IPSOS PANEL BOOK

HY1 2025



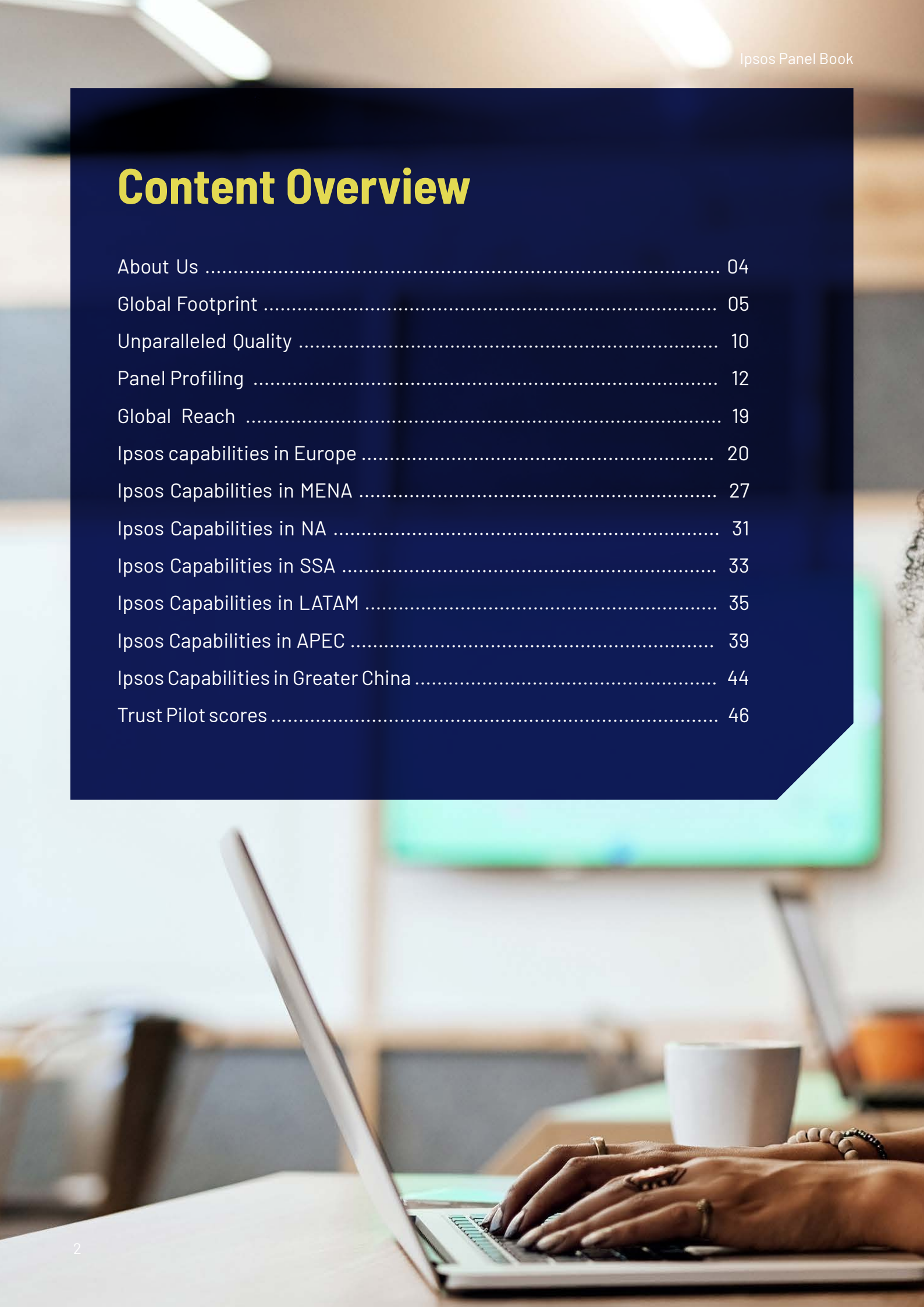






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About Us

At Ipsos, we know that high-quality panel research is the foundation of reliable insights. That's why we are committed to elevated standards and continuous innovation. With decades of experience dating back to our mail panel heritage, we have developed industry-leading practices to ensure accurate, trustworthy data.

Our dedicated research-on-research program helps us refine engagement strategies, enhance data quality, and adapt to evolving consumer behaviors. By prioritizing our members' experience, we maintain strong participation and deliver the most reliable insights to support your business decisions.

