

A NEW WORLD DISORDER?

Navigating a Polycrisis

GLOBAL
TRENDS
2023

The Human Perspective





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We undertook the most **ambitious** Ipsos Global Trends research—ever

48,000+
people

50
global markets

70%
of the world's
population

At a glance: the Ipsos Global Trends



To set the scene

People are not comfortable about the state of things today...

73%

Europe

85%

LATAM

**Worried that
government and
public services will
do too little to help
people in the future**

Strongly agree/Tend to agree

60%

Europe

69%

LATAM

**Wish their country
was run by a strong
leader instead of
the current
government**

Strongly agree/Tend to agree

73%

Europe

72%

LATAM

**Things in their
country are heading
in the wrong track**

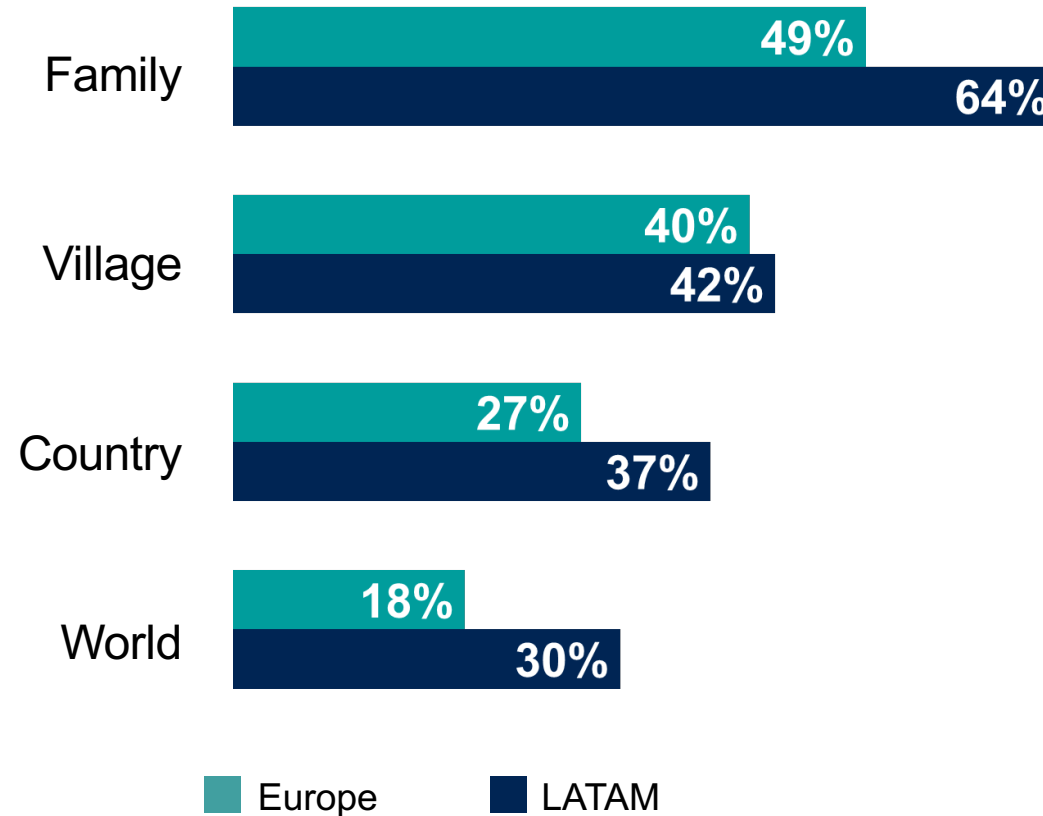
Wrong track

To set the scene

But LATAM is reasonably more optimistic than Europe

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

Very/Fairly optimistic



70%

I feel **very proud of**
my country

Strongly agree / Tend to agree

To set the scene

And prouder of their own countries

Europe

59%

LATAM

74%



CLIMATE ANTAGONISM

Climate Antagonism: Driving Forces

1

Climate
change

**2**

Over-
development

**3**

A greener
way of
thinking

**4**

Alternative
value
structures

**5**

Plateau of
globalisation

**6**

Rethinking
institutions

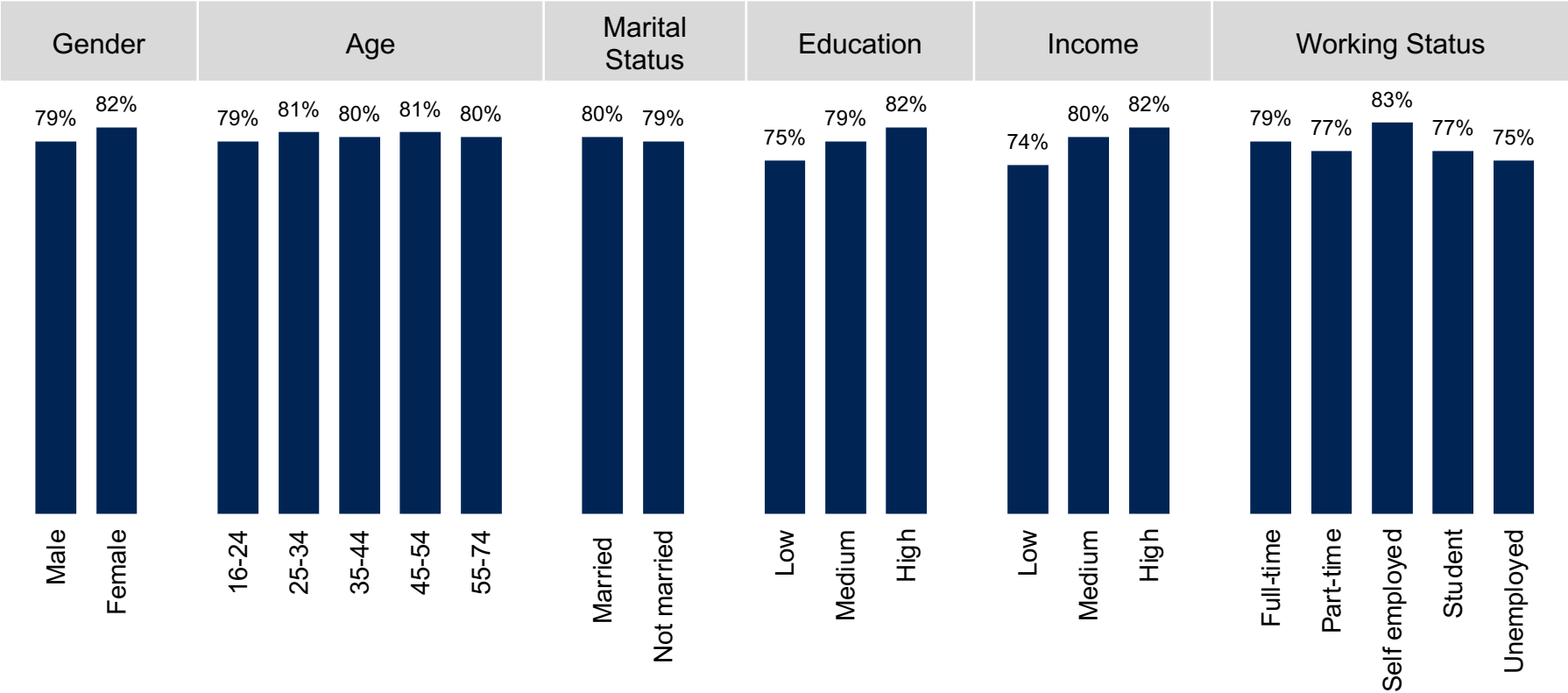


80%

of global citizens feel
we are heading for
environmental
disaster unless we
change our habits
quickly

