

2022: THE YEAR IN REVIEW

KEYS – A WEBINAR SERIES BY IPSOS

15th December 2022



**2022:
THE YEAR IN
REVIEW**

KEYS – A WEBINAR SERIES BY IPSOS

15th 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



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

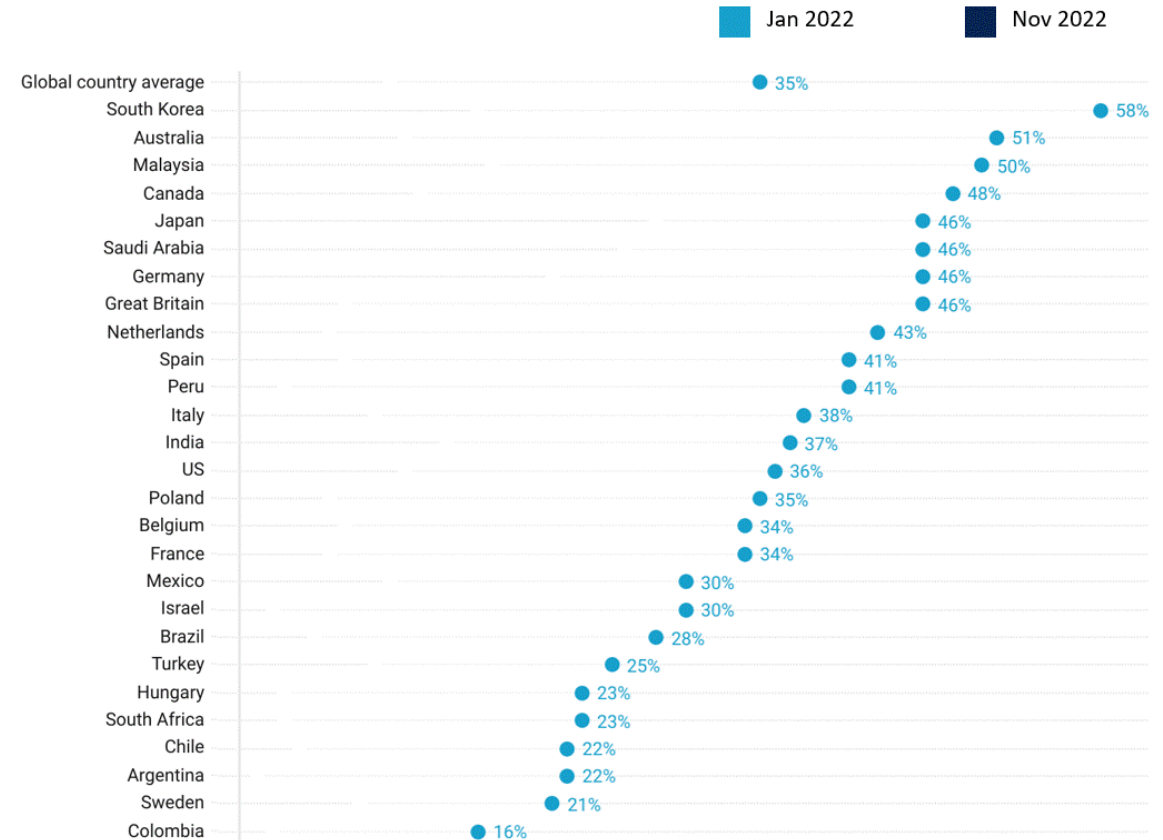
Back in 1st place

NOVEMBER 2022: LOWEST-EVER % WORRIED ABOUT COVID

Now in 12th
place overall

COVID-19: CHANGES IN REPORTED CONCERN

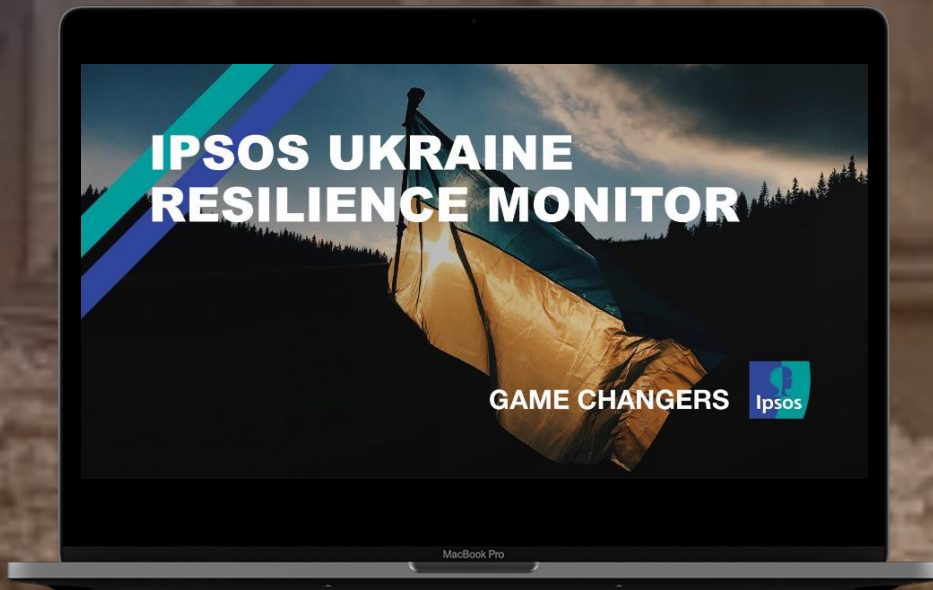
Q. Which three of the following topics do you find the most worrying in your country?
(% mentioned in January 2022 and November 2022)



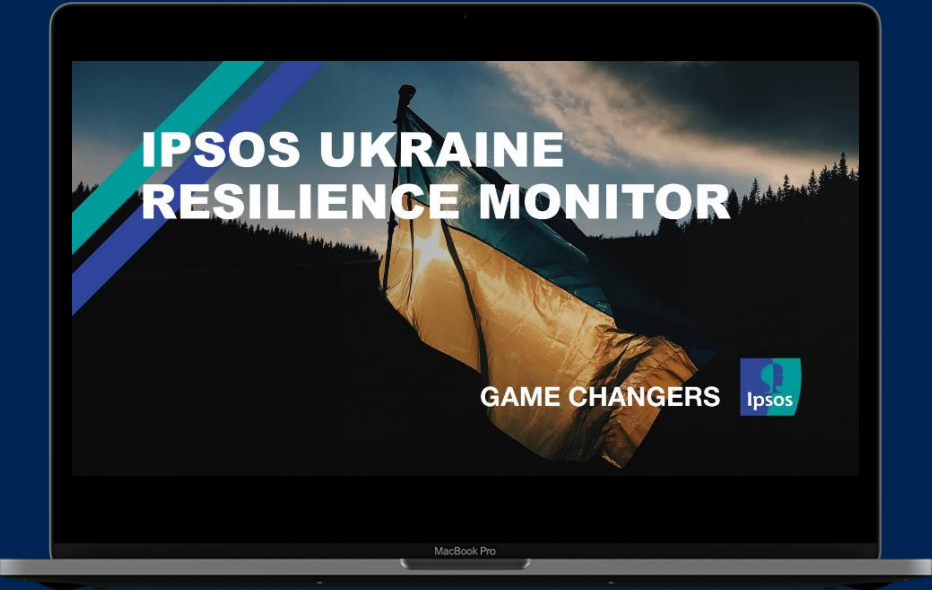
Base: Representative sample of c.20,000 adults aged 16-74 in 27 participating countries,

Source: Ipsos Global Advisor

FEBRUARY



UKRAINE LATEST: ACCESS TO ESSENTIALS



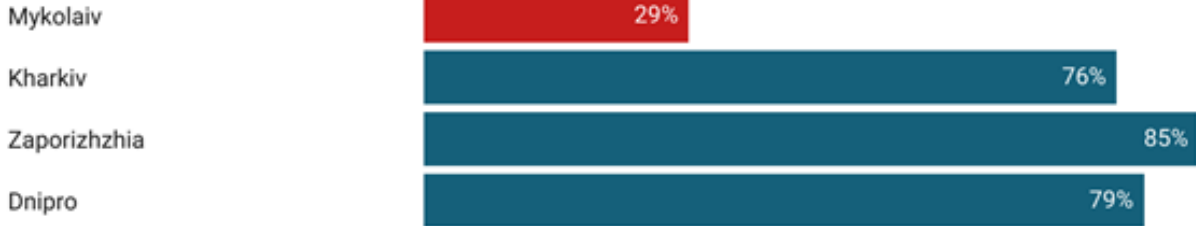
Less than a third of Mykolaiv's residents have access to safe drinking water

■ % With Access to Safe Drinking Water

Newly Liberated Cities

Balakliia, Izyum, Kupyansk and Lyman 66%

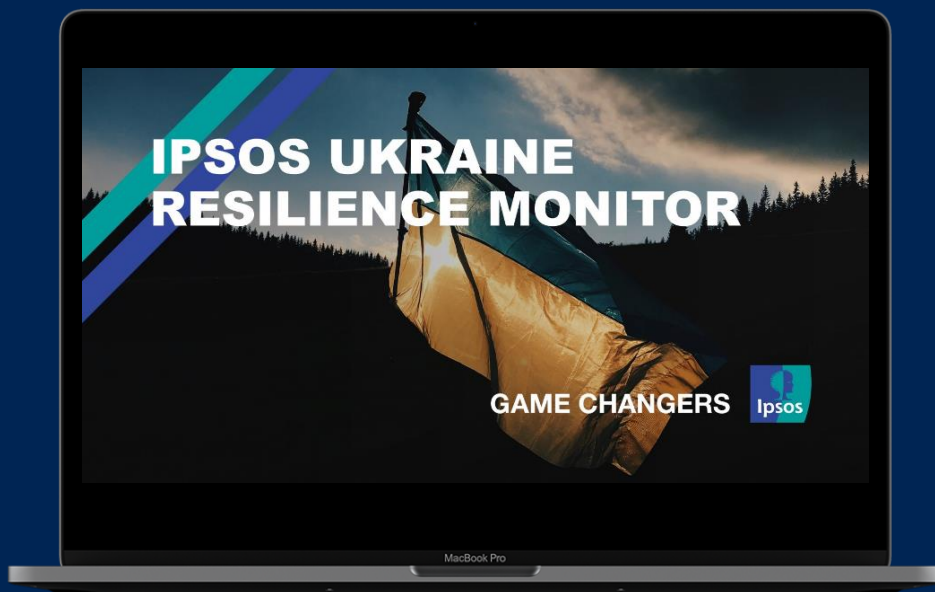
Front line cities



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, Kupiansk 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



