

A NEW WORLD DISORDER?

Navigating a Polycrisis

GLOBAL
TRENDS
2023

Quirks Chicago – March 27





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Ipsos Strategy3 isn't a consulting firm, research agency, or innovation lab. **We're all three.**



Our areas of expertise



Corporate/Business Strategy

Determining the right markets in which to play, and how to win



Brand Strategy

Developing strategies to help your brand and products stand out



Customer/Consumer Strategy

Understanding and reaching the right customers



Innovation Strategy

Planning and conceptualizing new products and offers



Sustainability & DEI Strategy

Transforming impact and equity



Trends and Foresight Strategy

Anticipating and shaping the future

We're entering a New World Disorder...



...a world not in
crisis, but in
crises

It's a polycrisis...

“ A polycrisis is not just a situation where you face multiple crises. It is a situation... where the whole is even more dangerous than the sum of the parts.

Adam Tooze, author & professor at Columbia University



...with three themes emerging

1

**An economic crisis
hitting our wallets,
and hearts**

2

**A crisis of
tensions between
global & local**

3

**A climate crisis
we want & need
to solve**

But there are **longer-term forces** influencing the world, as well.

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

48,000+
people

50
global markets

70%
of the world's
population

The result is a toolkit to help you navigate change. Today, we'll share a few relevant macro forces and trends...



**GLOBAL
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2023**

MACRO FORCES

We've identified 6 macro forces impacting societies, markets and people



Societies in Flux

- Aging populations
- Community migration
- Life stage evolutions
- Greater ethnic & religious diversity
- Identity fluidity



Tech-celeration

- Pervasive technology
- The immersive frontier
- AI advances & quantum computing
- Increased automation
- Toll of technology



Inequalities and Opportunities

- Rise & fall of middle classes
- Employee power shift
- Generational wealth disparities
- Impacts of inflation
- Alternative value structures



Environmental Emergencies

- Climate change
- A greener way of thinking
- Over-development



Political Splintering

- Plateau of globalization
- Security dilemmas
- Rethinking institutions
- Increasing geopolitical conflicts
- Entrenched inequality



Well-rounded Well-being






- Growing mental health crisis
- Systemic health inequality
- Integration of health & technology

Highlighting a few examples...

Societies in Flux

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AGING POPULATIONS

The population is aging in most countries, creating a brain drain for businesses and putting pressure on economies and social care programs. The birth rate is below the replacement rate everywhere in the world, except Africa.



How will your products and services change to suit an older audience with unique needs?



THE TOLL OF TECHNOLOGY

Many are pushing back on technology: Gen Z are using social media less often than prior years, there are anti-tech actions, and information overload has reduced our collective attention span.



**How can you
help consumers
be present while
being
connected?**



SMASH
Patriarchy
and
Capitalism

ENTRENCHED INEQUALITY

Global progress in reaching pay parity between men and women slowed down because of women dropping out of the labor force during/after the Covid-19 pandemic. Systemic racism has become more broadly acknowledged, and long-standing inequities are being surfaced and rectified.

SMASH
Patriarchy
and
Capitalism



In a culture and industry which are systemically unfair, how can you create true equity?