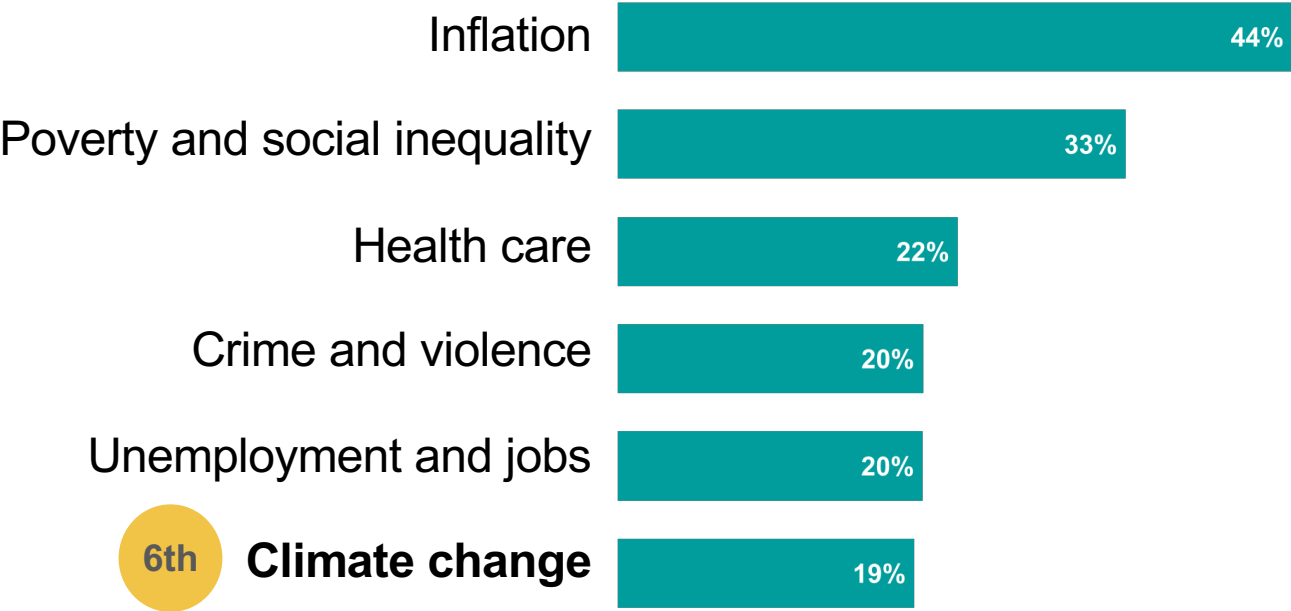
Concern about the environment is ubiquitous across groups

