

# 2022: THE YEAR IN REVIEW

KEYS – A WEBINAR SERIES BY IPSOS

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15<sup>th</sup> December 2022



**2022:  
THE YEAR IN  
REVIEW**

KEYS – A WEBINAR SERIES BY IPSOS

15<sup>th</sup> December 2022



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# AGENDA

## INTRODUCTION

**Jennifer Hubber**

Head of Global Client Organisation, Ipsos

## THEN AND NOW: PUBLIC OPINION in 2022

**Simon Atkinson**

Chief Knowledge Officer, Ipsos

## INFLATION: OLD STORY/NEW STORY

**Özlem Tekintaş Aydın**

Senior Client Officer, Ipsos in Turkey

## NEW WORLD DISORDER? Global Trends through a Latam Lens

**Cristina Páez**

Country Manager, Ipsos in Ecuador

## THE ROAD AHEAD

**Alexandre de Saint-Léon**

Global Service Line Leader, Automotive & Mobility Development



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# 2022: THEN AND NOW

A 12-month tour of Public Opinion

Simon Atkinson

# JANUARY

Ipsos > News & Events : News > 35% say that Coronavirus is one of the biggest issues facing their country this month

## 35% say that Coronavirus is one of the biggest issues facing their country this month

The recent rise in concern about Covid-19 following the spread of Omicron continues in 2022. Meanwhile, inflation hits record levels of concern.

25 January 2022   What Worries the World / Covid-19 / Employment / Financial Security / Climate change

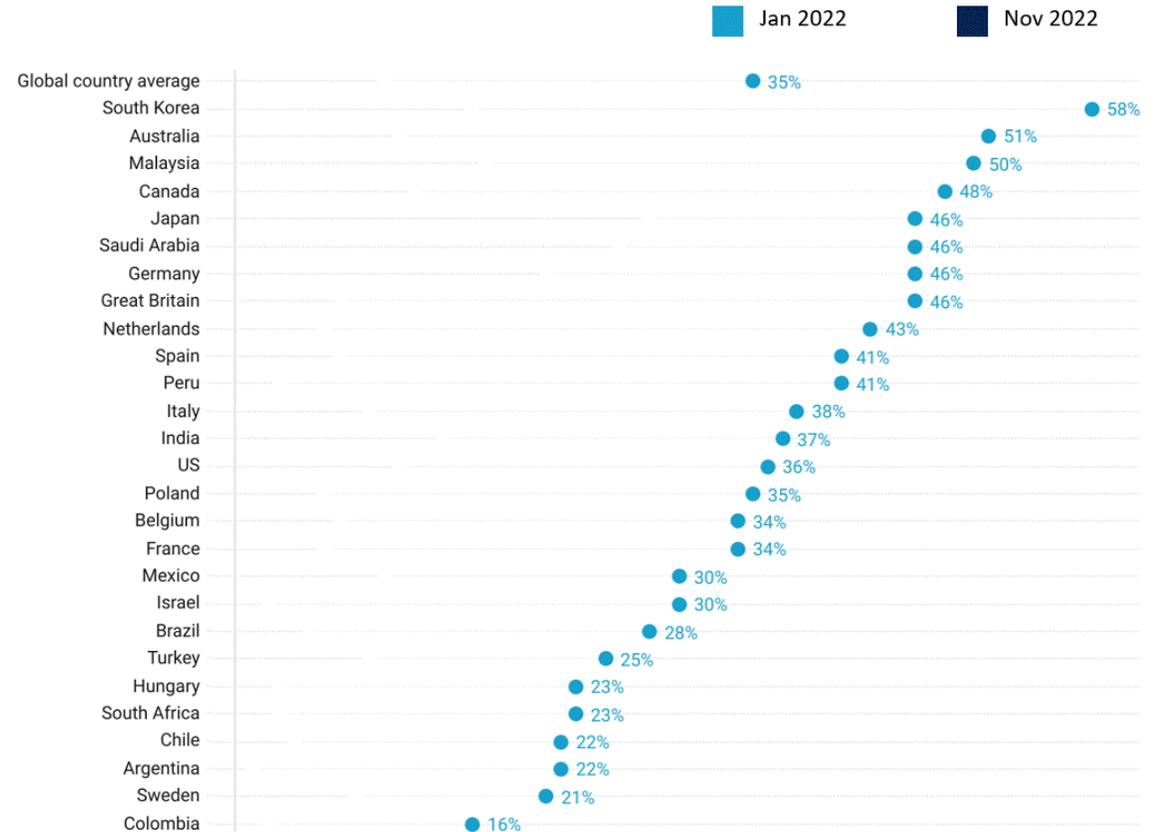
## Back in 1<sup>st</sup> place

# NOVEMBER 2022: LOWEST-EVER % WORRIED ABOUT COVID

Now in 12<sup>th</sup>  
place overall

## COVID-19: CHANGES IN REPORTED CONCERN

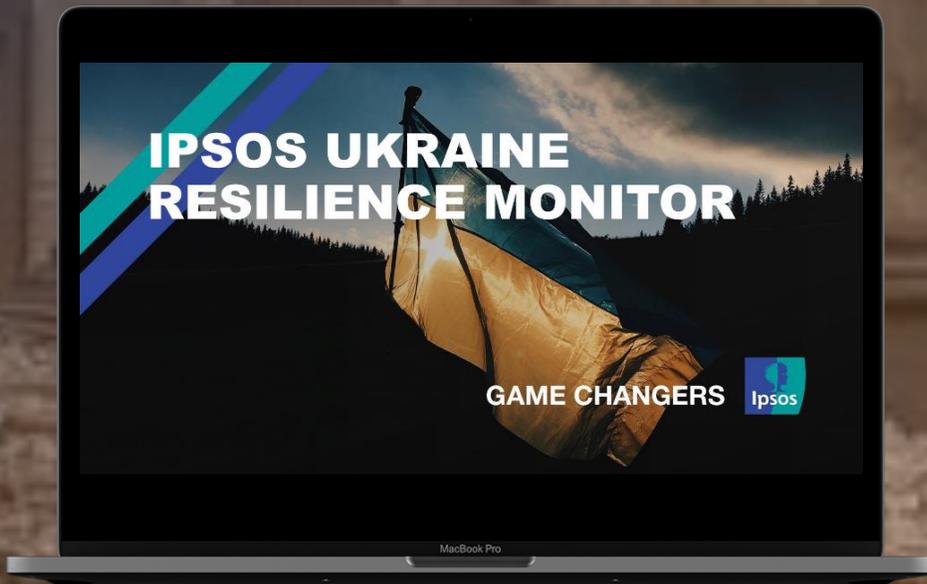
Q. Which three of the following topics do you find the most worrying in your country?  
(% mentioned in January 2022 and November 2022)



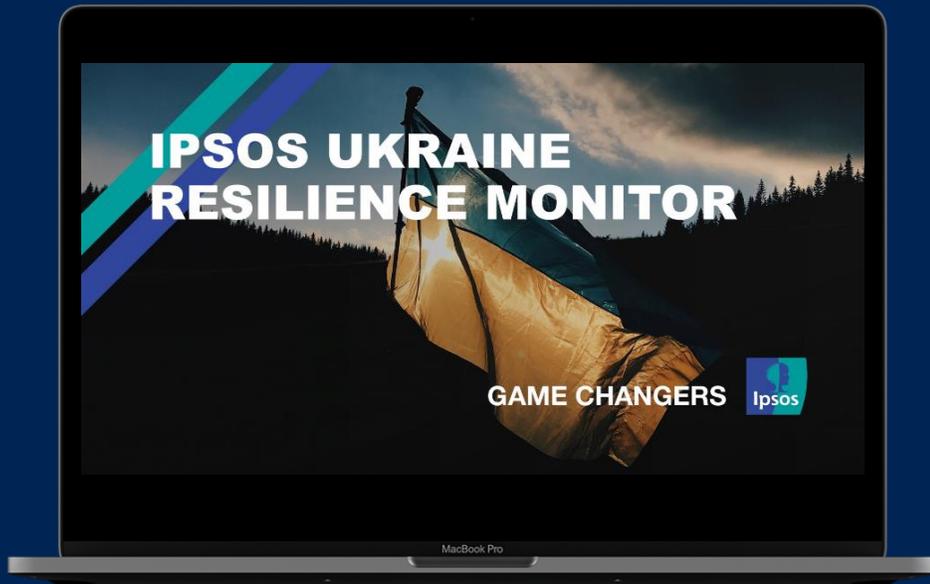
Base: Representative sample of c.20,000 adults aged 16-74 in 27 participating countries,

Source: Ipsos Global Advisor

# FEBRUARY



# UKRAINE LATEST: ACCESS TO ESSENTIALS



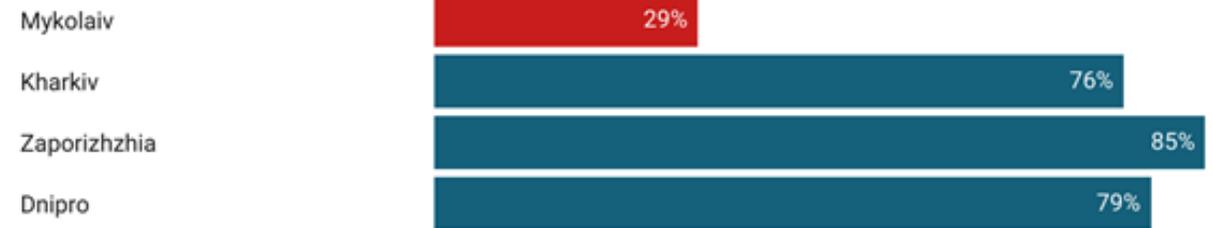
## Less than a third of Mykolaiv's residents have access to safe drinking water

■ % With Access to Safe Drinking Water

### Newly Liberated Cities

Balakliia, Izyum, Kupiansk and Lyman 66%

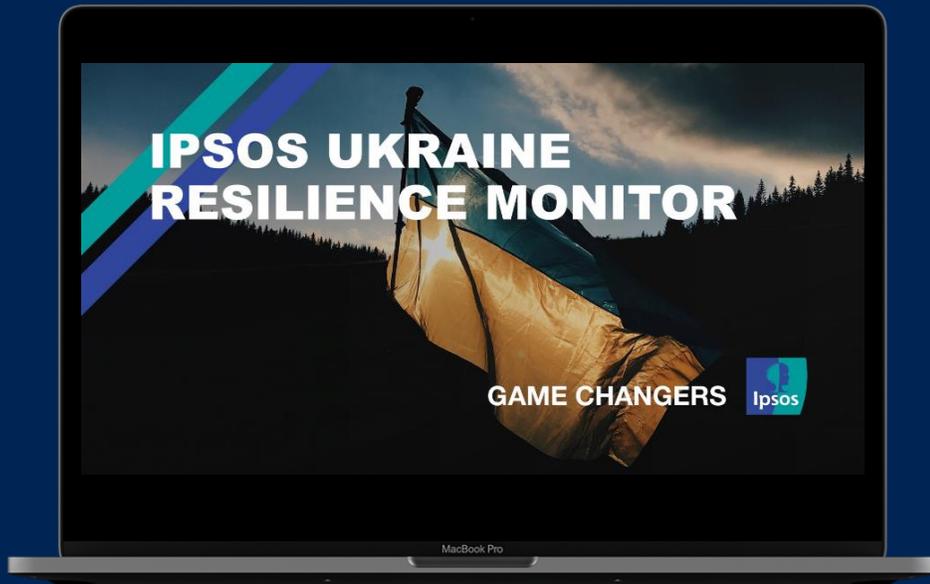
### Front line cities



Q18. At the place where you live at the moment (your home or temporary housing), do you have access to...