Ipsos Interactive Services has panels in over **54** countries in **North America, Europe, Latin America, Asia-Pacific and the Middle East.** Its divisions adhere to the same online research industry principles and panel management guidelines, though some differences in regional approaches exist, rules and privacy policies may vary to reflect the needs in the respective regions.

Ipsos began conducting online surveys in 1999 and has been running online panels for more than 20 years. We have conducted almost every type of research online. Study types fielded include (but are not limited to) concept, package and product testing, website evaluations, public opinion, sensitive topics, voter exit polling and ad testing.



We offer a vast global footprint for unparalleled access to respondents

Multiple sources

54
Owned panels

5.3
Million members

340M
Unique respondents accessed via partners

Programmatic Sample
+
Preferred Vendors

Engaging surveys

Mobile in-browser (Device Agnostic)

2K+
Online-mobile professionals with local footprints

Ipsos AppLife (Qual)



100+
Countries

Online & mobile

30+
Million Online / Mobile interviews per year



Ipsos is actively recruiting from every corner of the digital world

Building Diverse and Accurate Proprietary Panels

Ipsos leverages a global network of over **200 active sources** to build its proprietary consumer panels. This extensive network ensures a wide range of respondents are recruited through multiple channels, providing an accurate representation of the target population.

Recruitment Channels:

- **Local and Global Online Sources:** Local publications, ad networks, content advertising, and other online platforms.
- **Major Platforms:** Google, Facebook, Instagram, YouTube, and Tik-Tok.
- **Influencer Marketing:** Collaborations with influential individuals to reach specific demographics.
- **Digital Marketing:** Search engine marketing (SEM), search engine optimization (SEO), social media, and content marketing.