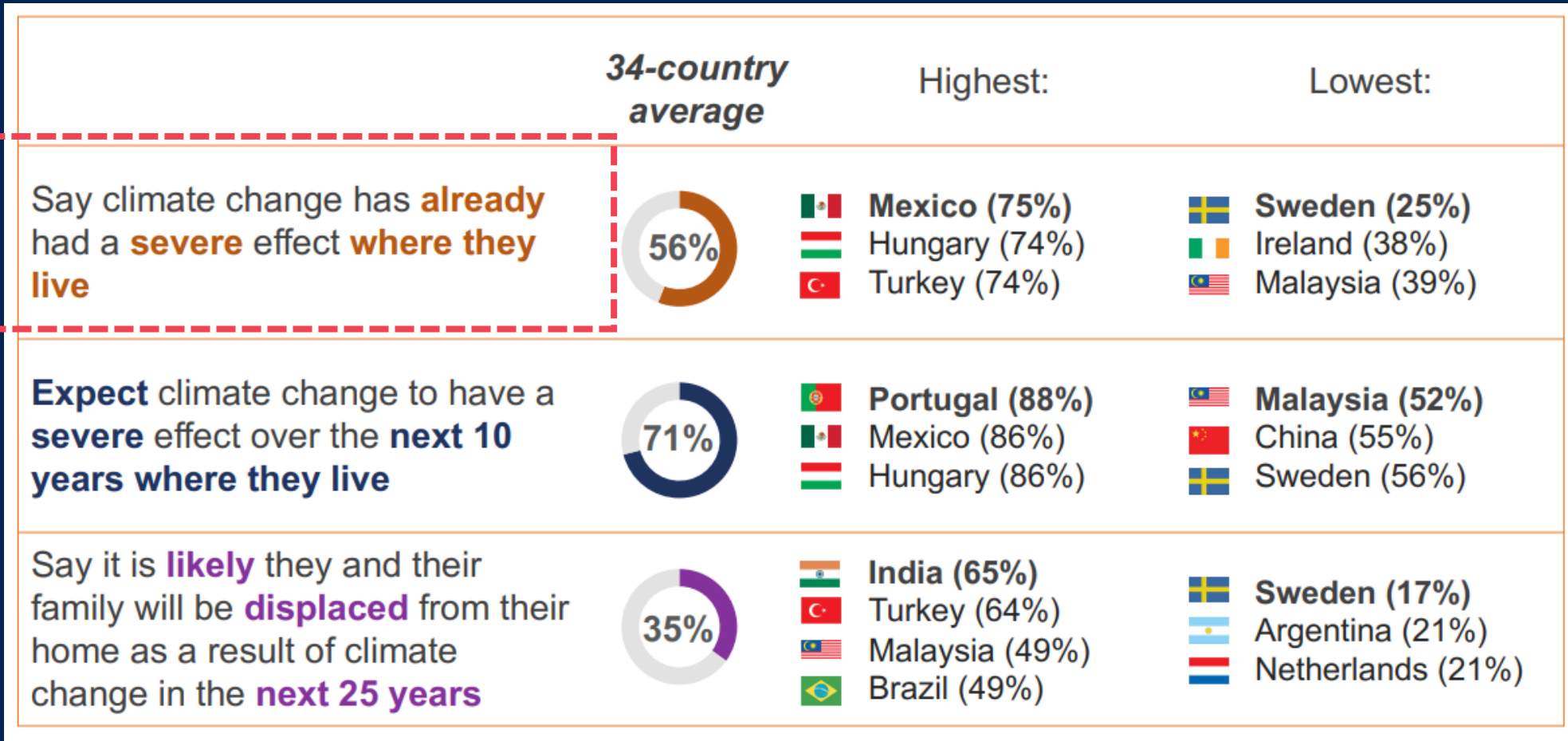
 [News & Events](#) [Innovation & Knowledge](#) [Our Solutions](#) [Ipsos.digital platform](#) 

[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

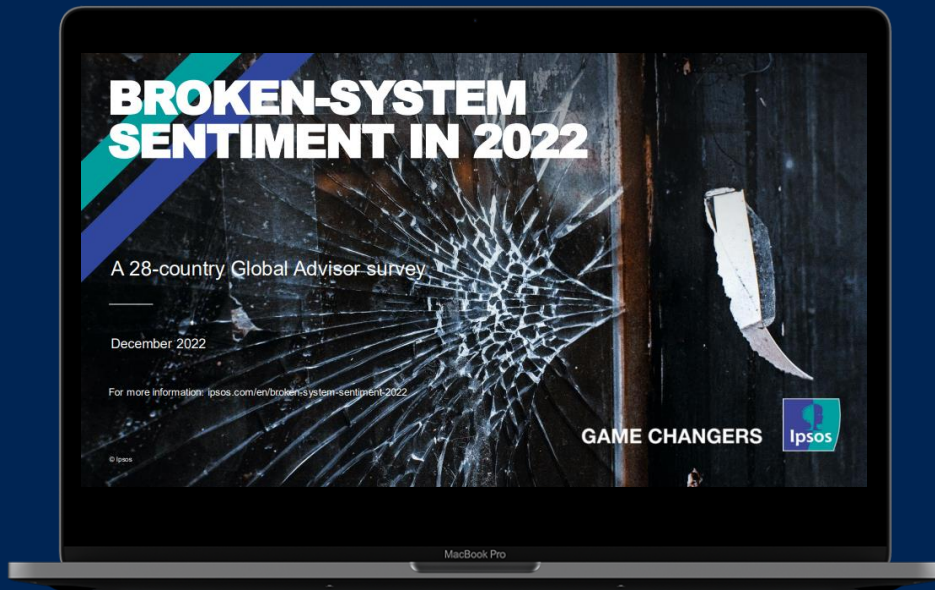


APRIL

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



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

3 May 2022

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.

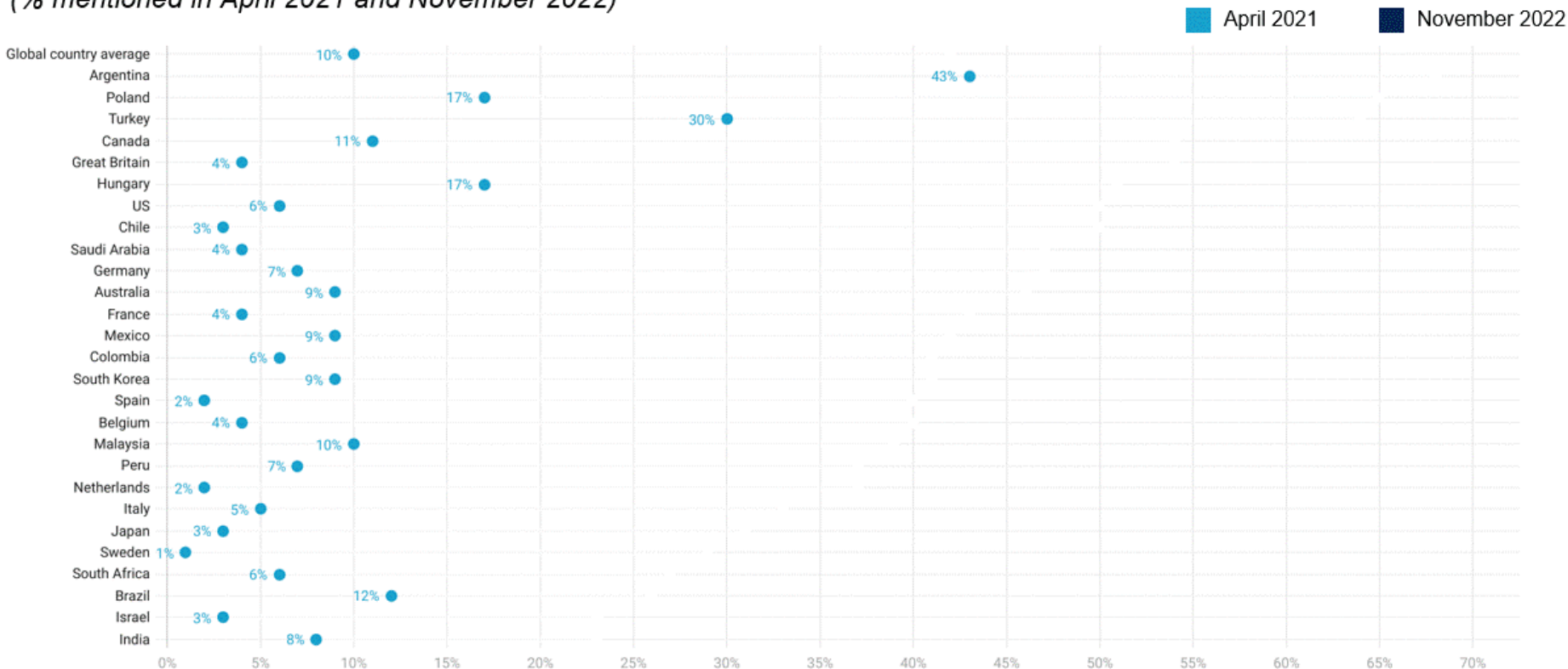
Global inflation is rising substantially, driven by higher energy and food prices, persistent supply chain disruptions, and tight labor markets in major developed economies. In the United States, inflation has reached multi-decade highs in recent months, prompting the Federal Reserve to raise interest 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

