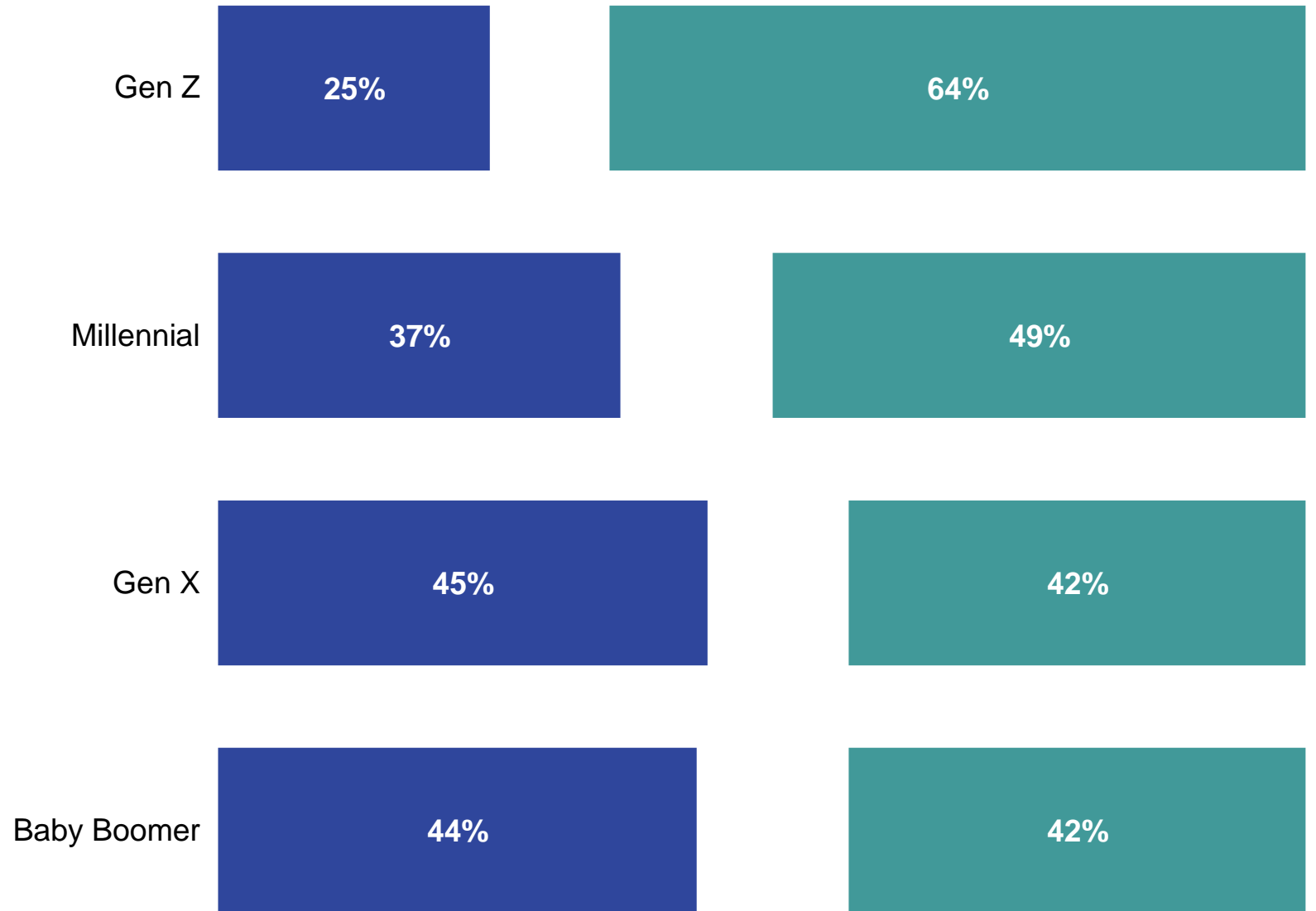
# With a strong generational skew

## Great Britain

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

**Companies paying the correct amount of tax?**

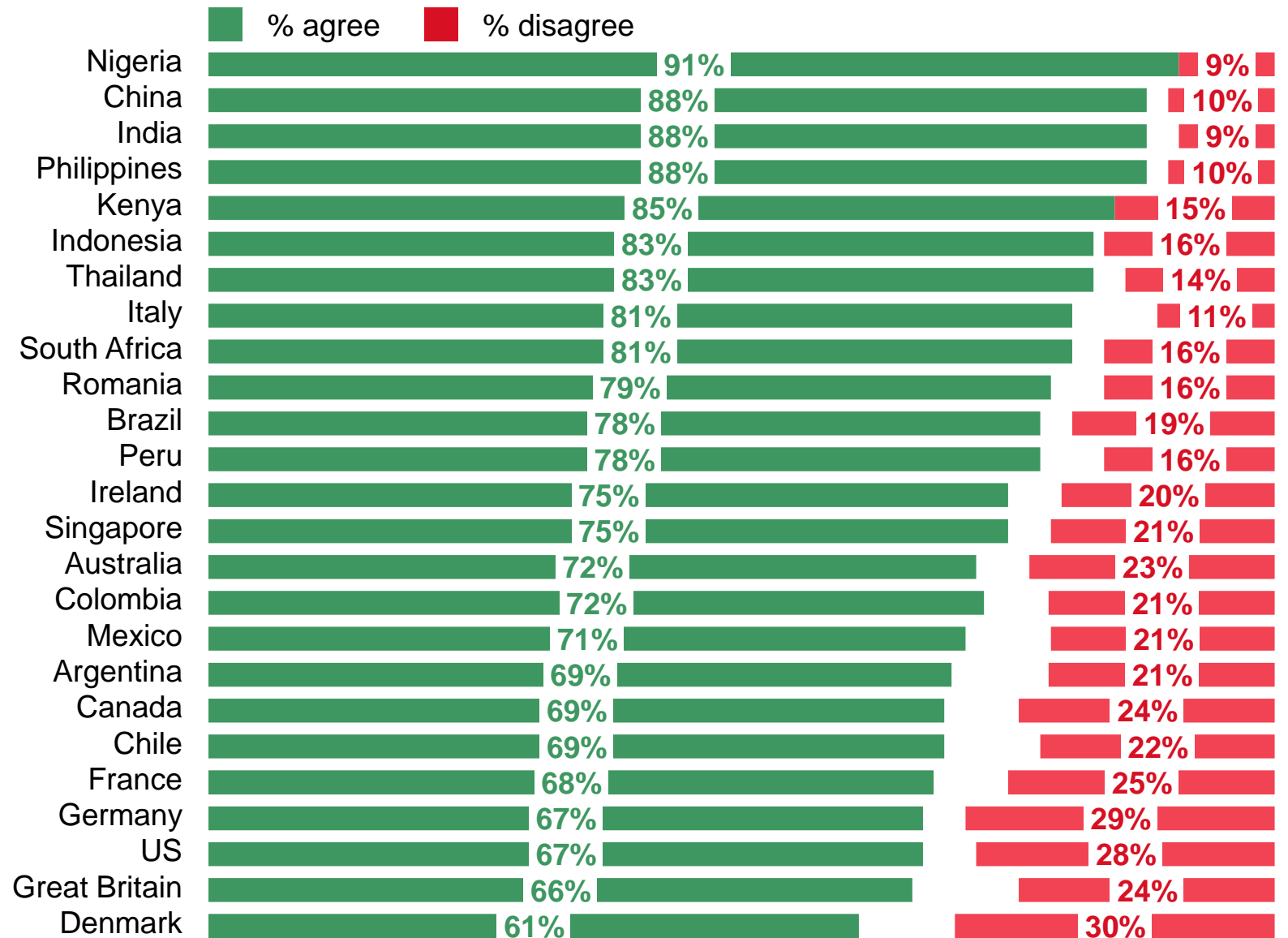
**Companies doing as much as they can to reduce harm to the environment?**



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

# Our health remains important

I will sacrifice convenience if it means getting healthier products

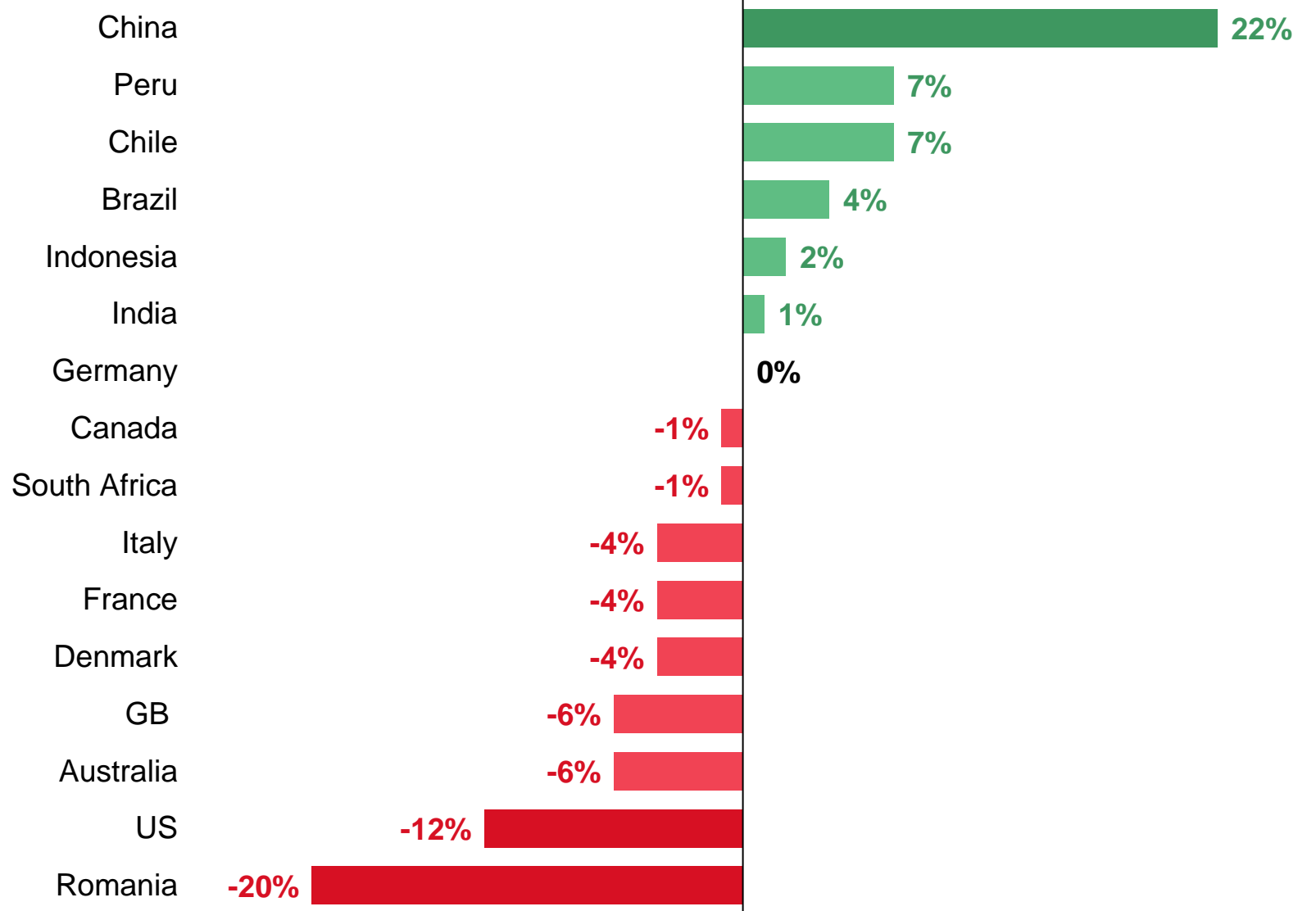


Base: 24,332 adults aged 16-75 (18-75 in US and CA) in 25 markets interviewed August - September 2021