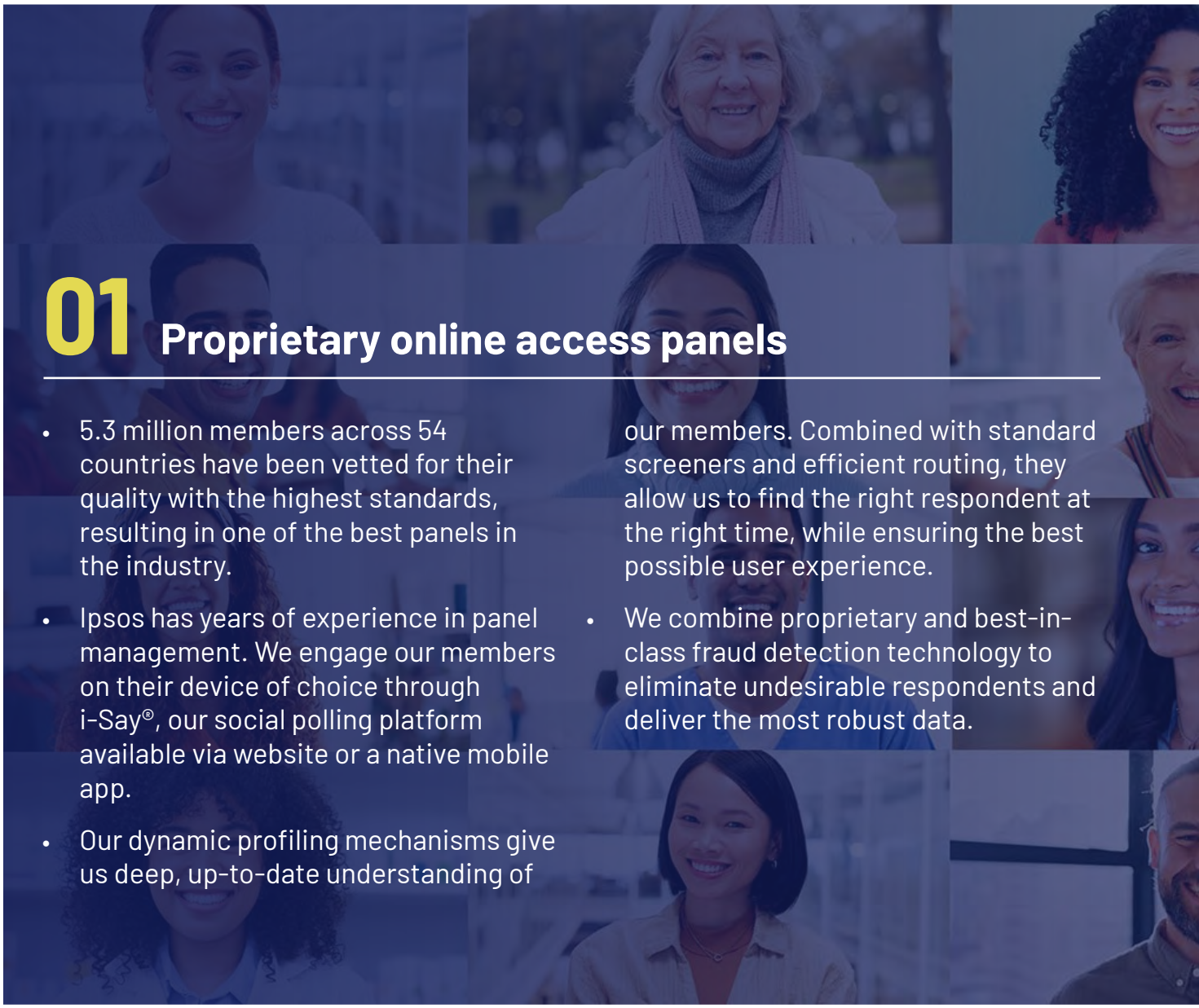


- **Cross-Device Recruitment:** Targeting respondents on both PC and mobile devices.
- **Web and App Downloads:** Utilizing Ipsos-owned platforms to attract potential panel members.
- **Phone or face-to-face recruitment:** Utilizing our call center and offline activity to recruit onto the panel.



Via Ipsos' proprietary panels and a network of trusted partners, carefully selected,

we have the scale and the experience to deliver superior access to respondents in 100+ countries around the world



01 Proprietary online access panels

- 5.3 million members across 54 countries have been vetted for their quality with the highest standards, resulting in one of the best panels in the industry.
- Ipsos has years of experience in panel management. We engage our members on their device of choice through i-Say®, our social polling platform available via website or a native mobile app.
- Our dynamic profiling mechanisms give us deep, up-to-date understanding of our members. Combined with standard screeners and efficient routing, they allow us to find the right respondent at the right time, while ensuring the best possible user experience.
- We combine proprietary and best-in-class fraud detection technology to eliminate undesirable respondents and deliver the most robust data.