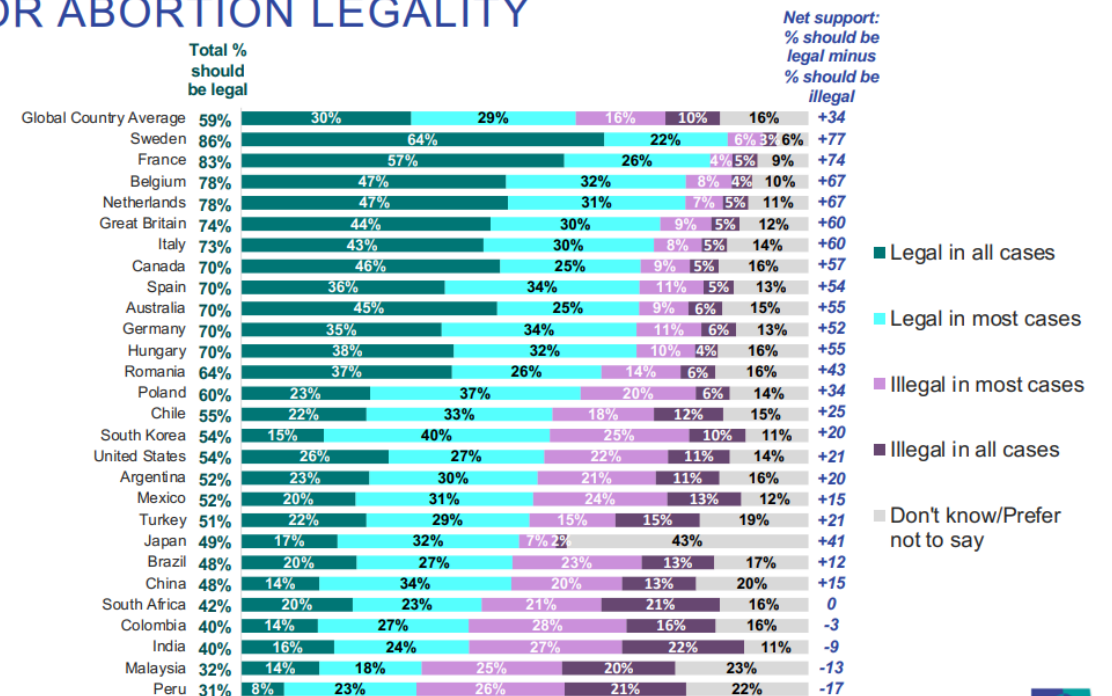


Results for 27-countries [here](#)

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



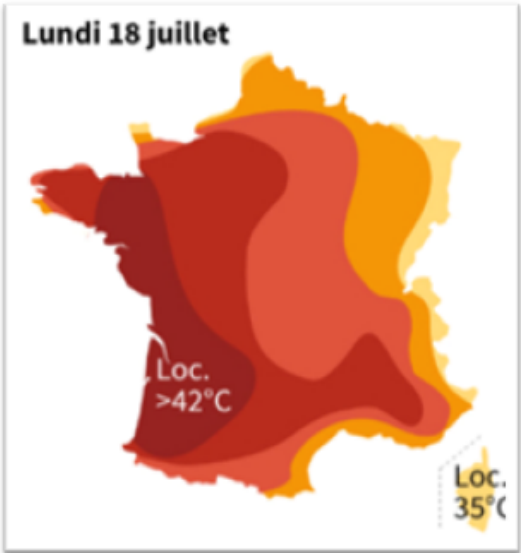
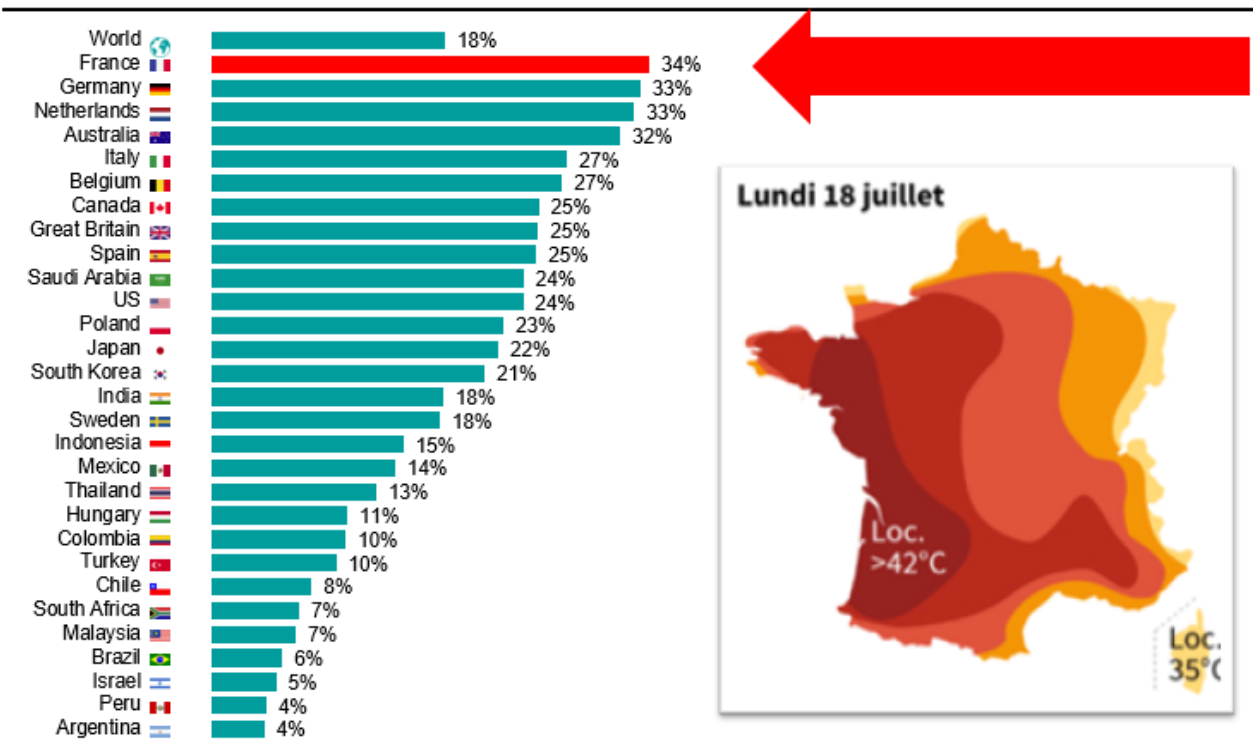
JULY



SPOTLIGHT ON FRANCE

Country Comparison

ISSUE FOCUS: CLIMATE CHANGE



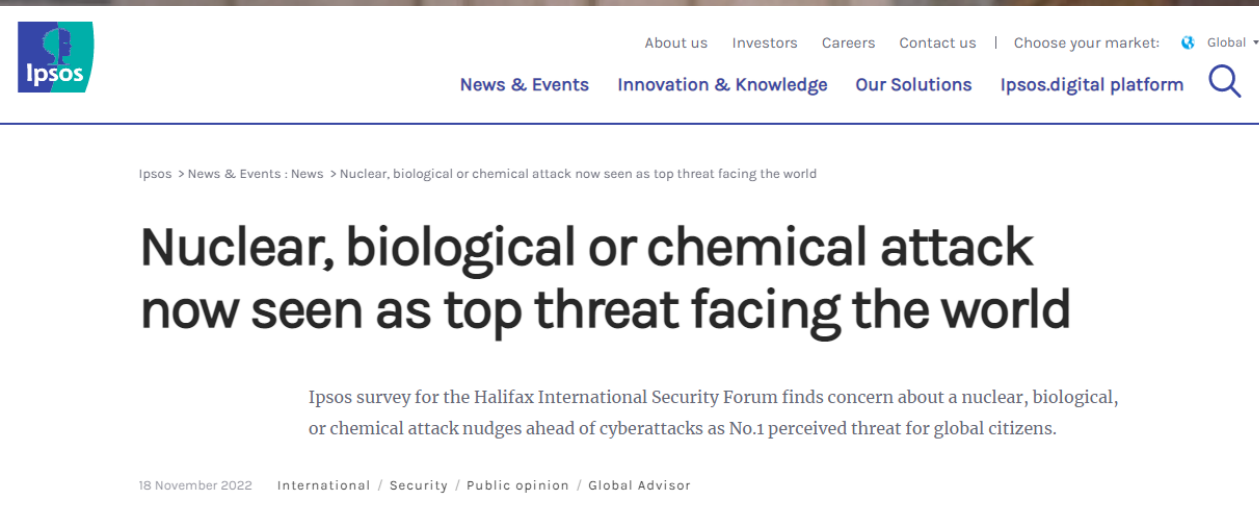
34%
Highest level of
concern recorded
in any country
during 2022

12 -

Base: Representative sample of 19,524 adults aged 16-74 in 29 participating countries.
Source: Ipsos Global Advisor. Global score is a Global Country Average. See methodology for details.



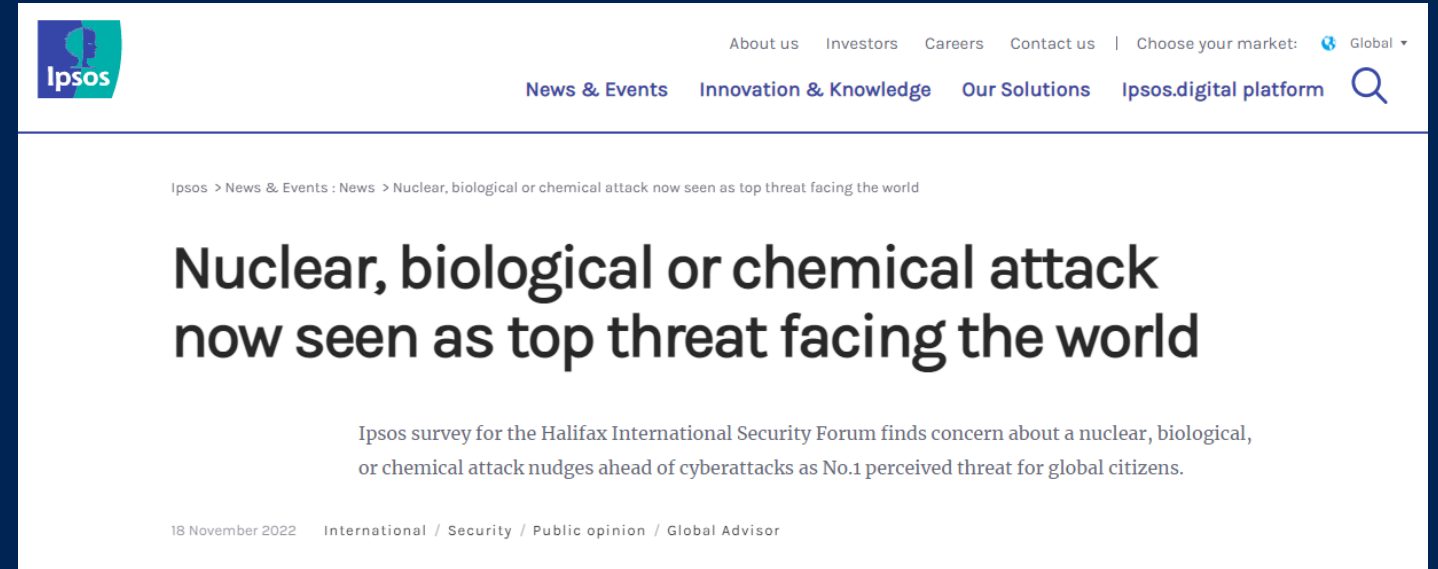
AUGUST



A NEW COLD WAR?



