Beyond the Pandemic

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Most predictions are wrong
Most predictions are wrong

What people most saw as a threat to health 5 months before CV19

- Chronic diseases such as cancer, obesity and diabetes: 32%
- My lifestyle, e.g. diet, weight and level of exercise: 16%
- Environmental pollution such as air and water pollution: 14%
- My mental health: 10%
- Accidents or injuries, such as road accidents: 8%
- Violent attacks from other people: 5%
- Infectious diseases such as influenza or malaria: 4%
- Other: 2%
- None of the above: 6%
Macro Forces

Dynamic populations
Growing inequality and opportunity
Geopolitical tensions

Data world
Technology tipping points
The fragile planet
Our theory of change

Covid-19 has produced a tsunami of new signals that are impacting life now and may result in impending change to our future societies.
Signals of Covid-driven change

- Green reset?
- Digital acceleration
- Fear of the Future
- Nostalgia/simplicity
- Engagement/reset
- Purpose
- Health +fitness
- Big government

Social Distancing? You Might Be Fighting Climate Change, Too

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Inequality is widely felt

77% “Wealthy people in society should pay more tax”

76% “Having large differences in income and wealth is bad for society overall”

74% “The economy of my country is rigged to advantage the rich and powerful”

Base: 22,614 adults aged 16-74 across 33 countries, interviewed June – July 2019
For some the response is a turn to populism

KEY:
- Higher than average
- Global average
- Lower than average

Base: 21,614 adults aged 16-74 across 31 countries, interviewed June – July 2019
50% wanted their country to be the way ‘it used to be’

<table>
<thead>
<tr>
<th>Country</th>
<th>Agree</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Montenegro</td>
<td>69%</td>
<td></td>
</tr>
<tr>
<td>India</td>
<td>68%</td>
<td></td>
</tr>
<tr>
<td>Turkey</td>
<td>63%</td>
<td></td>
</tr>
<tr>
<td>Saudi Arabia</td>
<td>62%</td>
<td></td>
</tr>
<tr>
<td>Serbia</td>
<td>62%</td>
<td></td>
</tr>
<tr>
<td>United States</td>
<td>61%</td>
<td></td>
</tr>
<tr>
<td>Belgium</td>
<td>59%</td>
<td></td>
</tr>
<tr>
<td>Mexico</td>
<td>57%</td>
<td></td>
</tr>
<tr>
<td>Australia</td>
<td>56%</td>
<td></td>
</tr>
<tr>
<td>France</td>
<td>56%</td>
<td></td>
</tr>
<tr>
<td>Italy</td>
<td>56%</td>
<td></td>
</tr>
<tr>
<td>Great Britain</td>
<td>55%</td>
<td></td>
</tr>
<tr>
<td>Brazil</td>
<td>54%</td>
<td></td>
</tr>
<tr>
<td>New Zealand</td>
<td>54%</td>
<td></td>
</tr>
<tr>
<td>Denmark</td>
<td>53%</td>
<td></td>
</tr>
<tr>
<td>Romania</td>
<td>53%</td>
<td></td>
</tr>
<tr>
<td>South Africa</td>
<td>53%</td>
<td></td>
</tr>
<tr>
<td>Canada</td>
<td>51%</td>
<td></td>
</tr>
<tr>
<td>Sweden</td>
<td>50%</td>
<td></td>
</tr>
<tr>
<td>Argentina</td>
<td>49%</td>
<td></td>
</tr>
<tr>
<td>Germany</td>
<td>47%</td>
<td></td>
</tr>
<tr>
<td>Indonesia</td>
<td>43%</td>
<td></td>
</tr>
<tr>
<td>Russia</td>
<td>43%</td>
<td></td>
</tr>
<tr>
<td>Chile</td>
<td>42%</td>
<td></td>
</tr>
<tr>
<td>Peru</td>
<td>42%</td>
<td></td>
</tr>
<tr>
<td>Netherlands</td>
<td>37%</td>
<td></td>
</tr>
<tr>
<td>Poland</td>
<td>36%</td>
<td></td>
</tr>
<tr>
<td>South Korea</td>
<td>36%</td>
<td></td>
</tr>
<tr>
<td>Spain</td>
<td>36%</td>
<td></td>
</tr>
<tr>
<td>Albania</td>
<td>35%</td>
<td></td>
</tr>
<tr>
<td>Japan</td>
<td>35%</td>
<td></td>
</tr>
<tr>
<td>Colombia</td>
<td>34%</td>
<td></td>
</tr>
<tr>
<td>China</td>
<td>27%</td>
<td></td>
</tr>
</tbody>
</table>