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



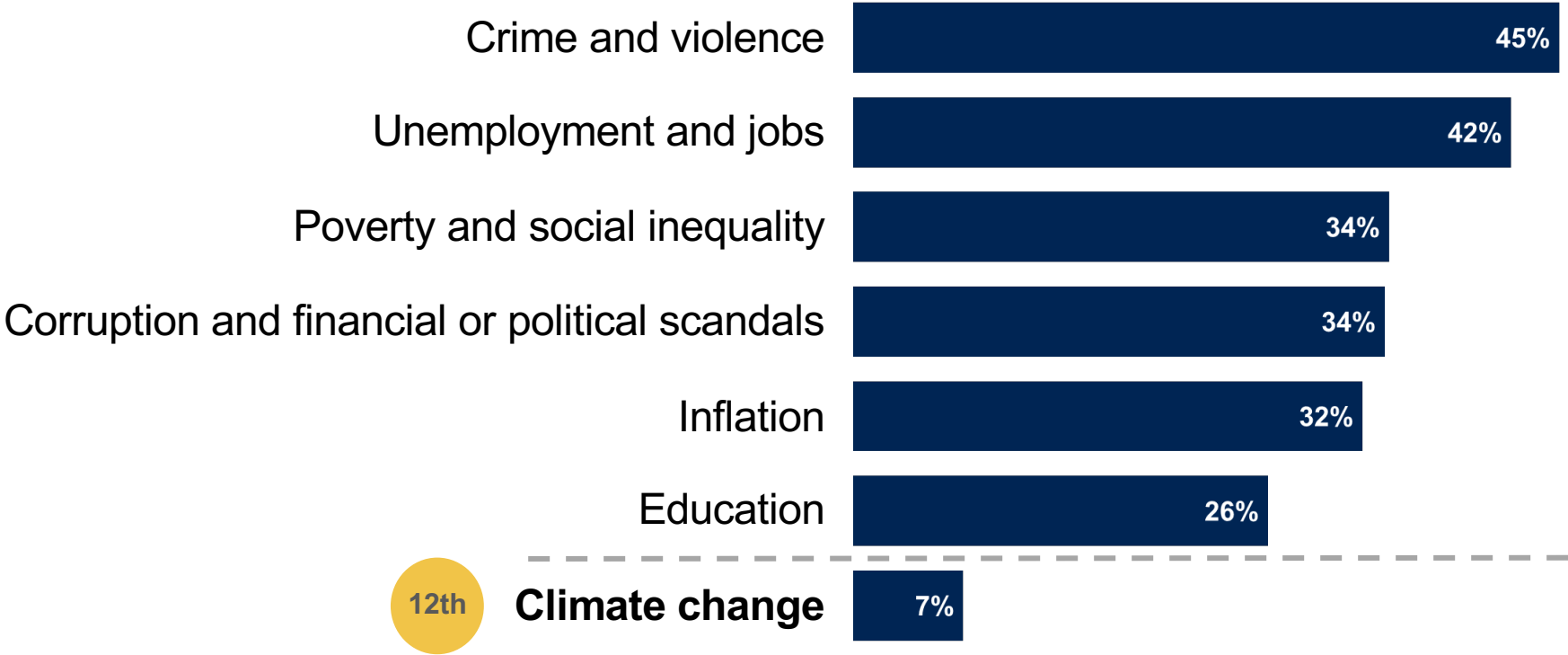
Europe: Different geographies, different worries

Which three of the following topics do you find the most worrying in your country?



LATAM: Different geographies, different worries

Which three of the following topics do you find the most worrying in your country?





Less mentioning is not necessarily less worried

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

Strongly agree / Tend to agree

Europe

76%

LATAM

84%

Base: 7,000 Europeans and 6,000 Latin American adults aged 16-75, interviewed online 23 September – 14 November 2022

Progress will require concerted action from governments, corporations, NGOs and citizens alike.

How can we guide, educate and promote sustainability practices when consumers are dealing with other concerns?



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CONSCIENTIOUS HEALTH

Conscientious Health: Driving Forces

1

Systemic
health
inequality

**2**

Growing
mental
health crisis

**3**

Ageing
populations

**4**

Pervasive
technology

**5**

AI advances
& quantum
computing

**6**

Integration
of health &
technology



86%

of global consumers
agree “I need to do
more to look after
myself physically”

86%

Agree that “I need
to do more to look
after
myself physically”

Strongly agree / Tend to agree

Countries with smaller GDP tend to focus more on the effects of physical health

Europe

80%

LATAM

90%

80%

Agree that “I need
to do more to look
after my mental
wellbeing”

Strongly agree / Tend to agree

But a holistic vision of health is important to both regions, especially in LATAM