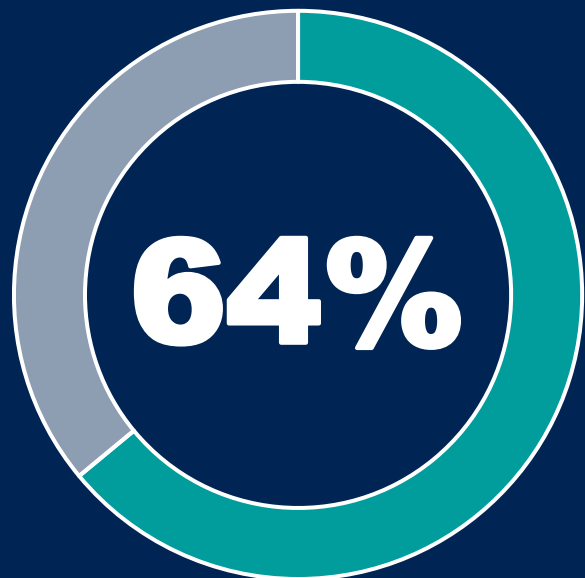
Full results [here](#)



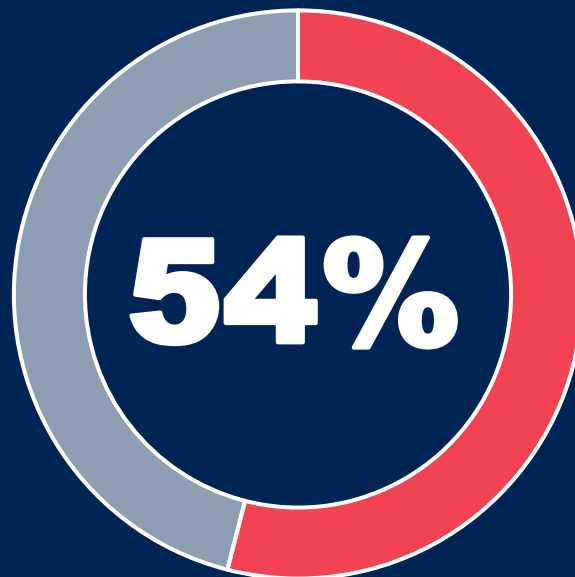
50% say my country being involved in armed conflict with another nation is “a real threat”

SEPTEMBER

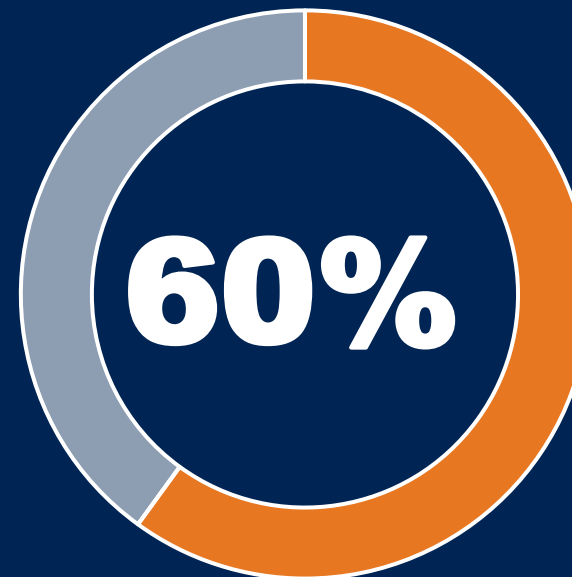
THE END OF AN ERA



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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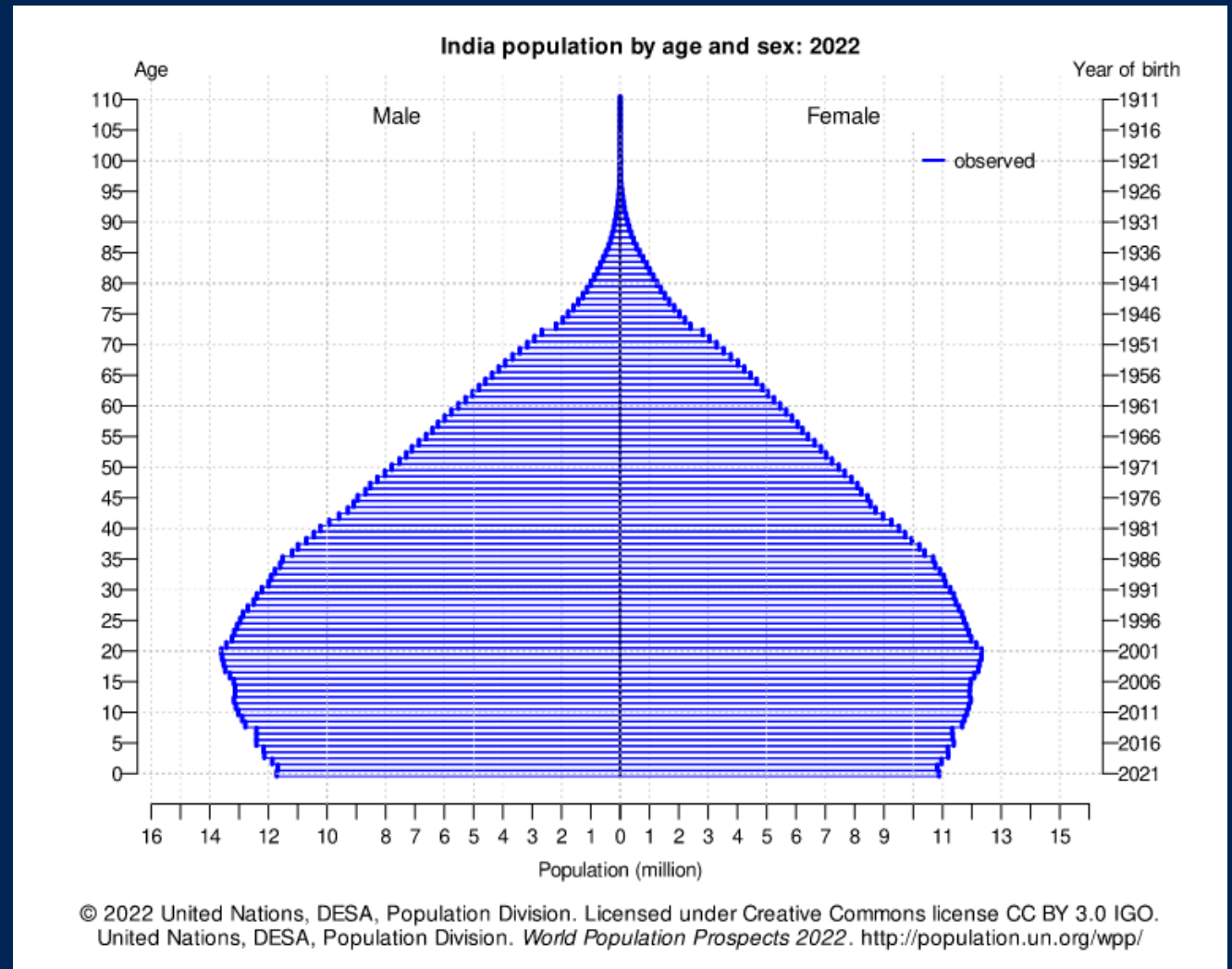
AUDIO HUB  SUBSCRIBE

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

INDIA POPULATION BY AGE AND SEX: 2022



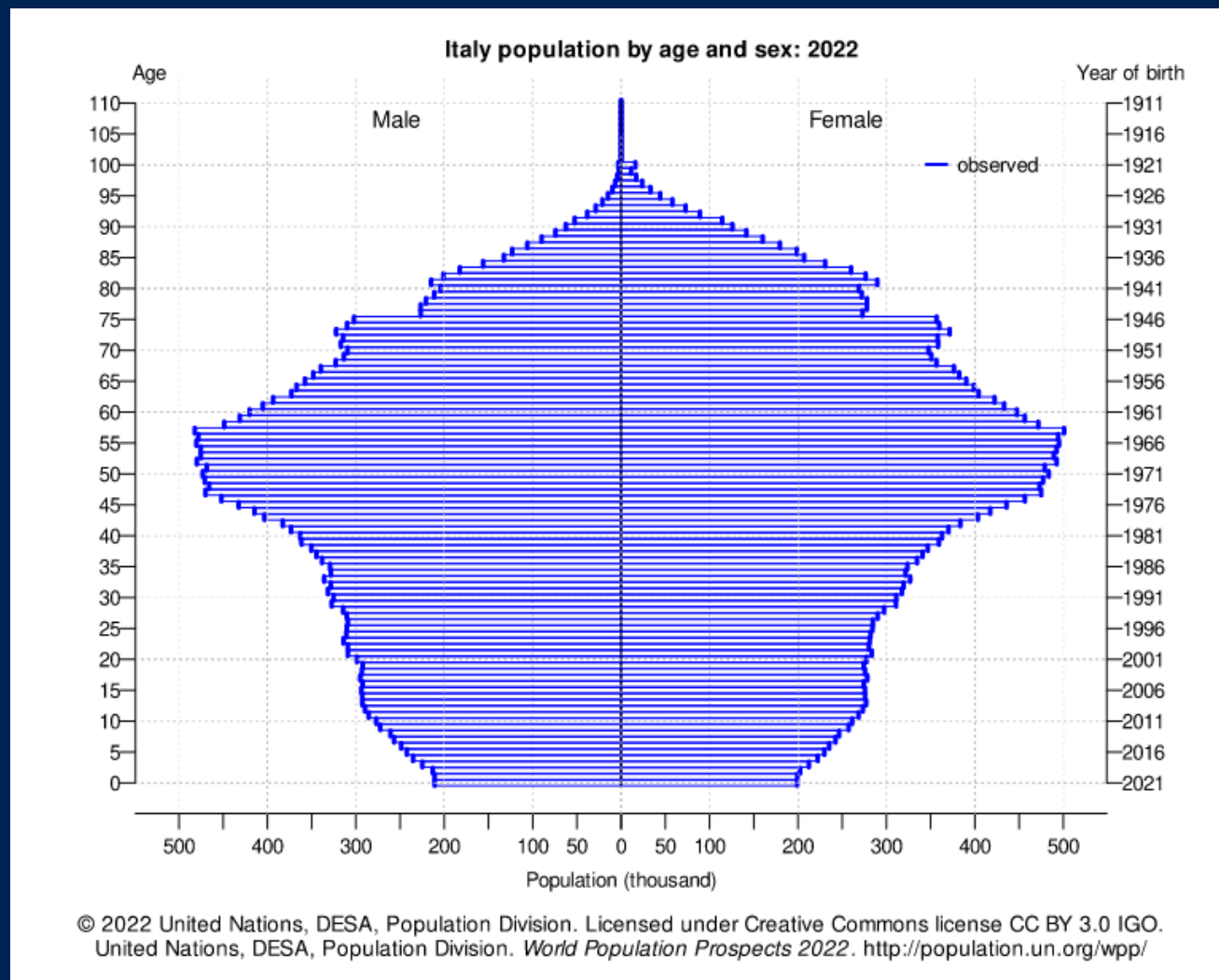
Median Age	28.6
Longevity	70
Percentage 65+	6.8%
Fertility Rate	2.0
Peak Fertility	5.98 (1965)
Below Replacement	2020