Base: 22,614 adults aged 16-74 across 33 countries, interviewed June – July 2019
However, even with a shock like COVID-19, it still takes much longer to shift underlying trends before a ‘new normal’ is created.
OPINIONS: ripples on the surface of public consciousness, shallow and easy to change

ATTITUDES: currents below the surface, deeper and stronger

VALUES: the deep tide of public mood, slow to change, powerful
Values hold true over the medium term

- I fear that technical progress is destroying our lives
- I wish I could slow down the pace of my life
- Fulfilment in life is achieving a prominent position in your chosen career

Sources: 1999: Ipsos Socioconsult Survey, 2019: Ipsos Global Trends survey – GB data, United Kingdom Internet penetration, Office for National Statistics (UK)
There is no single, global crisis of trust. Some countries are showing rising levels of social trust in other people.
It is true that trust in many key institutions was low around the world.
NO RECENT DECLINE IN TRUST IN AMERICA DESPITE POLARISATION

Most people can be trusted (GSS)

Trust in government (Pew)

% trust the government in Washington always/most of the time (Pew). Generally speaking, % who say that most people can be trusted (US General Social Survey)
% trust the government in Washington always/most of the time (Pew). Generally speaking, % who say that most people can be trusted (US General Social Survey)

**SAME DATA**

- DECLINE IN TRUST IS A LONGER TERM PHENOMENON ...

Most people can be trusted (GSS)

Trust in government (Pew)
The public trust scientists and other experts
Please look at this list of different types of people. In general, do you think each is trustworthy or untrustworthy in [COUNTRY]?

Please use a scale of 1 to 5, where 1 is very trustworthy and 5 is very untrustworthy.

Source: Ipsos Global Advisor. 17,793 online adults, aged 16-64, October 2018
% trust to tell the truth:
Source: Ipsos MORI Veracity Index
WHAT NOW?
WORLD WORRIES: LONG TERM TREND

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

Source: Ipsos Global Advisor
Base: 19,016 adults in 27 countries
July 24th 2020 – August 7th 2020.
Big state back in fashion?

Public support for increasing or decreasing taxes and spending

Conservative govt

Labour govt

Conservative govt

INCREASE TAXES/
SPEND MORE

KEEP TAXES/
SPEND SAME

REDUCE TAXES/
SPEND LESS

British Social Attitudes Survey
Even before CV19 - worry about the future

Fear of the future is in the top five global values measured by value intensity

Base: 22,614 adults aged 16-74 across 33 countries, interviewed June – July 2019
People are expecting big changes...

One year from now, how much, if at all, do you think each of the following will have changed as a result of the coronavirus pandemic, compared with before the coronavirus?

<table>
<thead>
<tr>
<th>Category</th>
<th>A great deal</th>
<th>A fair amount</th>
<th>Not very much/no difference at all</th>
</tr>
</thead>
<tbody>
<tr>
<td>Britain’s economy</td>
<td>49%</td>
<td>39%</td>
<td>9%</td>
</tr>
<tr>
<td>The way we work</td>
<td>26%</td>
<td>49%</td>
<td>22%</td>
</tr>
<tr>
<td>The way we live our lives</td>
<td>27%</td>
<td>48%</td>
<td>23%</td>
</tr>
<tr>
<td>British society</td>
<td>22%</td>
<td>47%</td>
<td>26%</td>
</tr>
<tr>
<td>Britain’s public services</td>
<td>24%</td>
<td>45%</td>
<td>26%</td>
</tr>
</tbody>
</table>

Base: 1,077 Online British adults 18-75, 1-4 May 2020.
MORE ONLINE EVERYTHING

Which of the following actions, if any, have you done or started doing more often as a result of concerns about the Coronavirus? Please only pick actions that you have started doing or increased doing because of the Coronavirus.