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2023**

THE TRENDS IN 2023

At a glance: the Ipsos Global Trends





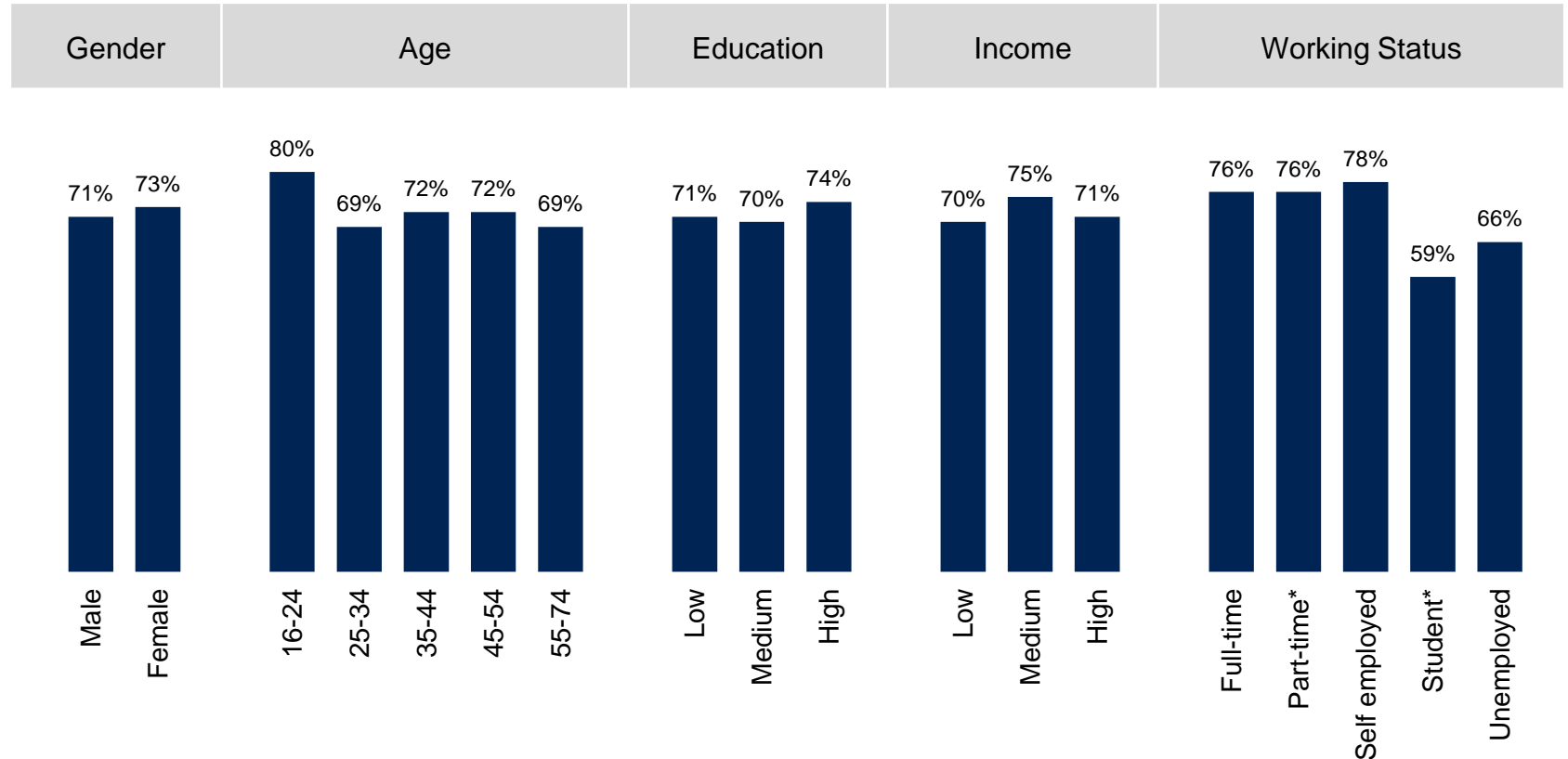
CLIMATE ANTAGONISM

Climate Antagonism: Driving Forces



72%
of Americans feel we are heading for environmental disaster unless we change our habits quickly, vs 80% of global citizens