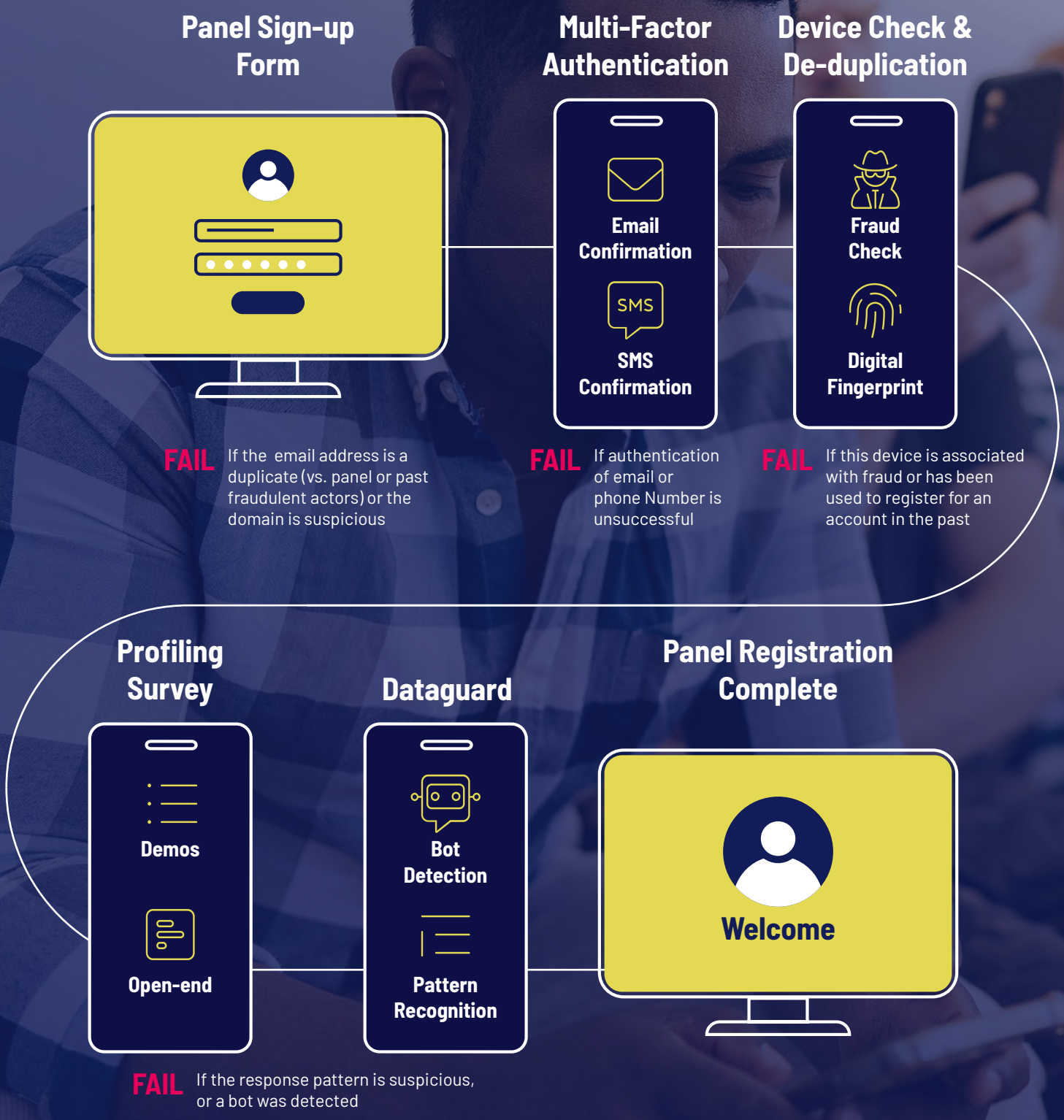


02 Robust sample at programmatic speed

- SampleOne®, our proprietary programmatic sample platform, blends Ipsos panels and the best third-party sample sources through a seamless programmatic integration, providing real-time access to an additional 80m+ respondents.
- Our sample experts have embedded years of knowledge into automation algorithms to deliver, by default, speed and quality to standard projects, and are available to consult on more challenging ad-hoc sample designs.
- Additional respondents can be intercepted on demand from social media and ad networks to help access niche audiences.