Source: Ipsos Ukraine Resilience Monitor | October 2022

# UKRAINE LATEST: ACCESS TO EMPLOYMENT



## Only 22% of those living in newly liberated cities are employed

■ % Employed now (full-time or part-time)

### Newly Liberated Cities

Balakliia, Izyum, Kupyansk and Lyman 22%

### Front line cities

Mykolaiv 39%

Kharkiv 43%

Zaporizhzhia 51%

Dnipro 58%

### Pre-war average

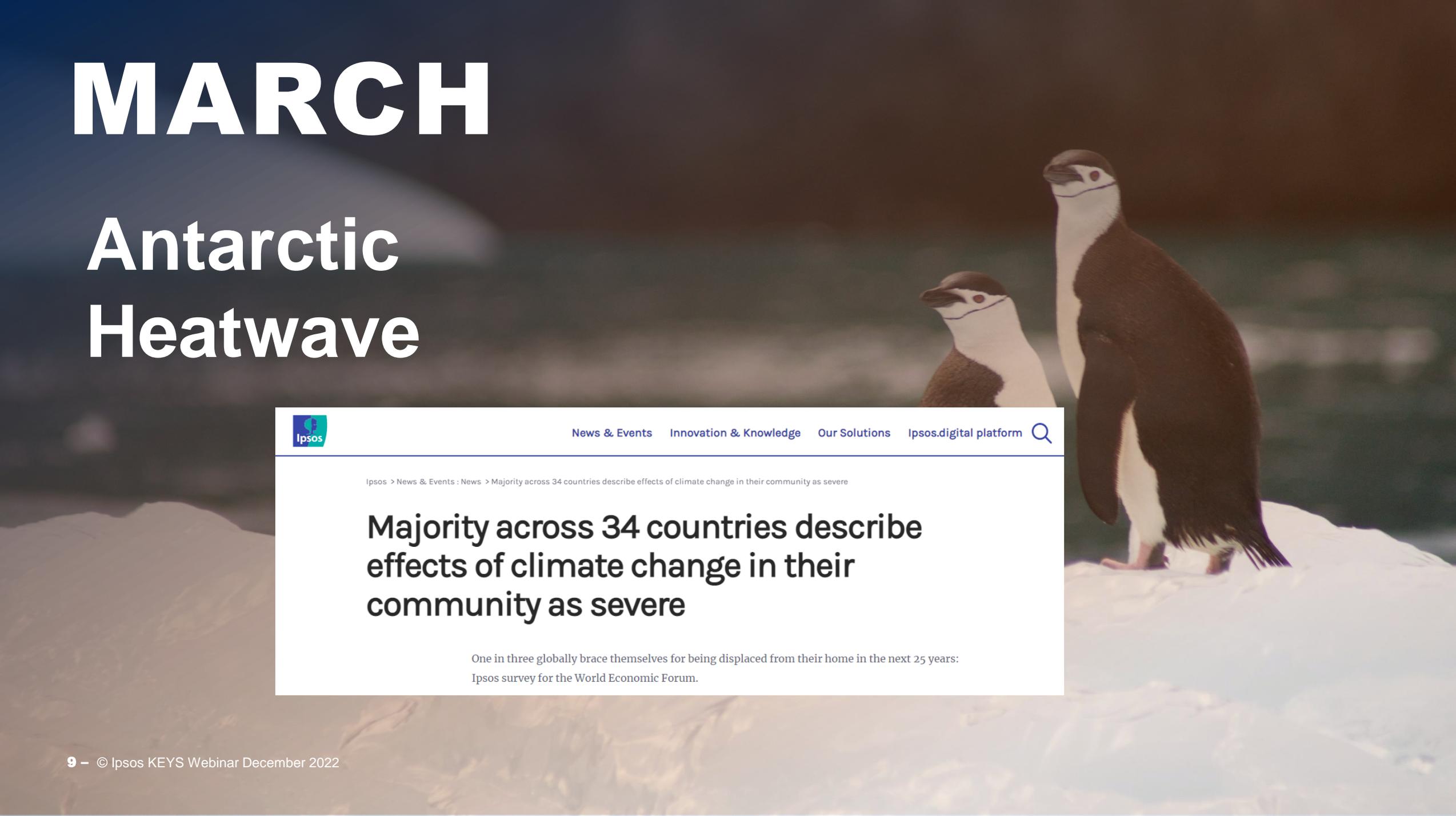
Pre-war average 80%

Q12. Do you work now (we are talking about paid employment)? | Q13. Please, indicate what was your employment status before 24 February 2022

Source: Ipsos Ukraine Resilience Monitor | October 2022

# MARCH

## Antarctic Heatwave



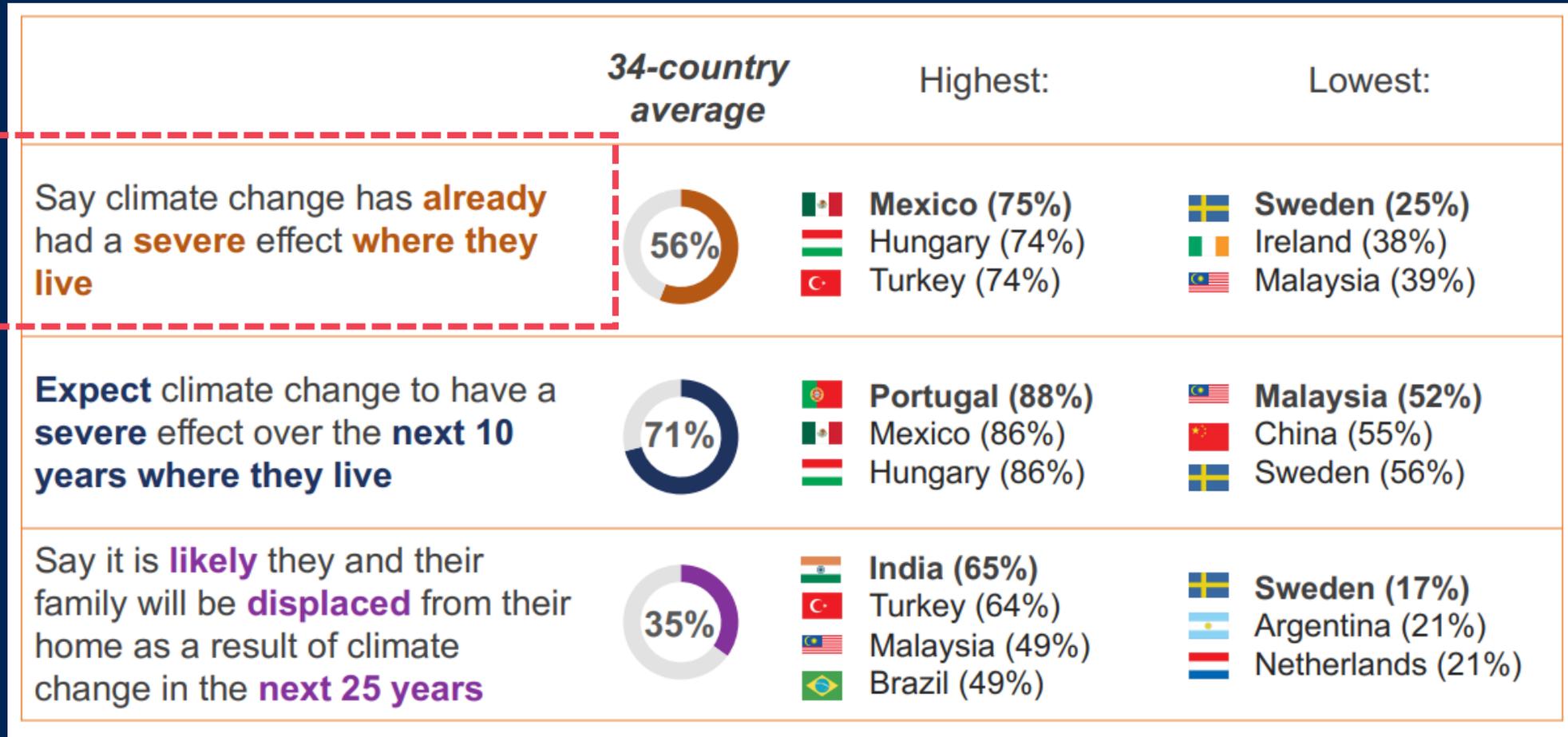
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[Ipsos](#) > [News & Events](#) > [News](#) > Majority across 34 countries describe effects of climate change in their community as severe

### Majority across 34 countries describe effects of climate change in their community as severe

One in three globally brace themselves for being displaced from their home in the next 25 years:  
Ipsos survey for the World Economic Forum.

# MARCH: CLIMATE CHANGE IS HERE

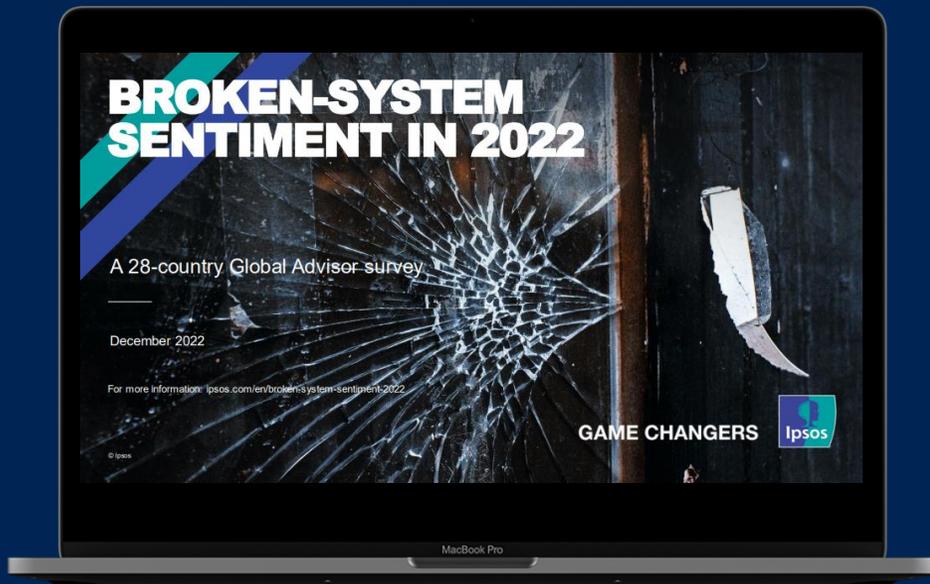


# APRIL

# *Le Débat*

## A Year of Elections

# A YEAR OF ELECTIONS: ASSESSING POLITICAL LANDSCAPE



# 64%

say “the economy of my country is rigged to favour the rich and powerful”

However, broken-system sentiment has receded since March-April 2021 when Ipsos conducted a similar survey in 24 of the 28 countries. It has declined steeply in Chile, Colombia, South Korea, Italy, Brazil, and Peru – all countries where elections resulted in a change of governing party. The only countries showing a significant increase in broken-system sentiment are Great Britain and Turkey.

# MAY



**United Nations**

Department of Economic and Social Affairs  
Economic Analysis

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## World Economic Situation and Prospects: May 2022 Briefing, No. 160

3 May 2022

# MAY: UN BRIEFING

## Rising inflation hits developing countries

### KEY MESSAGES

- » Inflation is rising in many developing countries, driven by higher energy and food prices, supply chain disruptions and, in some cases, release of pent-up demand. Many central banks have responded with significant interest rate hikes.
- » The rise of inflation, gradually becoming more widespread across the developing world, disproportionately affects the poor, worsening poverty and inequality prospects, already damaged due to the COVID-19 pandemic, even further. It also risks fueling social unrest and political instability.
- » Central banks are facing a major policy dilemma. High inflation and rising interest rates in the United States create pressure to tighten monetary policy. But this could undermine the still incomplete and fragile recovery from the COVID-19 pandemic.

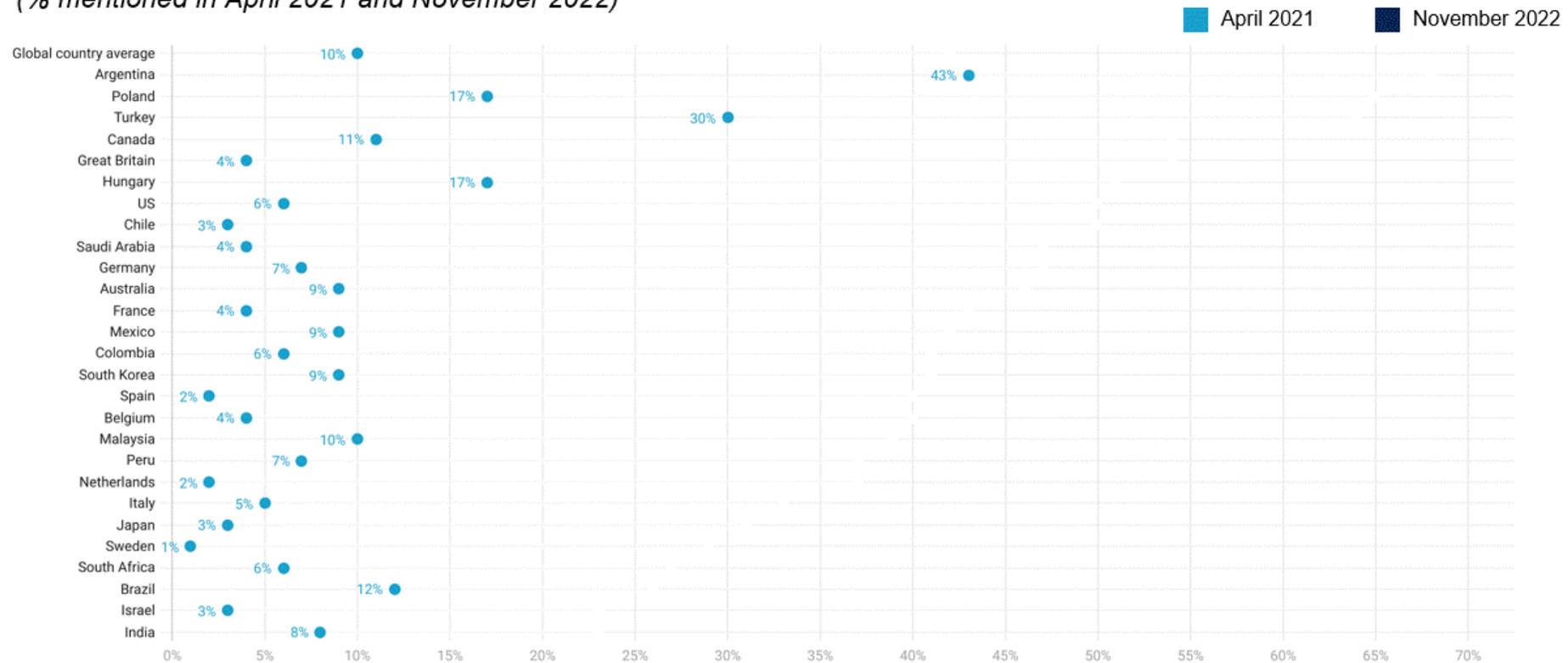
Global inflation is rising substantially, driven by higher energy and food prices, persistent supply chain disruptions, and tight labor markets in major developed economies. In the United States, inflation has reached multi-decade highs in recent months, prompting the Federal Reserve to raise interest rates and initiate a global monetary tightening cycle. Rising inflation in the developed economies has received considerable attention.