Concern about the environment is consistent across U.S. groups

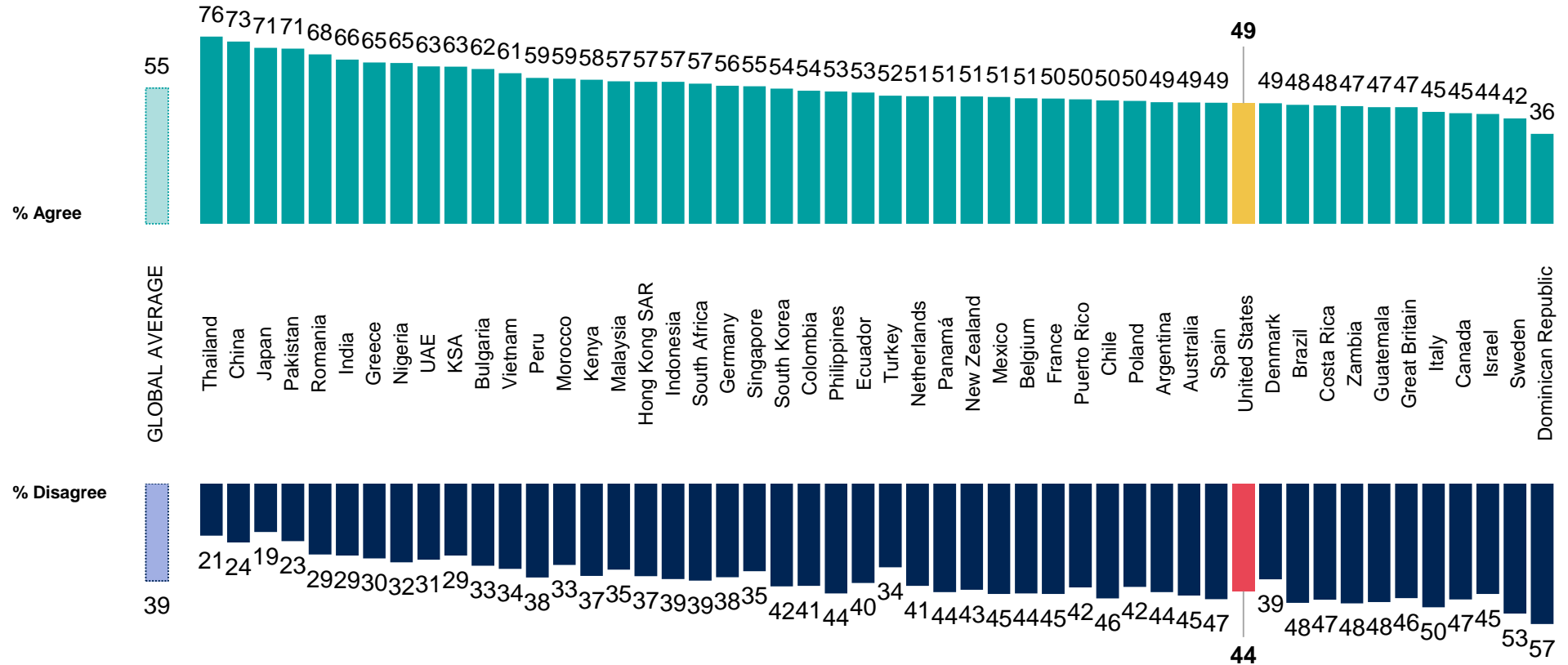


“We are heading for environmental disaster unless we change our habits quickly”

But there are worrying signs of a pushback

55%

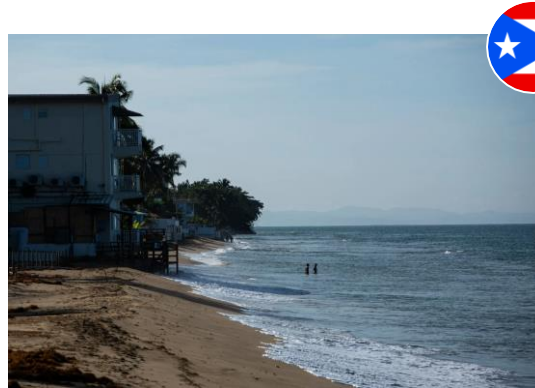
Of global citizens believe that
“Even the scientists
don't really know
what they are
talking about on
environmental
issues”



There is a great deal of innovation in sustainability, such as emissions reductions, lower resource usage and resource reuse



In **Nigeria**, farmers and herders are in conflict for arable land, due to desertification and flooding. (via [BBC](#))



In the U.S. territory of **Puerto Rico**, years of climate-change-driven hurricanes have eroded precious beaches. (via the [New York Times](#))



In **Australia**, new records have been set every year for solar roof installations. Almost one in three households have solar panels — the highest rate in the world. (via [ABC](#))



In **Romania**, plans have been solidified to move away from coal to more sustainable forms of power with support from the European Commission. (via [IEEFA](#))

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

What is your business doing to cooperate and solve for the climate crisis?