- 31% General shopping online
- 30% Grocery shopping online
- 29% Online banking
- 16% Upgrading media packages
- 14% Using an online GP
- 10% Ordering takeaways

Base: c.1069 Online British adults 18-75 each week
Confidence in institutions has not changed massively

% “A great deal” or “quite a lot” of confidence in...

<table>
<thead>
<tr>
<th>Institution</th>
<th>Australia</th>
<th>Italy</th>
<th>United Kingdom</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Government</td>
<td>52%</td>
<td>39%</td>
<td>42%</td>
<td>42%</td>
</tr>
<tr>
<td>Parliament/Congress</td>
<td>23%</td>
<td>38%</td>
<td>26%</td>
<td>12%</td>
</tr>
<tr>
<td>Political Parties</td>
<td>24%</td>
<td>8%</td>
<td>18%</td>
<td>12%</td>
</tr>
<tr>
<td>The EU</td>
<td>36%</td>
<td>37%</td>
<td>34%</td>
<td>34%</td>
</tr>
<tr>
<td>World Health Organisation</td>
<td>51%</td>
<td>56%</td>
<td>62%</td>
<td>55%</td>
</tr>
<tr>
<td>Health Services</td>
<td>72%</td>
<td>72%</td>
<td>73%</td>
<td>61%</td>
</tr>
<tr>
<td>Universities</td>
<td>56%</td>
<td>67%</td>
<td>75%</td>
<td>61%</td>
</tr>
<tr>
<td>Armed Forces</td>
<td>72%</td>
<td>73%</td>
<td>81%</td>
<td>81%</td>
</tr>
<tr>
<td>Press</td>
<td>30%</td>
<td>34%</td>
<td>17%</td>
<td>35%</td>
</tr>
<tr>
<td>Courts</td>
<td>51%</td>
<td>42%</td>
<td>59%</td>
<td>51%</td>
</tr>
<tr>
<td>Police</td>
<td>72%</td>
<td>76%</td>
<td>69%</td>
<td>70%</td>
</tr>
<tr>
<td>Civil Service</td>
<td>49%</td>
<td>30%</td>
<td>52%</td>
<td>54%</td>
</tr>
</tbody>
</table>

Base: 1,134 adults in Italy 21-22 May, 1,061 adults in Australia 28 May – 15 June, 1,167 adults in the UK 18-19 May, 1,150 adults in the USA 19-23 May
Evaluations of leader handling of COVID-19

% “Agree” or “strongly agree”

- **Scott Morrison (AUS)**
- **Giuseppe Conte (IT)**
- **Boris Johnson (UK)**
- **Donald Trump (US)**

**Handling the situation well**
- Scott Morrison: 49%
- Giuseppe Conte: 37%
- Boris Johnson: 35%
- Donald Trump: 35%

**Handling the outbreak competently**
- Scott Morrison: 66%
- Giuseppe Conte: 50%
- Boris Johnson: 37%
- Donald Trump: 35%

**Does his best to serve his country**
- Scott Morrison: 68%
- Giuseppe Conte: 60%
- Boris Johnson: 44%
- Donald Trump: 34%