# Faith in vaccines fell in 2020 but has rebounded for most

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



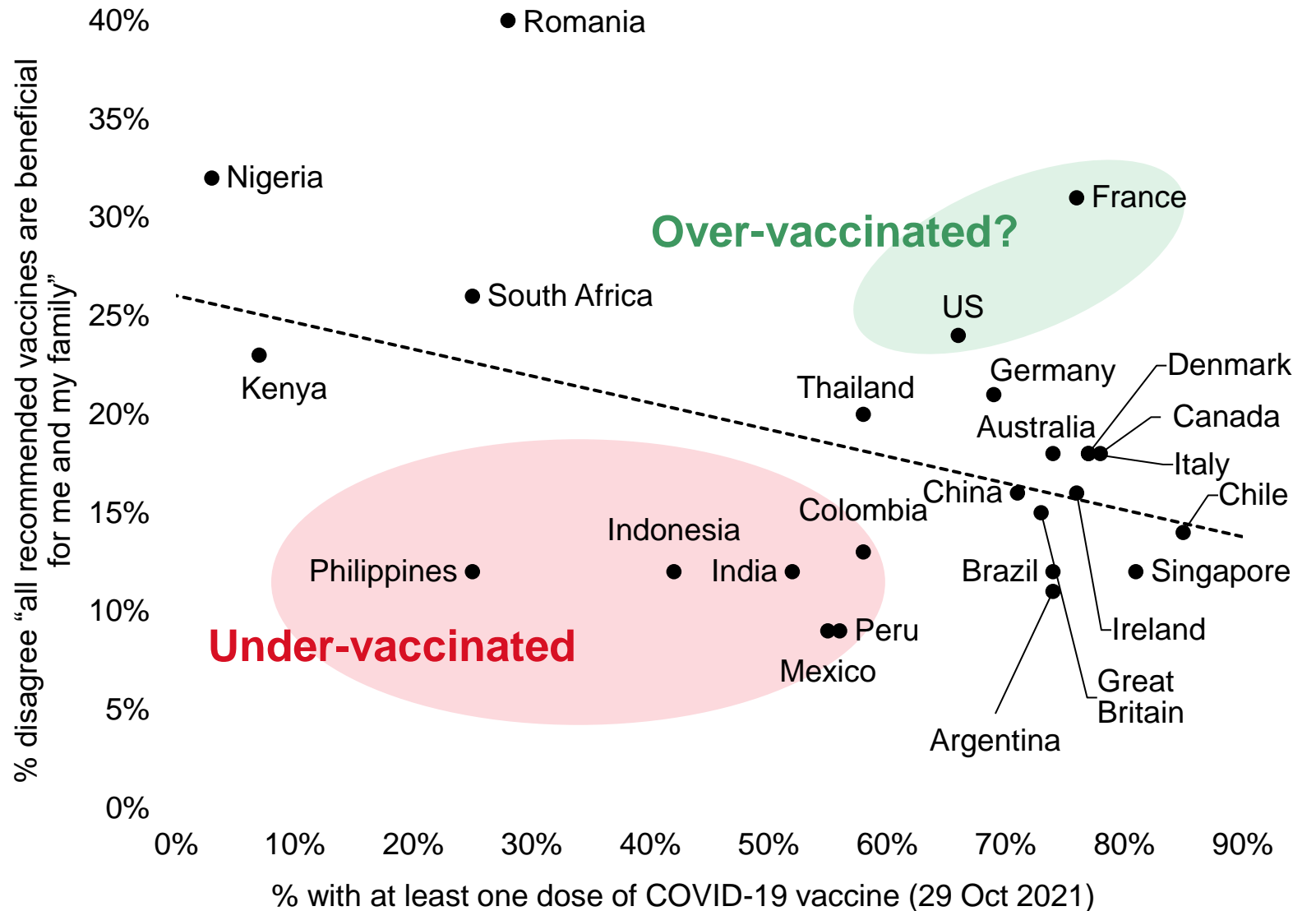
Ipsos Global Trends Series: 500-1,000 adults aged 16-75 (18-75 in US and CA) per market per year

# Scepticism is higher in less vaccinated countries

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

X

% disagree that all recommended vaccines are beneficial

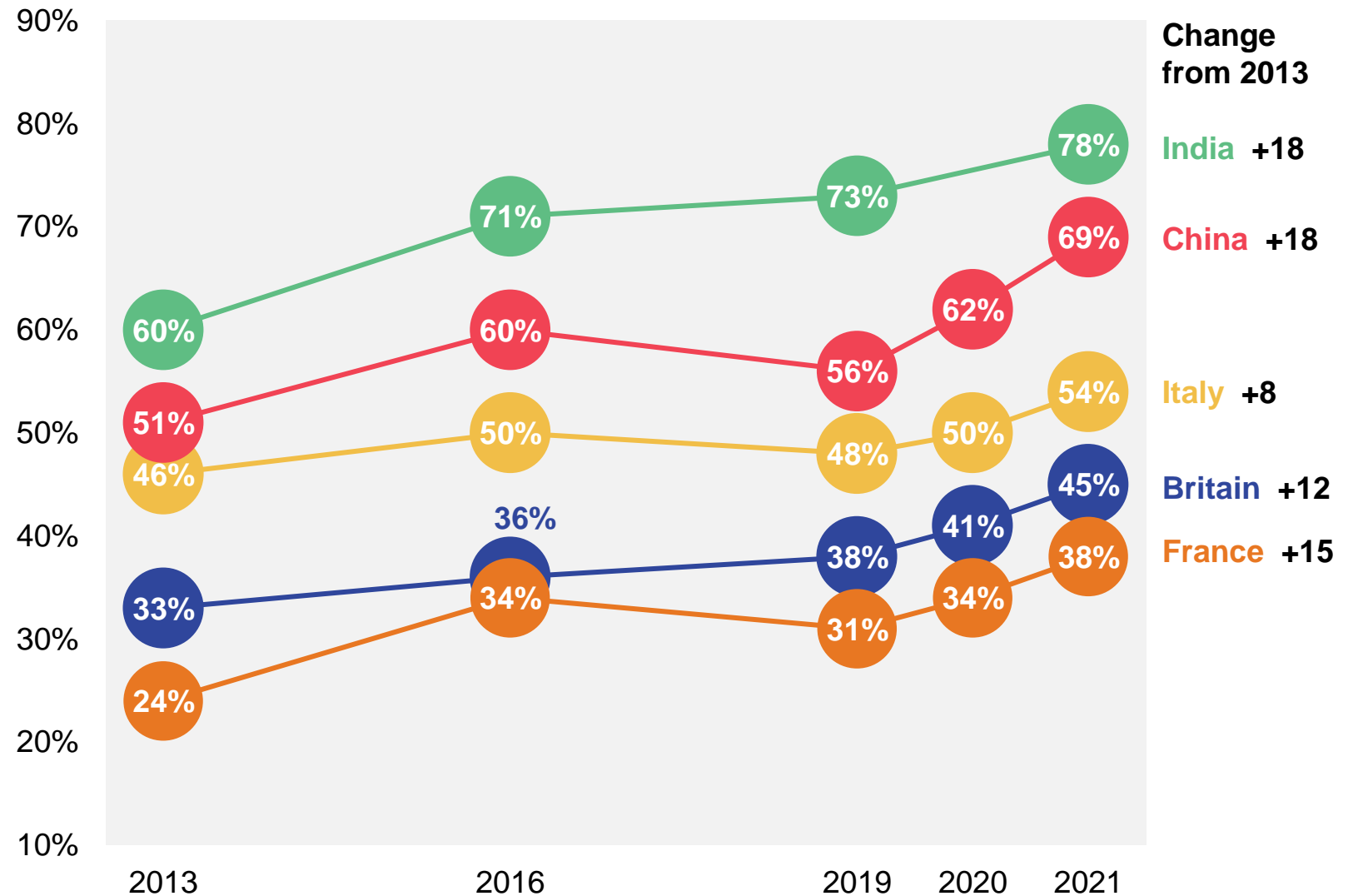


Ipsos Global Trends Series: 500-1,000 adults aged 16-75 (18-75 in US and CA) per market per year  
 Vaccination statistics collected from Our World In data. Romania figure from 26 November 2021 and China figure from 18 September 2021



# But overall: rising optimism in the power of science

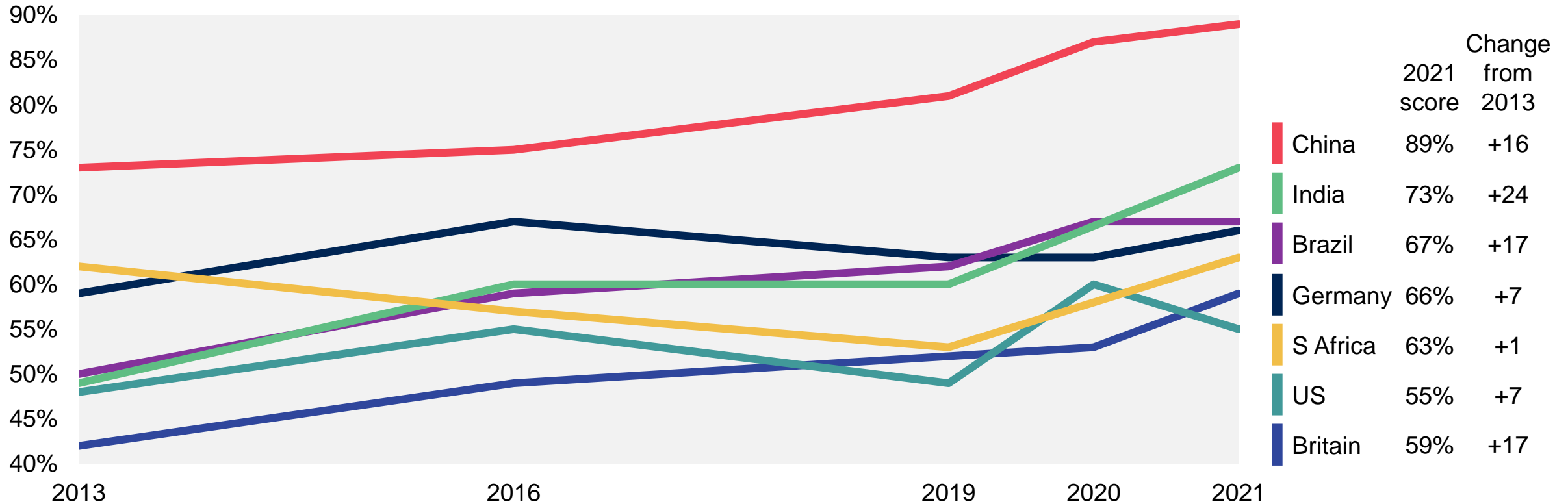
% agree that eventually all  
medical conditions and  
diseases will be curable