PEAK GLOBALIZATI ON

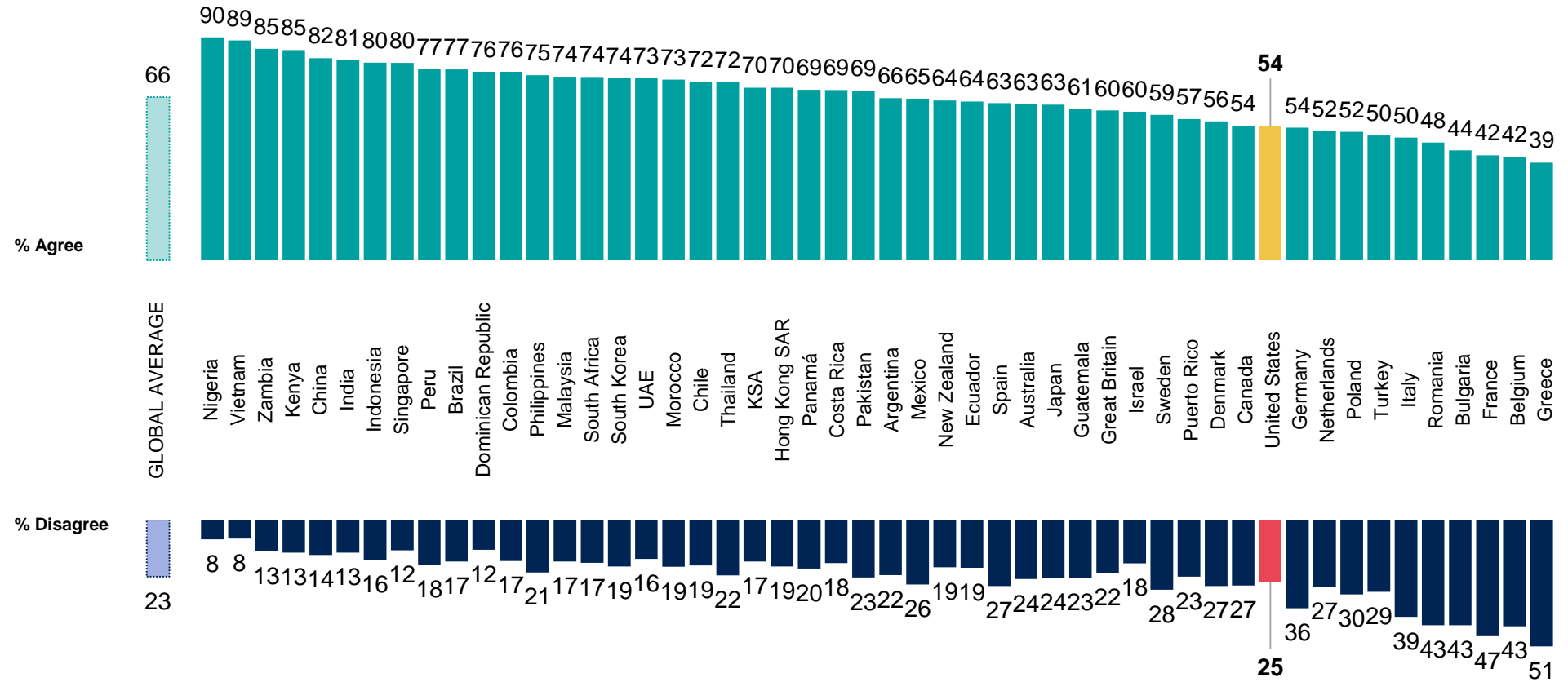
Peak Globalization: Driving Forces



45%
of Americans think that “globalization is good for me personally,” vs 62% of global citizens