**Cares about people like me**
- Scott Morrison: 45%
- Giuseppe Conte: 33%
- Boris Johnson: 32%
- Donald Trump: 34%

**Acts in his own interests**
- Scott Morrison: 31%
- Giuseppe Conte: 20%
- Boris Johnson: 37%
- Donald Trump: 31%

**Listens to his party**
- Scott Morrison: 52%
- Giuseppe Conte: 45%
- Boris Johnson: 46%
- Donald Trump: 39%

**Listens to experts**
- Scott Morrison: 55%
- Giuseppe Conte: 47%
- Boris Johnson: 36%
- Donald Trump: 36%

**Listens to other parties**
- Scott Morrison: 32%
- Giuseppe Conte: 22%
- Boris Johnson: 21%
- Donald Trump: 15%

**Acts in his own interests**
- Scott Morrison: 31%
- Giuseppe Conte: 20%
- Boris Johnson: 37%
- Donald Trump: 31%

**Listens to his party**
- Scott Morrison: 52%
- Giuseppe Conte: 45%
- Boris Johnson: 46%
- Donald Trump: 39%

**Listens to experts**
- Scott Morrison: 55%
- Giuseppe Conte: 47%
- Boris Johnson: 36%
- Donald Trump: 36%

**Listens to other parties**
- Scott Morrison: 32%
- Giuseppe Conte: 22%
- Boris Johnson: 21%
- Donald Trump: 15%

**Open and transparent**
- Scott Morrison: 55%
- Giuseppe Conte: 47%
- Boris Johnson: 36%
- Donald Trump: 36%

**Free of corruption in his handling**
- Scott Morrison: 53%
- Giuseppe Conte: 44%
- Boris Johnson: 44%
- Donald Trump: 32%

Base: 1,134 adults in Italy 21-22 May, 1,061 adults in Australia 28 May – 15 June, 1,167 adults in the UK 18-19 May, 1,150 adults in the USA 19-23 May
Partisan divides in evaluations of leader handling of COVID-19

% ‘agree’ or ‘strongly agree’ the leader is handling the coronavirus situation well by party currently most inclined to support

<table>
<thead>
<tr>
<th>Country</th>
<th>UK</th>
<th>US</th>
<th>IT</th>
<th>AUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conservative</td>
<td>69%</td>
<td>74%</td>
<td>79%</td>
<td>92%</td>
</tr>
<tr>
<td>Labour</td>
<td>17%</td>
<td>9%</td>
<td>16%</td>
<td>55%</td>
</tr>
<tr>
<td>M5S / PD</td>
<td>92%</td>
<td>79%</td>
<td>74%</td>
<td>69%</td>
</tr>
</tbody>
</table>

Base: 393 M5S/PD supporters, 267 LN/FI/Fdl supporters in Italy 21-22 May, 295 Labor supporters, 430 Liberal/Nat supporters in Australia 28 May - 15 June, 306 Labour supporters, 350 Conservative supporters in the UK 18-19 May, 483 Democrat supporters and 430 Republican supporters in the USA 19-23 May
Partisan divides in perceptions of media exaggeration of COVID-19

% ‘agree’ or ‘strongly agree’ media have exaggerated the ‘extent of the coronavirus’ by party currently most inclined to support

<table>
<thead>
<tr>
<th>Country</th>
<th>Party</th>
<th>Governing parties</th>
<th>Opposition parties</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>Conservative</td>
<td>19%</td>
<td>28%</td>
</tr>
<tr>
<td></td>
<td>Labour</td>
<td>28%</td>
<td>19%</td>
</tr>
<tr>
<td></td>
<td>Democrat</td>
<td>15%</td>
<td>28%</td>
</tr>
<tr>
<td>US</td>
<td>Republican</td>
<td>71%</td>
<td>28%</td>
</tr>
<tr>
<td></td>
<td>LN / FI / Fdl</td>
<td>28%</td>
<td>18%</td>
</tr>
<tr>
<td></td>
<td>M5S / PD</td>
<td>18%</td>
<td>28%</td>
</tr>
<tr>
<td>AUS</td>
<td>Liberal / Nat</td>
<td>17%</td>
<td>28%</td>
</tr>
<tr>
<td></td>
<td>Labor</td>
<td>17%</td>
<td>28%</td>
</tr>
</tbody>
</table>

Where do we go next?
Q1. Thinking about the current situation with Covid-19...which should your country prioritize more?