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

# Feeling overwhelmed has risen in many markets since 2013

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

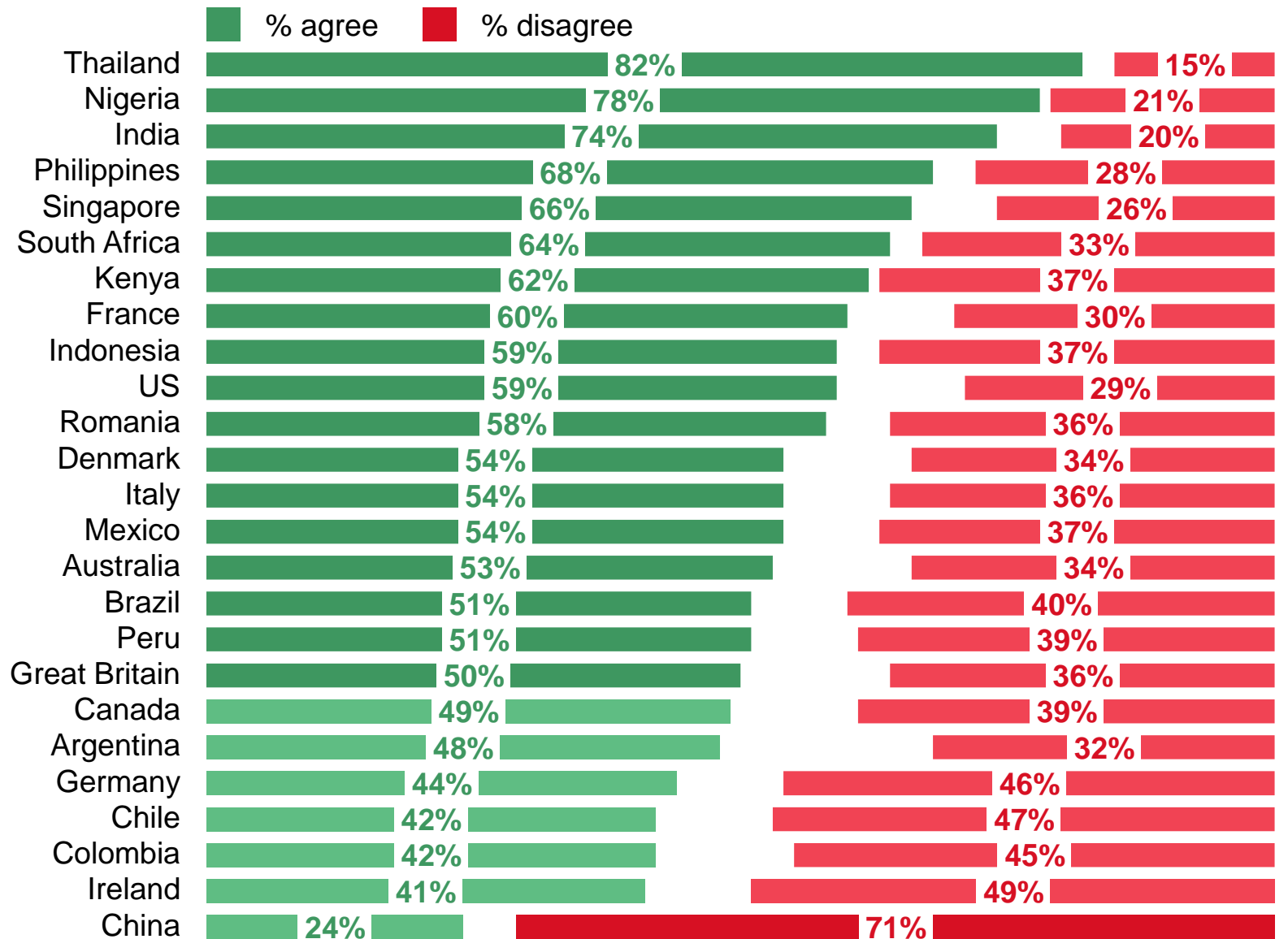


Ipsos Global Trends Series: 500-1,000 adults aged 16-75 (18-75 in US and CA) per market per year



# Nostalgia varies markedly

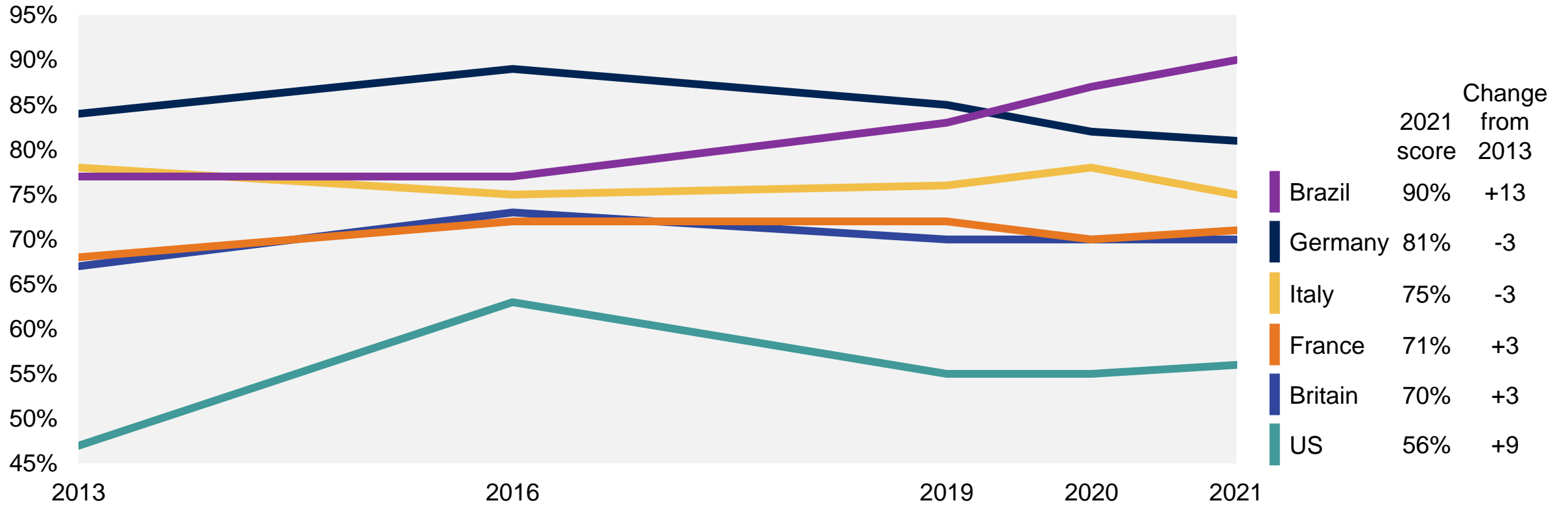
I would like my country to be the way it used to be



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

# As do views on the impact of income disparities

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



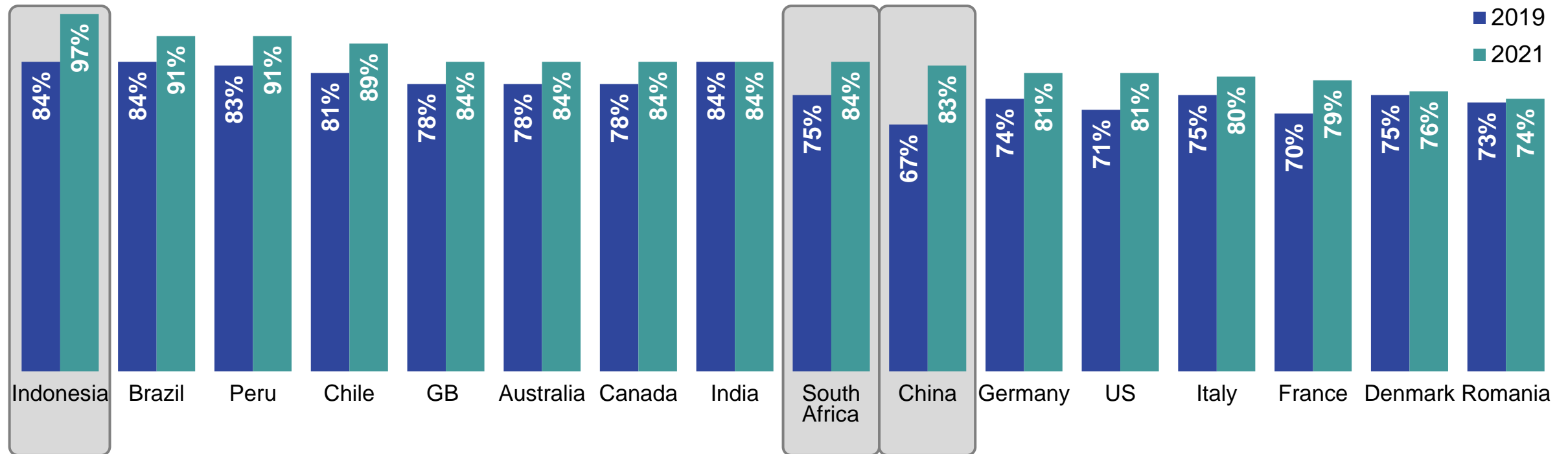
Ipsos Global Trends Series: 500-1,000 adults aged 16-75 (18-75 in US and CA) per market per year





# Social media firms still have 'too much power' – more notable growth in some emerging markets

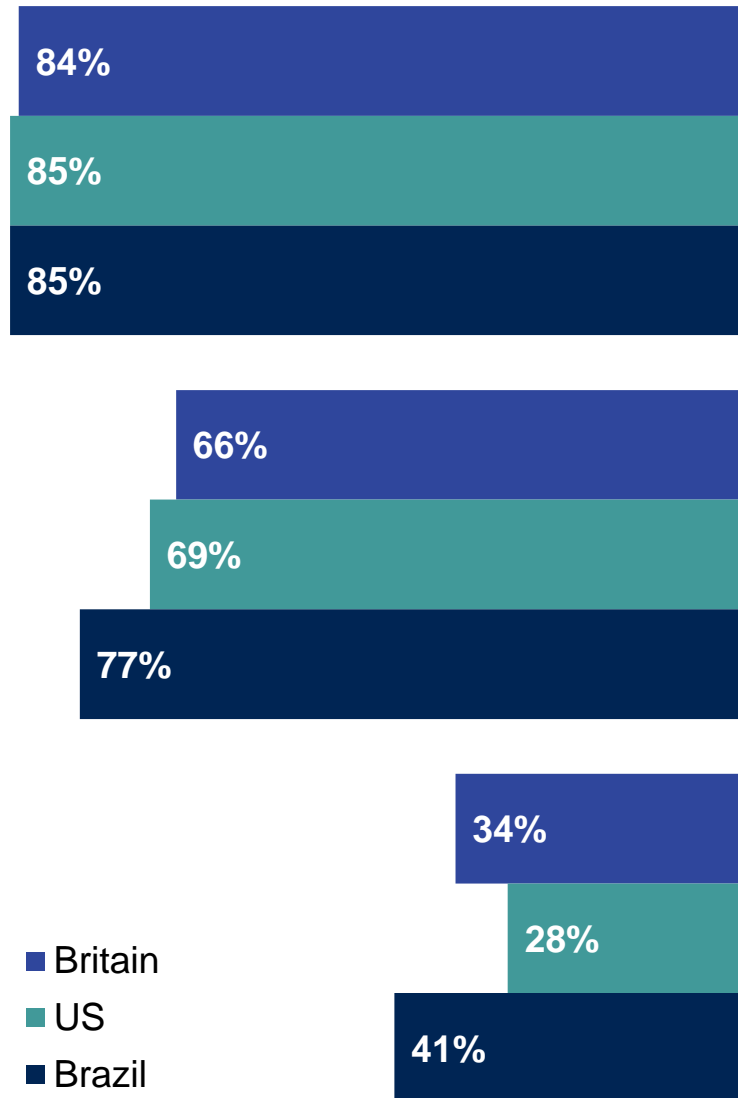
Social media firms have too much power - % agree 2019 and 2021