At the same time, inflation in developing countries – generally higher and more volatile than in developed countries – is also rising markedly and becoming more widespread as well. The return of inflation as a more prevalent phenomenon in developing countries marks a major turning point in macroeconomic conditions, creating greater challenges for policymakers. Over the past few decades, inflation in developing countries has generally been on a downward trend, thanks to demographic changes, technology-driven efficiency gains and improved

# RISING CONCERN ABOUT INFLATION: THE 18 MONTH VIEW

## INFLATION: CHANGES IN REPORTED CONCERN

**Q. Which three of the following topics do you find the most worrying in your country?**  
(% mentioned in April 2021 and November 2022)



Base: Representative sample of 19,524 adults aged 16-74 in 27 participating countries,  
Source: Ipsos Global Advisor



# JUNE

## Supreme Court overturns Roe v Wade

# ATTITUDES ON ABORTION



# ATTITUDES ON ABORTION

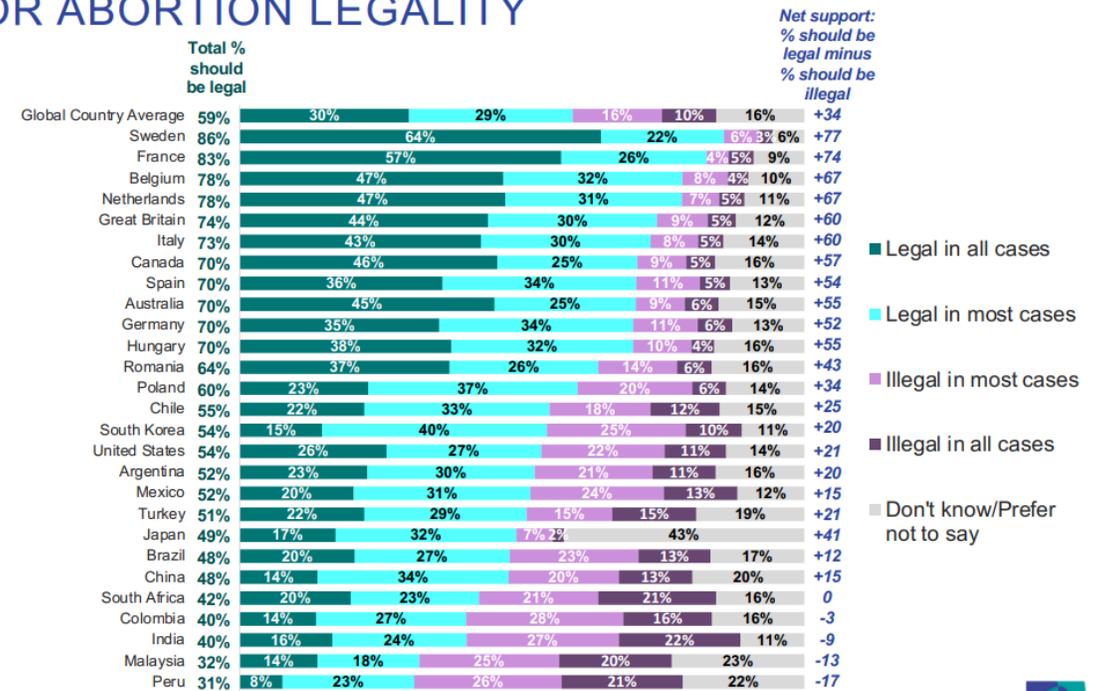


Results for 27-countries [here](#)

## SUPPORT FOR ABORTION LEGALITY BY COUNTRY

Q. Thinking of abortion, which of the following is closest to your personal opinion?

Abortion should be...



Base: 20,523 online adults across 27 countries  
 The "Global Country Average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result.  
 The samples in Brazil, Chile, China (mainland), Colombia, India, Malaysia, Mexico, Peru, South Africa, and Turkey are more urban, more educated, and/or more affluent than the general population.

4 - © Ipsos | Global Views on Abortion | August 2022



# JULY

Lannemeur (29)  
**40,3** °C  
ancien record : 36,0°C  
le 19 juillet 2016

Saint-Brieuc (22)  
**39,7** °C  
ancien record : 38,1°C  
le 5 août 2003

Brest (29)  
**39,3** °C  
ancien record : 35,1°C  
le 9 août 2003

Nantes (44)  
**40,2** °C  
ancien record : 40,3°C  
le 12 juillet 1949

Cholet (49)  
**41,3** °C  
ancien record : 39,1°C  
le 23 juillet 2019

Saint-Nazaire (44)  
**41,0** °C  
ancien record : 38,4°C  
le 9 août 2003

Niort (79)  
**41,0** °C  
ancien record : 40,1°C  
le 18 juin 2022

La Roche-sur-Yon (85)  
**41,5** °C  
ancien record : 38,8°C  
le 27 juin 2019

Saintes (17)  
**41,1** °C  
ancien record : 41,0°C  
le 12 juillet 1949

Chassiron (17)  
**39,4** °C  
ancien record : 35,0°C  
le 4 août 2003

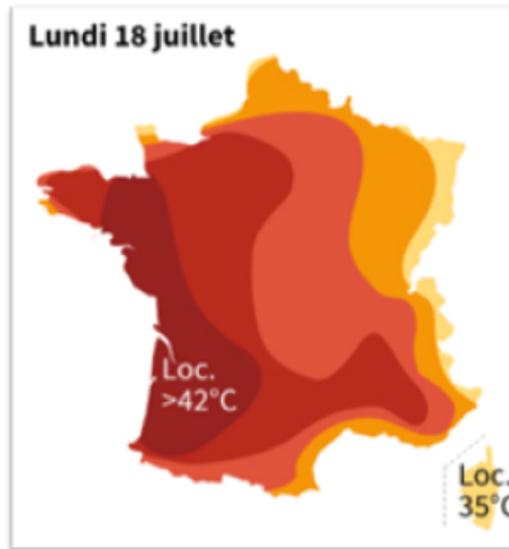
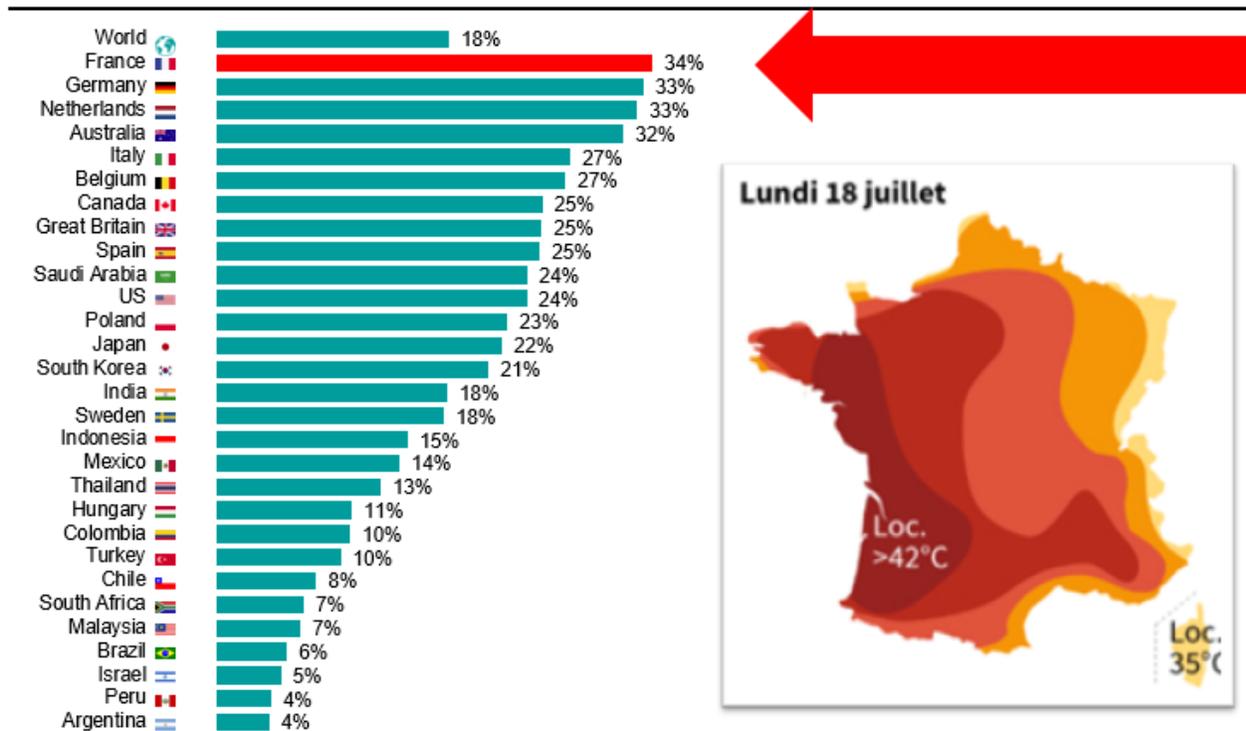
Bisacrosse (40)

Cazaux (33)

# SPOTLIGHT ON FRANCE

## Country Comparison

### ISSUE FOCUS: CLIMATE CHANGE



**34%**  
Highest level of concern recorded in any country during 2022

# AUGUST



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[Ipsos](#) > [News & Events](#) : [News](#) > [Nuclear, biological or chemical attack now seen as top threat facing the world](#)

## Nuclear, biological or chemical attack now seen as top threat facing the world

Ipsos survey for the Halifax International Security Forum finds concern about a nuclear, biological, or chemical attack nudges ahead of cyberattacks as No.1 perceived threat for global citizens.