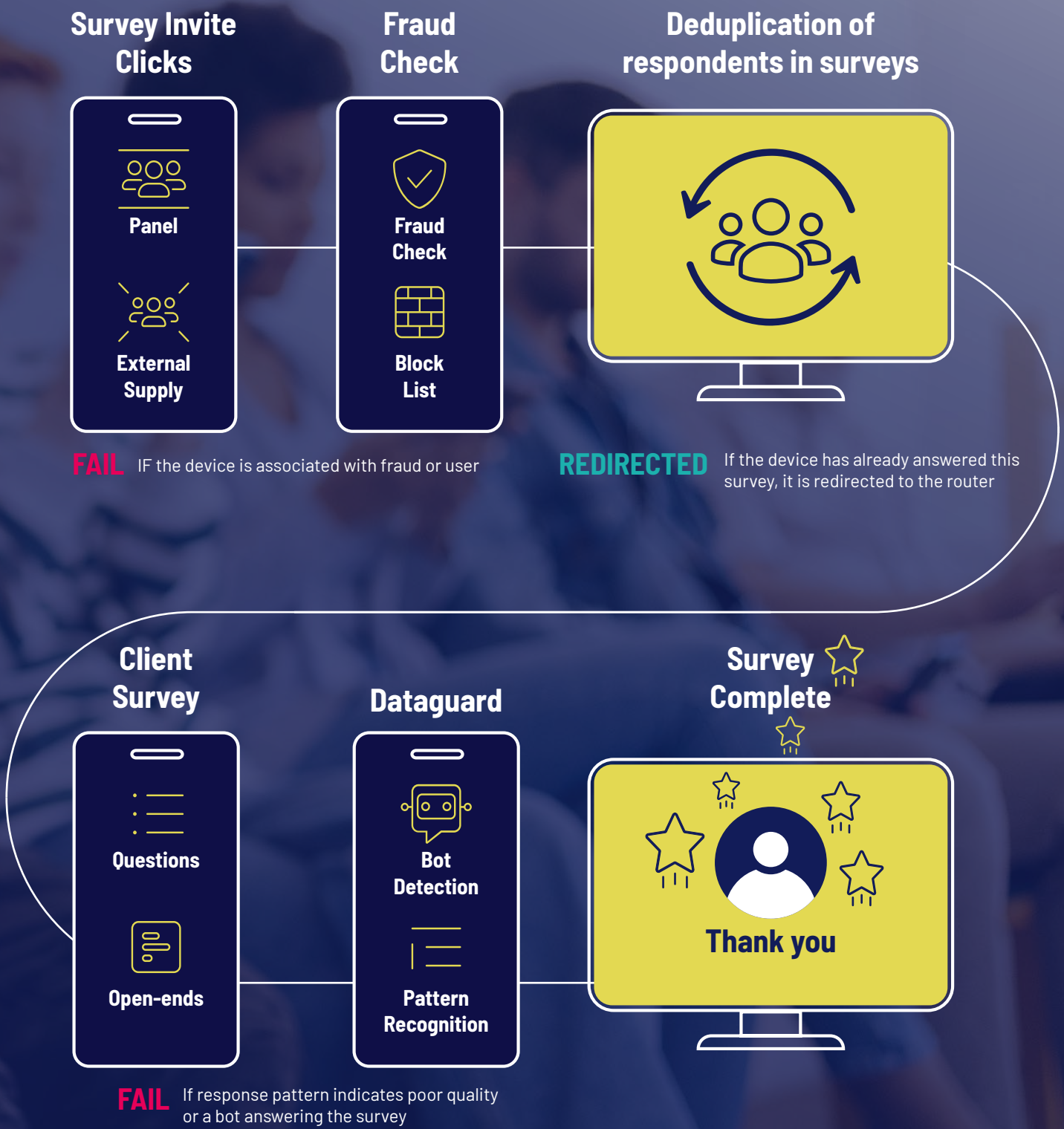
Unparalleled Quality

Panel Recruitment Flow



*A Panel Health team actively monitors the ongoing health and composition of panels to ensure ongoing quality.

Survey Flow



*Survey design is critical to fighting against fraud, and unengagement: online surveys are competing with other activities and distractions,. This impacts the quality of responses. Keep surveys blinded, simple and short.

Supported by in-depth panel profiling

To support access to more than 200+ specific audiences

Parents of children





Medical ailments

Tobacco



Parents of babies





Automotive

Personal care





Media consumption

Pet owners



Profiling variables

Demographics

- Age
- Binary Gender / Non-binary Gender / Gender Identity (only UK)
- Highest level of education reached
- Grouped Finished Education
- Employment status
- Main languages used at home
- Preferred language(s) for surveys
- Marital status
- Individual occupation
- Grouped individual occupation
- Sector of activity
- Main earner
- Main earner education
- Main earner employment status
- Main earner occupation
- Social grade

Region & Market Size

- Specific regions for each country
- Municipality / City
- City size
- Urban / Rural indicator
- Metropolitan area
- Degree of urbanization (only EU)

Race, Ethnicity & Nationality

- Race
- Ethnicity
- Country of birth
- Country of birth - father / mother of the respondent
- Hispanic origin (US only)
- Canadian citizen (CA only)
- Nationality (MENA countries only)

Household Composition & Children

- Baby expected
- Number of people in household
- Number of children in the household
- Age and gender of kids
- Parents of kids

Disclaimer: Please be advised that the list of variables may vary across markets.

Income & Assets

- Household income
- Personal Income

House Ownership

- House ownership
- Garden ownership
- Type of house

Business Owners & B2B

- Business decision maker
- Business owner
- Number of people employed in the company or organization
- Job title
- The level of education you teach
- Business decision maker for technology
- Degree of involvement in the decision-making process for advertising
- The average monthly advertising budget for agencies
- The average monthly advertising budget for companies
- The business type related to advertising
- The size of the advertising agency
- The type of the company depending on the spending advertising budget

Shopping & E-commerce

- Primary grocery shopper
- Financial decision maker
- Purchased goods in past 12 months
- Grocery products bought in past 12 months
- Intention to purchase goods in next 12 months
- Online shopping frequency
- Payment method for online shopping

Disclaimer: Please be advised that the list of variables may vary across markets.

Financial Products

- Value of financial assets
- Value of investible assets
- Household's liquid financial assets
- Financial products in household
- Type of card
- Main bank
- Bank account ownership

Automotives

- Number of cars in the household
- Year of purchase for the main / second car
- Model of the main / second car
- Engine type for the main / second car
- Intention to buy a new car
- Involvement in the purchase decision process
- Type of Main Car (New or Second Hand)
- Main driver of the car

Leisure

- Sports that you play regularly
- Time spends for watching TV
- TV programming received home
- Pay extra for special TV channels

Travel

- Frequency of leisure travel
- Business domestic flights (CA only)
- Leisure domestic flights (US only)
- Leisure international flights (US only)
- Business international flights
- Leisure travel frequency
- Decision maker for the destination of holidays or short breaks
- The main reason for trip(s)
- Travel method of transportation

Disclaimer: Please be advised that the list of variables may vary across markets.