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

# Yet anxiety and apathy remain the key reactions to the data dilemma

% agree with data values statements in 2021



## Data apathy:

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

## Data anxiety:

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

## Data sharing:

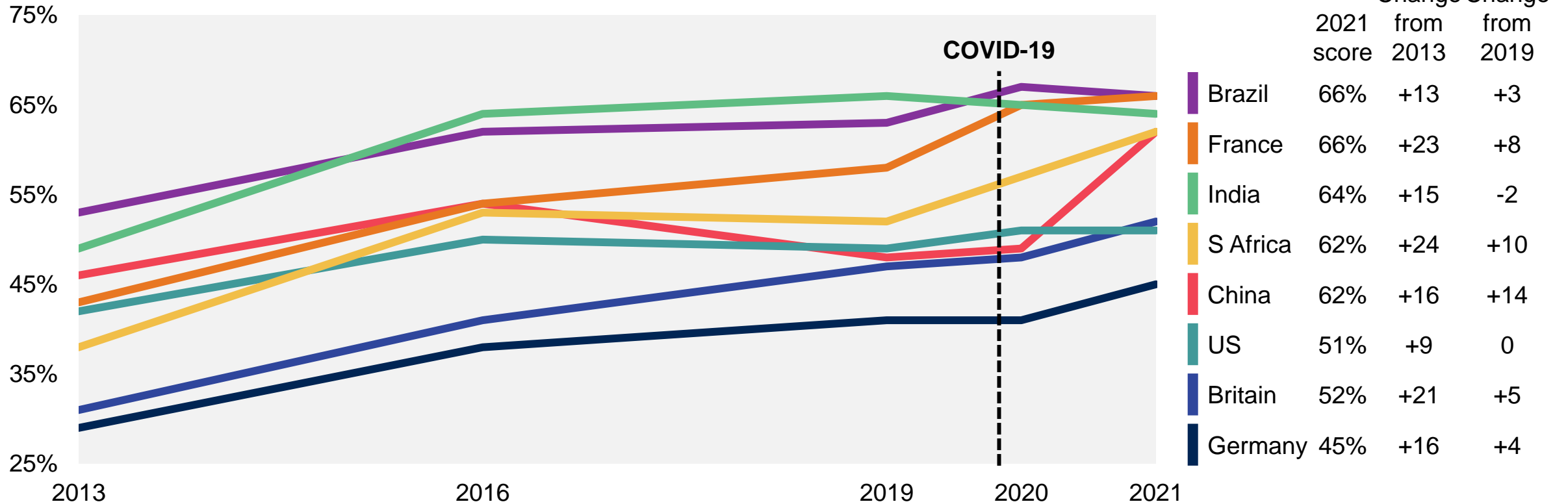
People worry too much about their privacy online - I'm not concerned about what companies or the government know about me

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



# Concern about tech rose more pre-COVID for developed markets

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



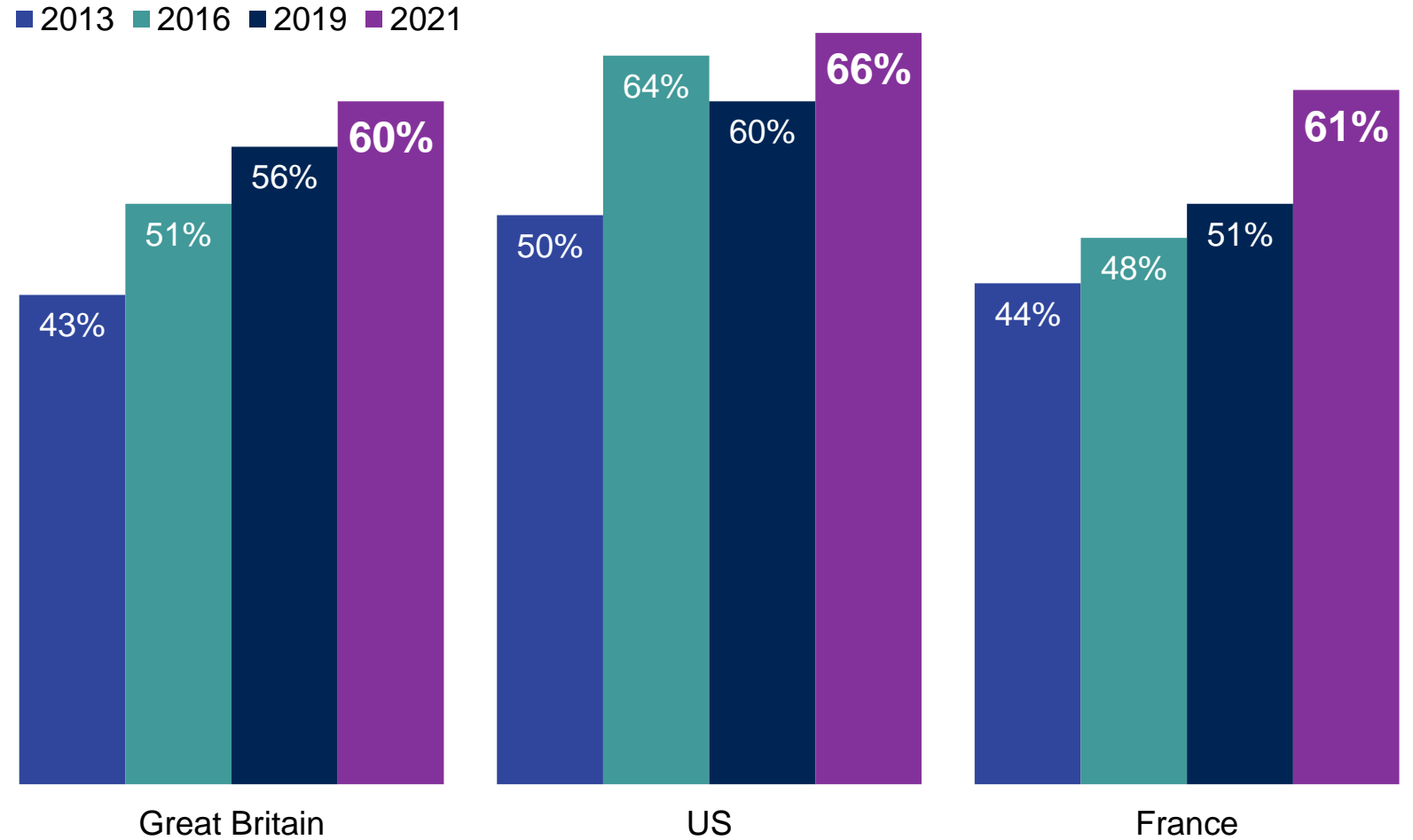
Ipsos Global Trends Series: 500-1,000 adults aged 16-75 (18-75 in US and CA) per market per year



# And where is there emerging change?

# The rise and rise of brand purpose

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

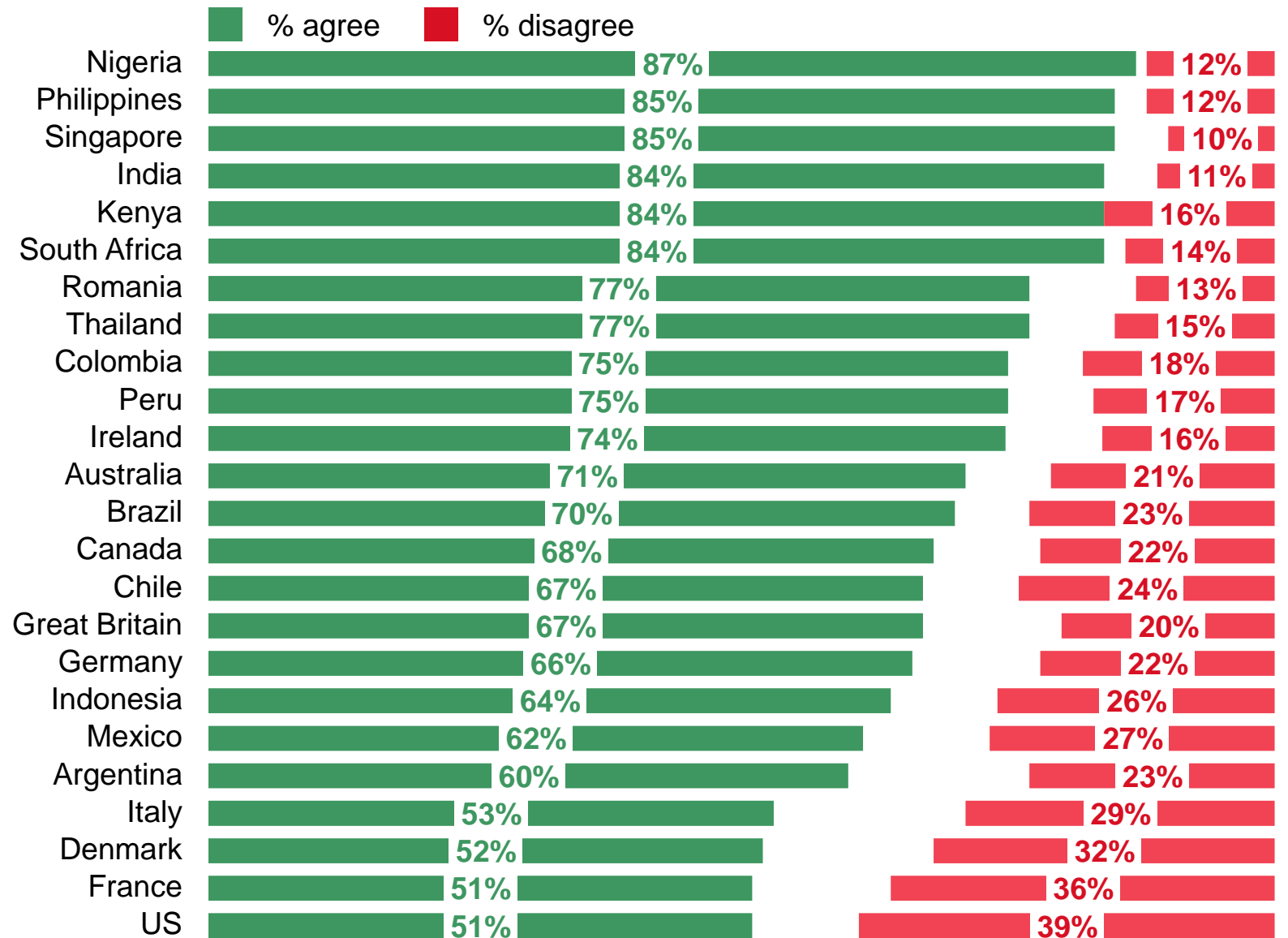


*Ipsos Global Trends Series: 1,000 adults aged 16-75 (18-75 in US and CA) per market per year*



# Many see a role for business in social issues

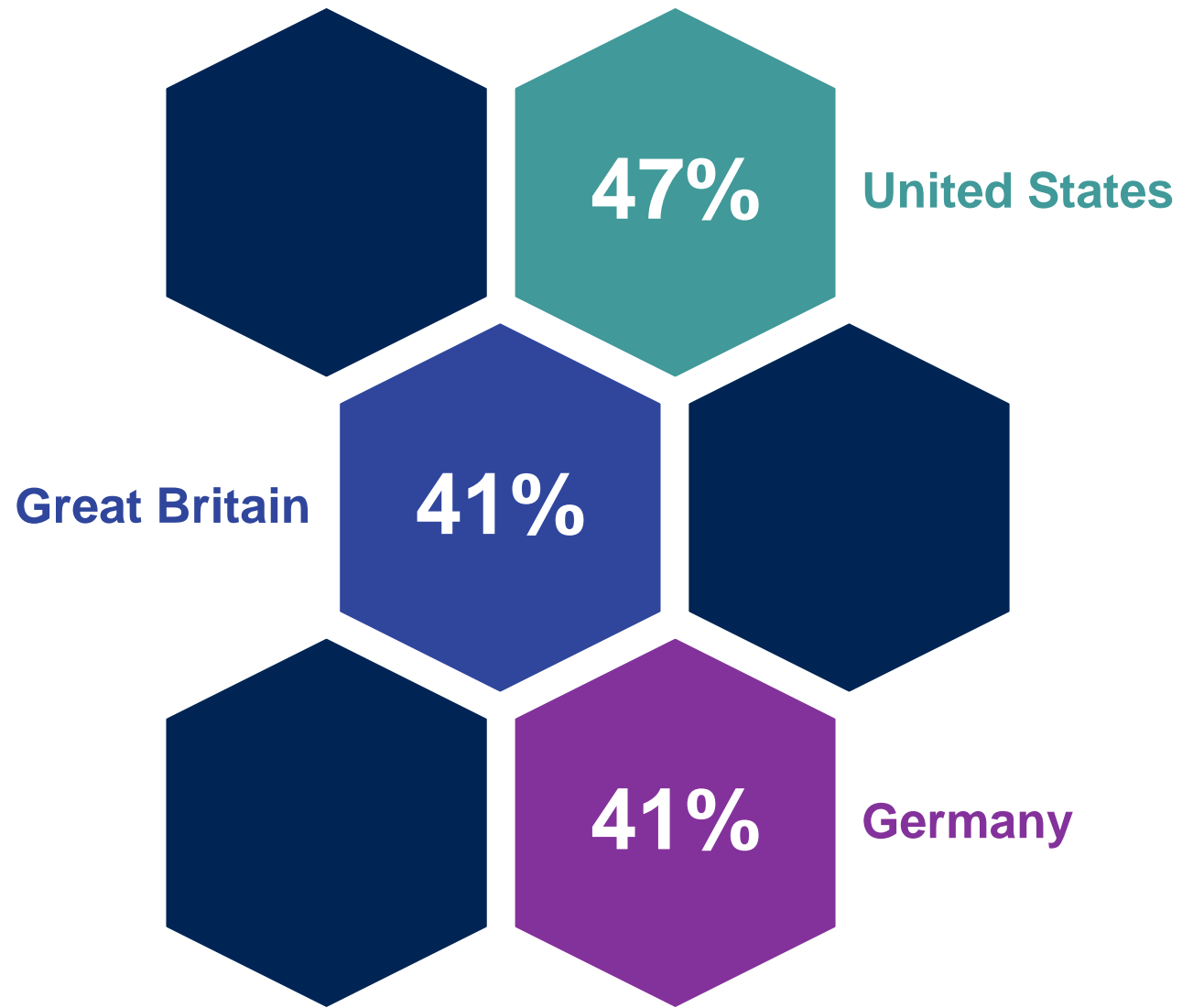
Business leaders have a responsibility to speak out on social and political issues affecting my country