Overall, 72% believe health and well-being should be the current focus in their countries, while 28% believe their countries should focus on economic growth.

At the individual country level, a majority in every surveyed country think health & well-being should be the priority in the midst of the pandemic.

Over 3 in 4 respondents in Canada (79%), Chile (83%), Peru (79%), and Spain (77%) agree that health & well-being belong at the fore.

**Health is a top priority**

<table>
<thead>
<tr>
<th>Country</th>
<th>Health &amp; Well-being</th>
<th>Economic Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Countries</td>
<td>72.0%</td>
<td>28.0%</td>
</tr>
<tr>
<td>Australia</td>
<td>75.0%</td>
<td>25.0%</td>
</tr>
<tr>
<td>Brazil</td>
<td>66.0%</td>
<td>34.0%</td>
</tr>
<tr>
<td>Canada</td>
<td>79.0%</td>
<td>21.0%</td>
</tr>
<tr>
<td>Chile</td>
<td>83.0%</td>
<td>17.0%</td>
</tr>
<tr>
<td>India</td>
<td>64.0%</td>
<td>36.0%</td>
</tr>
<tr>
<td>Italy</td>
<td>59.0%</td>
<td>41.0%</td>
</tr>
<tr>
<td>Mexico</td>
<td>71.0%</td>
<td>29.0%</td>
</tr>
<tr>
<td>Peru</td>
<td>79.0%</td>
<td>21.0%</td>
</tr>
<tr>
<td>Russia</td>
<td>70.0%</td>
<td>30.0%</td>
</tr>
<tr>
<td>South Africa</td>
<td>63.0%</td>
<td>37.0%</td>
</tr>
<tr>
<td>Spain</td>
<td>77.0%</td>
<td>23.0%</td>
</tr>
<tr>
<td>UK</td>
<td>72.0%</td>
<td>28.0%</td>
</tr>
<tr>
<td>US</td>
<td>73.0%</td>
<td>27.0%</td>
</tr>
</tbody>
</table>

Base: 10,013 online adults between the ages of 16 and 74 across 13 countries
Globally, over half (53%) of respondents believe social progress should remain the priority over economic growth even after the pandemic subsides.

However, there is more discrepancy over what countries should focus on in the future vs. what countries should focus on in the present. A majority in Australia (60%), Italy (54%), Mexico (57%), South Africa (58%), the UK (51%), and the US (52%) believe economic growth should be the priority in the longer term.

Social progress in demand where most lacking

Q2. Imagining when the Covid-19 pandemic is over...which should your country prioritize more?
Covid reveals our lack of resilience

Upcoming global challenges

**AGEING SOCIETY**
Reality of demographic timebomb

**SEISMIC CLIMATE AND HEALTH EVENTS**
More of them, greater impact

**SINO-AMERICAN TECH WAR**
Global rupture coming
Fragility of our systems reveals our need for resilient public services

Collaboration across sectors is possible
To ensure services continue to exist and citizens can access them in any crisis

Need, and permission, to make new connections which create better human and tech supply chains
Covid accelerates expectations of delivery & speed

Existing Trends

**DIGITAL TRANSFORMATION**
Services already moving this way

**SPEED UP SCIENCE**
Risks and benefits

Higher expectations of interfaces - Private sector accelerates

Speeding up capacity for public and private sector collaboration.
Covid accelerates scrutiny of structures

Existing Trends

INEQUALITY CONSOLIDATING
Rich save more and work from home, poor, BAME and key workers more exposed to virus, youth unemployment. Activism ramps up, structural problems as the focus.

POLARISED INFORMATION LANDSCAPE
Information and evidence is presented differently to different groups. Bubbles are more visible.
Accelerates scrutiny of government

Corporate and government need to be accountable from many angles: workforce, sustainability…

Focus on the lived experience of diverse citizens, and design services to meet their needs

Help citizens to navigate information and evidence
Predictions are hard, but...
The most adaptable organisations will thrive – not the biggest (nor even the cleverest)