Pets

- Pets in the household
- Number of cats / dogs
- Responsible for feeding or purchasing food for cats / dogs
- Cat(s) neutering
- Dog(s) size

Equipment & Electronics

- Devices owned in household
- Webcam consent for facial coding
- Mobile devices owned
- Responsible for mobile payments
- Mobile services
- Tablet Brand

Political Elections

- Specific questions for elections in UK and Netherlands

Beverages

- Alcoholic drinks consumption
- Non-alcoholic drinks consumption

Health

- Wear glasses
- Health conditions including hypertension (high blood pressure), high cholesterol, allergies, dandruff/itchy scalp, depression, diabetes, erectile dysfunction, gastric intestinal problem, headaches (including migraine), heart disease, HIV, hepatitis, acne, insomnia, multiple sclerosis, menopause, incontinence, stress, stroke, upset stomach, osteoarthritis/arthritis, asthma, bipolar disorder, body aches not caused by arthritis, cancer, cold, blisters or sores, and heartburn)

Disclaimer: Please be advised that the list of variables may vary across markets.

Tobacco and Non-Combustible products

- Tobacco and Nicotine Replacement Products
- Tobacco Products Usage in the past 7 days
- Heated Tobacco Products (Poland)
- E-Cigarettes Frequency
- Ready Made Cigarettes Frequency
- Shisha/Hooka Frequency
- Number of cigarettes smoked every day

Personal Care

France, Germany, Spain, United Kingdom

- Armpit sensitivity
- Body skin sensitivity
- Body skin type
- Colored hair
- Damaged hair
- Dandruff
- Face skin sensitivity
- Face skin type
- Face wrinkles
- Grey hair
- Personal care products used in past 12 months
- Hair length females / men
- Hair loss
- Hair nature
- Hair thickness
- Hair type
- Mascara most used
- Mascara most used color
- Perspiration level
- Scalp sensitivity
- Skin imperfections
- Sun protection SPF

Disclaimer: Please be advised that the list of variables may vary across markets.

Global Reach*

Europe

Belgium
Czech Republic
Denmark
France
Germany
Hungary
Italy
Netherlands
Norway
Poland
Romania
Slovakia
Spain
Sweden
Switzerland
Turkey
UK