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

# Although not everyone agrees this is a priority...

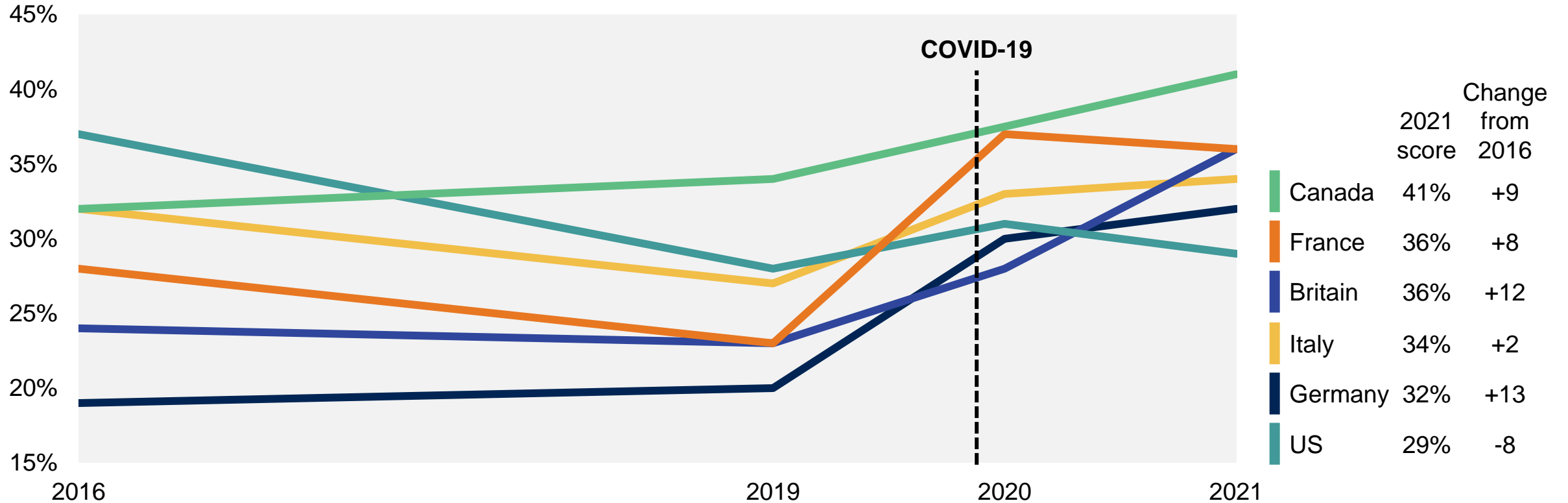
I don't care if a brand is ethically or socially responsible, I just want them to make good products – % agree



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

# Online friction has risen since COVID-19

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



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

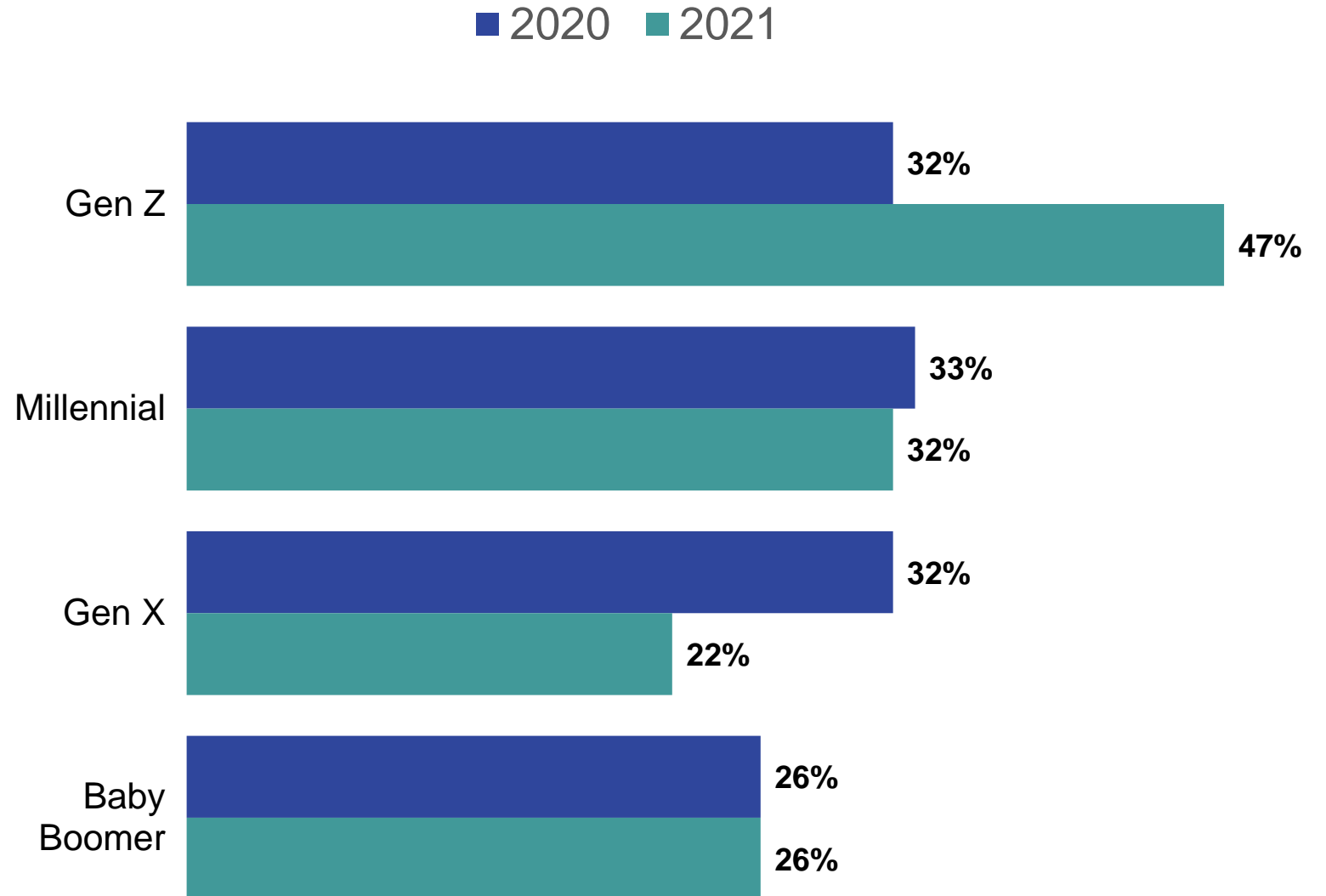




# But who is experiencing the most friction?

## United States

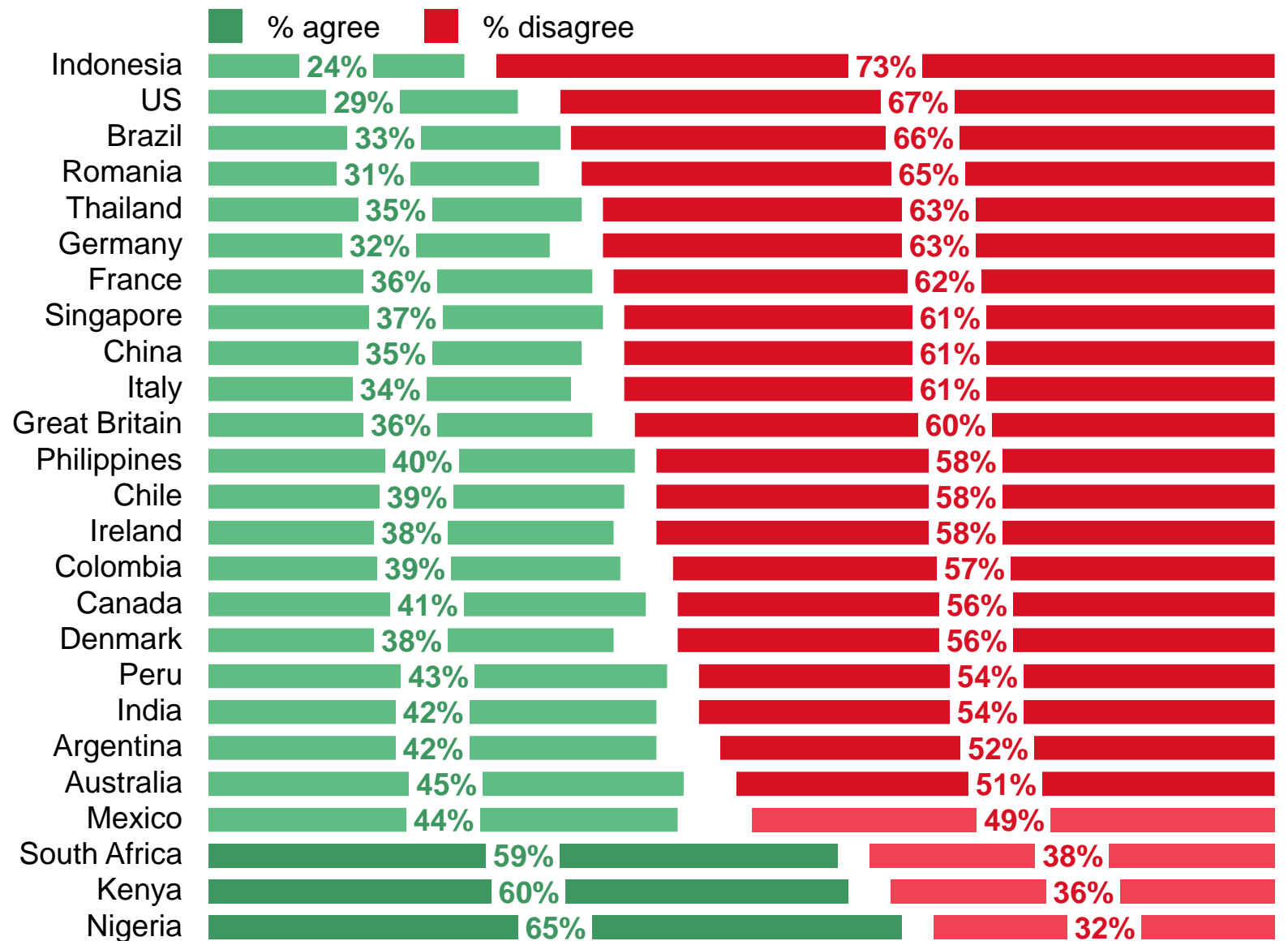
I find shopping online more difficult than shopping in traditional stores – % agree