Europe

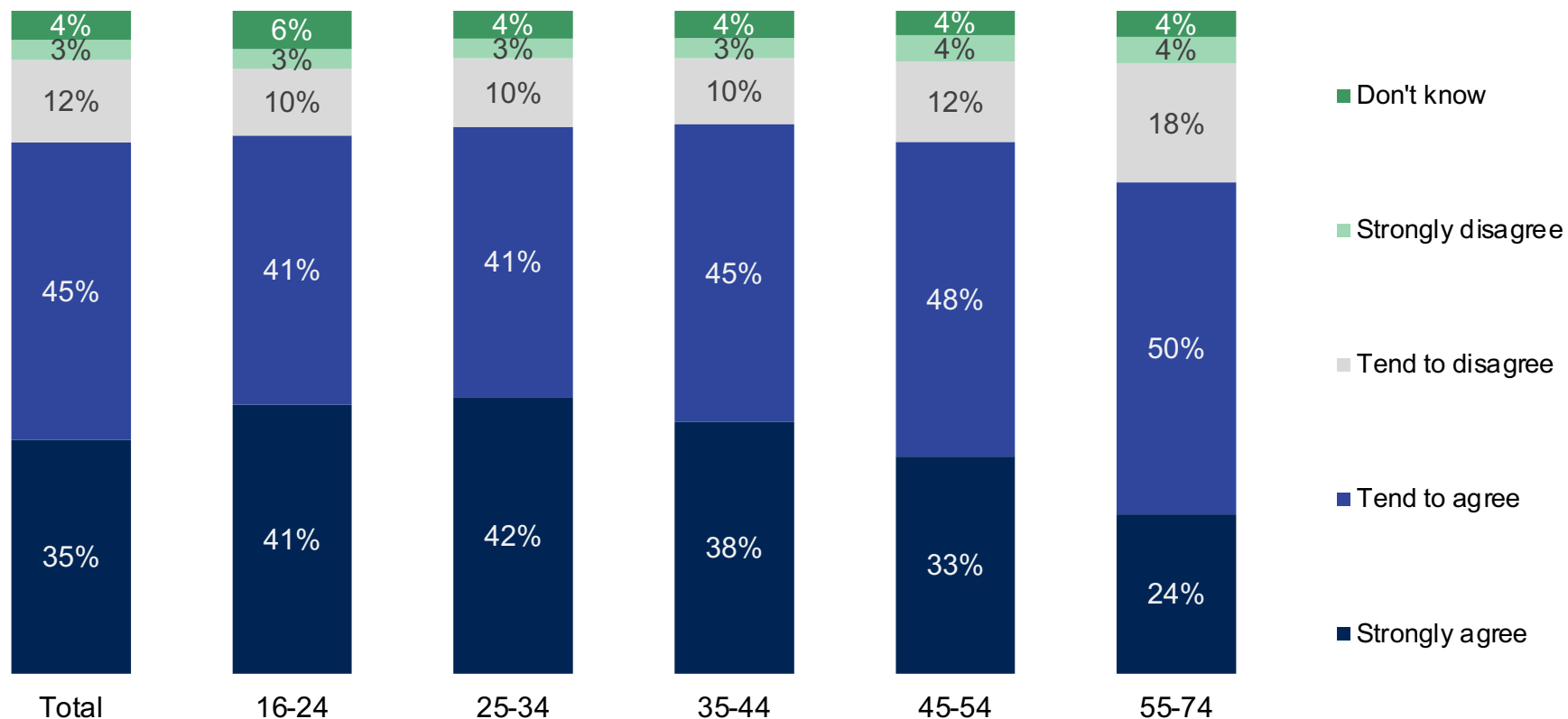
71%

LATAM

87%

“I need to do more
to look after my
mental wellbeing”

While mental health is a challenge for all ages, it is the young who feel it most acutely



Health is increasingly understood as a holistic system beyond just physical wellbeing.

How do institutions can support a more integrated view of health – for customers, employees, and community?



DATA DILEMMAS

81%

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

Data Dilemmas: Driving Forces

Most Impactful Macro Forces

1

Pervasive
technology



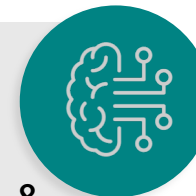
2

The
immersive
frontier



3

AI
advances &
quantum
computing



4

Increased
automation



5

Toll of
technology



Most people accept the trade-off between data given and consequent gains

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

Strongly agree / Tend to agree

Europe

77%

LATAM

84%

However, there is less anxiety about how governments use private data in Europe

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

Strongly agree / Tend to agree

Europe

62%

LATAM

76%

It's not always clear to consumers how their data is being used.