ITALY POPULATION BY AGE AND SEX: 2022



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



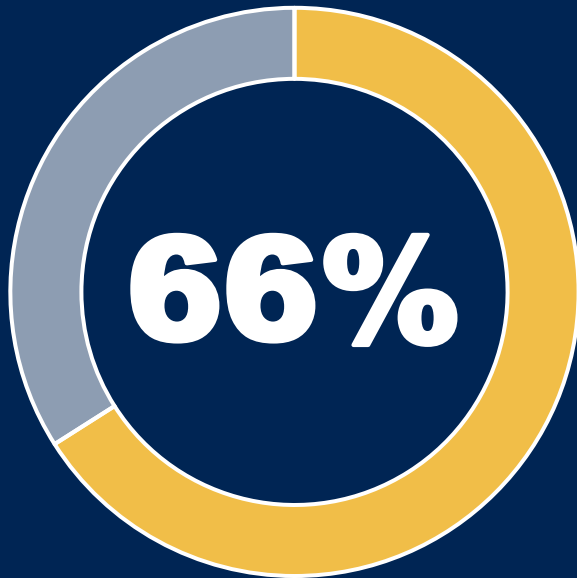
DECEMBER

ATTITUDES TOWARDS THE FIFA WORLD CUP 2022 IN QATAR

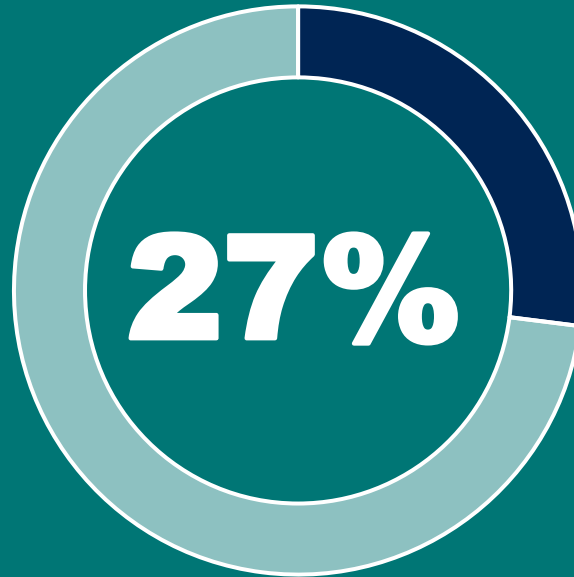


HOW WE SEE OUR COUNTRIES

% expecting **their country** to reach the final



BRAZIL



FRANCE

VS



ARGENTINA

HOW WE SEE **OTHER COUNTRIES**

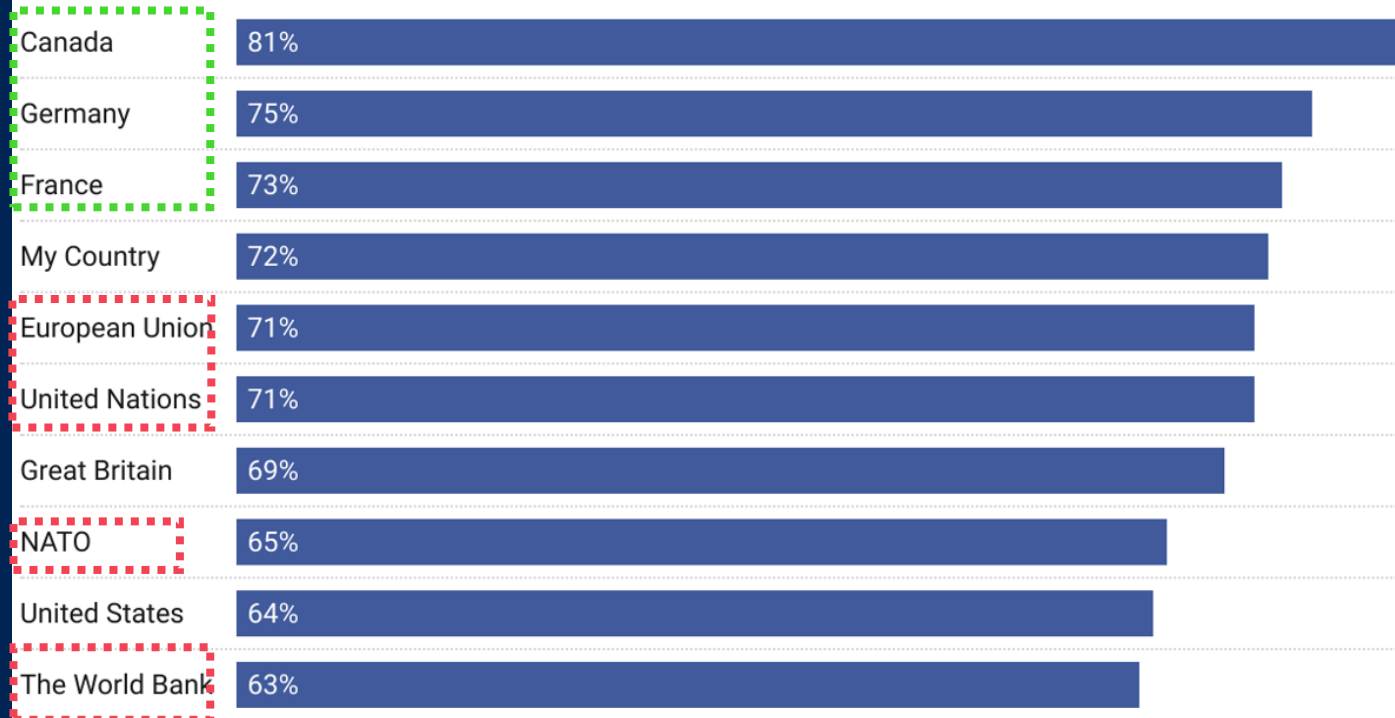


Download the survey results and see also the Nation Brands Index

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?

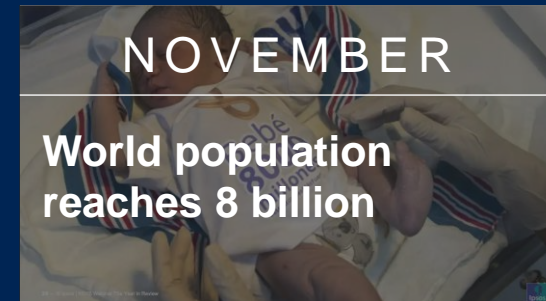
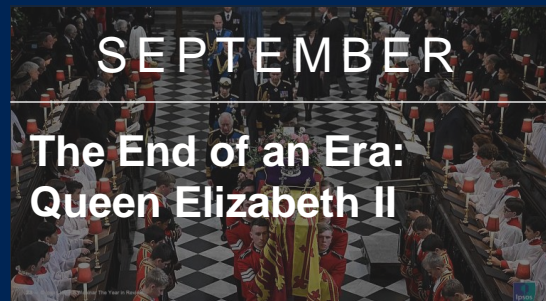
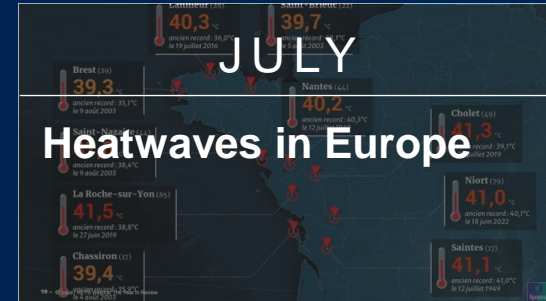
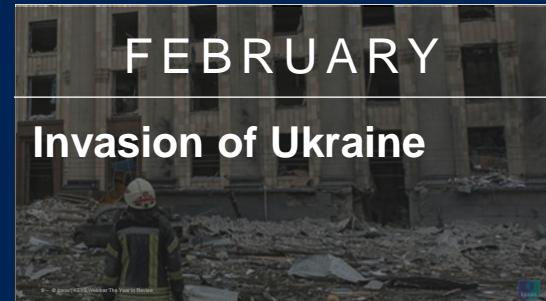
■ Global Country Average



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!

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[THE EVENTS OF 2022](#)

[THE VIEW FROM HERE](#)

The Ipsos Almanac

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and resources from this episode



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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.

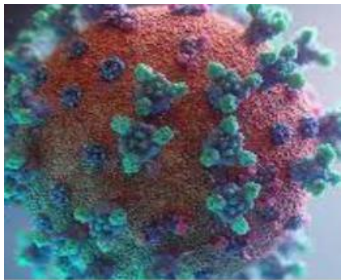


.....