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

# It remains easier for most however

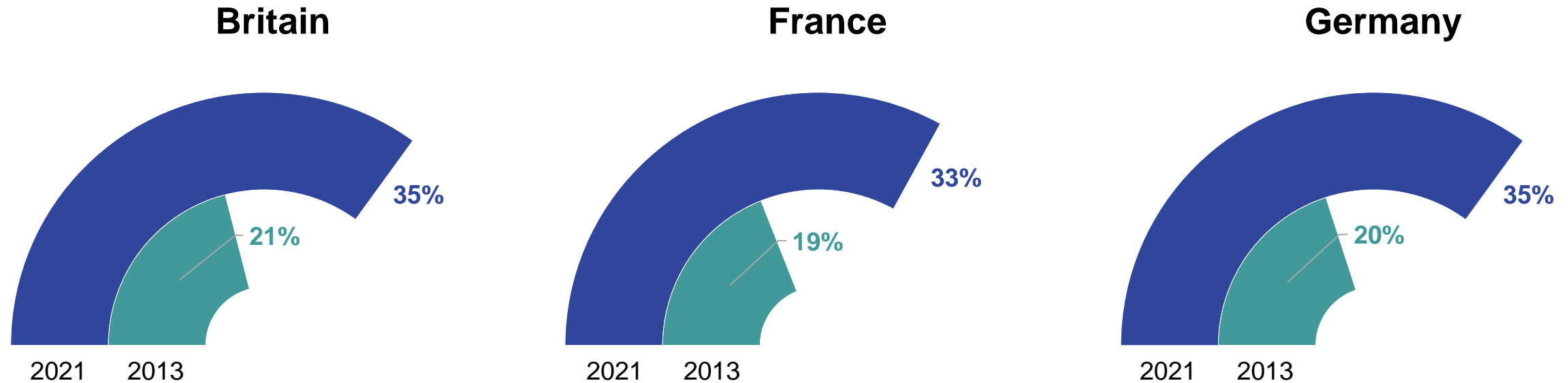
I find shopping online more difficult than shopping in traditional stores



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

# And we also see some growth in comfort with sharing data

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

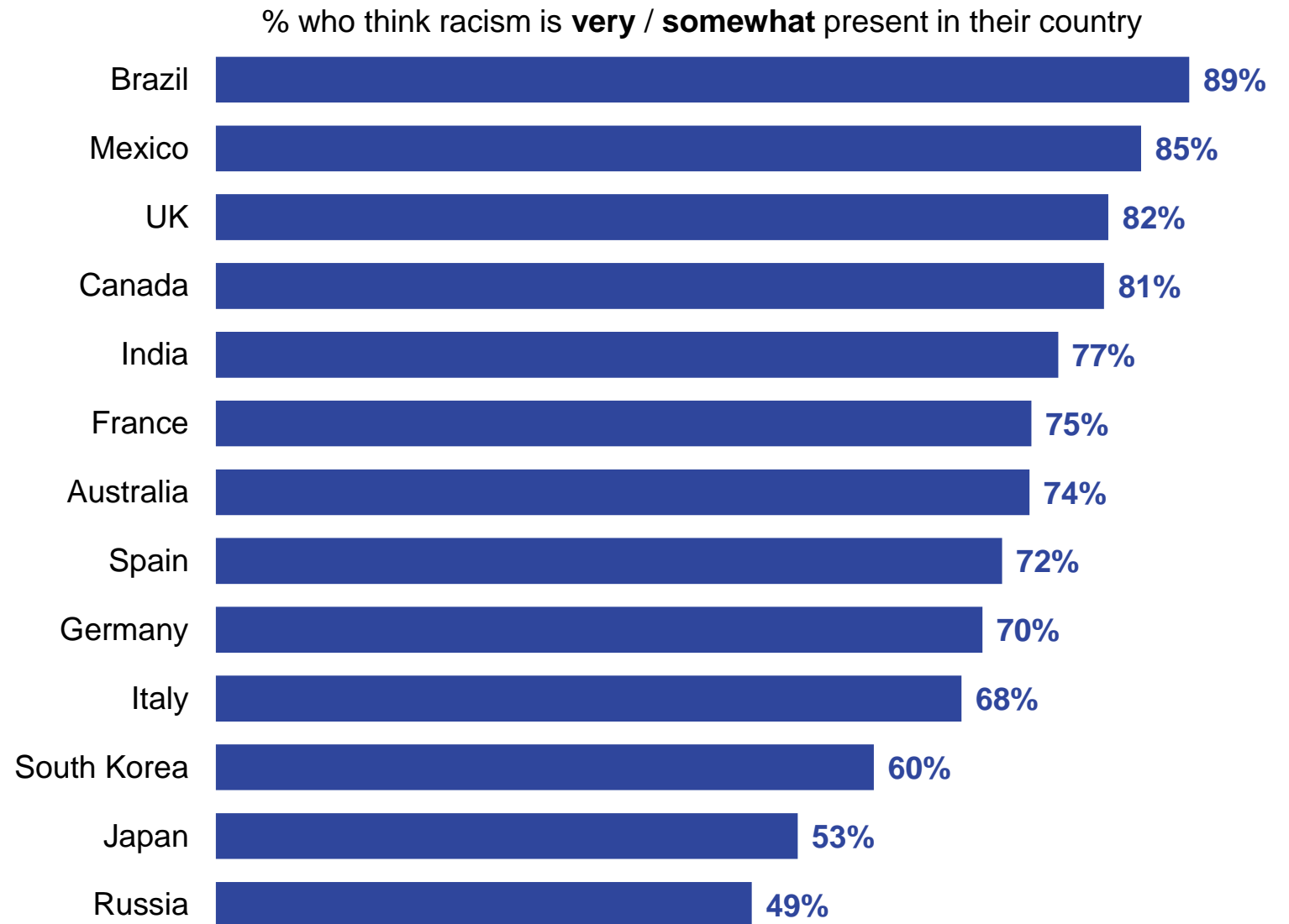


Base: 24,332 adults aged 16-75 (18-75 in US and CA) in 25 markets interviewed August - September 2021



# Black Lives Matter has also changed the narrative

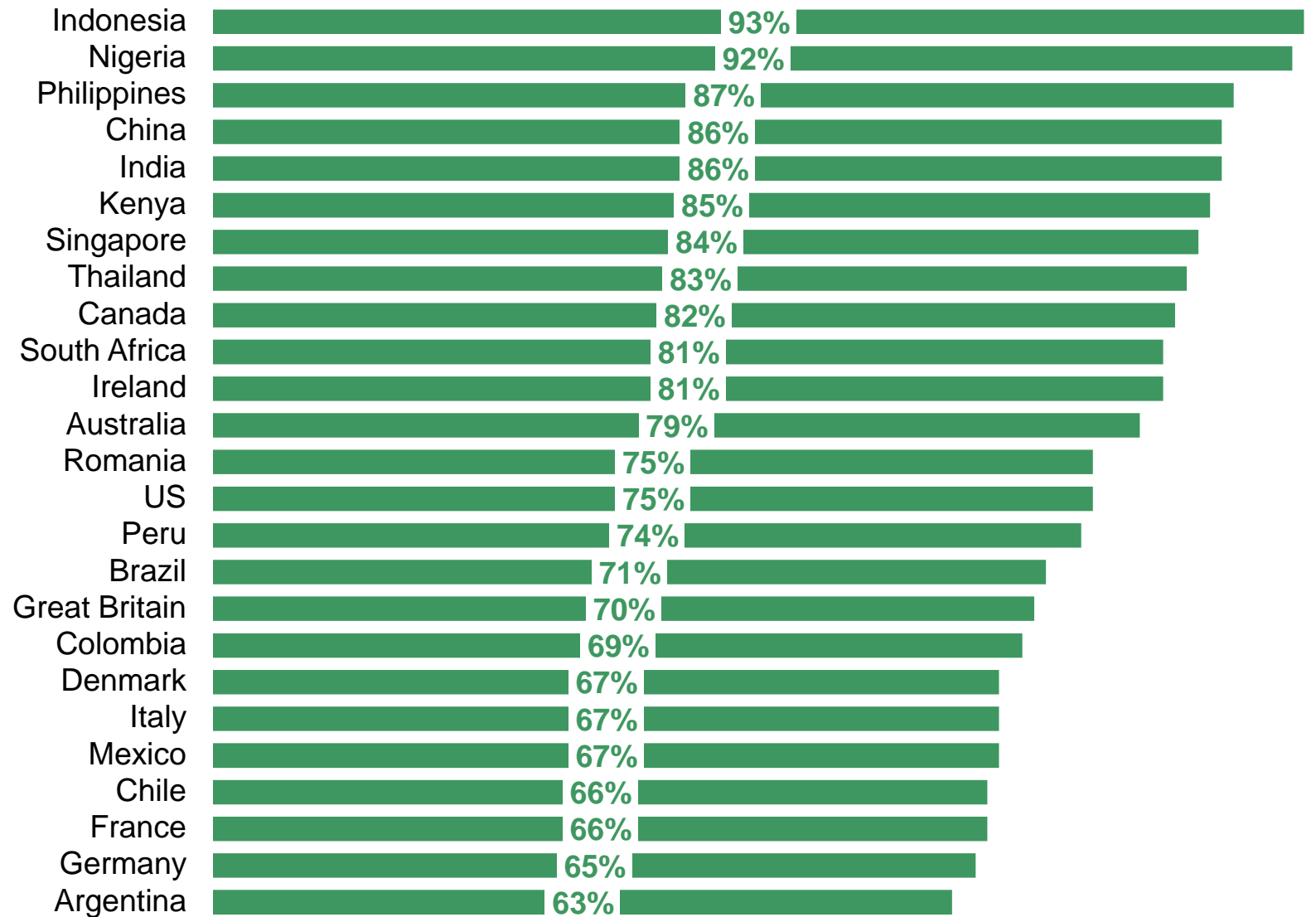
To what extent if at all do you think that racism and other forms of intolerance which is the base of the protests in the United States is present in your country?