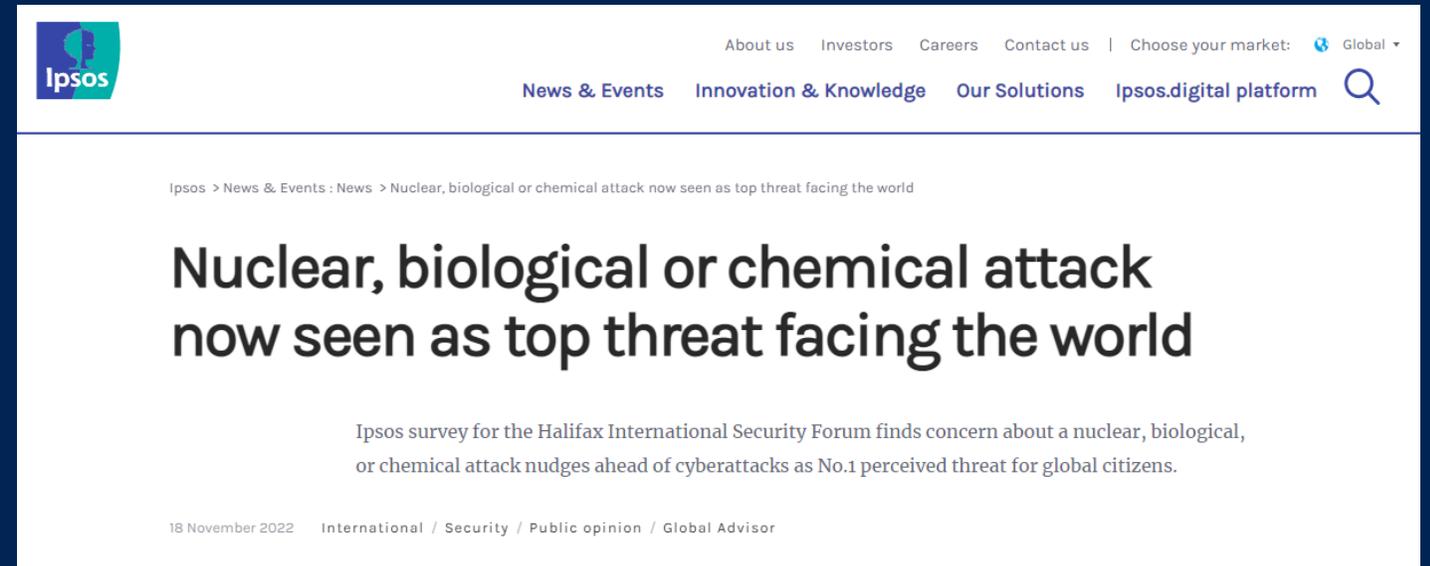
18 November 2022 | [International](#) / [Security](#) / [Public opinion](#) / [Global Advisor](#)



# A NEW COLD WAR?



Full results [here](#)

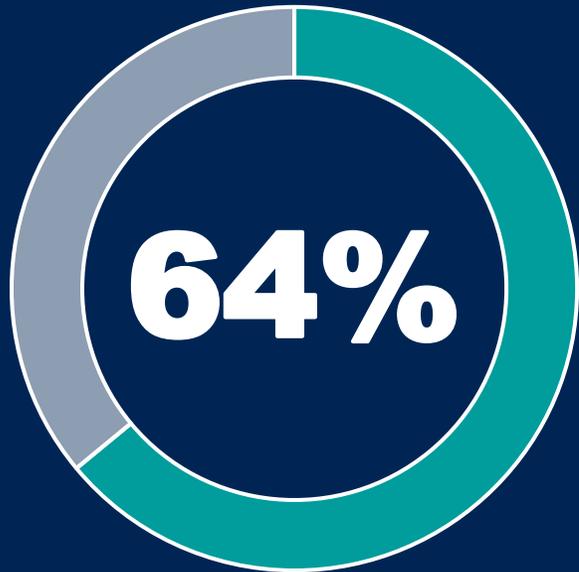


**50%** say my country being involved in armed conflict with another nation is “a real threat”

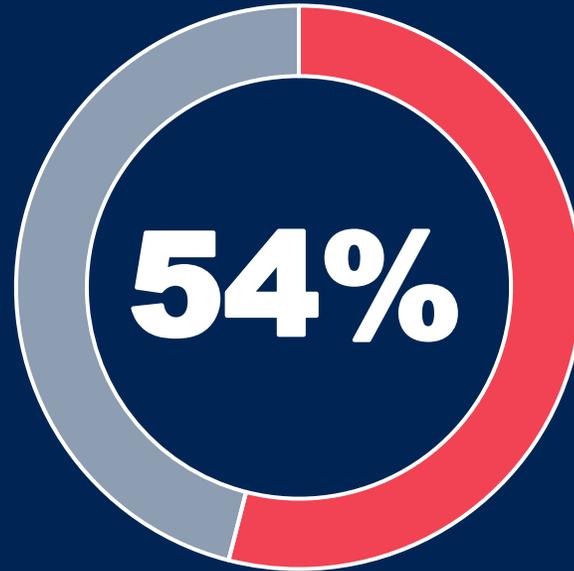
# SEPTEMBER



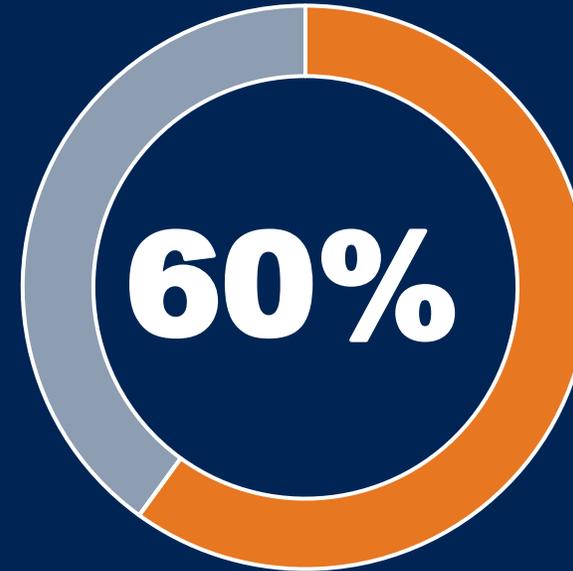
# THE END OF AN ERA



say “the Queen did a good job as monarch”



feel “Canada should now end its ties with the monarchy”



say “relationship with monarchy is useful as it helps keep us different from the United States”

# OCTOBER

## Paris Motor Show



World ▾ Business ▾ Legal ▾ Markets ▾ More ▾



Autos & Transportation



2 minute read · June 8, 2022 5:41 PM GMT+1 · Last Updated 6 months ago



### EU lawmakers back ban on new fossil-fuel cars from 2035

By Kate Abnett



# NOVEMBER



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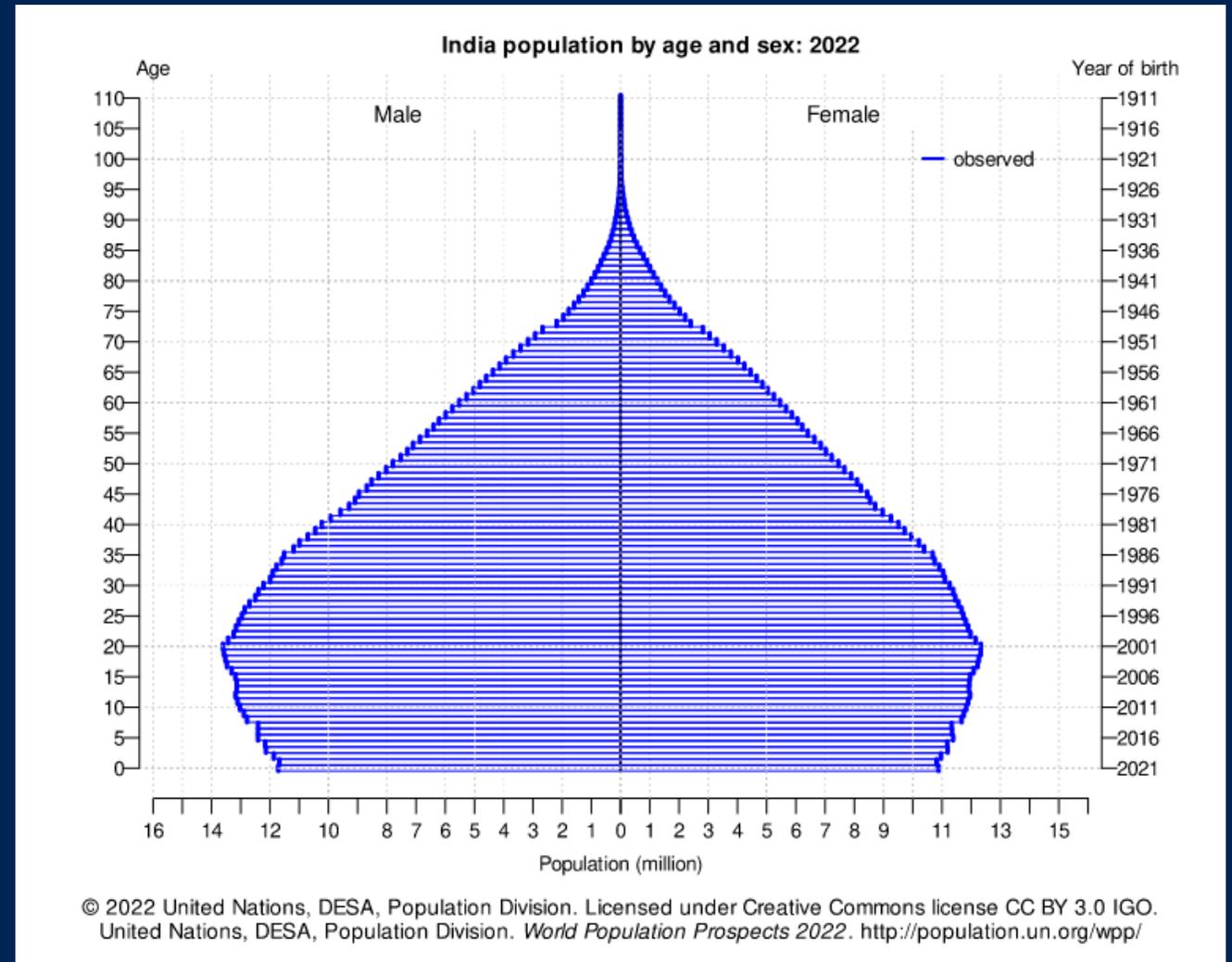
AUDIO HUB  SUBSCRIBE

## World population to reach 8 billion this year, as growth rate slows

# INDIA POPULATION BY AGE AND SEX: 2022



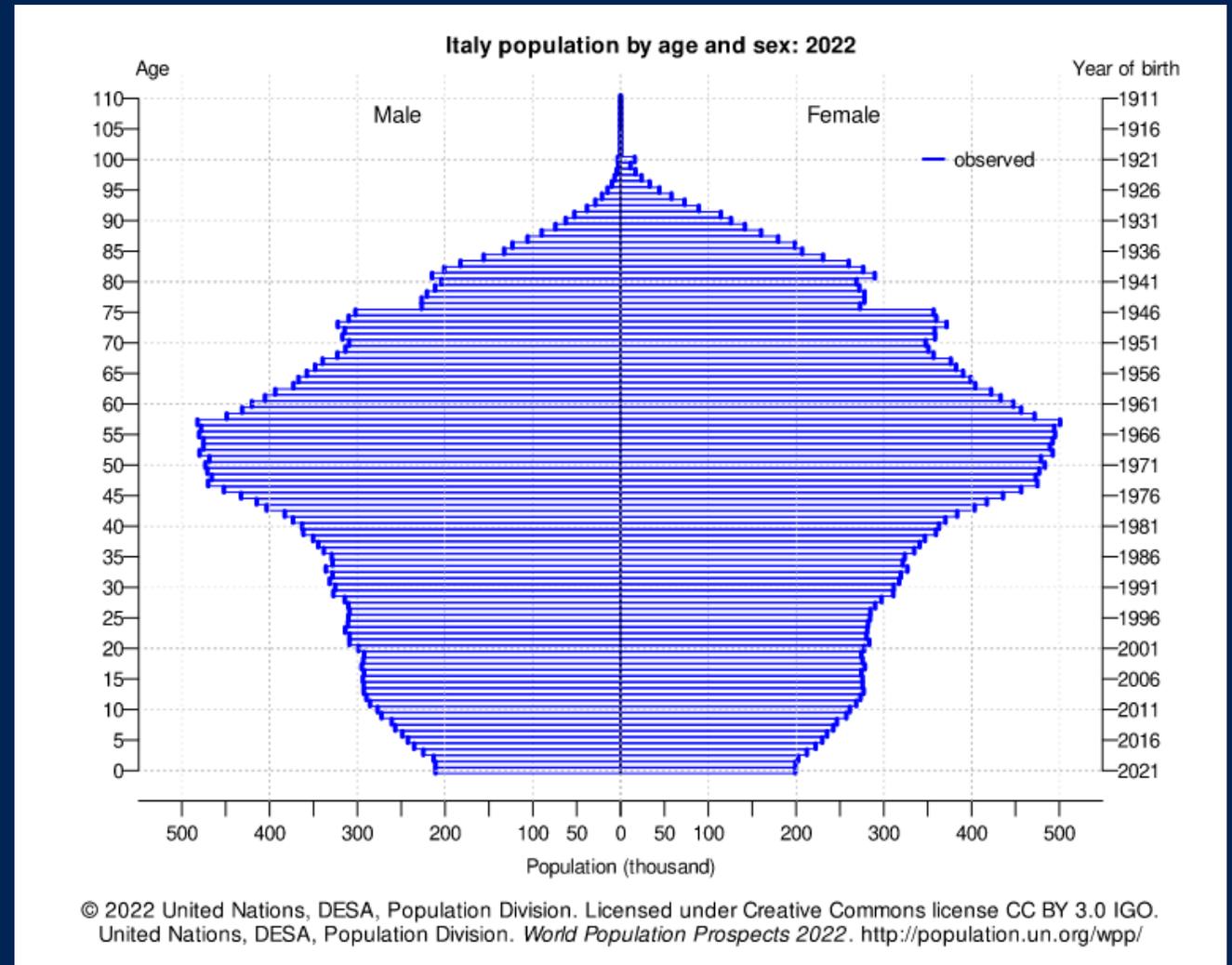
Median Age	<b>28.6</b>
Longevity	<b>70</b>
Percentage 65+	<b>6.8%</b>
Fertility Rate	<b>2.0</b>
Peak Fertility	<b>5.98 (1965)</b>
Below Replacement	<b>2020</b>