Political Tension



Immigrants



Covid-19



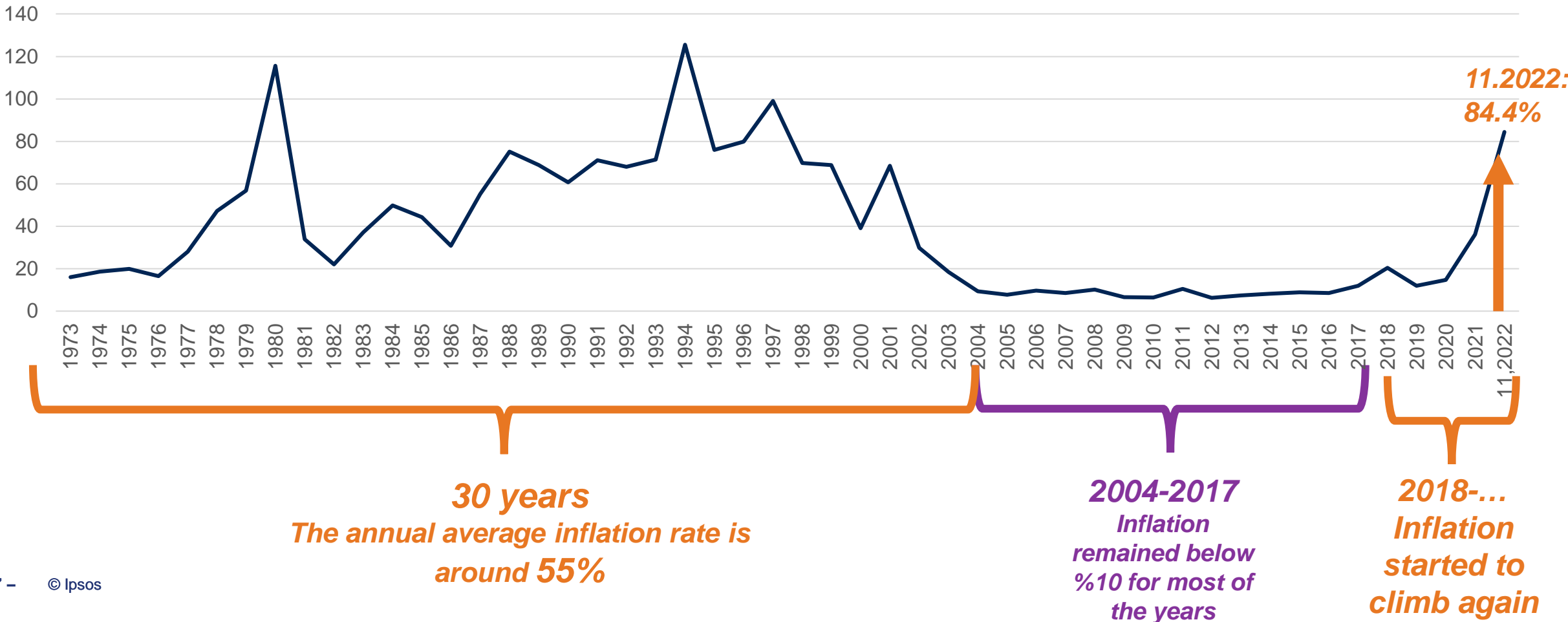
Hyper-Inflation



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

[illegible]

TRADE-OFFS

CUT-OFFS

BUDGET MANAGEMENT

AFFORDABILITY

KEEPING THE EXPERIENCE

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**



NETFLIX

22%

Same as
previous
year

SPENDING TIME OUTSIDE



~~LOSE WEIGHT~~ FOOD BUDGET MANAGEMENT

Spending Share%	MAT 21	MAT 22	Spending Change%	Volume Change%
FMCG	100	100	66	
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



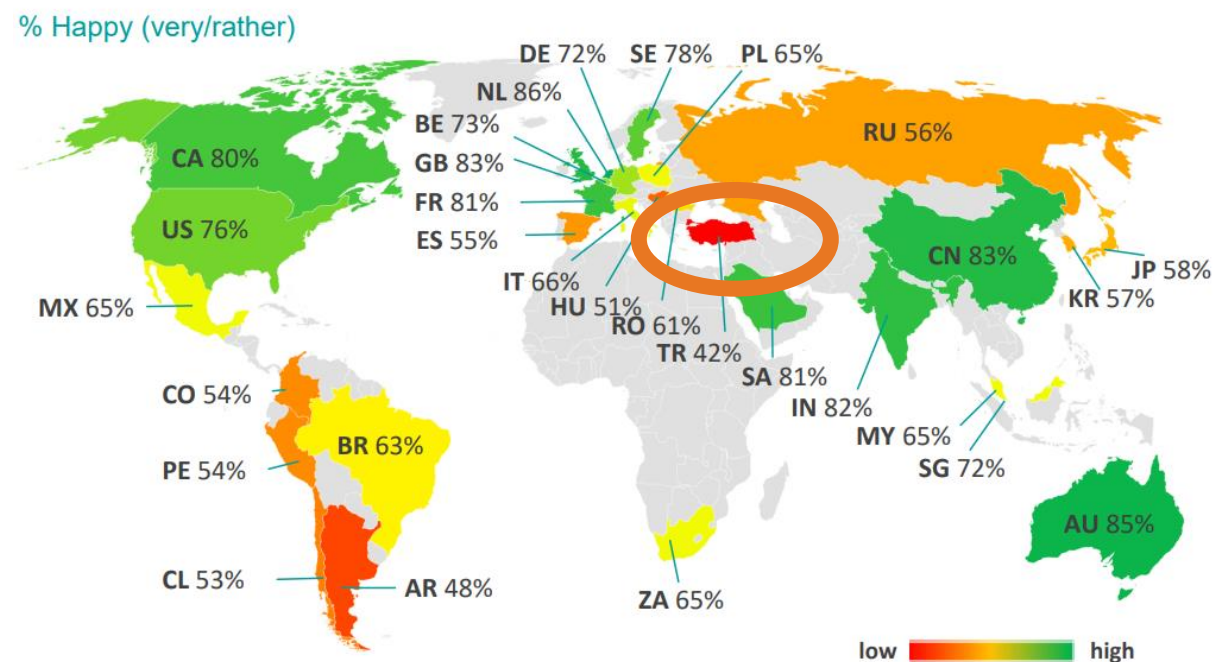
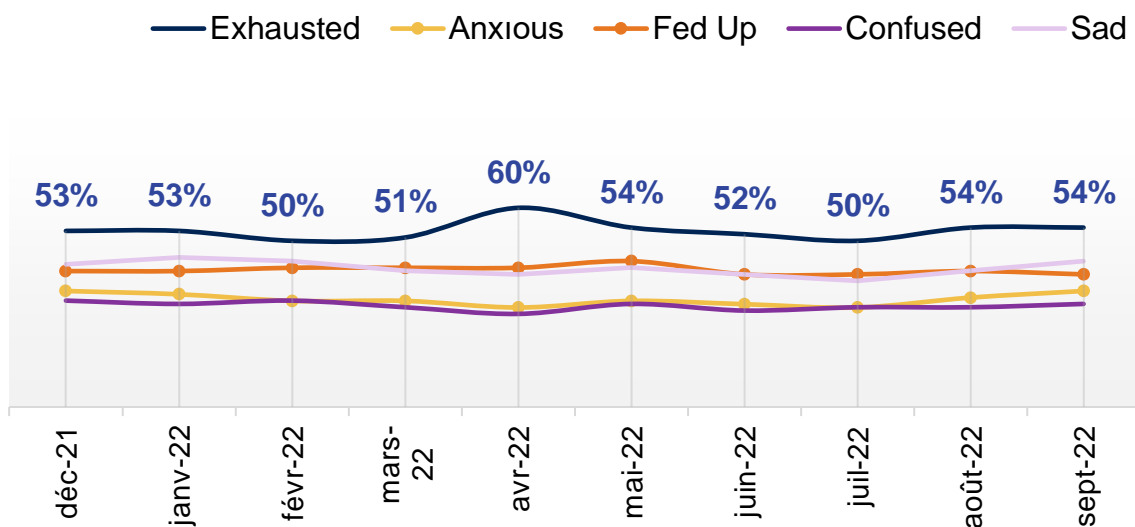
✓ Some Beverage Categories
Positioned As Meals