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

# While most think they live in cohesive neighbourhoods

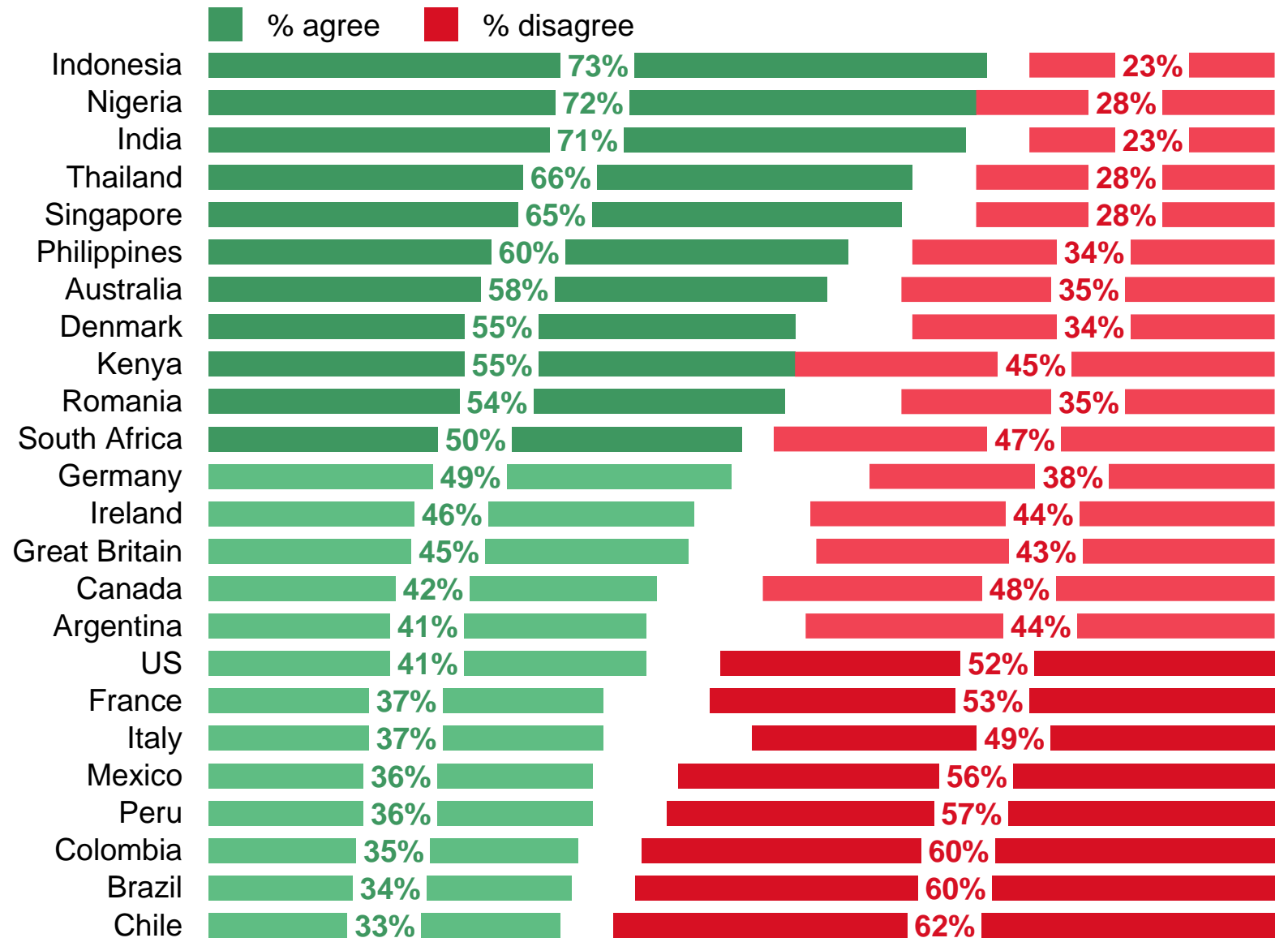
My local area is a place where people from different backgrounds get on well together – % agree



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

# They agree less on how minorities are treated

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



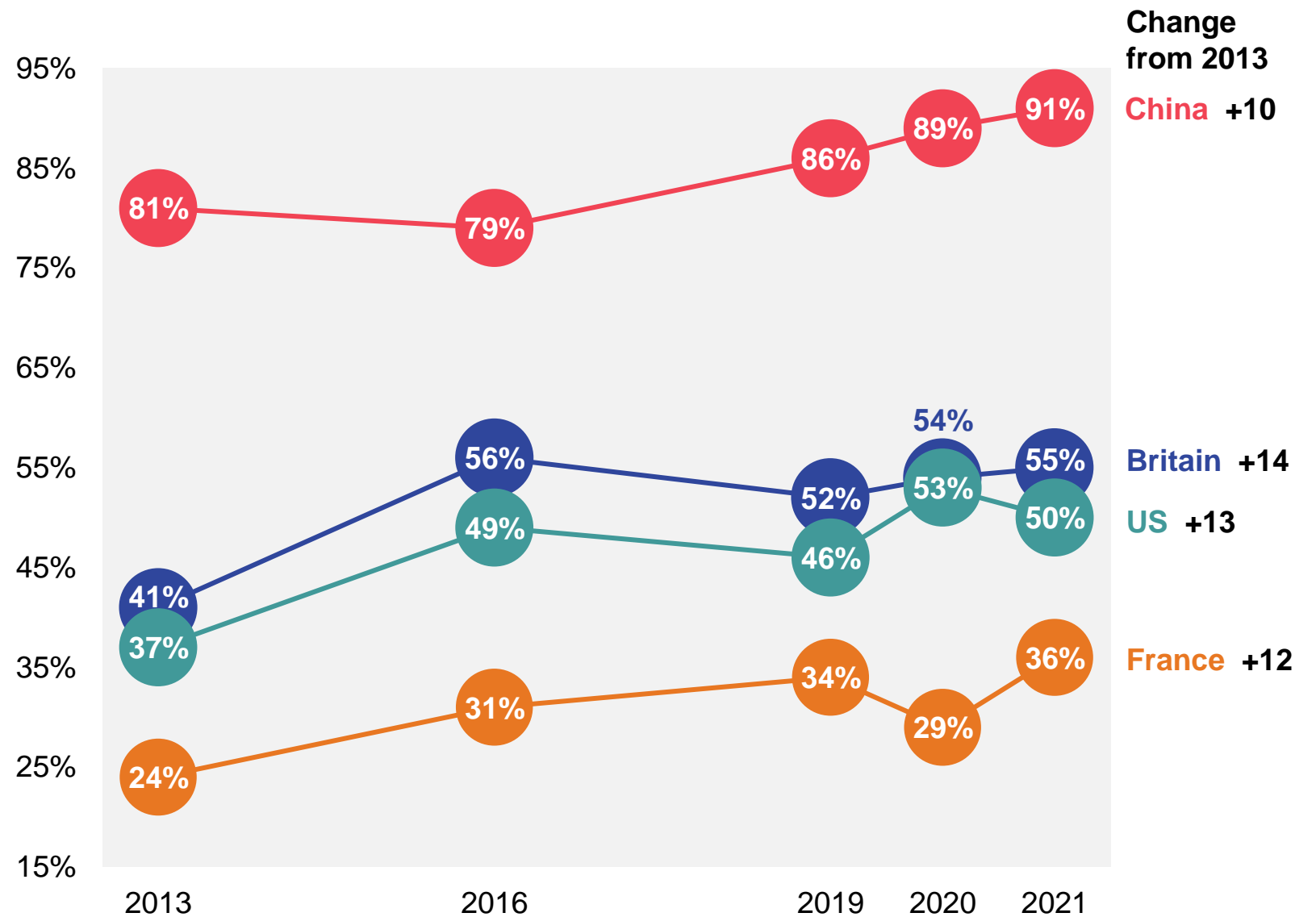
Base: 24,332 adults aged 16-75 (18-75 in US and CA) in 25 markets interviewed August - September 2021



# A globalisation paradox

# Views of globalisation continue to improve

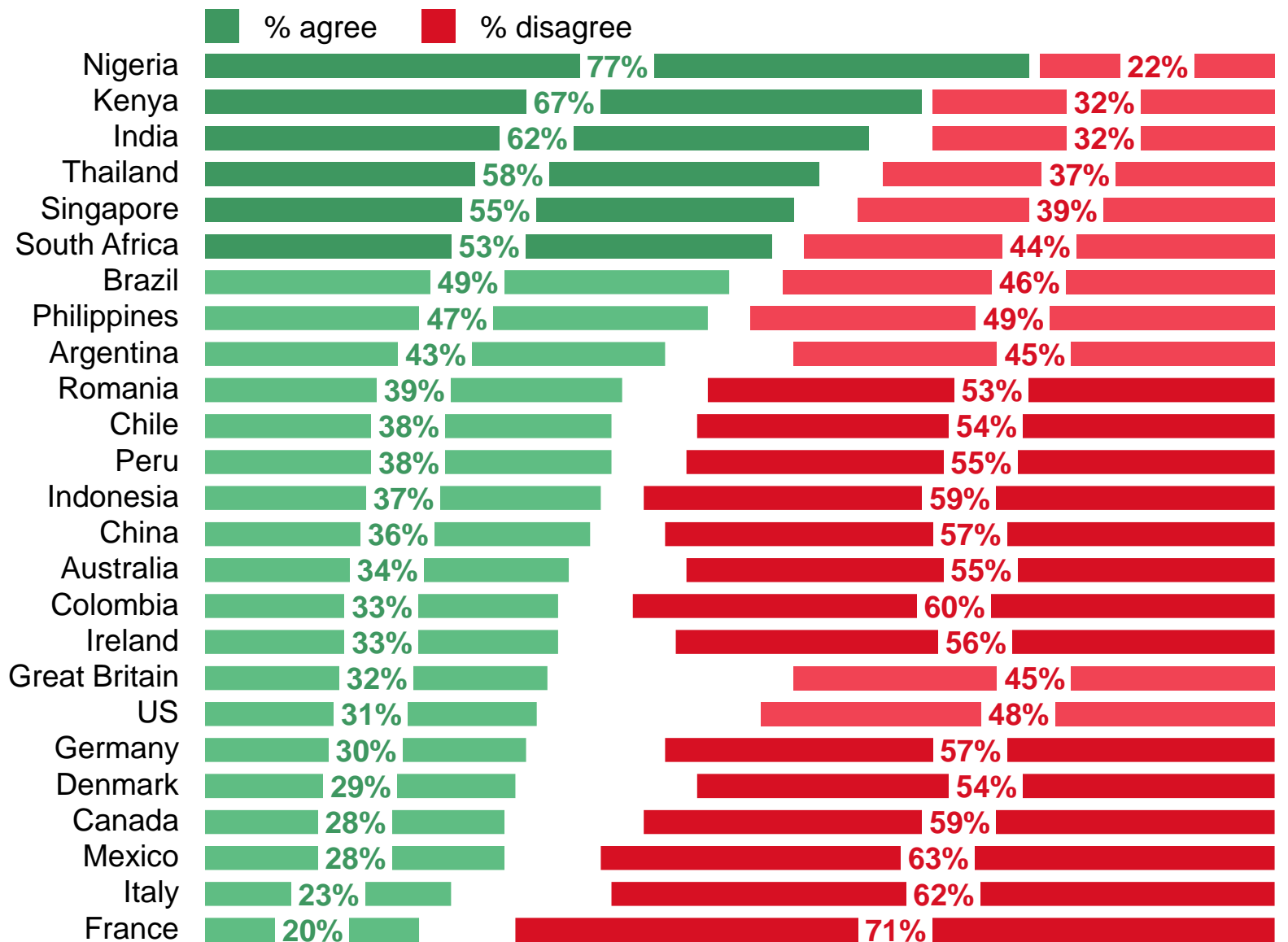
Globalisation is good for my country – % agree