# ITALY POPULATION BY AGE AND SEX: 2022



Median Age	<b>47.7</b>
Longevity	<b>82</b>
Percentage 65+	<b>24%</b>
Fertility Rate	<b>1.3</b>
Peak Fertility	<b>2.65 (1964)</b>
Below Replacement	<b>1976</b>



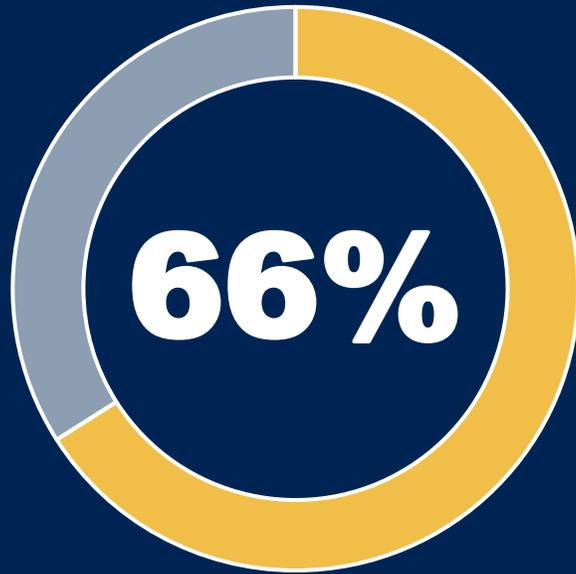
# DECEMBER

## ATTITUDES TOWARDS THE FIFA WORLD CUP 2022 IN QATAR

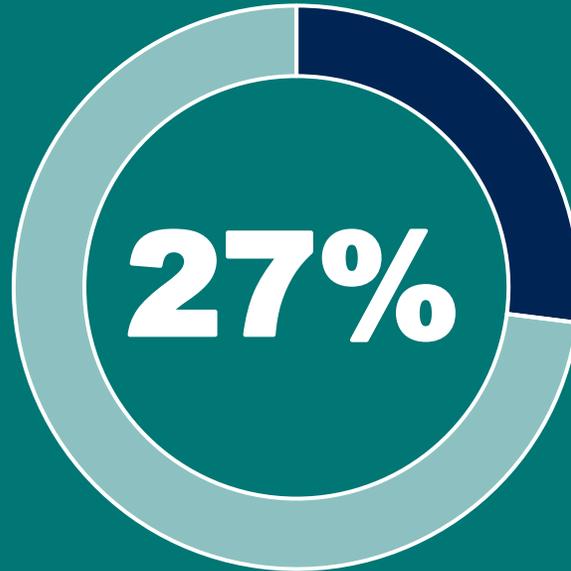


# HOW WE SEE OUR COUNTRIES

% expecting their country to reach the final



**BRAZIL**



**FRANCE**

**VS**



**ARGENTINA**

# HOW WE SEE **OTHER COUNTRIES**

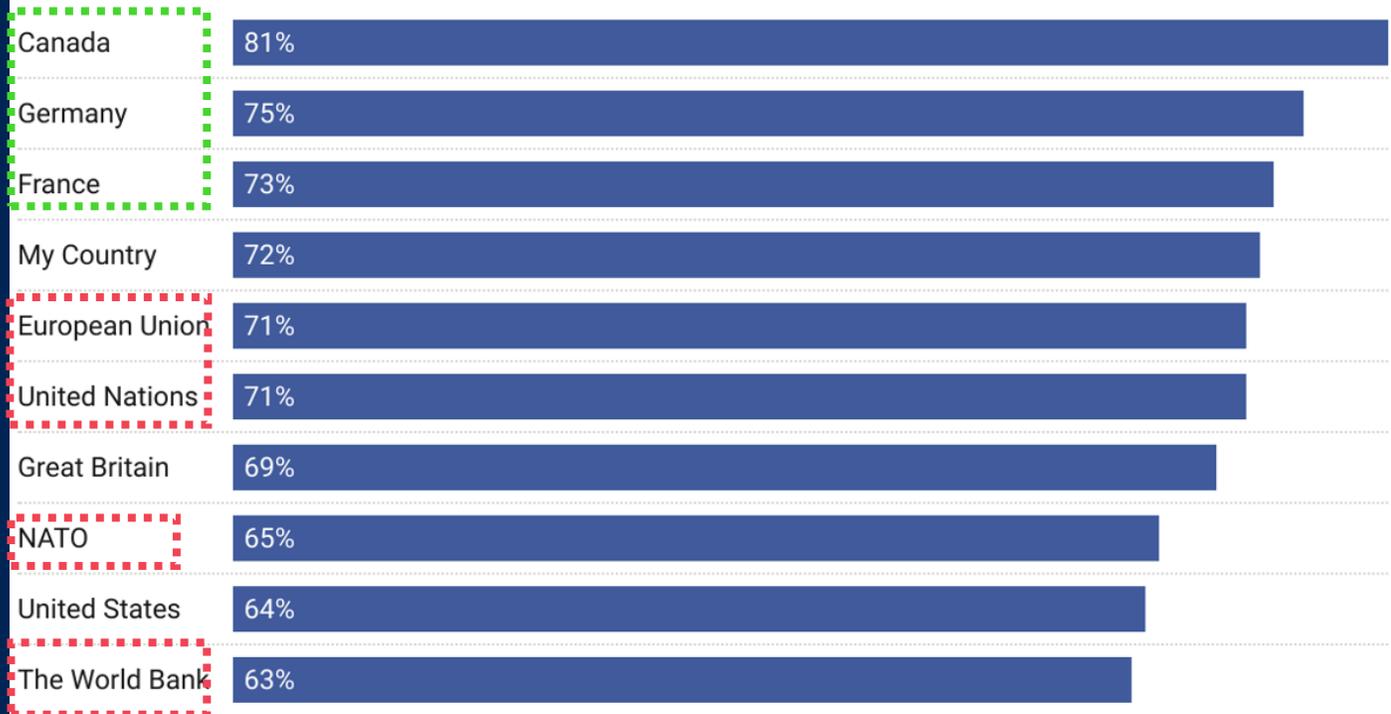


[Download](#) the survey results and see also the [Nation Brands Index](#)

## World Influencers

Thinking about the next decade, would you say the following countries or organizations will have a strongly/somewhat positive influence on world affairs?

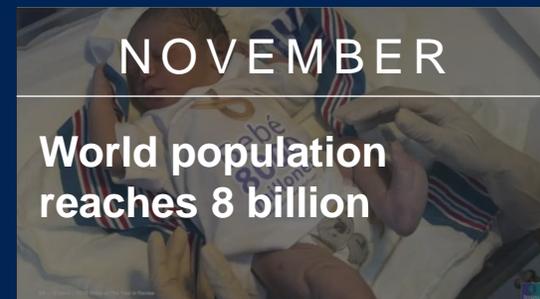
■ Global Country Average



Base: 32,507 adults across 33 countries, ages range from 16-74 (depending upon country), and conducted between September 23 - October 7, 2022

Source: Ipsos.com • Created with Datawrapper

# 2022: A TOUR OF PUBLIC OPINION



# FOR MORE: OUT NEXT WEEK!

[OVERVIEW](#)

[THE EVENTS OF 2022](#)

[THE VIEW FROM HERE](#)

## The Ipsos Almanac

# KEYS

AN IPSOS WEBINAR SERIES

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and resources from this episode



[\[Webinar\] KEYS - The year in review | Ipsos](#)

JOIN US for our next KEYS webinar:  
Thursday, 19 January  
11:00 & 17:00 CET

THE YEAR AHEAD:  
ARE WE READY?

KEYS - A WEBINAR SERIES BY IPSOS



# OLD STORY NEW STORY

## Inflation In Turkey

Özlem Tekintaş Aydın

GAME CHANGERS



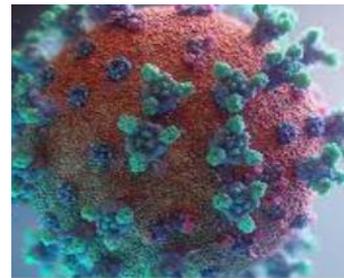
# THERE ARE ALWAYS SOME MACRO ISSUES ON TURKEY'S AGENDA.



Political Tension



Immigrants



Covid-19



Hyper-Inflation

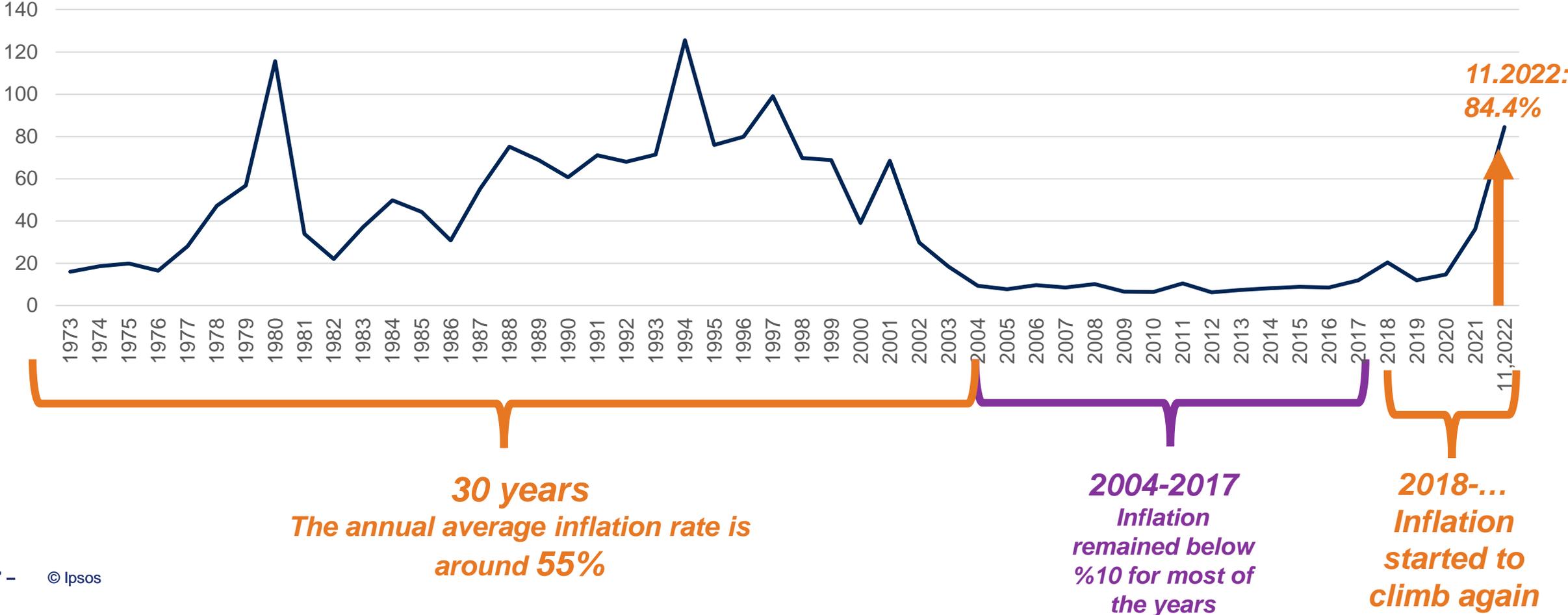
.....



The Story Of A Resilient Society  
That can Adapt To Different  
Challenges

# ALTHOUGH INFLATION IS A NEW CONCEPT FOR SOME COUNTRIES, WE ARE VERY FAMILIAR WITH IT IN TURKEY.

### Historical Inflation Rates In Turkey(%)



# PART ONE: THE ADAPTATION JOURNEY OF CONSUMERS



# NOVEMBER 2021... REVENGE PLANS...

## 2022 Plans

- Save Money
- Travel Nice Places
- Less Netflix & More Friends
- Lose Weight
- Wellness

21%

November 2021  
Inflation Rate

36%

December 2021  
Inflation Rate

84%

November 2022  
Inflation Rate



# ALL REVENGE PLANS REQUIRE MONEY

## 2022 Plans

- Save Money
- Travel Nice Places
- Less Netflix & More Friends
- Lose Weight
- Wellness

## 2022 Plans Revision v12

- ~~Save~~ Find More Money
- ~~Travel Nice~~ Some Places
- ~~Less~~ I love Netflix & ~~More Friends~~
- ~~Lose Weight~~ Budget Management
- ~~Wellness~~

# ~~SAVE~~ FIND MORE MONEY



## KEEPING THE VALUE OF MONEY

Central Bank Interest Rate **9%**  
vs inflation **84%**

**72%**

Couldn't save money in last year.