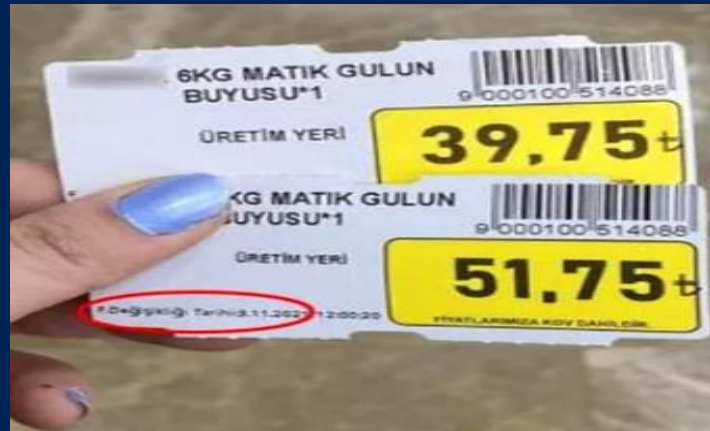
WELLNESS

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

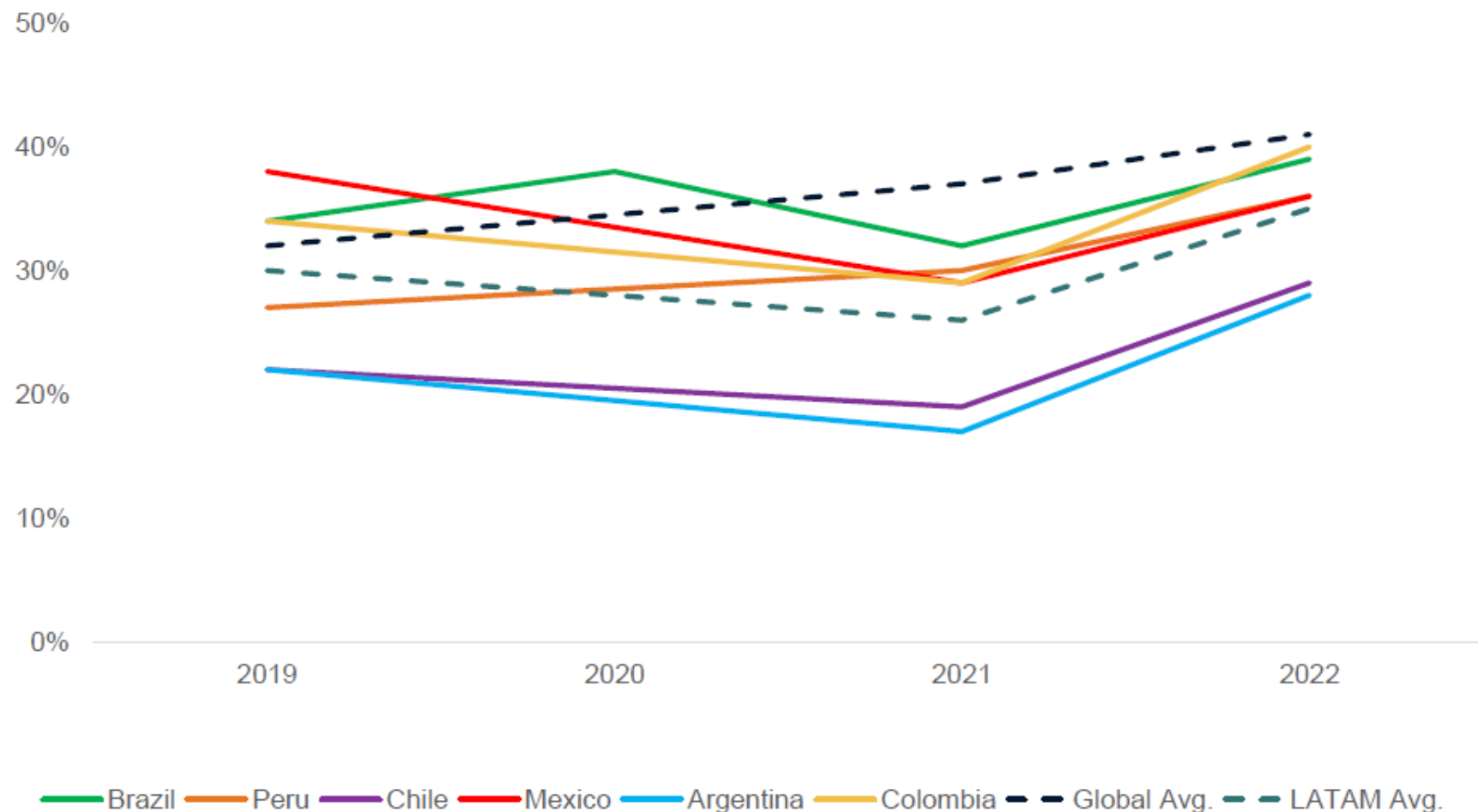


In a moment
when trusting
business
leaders is on the
rise creating the
opportunity for
brands to speak
up

"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



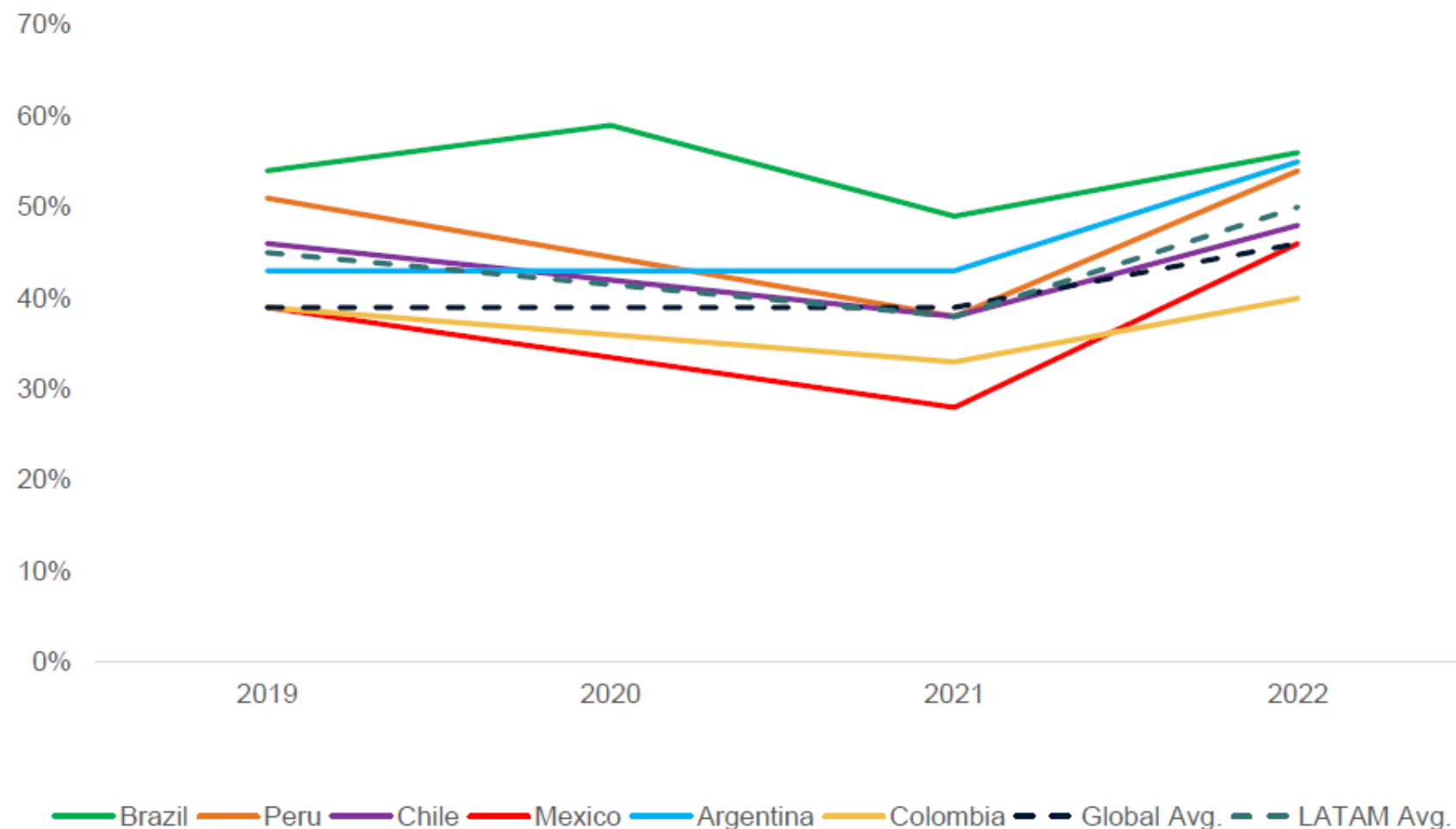
**GLOBAL
TRENDS
2023**

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

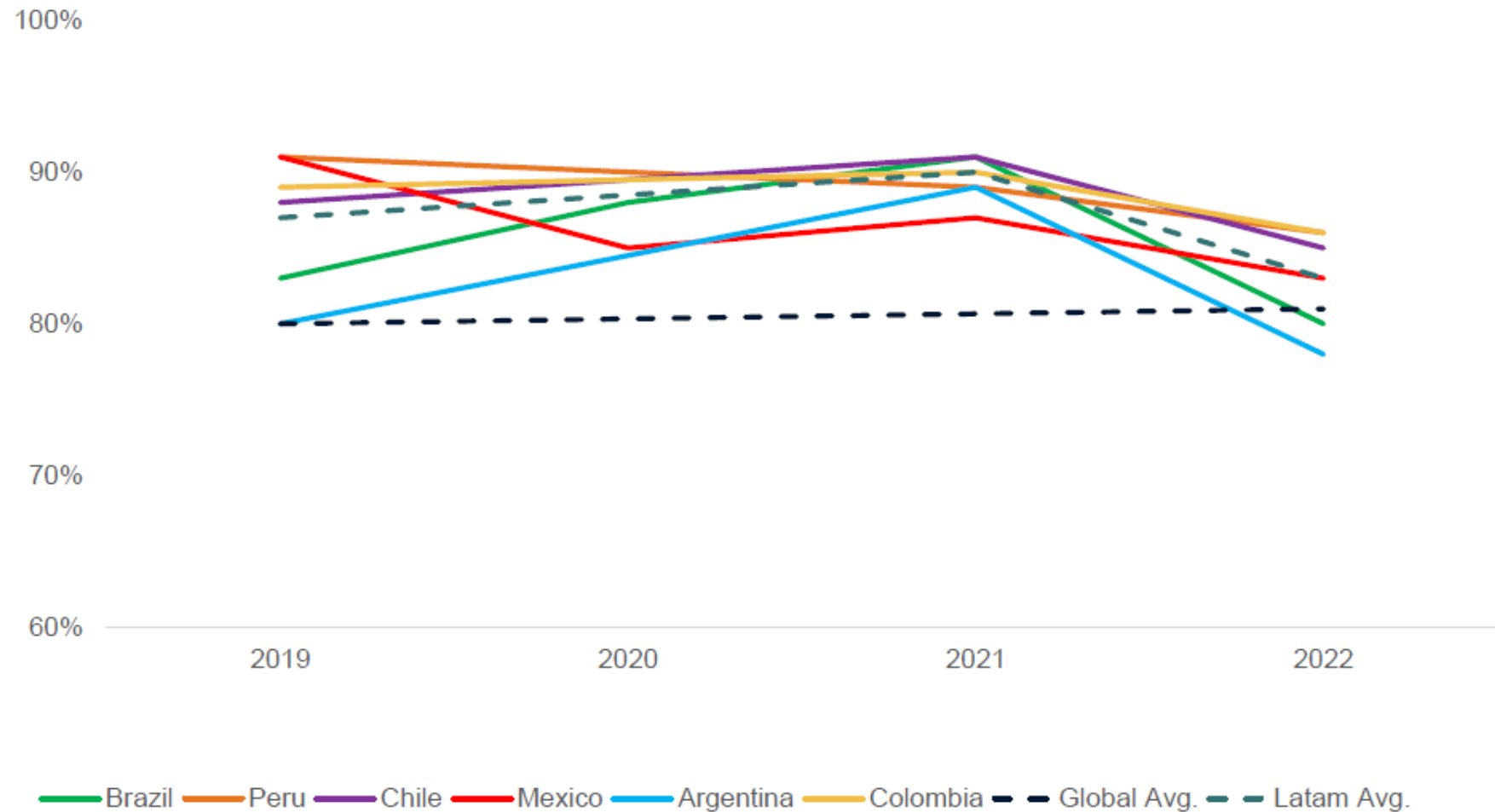


Climate concern has stopped rising

“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...