**How transparent is your organisation willing to be with your data practices?
What will you deliver in terms of benefits when asking for personal data?**

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2023**



PEAK GLOBALISATION

Peak Globalization: Driving Forces

1

Plateau of
globalisation

**2**

Security
dilemmas

**3**

Rethinking
institutions

**4**

Rise & fall
of middle
classes

**5**

Impacts of
inflation

**6**

Community
migration



62%

think that
“globalisation is good
for me personally”

Despite being proud of their countries, LATAM people see themselves as citizens of the world

74%

I would like to experience **living in different parts of the world**

Strongly agree / Tend to agree

Europe

62%

LATAM

88%

And have stronger expectations about what globalization can do for their countries

66%

of global citizens
agreed that
“globalisation is
good for my
country”

Strongly agree / Tend to agree

Europe

51%

LATAM

69%

Base: 7,000 Europeans and 6,000 Latin American adults aged 16-75, interviewed online 23 September – 14 November 2022

There is also a different perception of global brands performance which may be aspirational in LATAM

48%

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

Strongly agree / Tend to agree

Europe

36%

LATAM

50%



56%

**Finding a right balance
between global and local is
imperative.**

**Where does your organization
sit along the global-to-local
continuum, and can or should
this positioning be flexed?**

REACTIONS TO UNCERTAINTY AND INEQUALITY

60%

wish their country
was run by a strong
leader instead of the
current elected
government

Reactions To Uncertainty and Inequality: Driving Forces

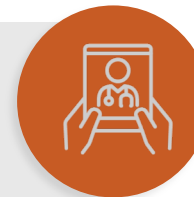
1

Rethinking
institutions



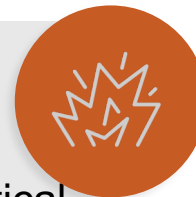
2

Systemic
health
inequality



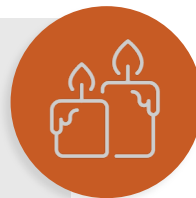
3

Increase
in geopolitical
conflicts



4

Greater
ethnic &
religious
diversity



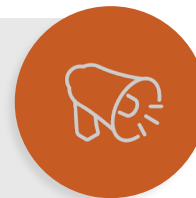
5

Rise and
fall of middle
classes



6

Entren-
ched
Inequality



Even on local grounds polarization reveals an increase of conflict and protest

77%

In my country, there is **more and more conflict between people who don't share the same values**