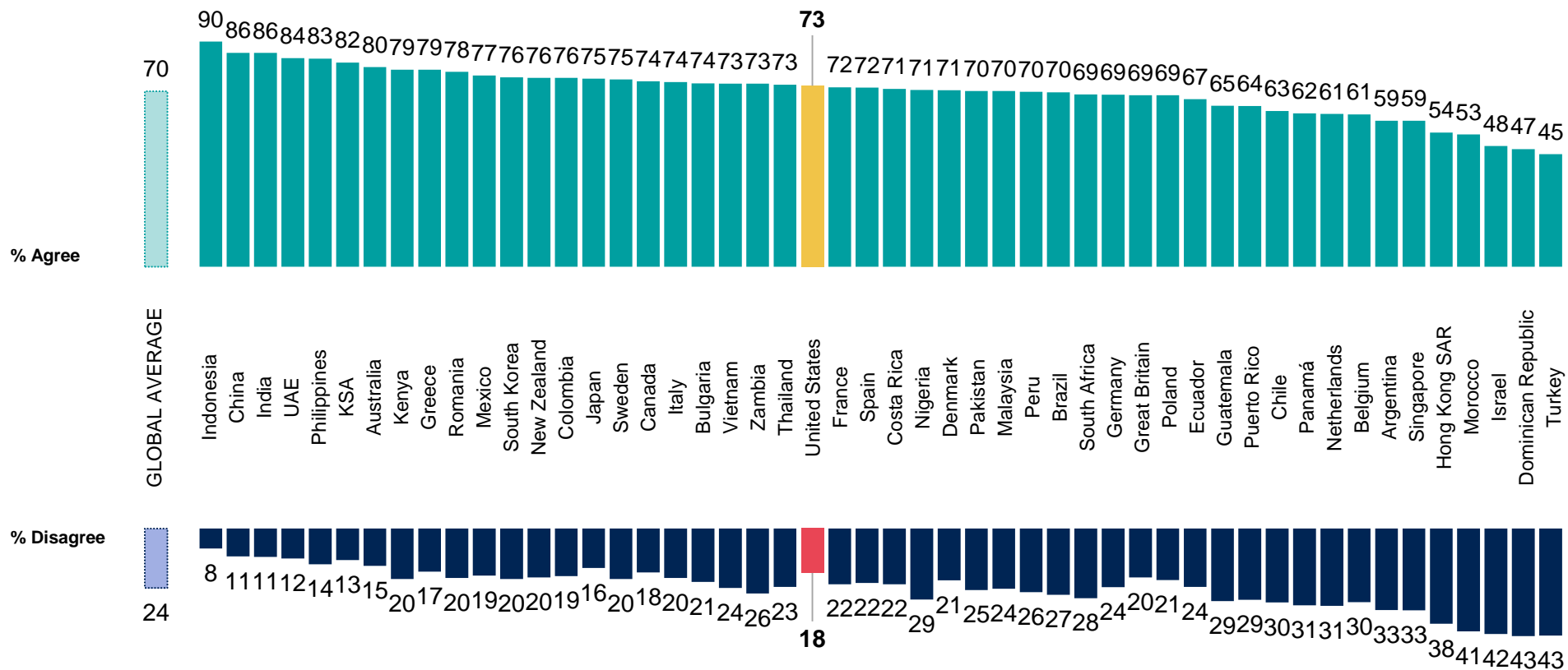
66%

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



70%

prefer to buy products from **my own country** rather than products from **abroad**



Industry is still seeking the right balance between local and global



Globally, Danone restructured its business to become a 'local-first' company. Its 'local-first' project seeks to be as close to the customers and fields as possible, translating into €1bn cost savings expected by 2023, including through 20% reduction in overhead costs. (via [FoodNavigator](#))



Under Armour mapped out a plan to reduce its reliance on manufacturing in China in favor of countries such as Vietnam, Jordan, the Philippines and Indonesia. (via [LoveMoney](#))



Volkswagen Group announced plans to build six 'gigafactories' in Europe to support the group's electrification of its cars and reduce its reliance on its foreign manufacturing plants. (via [Manufacturing](#))

Finding a 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

62%

of Americans wish their country was run by a strong leader instead of the current elected government, vs 60% of global citizens