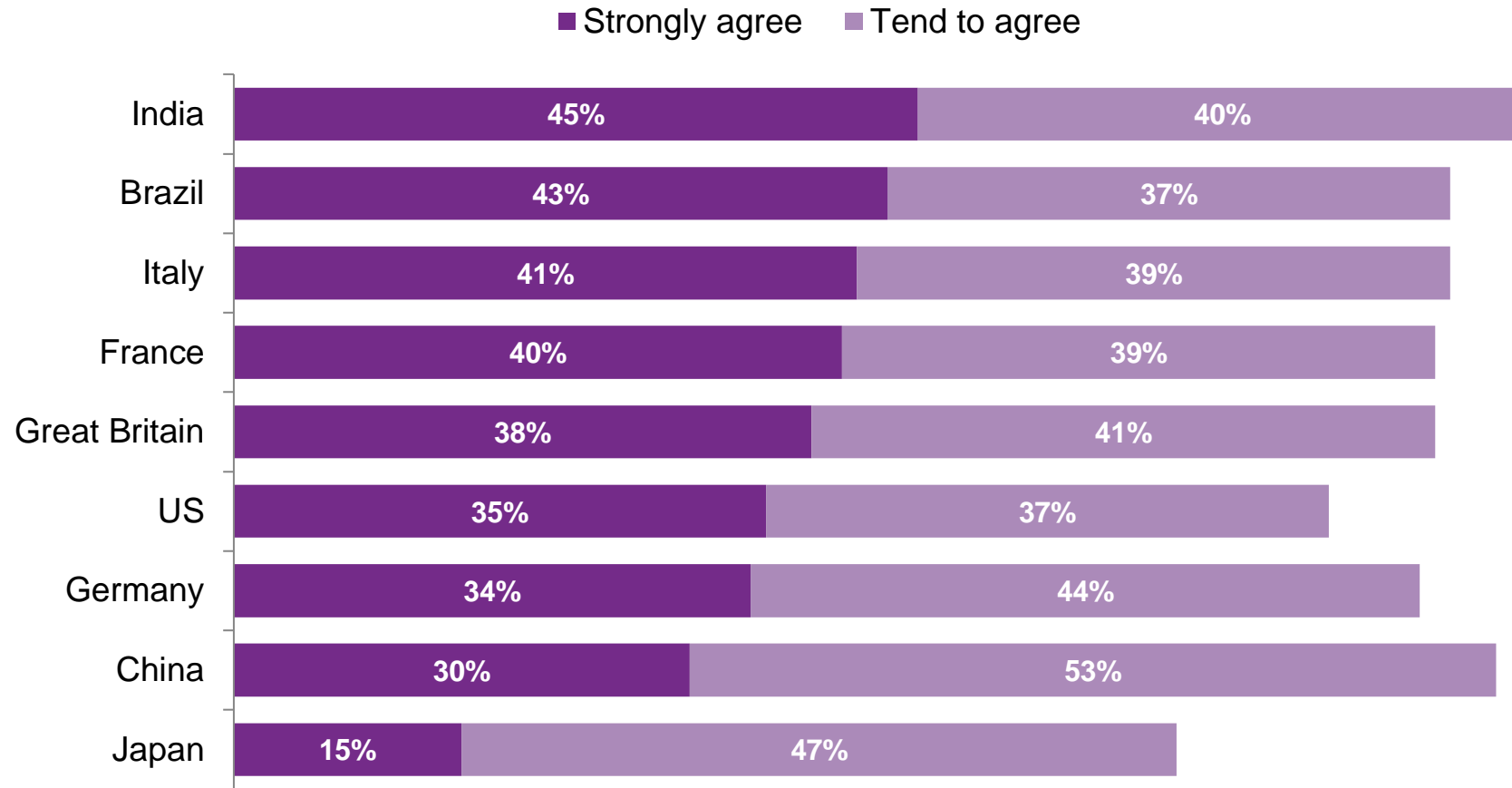
Alexandre de Saint-Léon

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?

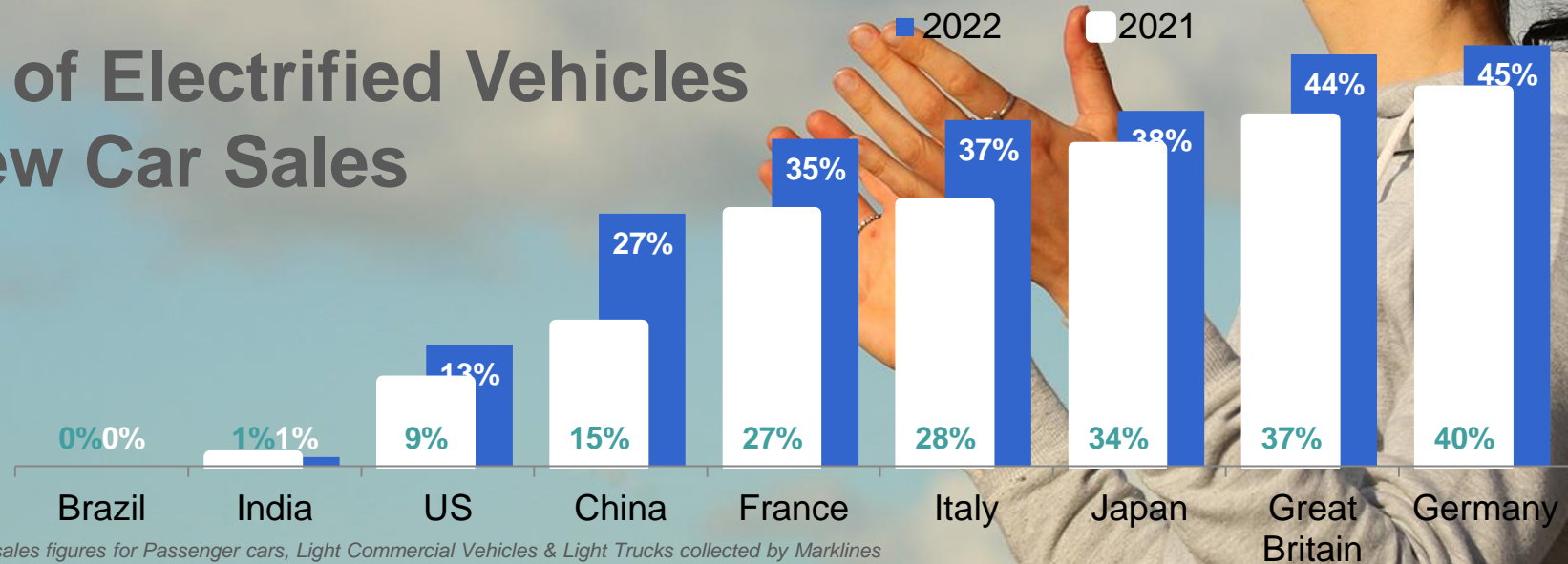
Ipsos Global Trends 2022: 500-1,000 adults aged 16-75 (18-75 in US and CA) per market per year

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

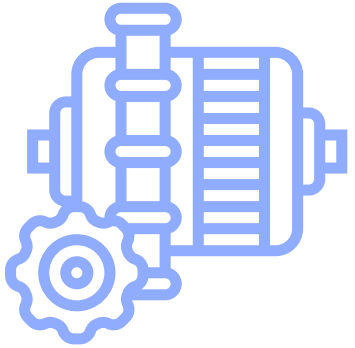
An auto crisis?

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

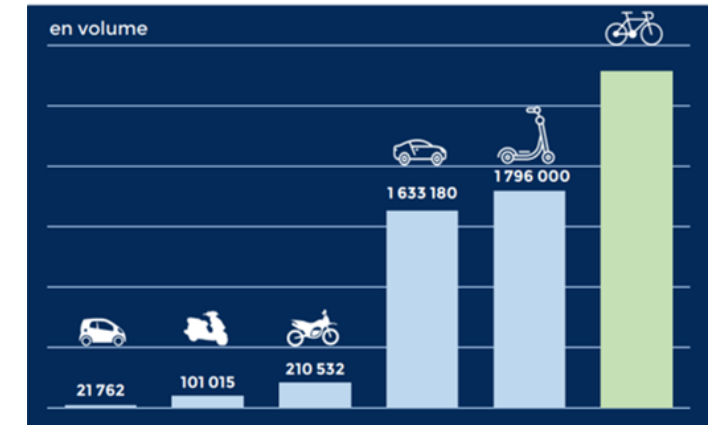
Eco diagnostic



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 [Autos 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

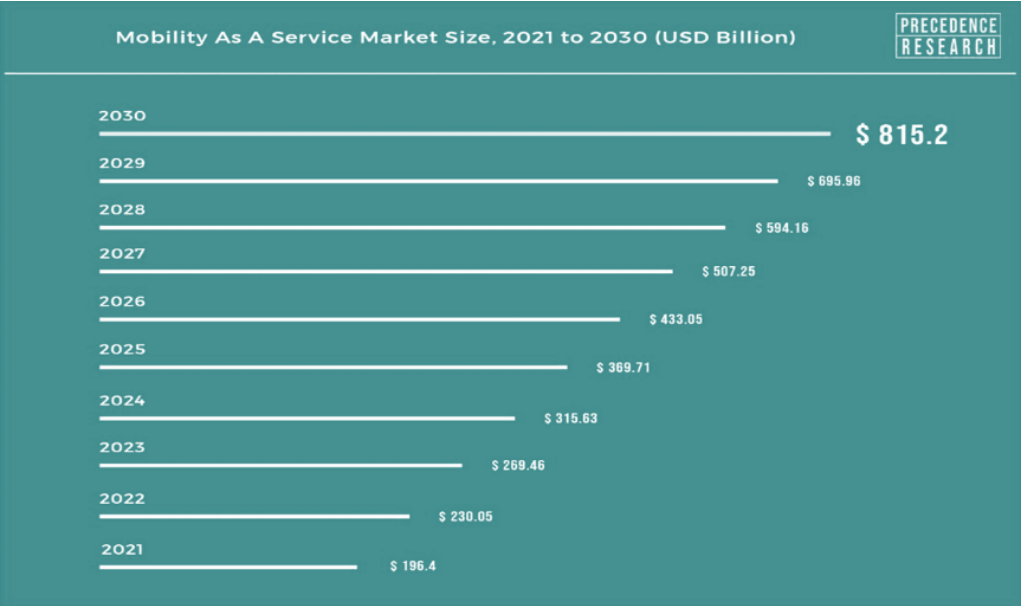
Is it a bird? Is it a plane?
No, it's a Jetson ONE!
Europe's first 'passenger drone' takes to the skies

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