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

# Yet many show a preference for local / national brands

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

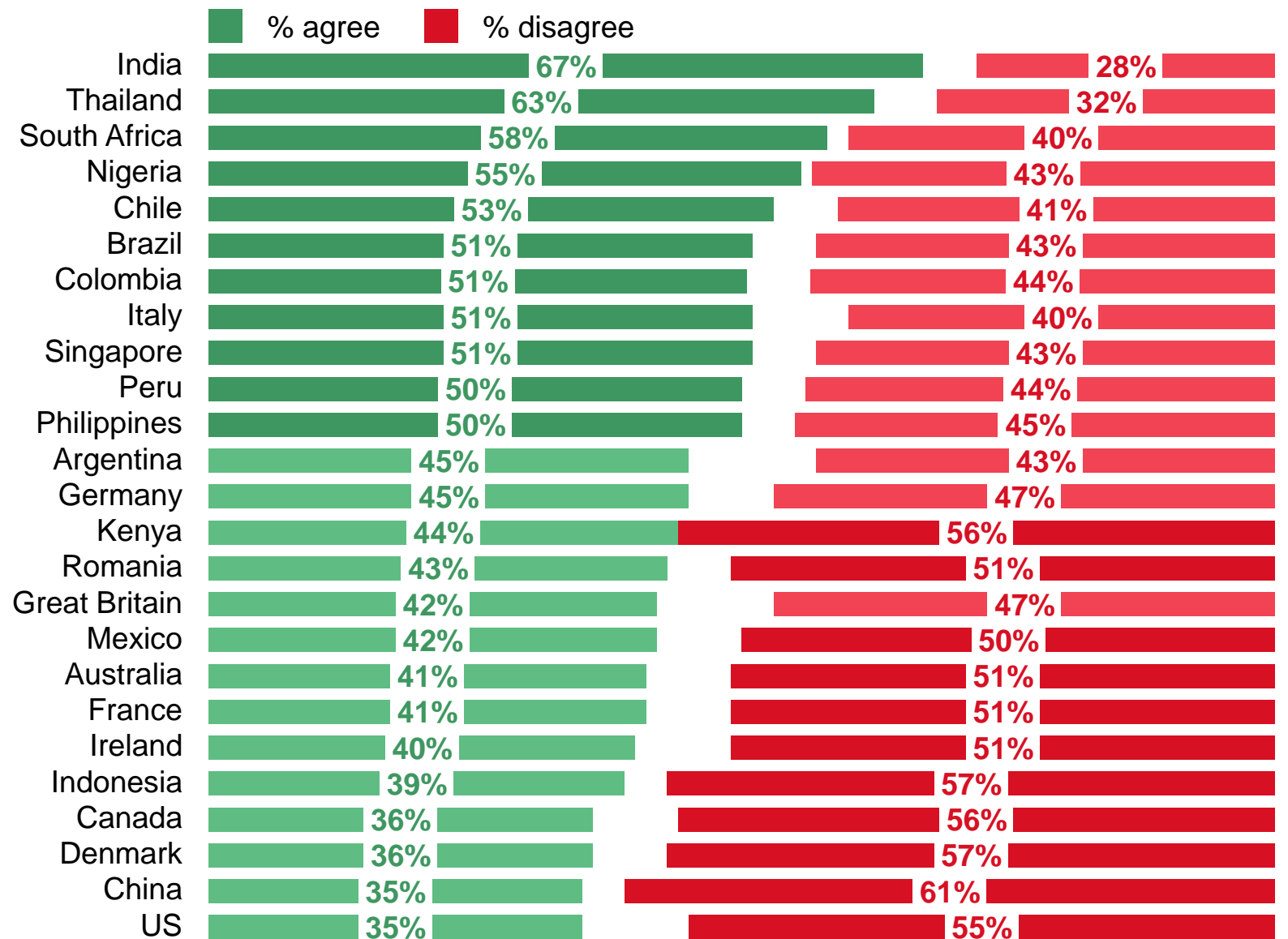


Base: 24,332 adults aged 16-75 (18-75 in US and CA) in 25 markets interviewed August - September 2021



# And feel a closer affinity to the nation

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



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

# Values remain mostly unchanged 1.5 years in

## Still more continuity than change

Climate concern was not interrupted by COVID-19

Link between brand and values/purpose

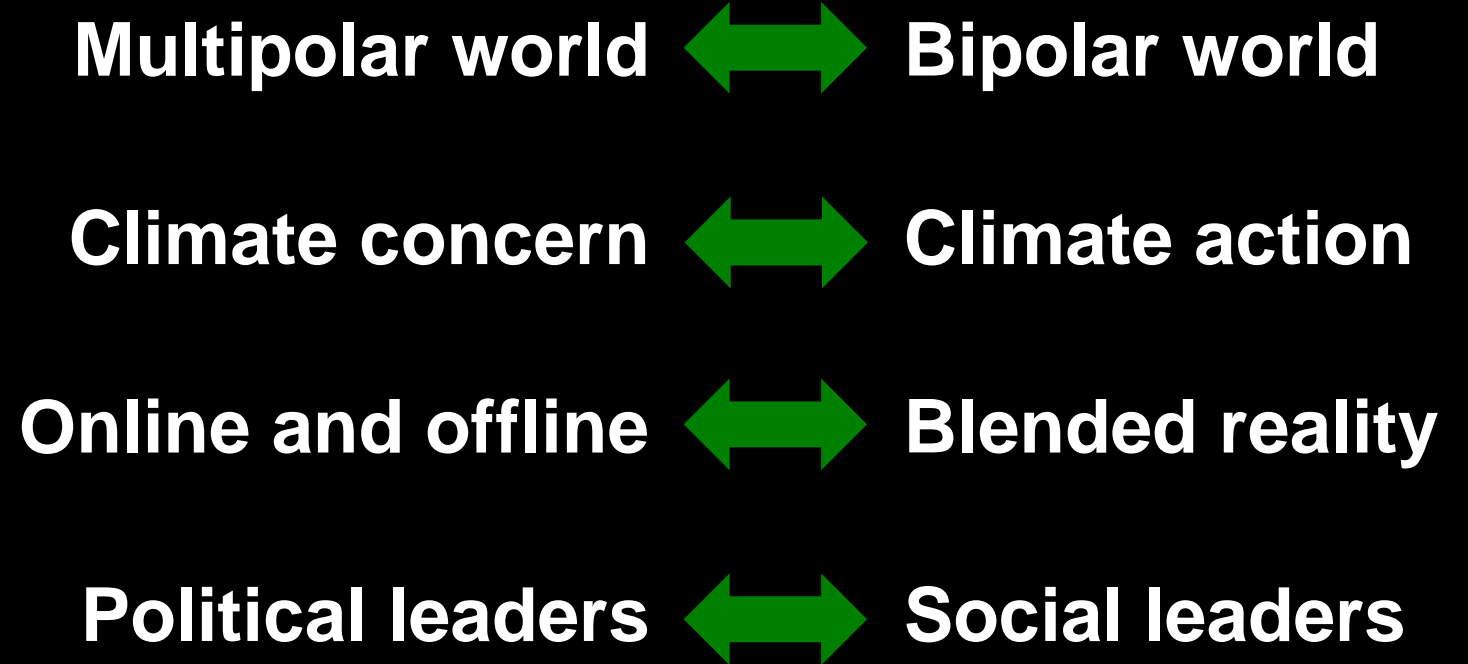
## But we see potential for evolution in some areas

Attitudes to data and online/offline world

Rebalancing between global and local



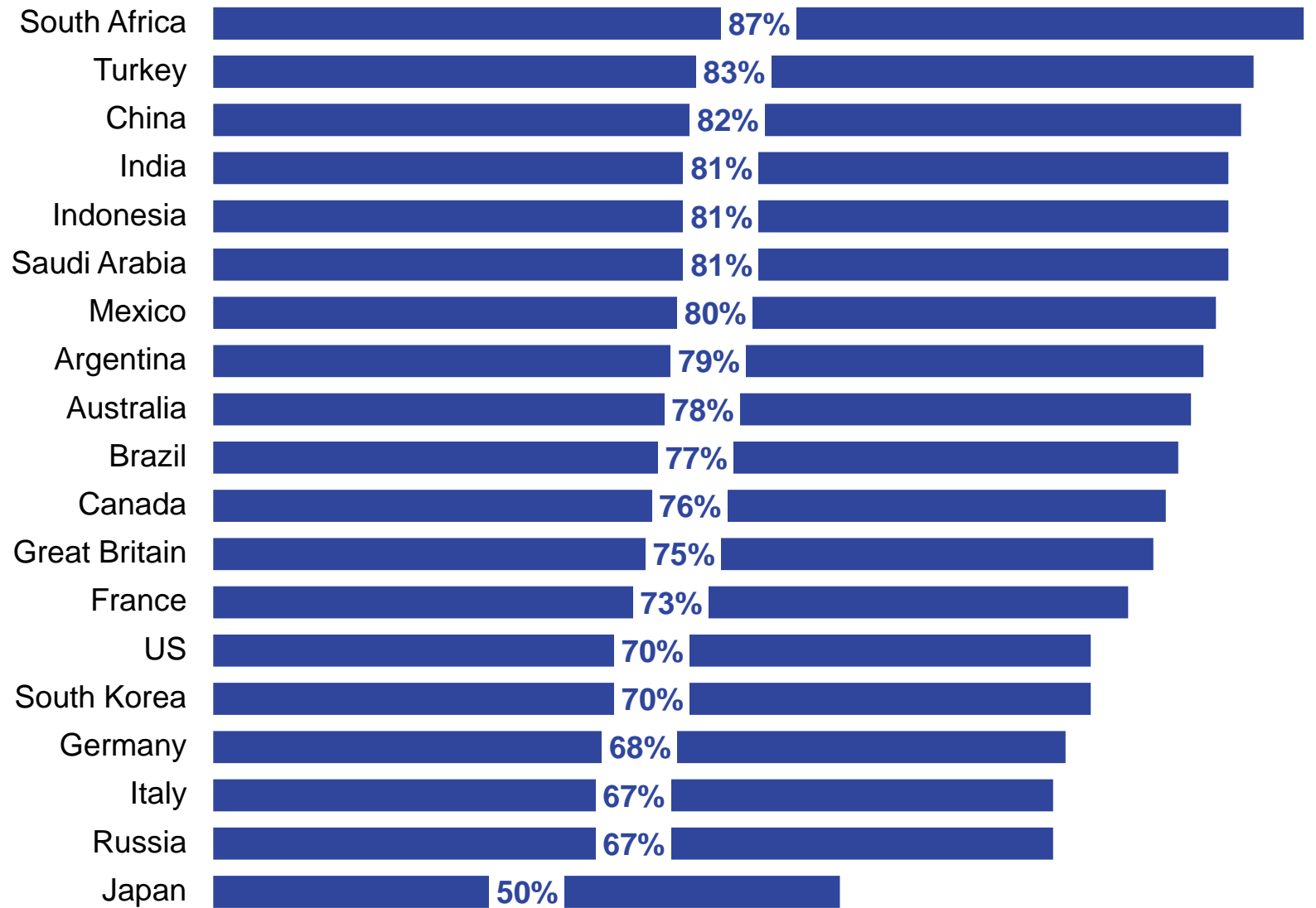
# BUT whether we see it or not, the world is changing fast





# Post pandemic, the capacity for change is there...

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



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

# The question for 2022 is...

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

And who will lead the public to help them adapt?



# IPSOS GLOBAL TRENDS 2021

## TECHNICAL DETAILS

### MARKETS

**25 countries are included in Ipsos Global Trends 2021.** These are Argentina, Australia, Brazil, Canada, China, Chile, Colombia, Denmark, France, Germany, Great Britain, India, Indonesia, Italy, Kenya, Mexico, Nigeria, Peru, the Philippines, Romania, Singapore, South Africa, Thailand and the United States.

### METHOD

In most markets this wave of the survey was carried out online with adults aged 16-75 (18-75 in the US and Canada), using the Ipsos Online Panel. However in some countries where internet penetration is lower different methods were used: in Nigeria and South Africa a face-to-face methodology was employed while Kenya the survey was carried out over the telephone.

The results are weighted to ensure that the sample's composition reflects that of the adult population according to the most recent country census data.

Total global data has not been weighted by population size, but are simply a country average. In established markets with a higher level of internet penetration (more than 60% online), the results can be taken as representative of the general working-age population.

In markets where internet penetration is lower, the results should be viewed as representative of a more urban, affluent and 'connected' population.

### FIELDWORK DATES

- 2021 edition (August-September 2021)
- 2020 edition (September 2020)
- 2019 edition (June-July 2019)
- 2016 edition (September-October 2016)
- 2013 edition (September-October 2013)

### BASE SIZES

In each country a representative sample of online adults aged 16-75 (18-75 in the US) participated in the survey.

In most countries the sample size is approximately 1,000, however a sample size of 500 was used in Peru, Colombia, Argentina and Chile and the South African sample consists of 1,500 participants.

### HISTORICAL DATA

Comparison is made with previous waves of the Ipsos Global Trends Survey in 2020, 2019, 2016 and 2013. In nearly all cases the methodology and sample sizes will be the same in each wave of the panel: c.1,000 adults interviewed through the Ipsos online panel system. Data for South Africa for 2021 utilises a different method to previous waves so caution must be used in making trend comparisons with this data.

More detail on the series can be found here:

<https://www.ipsosglobaltrends.com/technical-details/>