Reactions To Uncertainty and Inequality: Driving Forces

1

Rethinking institutions

**2**

Systemic health inequality

**3**

Increase in geopolitical conflicts

**4**

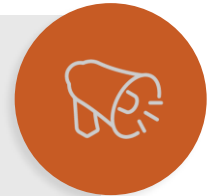
Greater ethnic & religious diversity

**5**

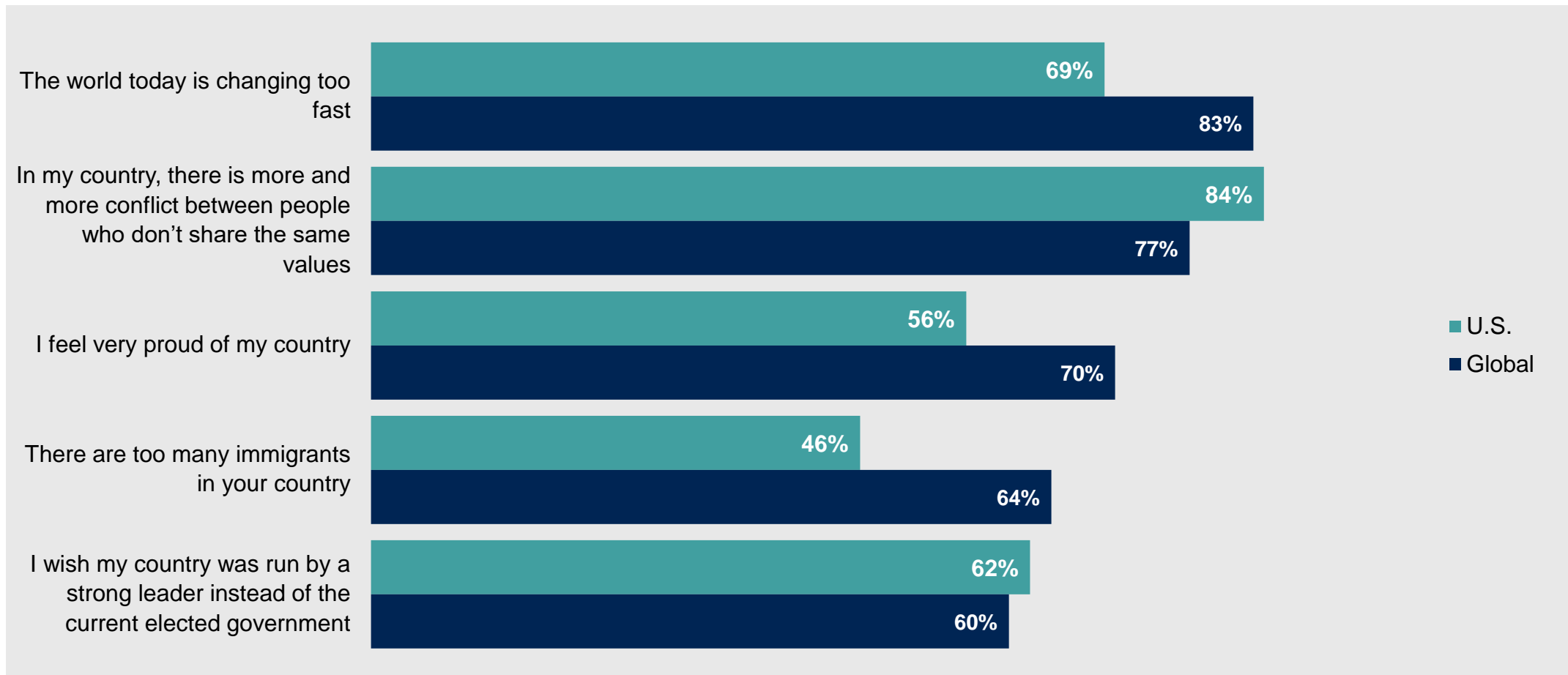
Rise and fall of middle classes

**6**

Entrenched Inequality



Americans also are very aware of and feel the effects of divisiveness



Uncertainty and inequality provide significant opportunities for political gain and corporate innovation



In **Costa Rica** ongoing inequality helped drive a populist economist and political newcomer to the presidency. (via [El Pais](#))



In **Panama**, relief organization UNICEF has been dealing with a growing humanitarian crisis as migrants pass through the nation on their way to countries in the North. (via [UNICEF](#))



stwowość, ale nie religia i nawet nie język, bo stosowane są tam oficjalnie cztery języki. Belgia uformowana została jako państwo dopiero w l. 1830–1839, posiada trzy języki urzędowe, między kilkoma regionami występują tam duże różnice kulturowe. Tym, co praktycznie łączy Belgów, jest osoba wspólnego wszystkim króla, choć

Takie dzieła sztuki stanowią fundament tożsamości narodowej danego kręgu kulturowego. Arcydzieło późnogotyckiej rzeźby – środkowa część monumentalnego Ołtarza Mariackiego dłuta Wita Stwosza. Ołtarz znajduje się w krakowskim kościele Mariackim.

In **Poland**, a new high school textbook produced under the auspices of Poland's conservative government has provoked criticism for what many see as an attempt to indoctrinate young people. (via [the Brussels Times](#))

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

How do you deliver consistency to your customers and citizens in the face of uncertainty?



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THE TECH DIMENSION

71%

of Americans say they can't imagine life without the internet, the same as global citizens at 71%