Strongly agree / Tend to agree

Europe

75%

LATAM

85%

In a world where uncertainty is a certain, people struggle to keep the pace

83%

The **world is
changing too fast**

Strongly agree / Tend to agree

Europe

74%

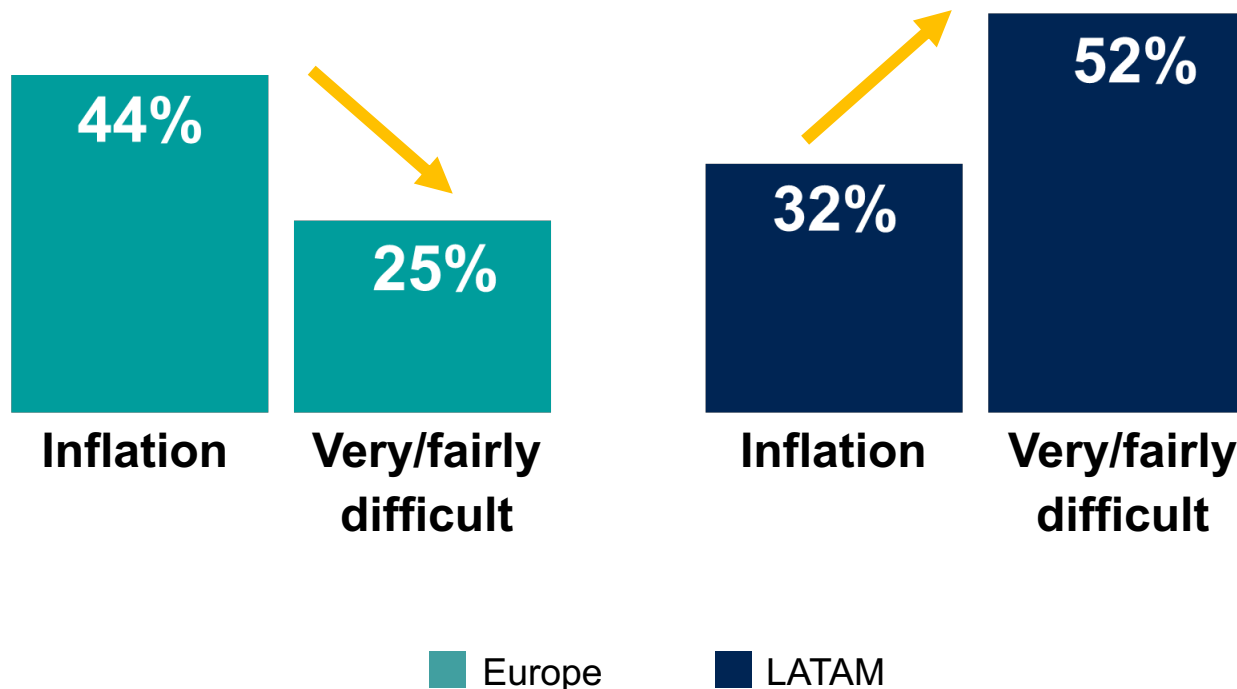
LATAM

91%

Inflation is a key concern in Europe, even though LATAM people are feeling more difficulties

Which three of the following topics do you find the most worrying in your country?

How well would you say you are managing financially these days?



**Helping people feel stable
and valued helps them deal
with uncertainty and
inequality.**

**How to deliver consistency
to customers and citizens in
the face of uncertainty?**



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SEARCH FOR SIMPLICITY AND MEANING