MENA

Egypt
Iraq
Jordan
Kuwait
Lebanon
Morocco
Qatar
Saudi Arabia
UAE

NA

Canada
USA

SSA

South Africa

LATAM

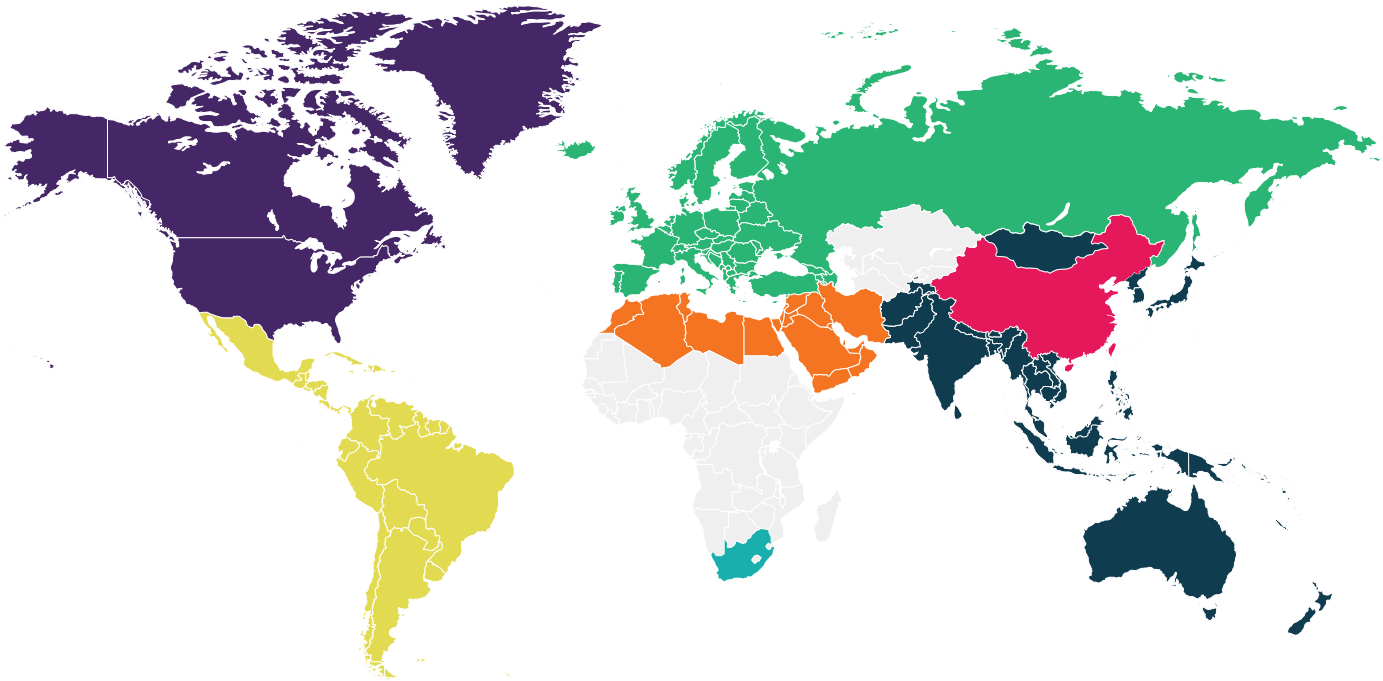
Argentina
Brazil
Chile
Colombia
Ecuador
Mexico
Peru

APEC

Australia
India
Japan
Indonesia
Malaysia
Singapore
South Korea
New Zealand
Philippines
Thailand
Vietnam

Greater China

China
Hong Kong



*This Panel Book does not include data from panels in Croatia, Slovenia, Bosnia and Herzegovina, Macedonia, and Portugal.

Ipsos capabilities in Europe



Belgium

Total Reach[1] 1.545.789 | **88% Smartphone penetration[2]** | **94.5% Online penetration[3]**

Age	Population 14+ individuals	Ipsos Panel 16+ members
14-17	6%	2%
18-24	10%	20%
25-34	15%	19%
35-44	15%	19%
45-54	15%	18%
55-64	16%	11%
65+	23%	12%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 16+ members
Male	49%	46%
Female	51%	54%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 16+ members
Center (Bruxelles)	10%	10%
North (Flandre)	58%	51%
South (Wallonie)	31%	38%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

[2]*Eurostat 2023;* [3]*Eurostat 2023*

Czech Republic

Total Reach[1] 226.124 | **86% Smartphone penetration[2]** | **92% Online penetration[3]**

Age	Population 14+ individuals	Ipsos Panel 16+ members
14-17	5%	0%
18-24	8%	11%
25-34	14%	26%
35-44	17%	24%
45-54	18%	19%
55-64	14%	14%
65+	24%	6%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 16+ members
Male	49%	32%
Female	51%	68%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 16+ members
Praha	13%	16%
Strední Cechy	13%	13%
Jihozápad	12%	11%
Severozápad	10%	10%
Severovýchod	14%	10%
Jihovýchod	16%	16%
Strední Morava	11%	11%
Moravskoslezsko	11%	12%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

[2]*Eurostat 2023;* [3]*Eurostat 2023*

Denmark

Total Reach[1] 845.555 | **93% Smartphone penetration[2]** | **99% Online penetration[3]**

Age	Population 14+ individuals	Ipsos Panel 16+ members
14-17	6%	1%
18-24	10%	20%
25-34	16%	19%
35-44	14%	19%
45-54	15%	20%
55-64	15%	10%
65+	24%	10%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 16+ members
Male	49%	48%
Female	51%	52%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 16+ members
Jylland	33%	32%
Syddanmark	21%	22%
København	32%	31%
Sjælland	14%	15%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

[2]*Eurostat 2023;* [3]*Eurostat 2023*

[1]***Total Reach*** *- Represents the total reach we have online in that given market (proprietary panels and partners).*

France

Total Reach[1] 7.981.300 | **86% Smartphone penetration[2]** | **93% Online penetration[3]**