The Tech Dimension: Driving Forces

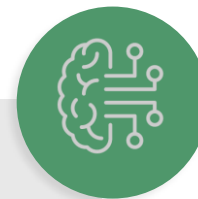
1
Pervasive
technology



2
The
immersive
frontier



3
AI advances
& quantum
computing



4
Increased
automation

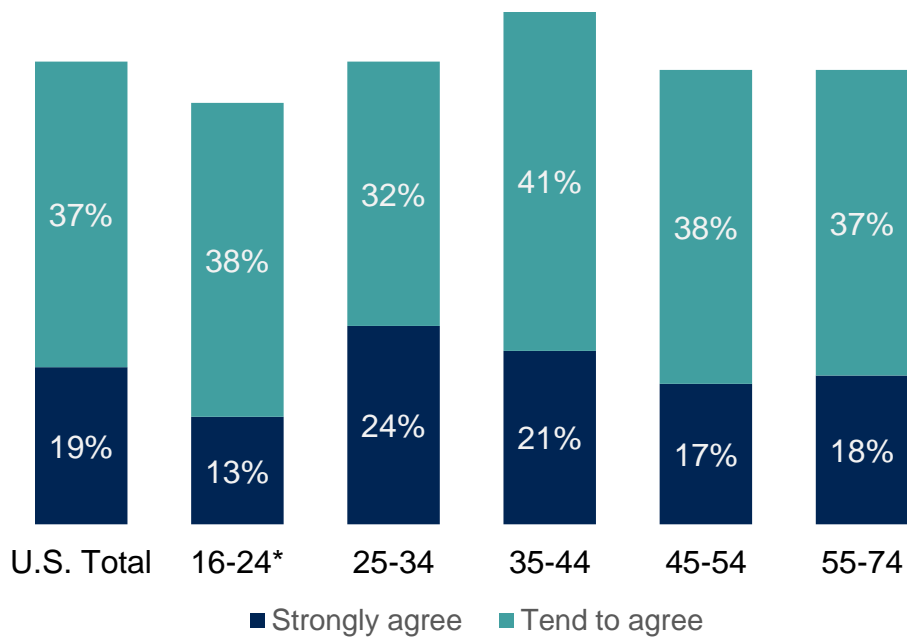


5
Toll of
technology

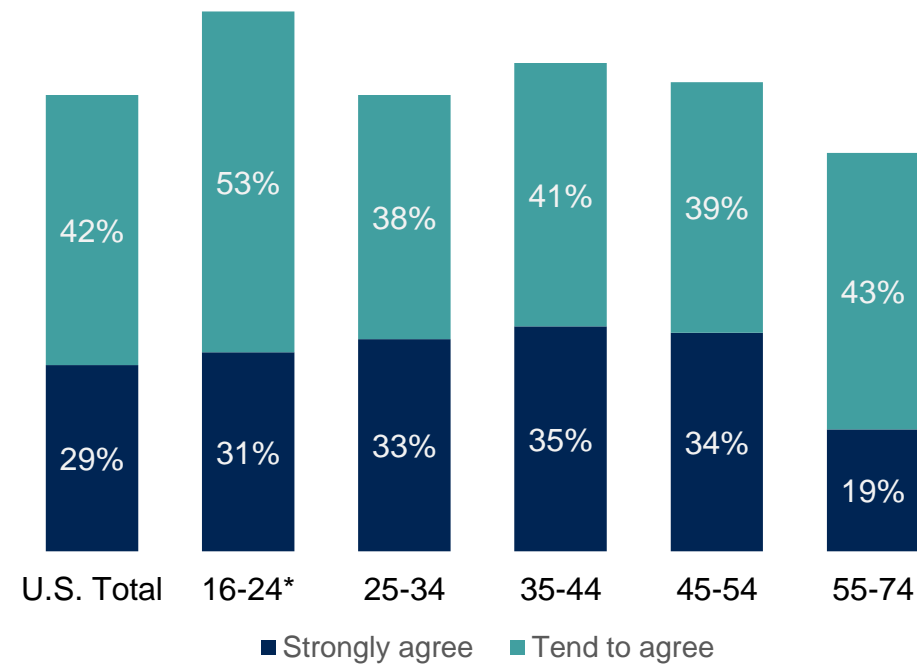


Disquiet about technology is more prevalent among Americans in their mid-20s to mid-40s

I fear that technical progress is destroying our lives



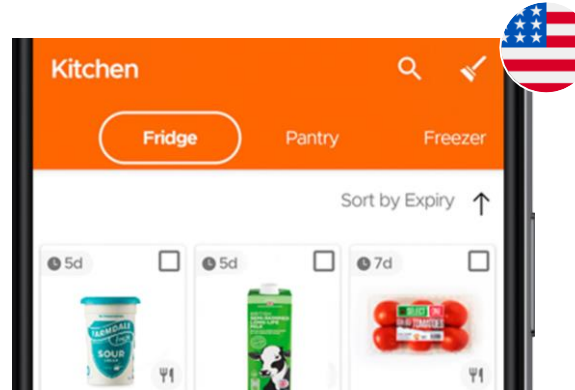
I cannot imagine life without the internet



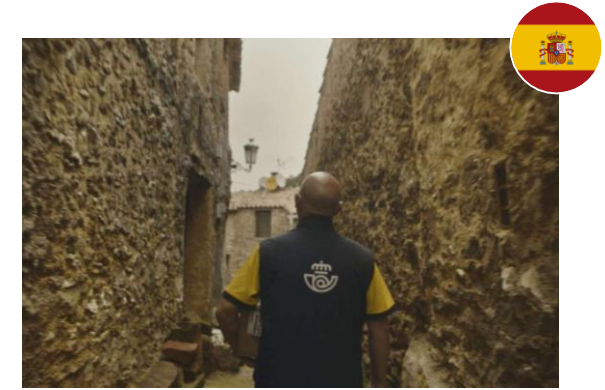
Technology is increasingly ubiquitous in peoples' lives



In **Sweden**, open finance services such as Insurely, which accesses your financial data to provide personalized offers powered by AI. (via [Insurely](#))