42 - © Ipsos **47%**

Expect to go into debt in the coming period



## COST OF LIVING

**80%**

Purchasing Power Decreased

**64%**

Dissatisfaction with own standard of living

# ~~TRAVEL NICE~~ SOME PLACES

## LEISURE TRIPS

5%

*Had leisure trip plan last summer*



## FIND THE CHEAP

51%

Wandering around different markets to find the cheapest option

More stores are visited →

Shopping Frequency Decrease ↘

# ~~LESS LOVE NETFLIX & MORE FRIENDS~~

BRING THE EXPERIENCE TO HOME

## GOING OUT

10%

Going out to dinner in Sept'22  
vs 17% December'21

16%

Spending time outside with  
friends in Sept'22  
vs 28% December'21

**Tortilla Pizza  
in Pan**



**One Pan  
Pasta**



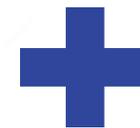
**Starbucks at  
home**



22%

Same as  
previous  
year

## SPENDING TIME OUTSIDE



# ~~LOSE WEIGHT~~ FOOD BUDGET MANAGEMENT

Spending Share%	MAT 21	MAT 22	Spending Change%	Volume Change%
<b>FMCG</b>	<b>100</b>	<b>100</b>	<b>66</b>	
Food & Beverages	83%	84%	69	-3
General Food	13%	14%	80	4 ↑
Meat & Meat Products	14%	13%	57	-5
Fats & Oils	8%	9%	82	-1
Dairy Products	16%	17%	74	3 ↑
Snacking	14%	13%	60	-3
Beverages	12%	12%	67	-7
Other Food	6%	6%	66	-7

✓ Essential Foods  
Dairy Products



✓ Hunger Suppressing Snacks



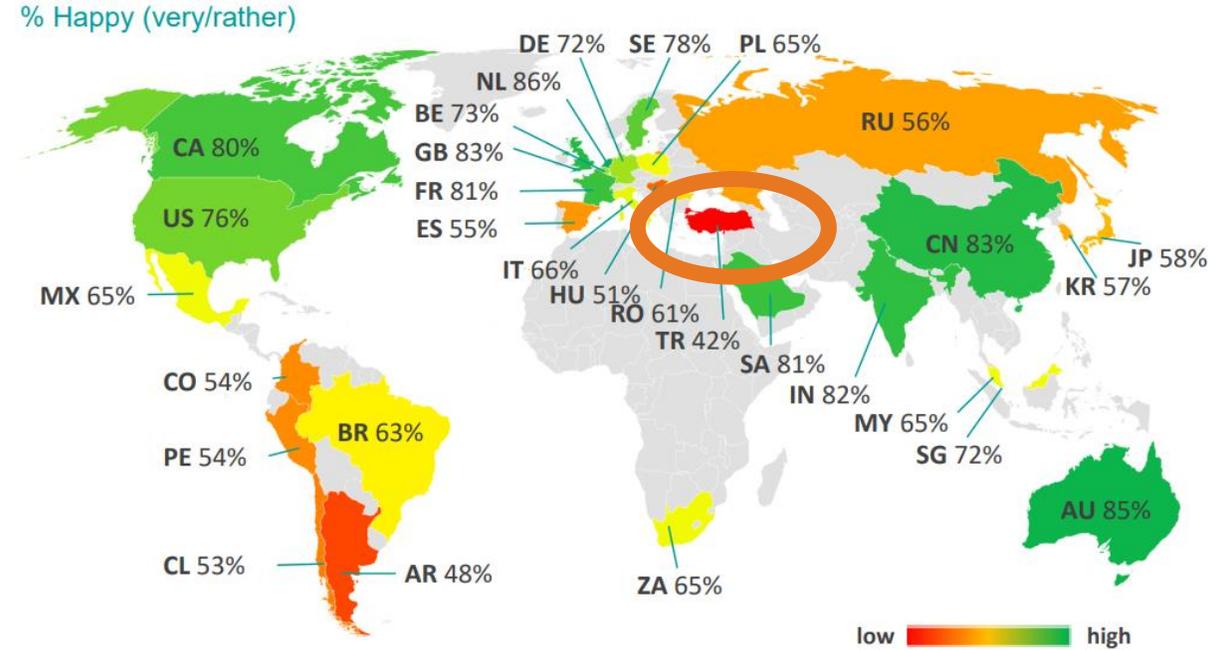
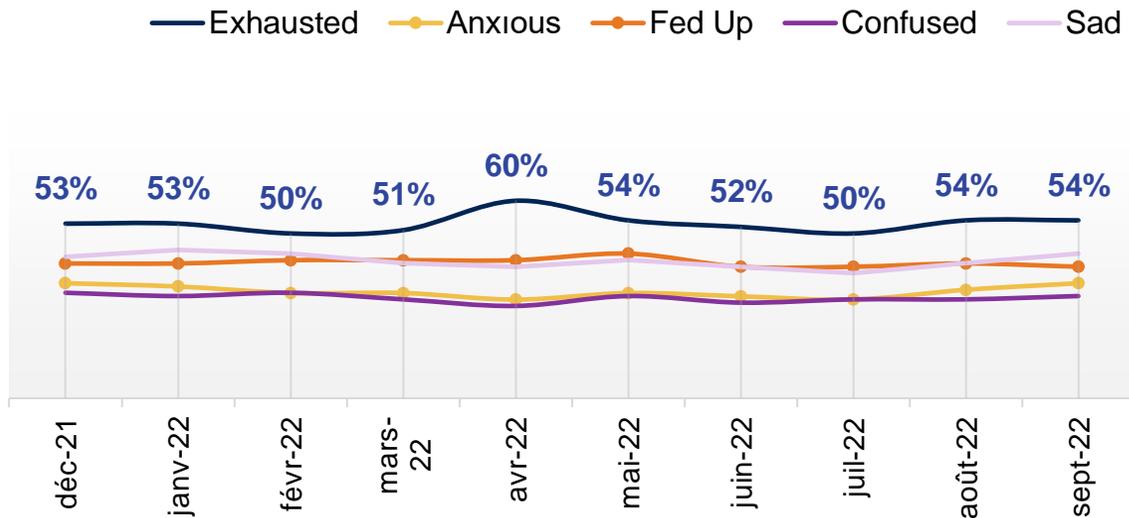
✓ Some Beverage Categories  
Positioned As Meals



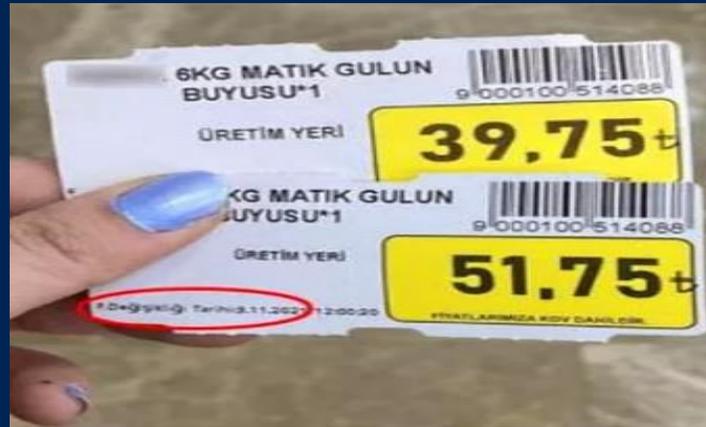
# WELLNESS

**45%** Expect to current economic crisis to continue more than to next three years

## “How have you been feeling lately?/Top 5”



# PART TWO: THE ADAPTATION JOURNEY OF BRANDS



# DISCOUNTER IS THE QUEEN



Ad campaigns  
with major celebrities

*One of the most  
recognized campaigns*



Weekly in & out strategies  
with different portfolio



Superior taste award  
announcements for their  
PL brands

# FMCG INNOVATION STRATEGIES



Catchy ads  
High visibility on the shelf  
Affordable price point



Integration of a traditional but very expensive dessert with chocolate

Premium chocolate but affordable dessert



Line extension of well-known sweet biscuit brand into the salty biscuit category



A new variant of taste like a cake communication

# KEY MESSAGE ADAPTATION



*Fairy: Don't waste  
electricity  
Save your budget,  
save the world*



*Ruffles: Suppress  
your hunger with the  
taste of grilled meat  
flavor Ruffles*

**IS THE STORY OVER?**

# WORLDWIDE CONSENSUS: INFLATION AND ITS NEGATIVE EFFECTS WILL CONTINUE



Results [here](#)

**THE PRICES WILL RISE  
A LOT/A LITTLE**

**THE NUMBER OF  
UNEMPLOYED PEOPLE  
WILL RISE A LOT/A LITTLE**

**GLOBAL**

**69%**

**61%**



**TURKEY**

**74%**

**73%**



# The CRISIS in the POLYCRISIS

GLOBAL • LATAM • ECUADOR

“ Only a **deep understanding** of our local markets will provide the **understanding** for these *conjoining crisis* ”





People in each Latin American country identify different building blocks for their perceived polycrisis

60% Brasil

40% Mexico

% “willing to invest in a Brand that its image appeals to me”



# 5 themes to lookout for in Latam:

1. An economic crisis hitting our wallets, and hearts
2. A crisis of tensions with global vs. local
3. A climate crisis vs inflation and insecurity
4. The tech dimension: Digital transformation
5. The enduring appeal of nostalgia



An economic crisis hitting our wallets and hearts



GLOBAL TRENDS 2023

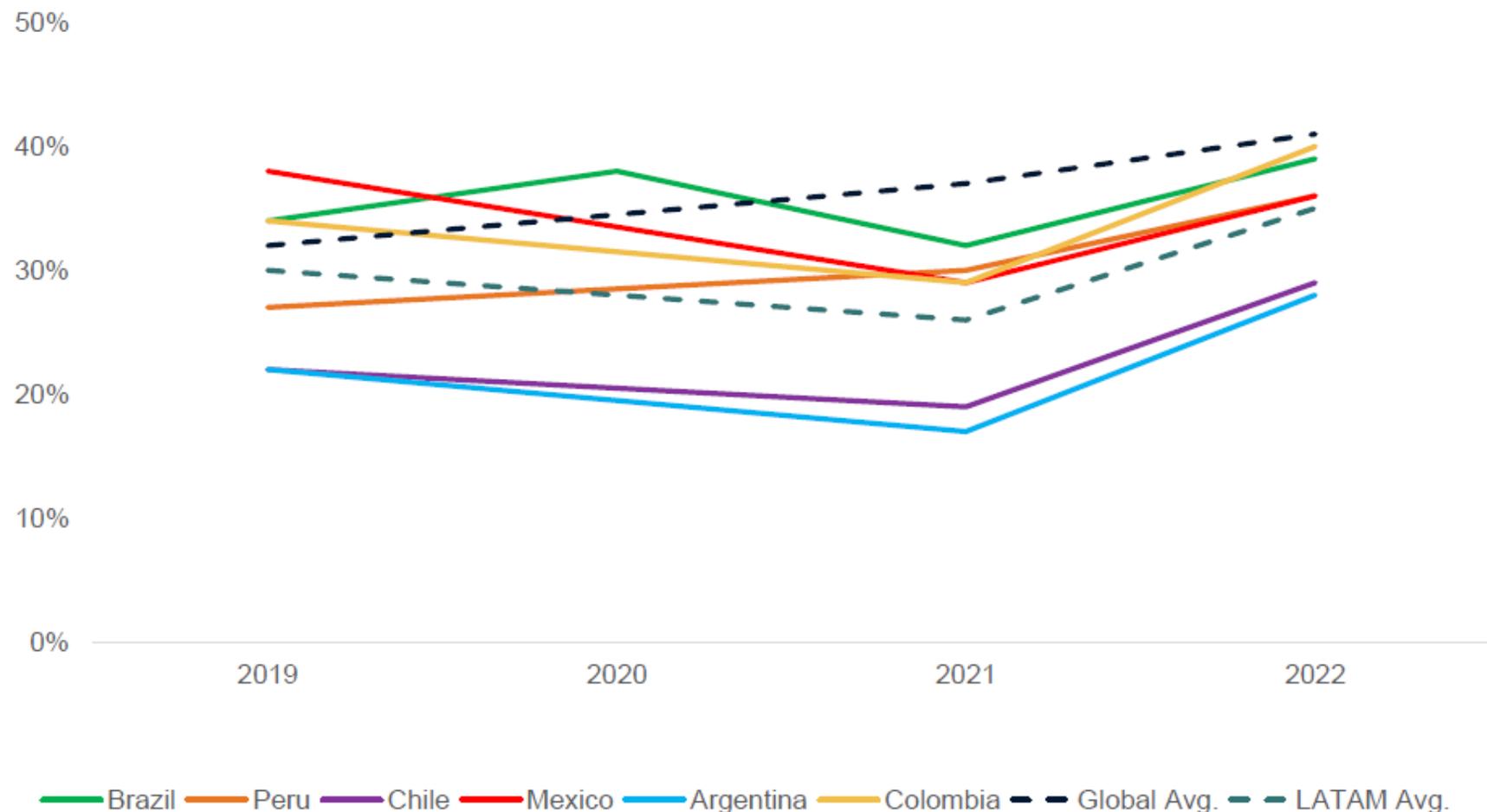


# In a moment when trusting business leaders is on the rise creating the opportunity for brands to speak up

“I trust business leaders to tell the truth”