73%

wish they could slow
down the pace of
their life

Search For Simplicity And Meaning: Driving Forces

1

Community
migration



2

Alternative
value
structures



3

Over-
development



4

Pervasive
technology



5

A greener
way of
thinking



6

Increasing
geopolitical
conflicts



We share an assertive desire for a simpler life

73%

I wish **my life was
more simple**

Strongly agree / Tend to agree

Europe

70%

LATAM

71%

On top of this desire for a simpler life, LATAM strongly wishes to decelerate

73%

I wish I could slow
down the pace of
my life

Strongly agree / Tend to agree

Europe

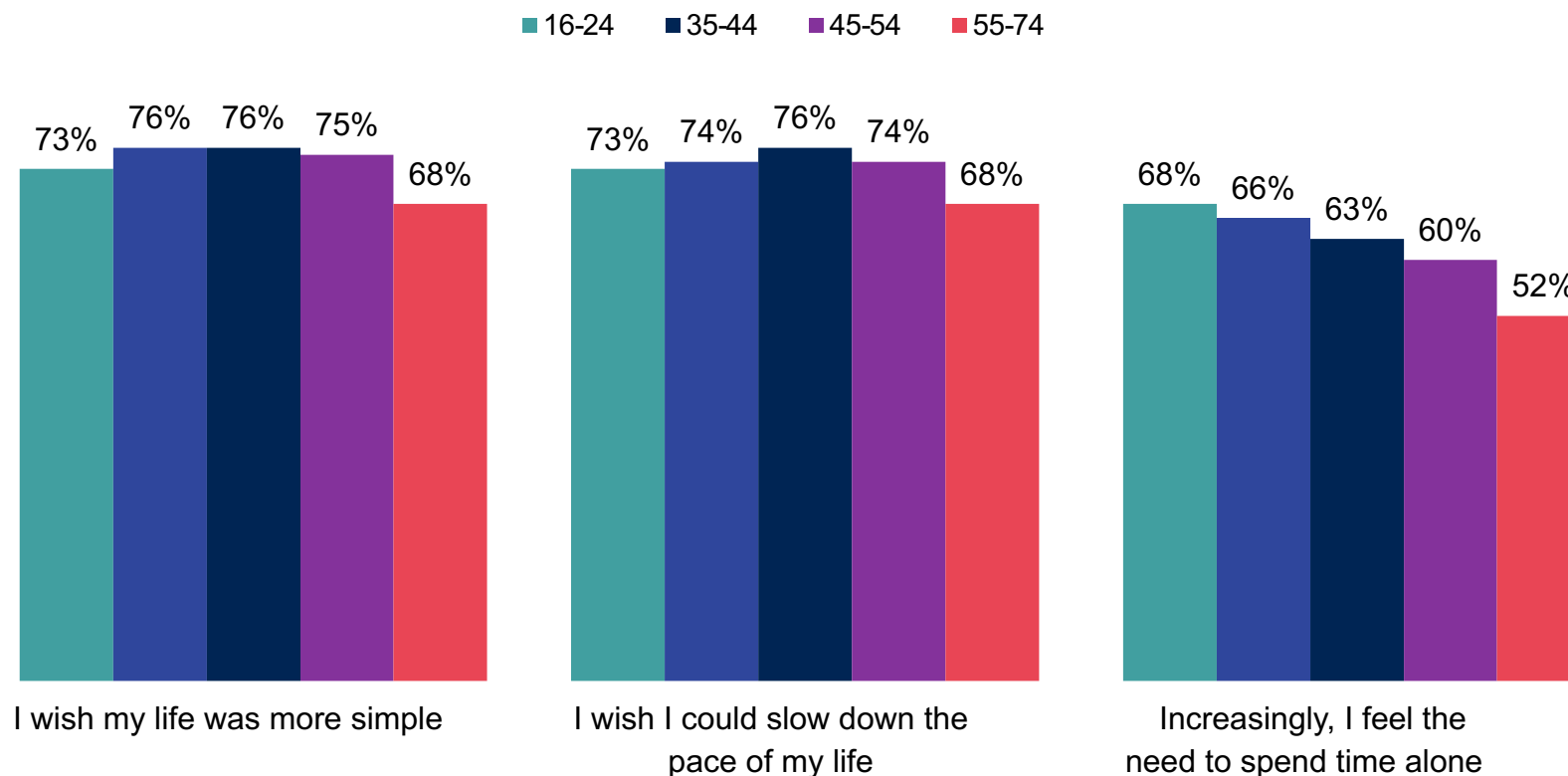
67%

LATAM

86%

Simplicity is important for everyone, though the desire for solitude declines with age

To what extent do you agree or disagree with the following statements?



Avoid the temptation to complicate things.

How do you balance the need to offer your people a good work–life balance with the need to reduce costs and maintain productivity?
How to communicate in a simple way, not requiring too much mental resources?

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IN SUMMARY

In summary: relevant similarities but also significant differences between regions

1

Citizens are worried about many dimensions of our world

People are feeling the economic uncertainty deeply, with implications on their wallets and lifestyle, but also on their emotions and values.

The majority in both regions think the government will do too little to help them in the years ahead.

2

But we show different levels of resilience

LATAM is more confident about the future, especially their family and the world. Also, LATAM people are proud of their countries.

Europeans show disbelief in institutions, governments, companies, and people.

3

And we don't always agree on solutions

There are age and regional differences regarding concern and responsibility for climate change.

Europe and LATAM are in different stages of globalization.

There is a balance that needs to be achieved between global and local.

Thank you!

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