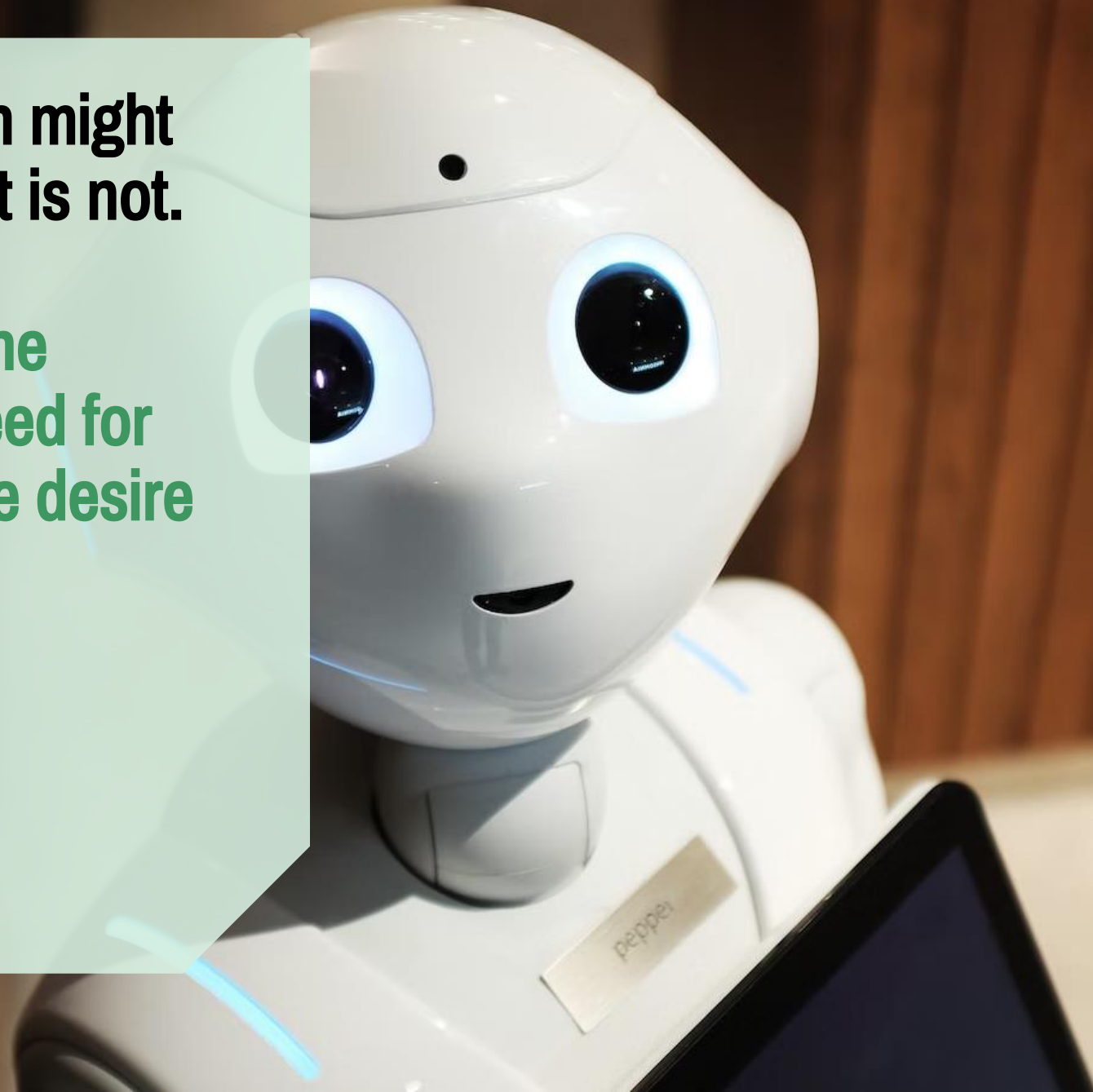
In the **United States**, the KitchenPal app makes it easy for users to keep an inventory of their food cupboards, then syncs this with a grocery list to minimize food waste or overbuying. Using barcode scanning, it also performs product comparisons and suggests recipe ideas. (via [KitchenPal](#))



In **Spain**, the national postal company now offers at home many of the services and products it provides in its offices, such as paying electricity, gas and telephone bills, and paying in and withdrawing money in cash, via its 6,011 rural postal workers. (via [YouTube](#))

Take stock of what tech might be good for, and what it is not.

How will you address the tension between the need for connectedness, and the desire to disconnect?



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IN SUMMARY

**We've talked about
a lot of
change today...**





...and we should expect more change and disruption in the future.

What will your brand do?

Ways to use Ipsos Global Trends

What's available to you:

- **Topline global report** with all the trends, global data, and macro forces at IpsosGlobalTrends.com
- **Video** about the Ipsos Global Trends
- **Sector-specific** insights and white papers through the spring

Ways to use the trends:

- Future-focused input into **strategic planning**
- Inspiration for **white spaces innovation** workshops & ideation
- Content for lunch and learns to **inspire your team**
- Ingredients for **foresight scenarios**

Reach out if you want additional support and details!

Thank you.

Come talk to us at the Ipsos booth!

Download the full report at
IpsosGlobalTrends.com



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