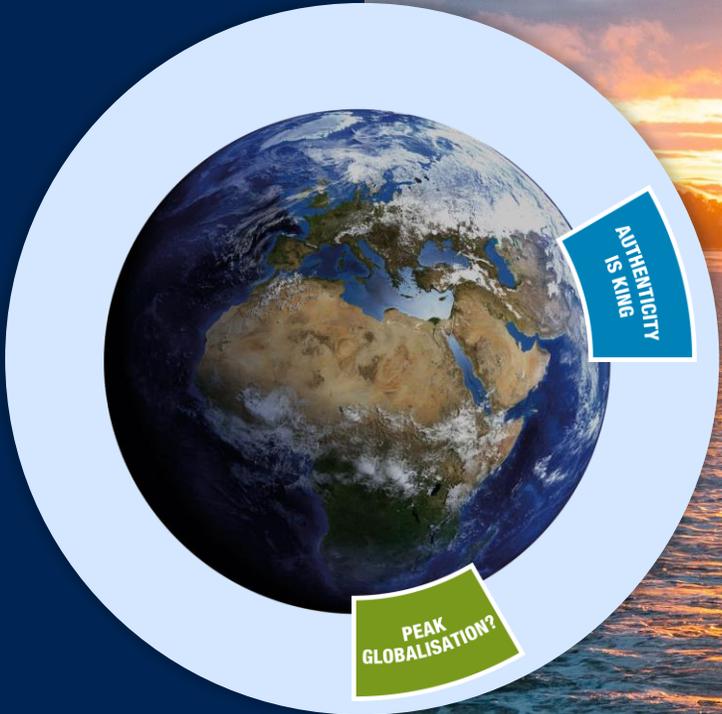
% agree

**Value: Faith in capitalism**



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

# A crisis of tensions with global vs. local



# GLOBAL TRENDS 2023

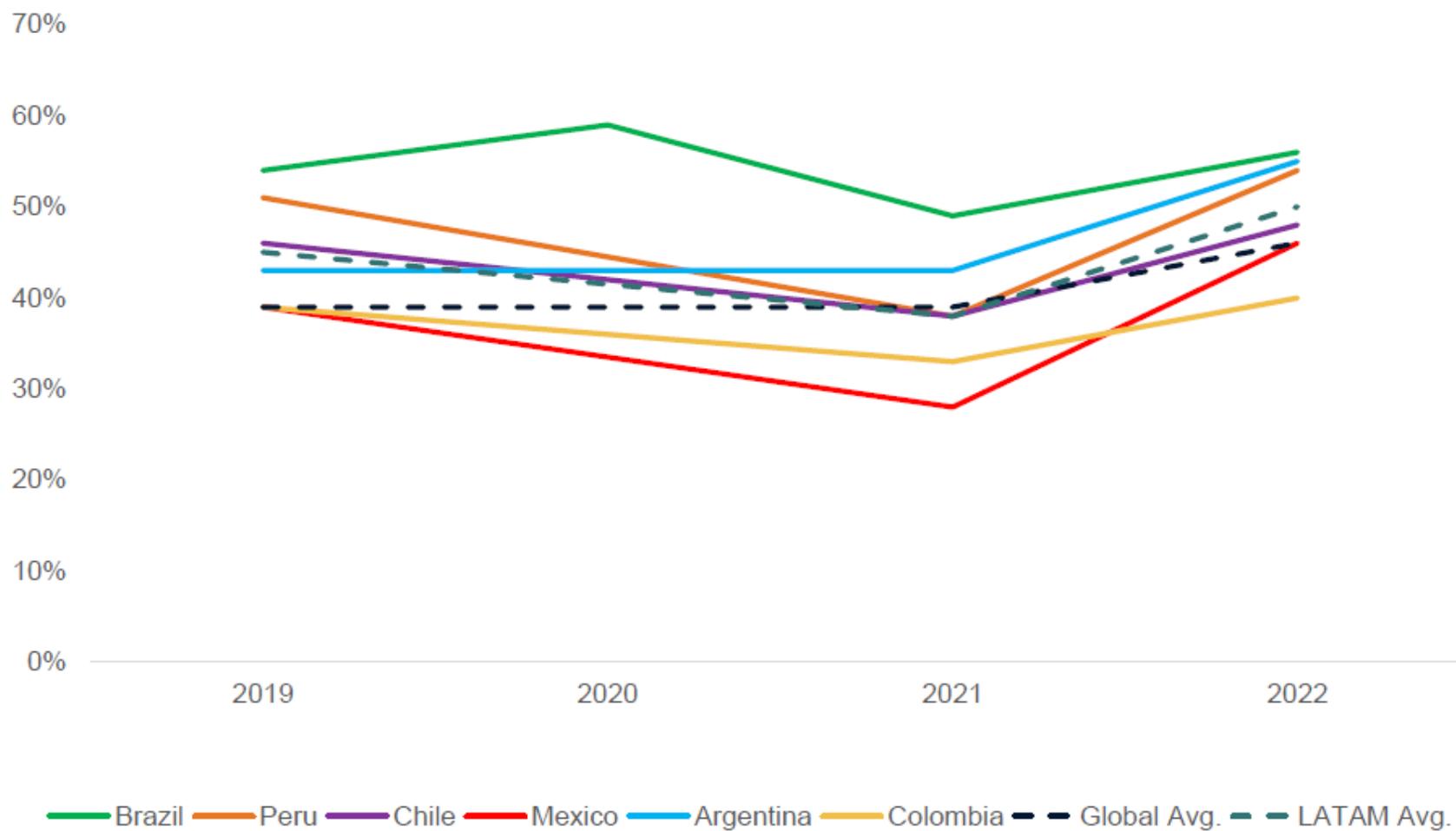


# And yet in 2022, consumers have swung back toward global brands

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

% agree

**Value: Xenophilia**



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





... Is the origin of the product decisive to be purchased?

# A climate crisis vs inflation and insecurity



**GLOBAL  
TRENDS  
2023**

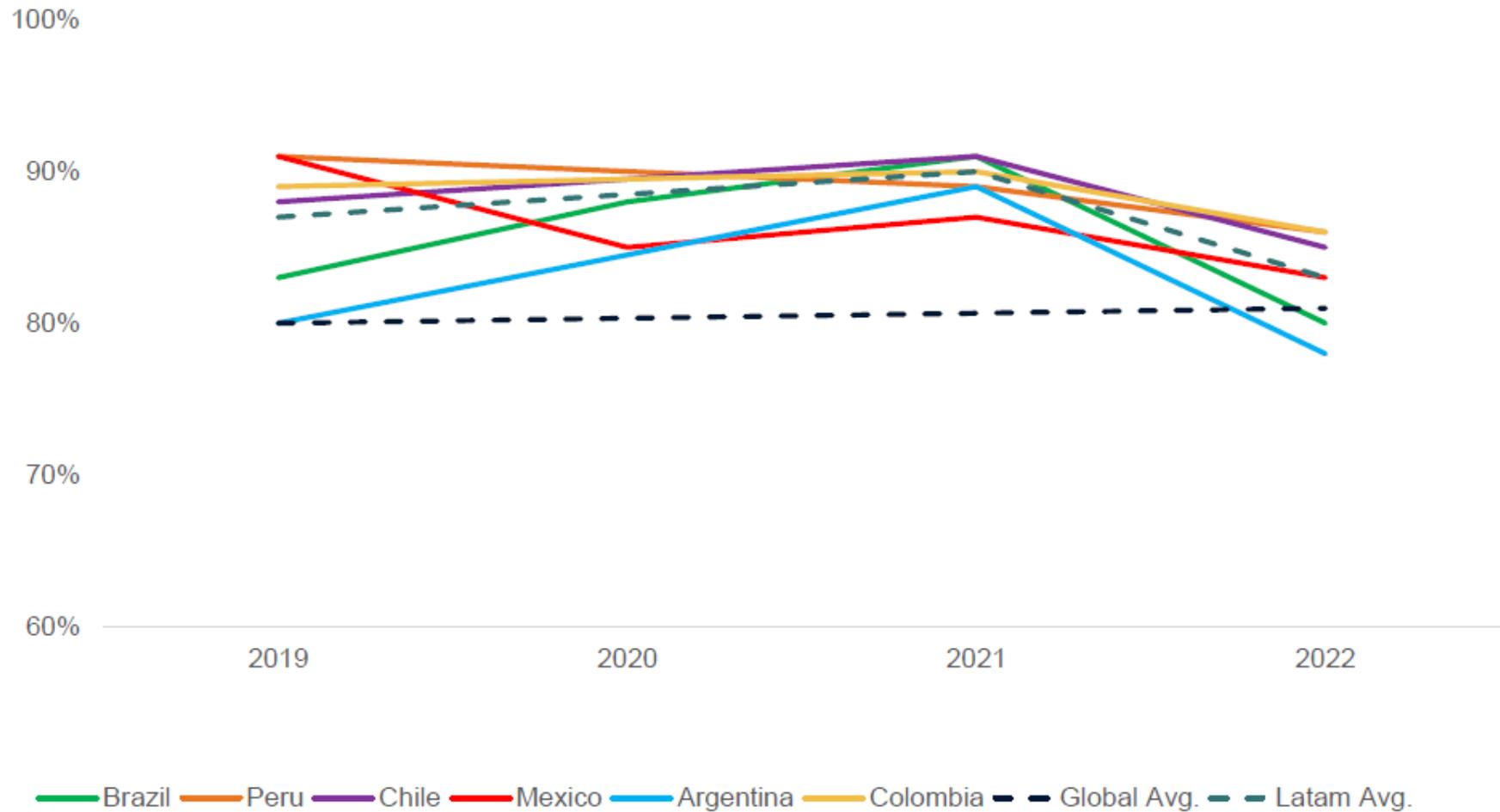


# Climate concern has stopped rising

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

% agree

**Value: Climate emergency**



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



We live in a world that approaches the same **dilemmas**, **situations** and **challenges** from different scopes and lenses



The data shown today is the **starting point** to bringing **solutions** to the crisis that build up today's **polycrisis**

# 2022, THE YEAR IN REVIEW & THE ROAD AHEAD

Planes, Trains, Automobiles, E-scooters...

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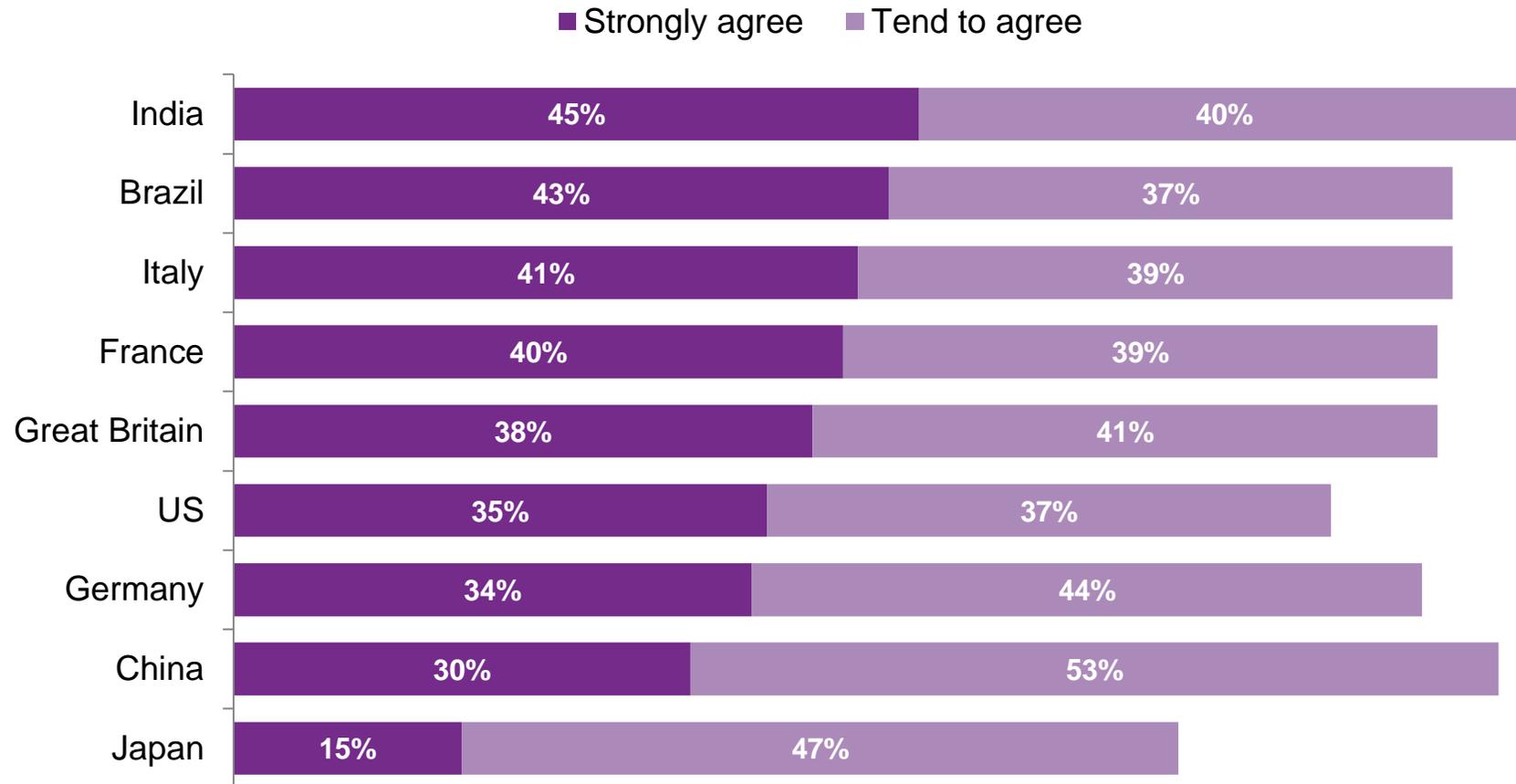
Alexandre de Saint-Léon

GAME CHANGERS



# Sustainability, an ALIGNED imperative?

*% agree that we are heading for environmental disaster unless we change our habits quickly*



**How is this impacting the Automotive and Mobility industry?**

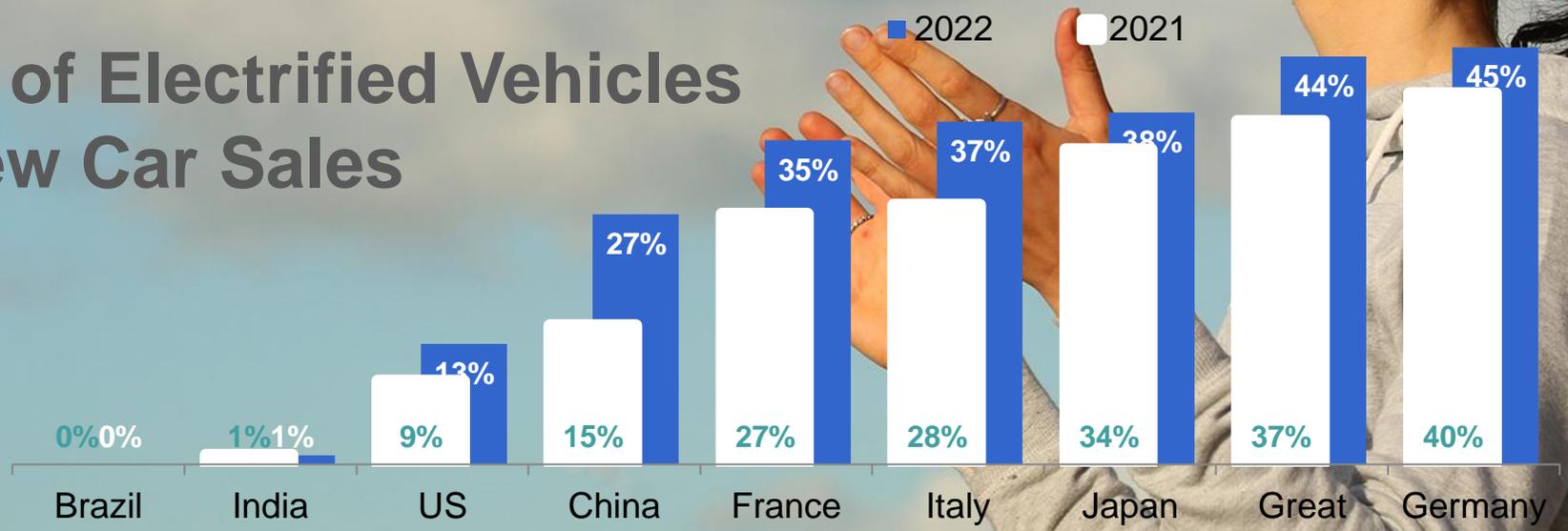
*Ipsos Global Trends 2022: 500-1,000 adults aged 16-75 (18-75 in US and CA) per market per year*

# New car sales of Electrified vehicles (BEV, FCV, HEV, PHEV)

**+ 42%** vs 2021 (Jan through Oct)

New car sales of “Thermal” vehicles  
**- 9%**

## Share (%) of Electrified Vehicles among New Car Sales



# What is the problem?

Strong and divided opinions

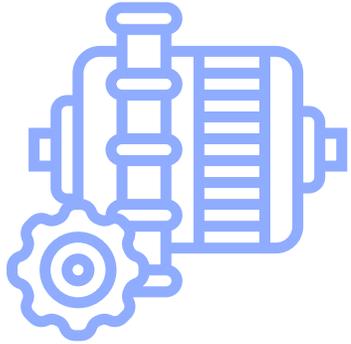
An auto crisis?

A market transformation?

A mobility revolution



# More precisely, with ELECTRIFIED VEHICLES?



## 54%

of EU citizens in the 4 larger auto markets **approve the EU ban** on thermal engines for new vehicle sales in 2035

**39% in France**

**49% in Germany**

**63% in Italy**

**65% in Great Britain**

## Why?

- \* Reluctance to **change**
- \* Fear over **infrastructure**
- \* Concern about **charging experience**
- \* **Lack of alignment** between actors
- \* **Affordability** of New EV cars
- ☹️ But **80%+** of new **BEV owners** are **enthusiastic** about their experience

# alternatives to EV for sustainable automobile?

## Retrofit



**53%**  
would consider  
converting their vehicle  
to Electric engine

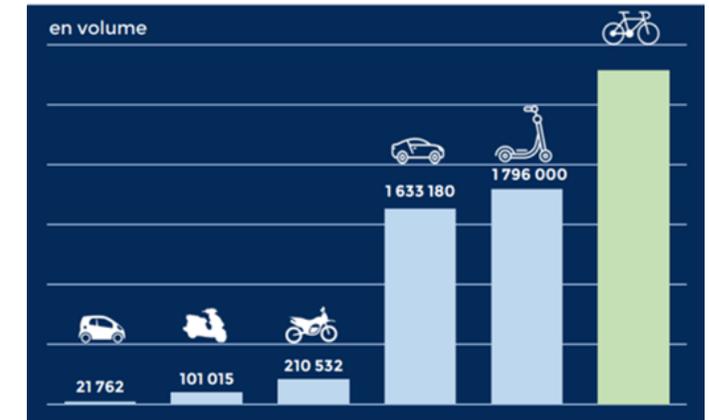
## Eco diagnostic



**63%**  
would consider and be  
ready to pay for an eco-  
diagnostic or an eco-  
maintenance offer of  
their vehicle

## New Mobility

Ventes 2021 des différents mode de transports



## Bikes & e-bikes

New bicycles sales in France exceed  
the number of New car sales...

...and are growing, driven by e-bikes

# SHIFTING from Vehicles as Transportation to having "Mobility Options"

Mobility Options

Traditional + new + on-demand choices

## PERSONAL OPTIONS

Vehicle



Motorcycle



Scooter / Moped



Bicycle / eBike



Walking / Jogging



## FOR HIRE VEHICLES

Traditional Taxi



Ride Hailing Service



Car Sharing Service



Car Subscription Service



Traditional Rental Car Service



## FOR HIRE BIKES / SCOOTER STRAIN / BUS

Bicycle Sharing Service



Scooter Sharing Service



Subway / Local Train



Long-Distance Rail



Local / City Bus



Long-Distance Bus



Microtransit Service



# Mobility revolution is on

It's not just buying a car — owning one is getting pricier, too

November 4, 2022 · 5:00 AM ET  
Heard on All Things Considered



Cruise, Waymo push robotaxis amid doubts about self-driving tech

Joann Muller, author of [Axios What's Next](#)

**Apple expands car key sharing, Bird charts out a strategy and layoffs come for Motional**

Kirsten Korosec @kirstenkorosec / 5:00 AM MST • December 5, 2022

**Car-sharing startup Turo expands to New York and France**

Rebecca Bellan @rebeccabellan / 3:00 AM MST • June 1, 2022

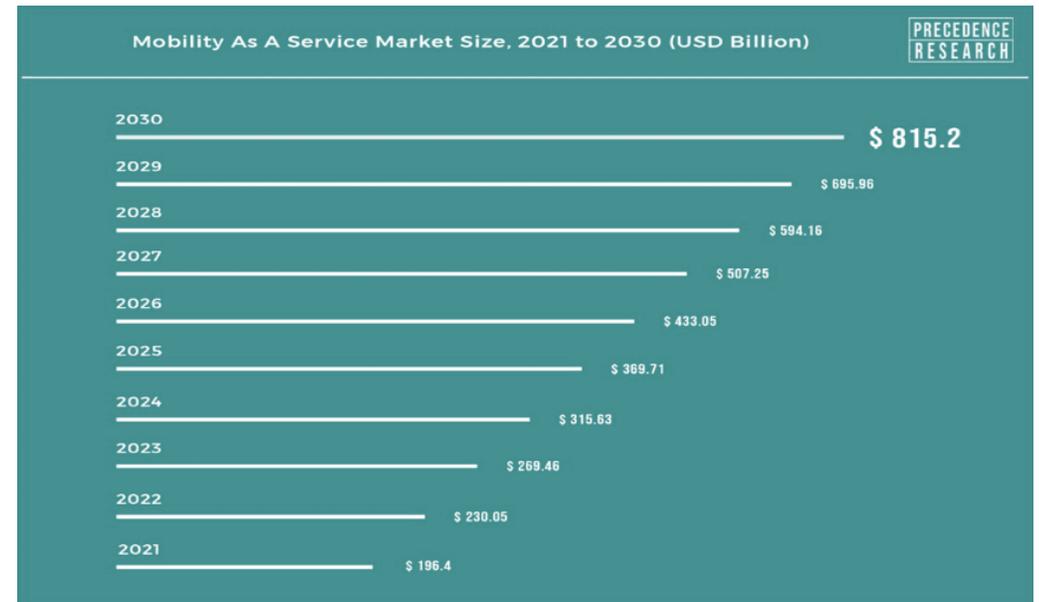
**Is it a bird? Is it a plane?  
No, it's a Jetson ONE!  
Europe's first 'passenger drone' takes to the skies**

BUSINESS | SCIENCE | LIFE

BLANKA KONOPKA JANUARY 11, 2022



**Regardless of the ups & downs, it's projected to be BIG BUSINESS.**



# WITH LOTS OF PLAYERS

## TRADITIONAL AND THE NEW USUAL SUSPECTS



## BEYOND THE USUAL SUSPECTS



A very open battle for market leadership

# To complete the road ahead

A preview of a “New Mobility Tracking solution”

Mobility Mode Usage: Share of all trips on weekdays (%)

	France results 	Paris City Center	Paris + “Petite Couronne”	Ile de France
Personal vehicle	52%	21	26	34
Personal Motorbike / Motorcycle	4%	3	3	3
Personal scooter or moped	4%	4	3	3
Personal Bicycle / eBike	5%	6	5	4
Walking / Jogging	16%	21	24	21
Traditional taxi	2%	4	3	3
Ride hailing service	2%	3	2	2
Car sharing service	2%	6	3	3
Car subscription service	1%	2	1	2
Traditional rental car service	1%	2	1	1
Bicycle-sharing service	1%	1	1	1
Scooter sharing service	1%	1	1	1
Subway and local train service	4%	15	15	12
Local / City bus	4%	8	8	7
Long-distance rail travel	1%	3	2	2
Long-distance bus travel	1%	1	1	1

**Stay tuned for the full release in January 2023**

+ details by consumer profile, type of trips, reasons to select mode, selected provider and detailed experience ratings...

7 markets covered and 10+ metro areas