Age	Population 14+ individuals	Ipsos Panel 16+ members
14-17	6%	1%
18-24	10%	15%
25-34	14%	15%
35-44	15%	20%
45-54	15%	23%
55-64	15%	14%
65+	25%	12%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 16+ members
Male	48%	41%
Female	52%	59%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 16+ members
Ile de France	18%	17%
North & North East	19%	21%
North West & West	19%	21%
Centre & East	18%	18%
South	25%	24%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

[2]Eurostat 2023; [3]Eurostat 2023

Germany

Total Reach[1] 10.718.170 | **84% Smartphone penetration[2]** | **92.5% Online penetration[3]**

Age	Population 14+ individuals	Ipsos Panel 16+ members
14-17	4%	1%
18-24	8%	27%
25-34	14%	18%
35-44	15%	16%
45-54	15%	13%
55-64	18%	13%
65+	25%	10%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 16+ members
Male	49%	44%
Female	51%	56%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

[2]Eurostat 2023; [3]Eurostat 2023

Region	Population 14+ individuals	Ipsos Panel 16+ members
Bremen, Hamburg, Niedersachsen & Schleswig-Holstein	16%	17%
Nordrhein-Westfalen	21%	22%
Hessen, Rheinland-Pfalz & Saarland	14%	13%
Baden-Württemberg	13%	11%
Bayern	16%	15%
Berlin	4%	6%
Brandenburg, Mecklenburg-Vorpommern & Sachsen-Anhalt	8%	8%
Sachsen & Thüringen	7%	8%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

Hungary

Total Reach[1] 1.157.003 | **86% Smartphone penetration[2]** | **91% Online penetration[3]**

Age	Population 14+ individuals	Ipsos Panel 16+ members
14-17	5%	0%
18-24	9%	15%
25-34	14%	24%
35-44	16%	27%
45-54	19%	23%
55-64	14%	7%
65+	24%	4%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 16+ members
Male	48%	40%
Female	52%	60%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 16+ members
Central Hungary	31%	31%
North and the Great Plain	38%	39%
Transdanubia	30%	30%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

[2]Eurostat 2023; [3]Eurostat 2023

[1]Total Reach - Represents the total reach we have online in that given market (proprietary panels and partners).

Italy

Total Reach[1] 6.357.360 | **85%** Smartphone penetration[2] | **87%** Online penetration[3]

Age	Population 14+ individuals	Ipsos Panel 16+ members
14-17	4%	1%
18-24	8%	14%
25-34	12%	19%
35-44	14%	22%
45-54	18%	23%
55-64	17%	14%
65+	27%	8%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 16+ members
Male	49%	50%
Female	51%	50%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 16+ members
NORD-OVEST	27%	19%
NORD-EST	20%	11%
CENTRO(I)	20%	17%
SUD	23%	30%
ISOLE	11%	22%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

[2]*Eurostat 2023;* [3]*Eurostat 2023*

Netherlands

Total Reach[1] 2.205.673 | **98%** Smartphone penetration[2] | **99%** Online penetration[3]

Age	Population 14+ individuals	Ipsos Panel 16+ members
14-17	5%	1%
18-24	10%	15%
25-34	15%	17%
35-44	14%	17%
45-54	15%	19%
55-64	16%	13%
65+	24%	17%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 16+ members
Male	49%	46%
Female	51%	54%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 16+ members
Noord & Oost Nederland	31%	31%
West-Nederland	48%	48%
Zuid-Nederland	21%	21%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

[2]*Eurostat 2023;* [3]*Eurostat 2023*

Norway

Total Reach[1] 795.190 | **98%** Smartphone penetration[2] | **100%** Online penetration[3]

Age	Population 14+ individuals	Ipsos Panel 16+ members
14-17	6%	1%
18-24	10%	17%
25-34	16%	19%
35-44	16%	20%
45-54	16%	20%
55-64	15%	11%
65+	22%	13%
Total	100%	100%
Sources	*Norway Statistics 2024*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 16+ members
Male	50%	43%
Female	50%	57%
Total	100%	100%
Sources	*Norway Statistics 2024*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 16+ members
Nord-Norge, Trøndelag	18%	17%
Sør-Østlandet	18%	20%
Oslo, Akershus, Innlandet	33%	37%
Agder og Rogaland	15%	12%
Vestlandet	17%	15%
Total	100%	100%
Sources	*Norway Statistics 2024*	*IIS Jan 2025*

[2]*Eurostat 2023;* [3]*Eurostat 2023*

[1]***Total Reach*** *- Represents the total reach we have online in that given market (proprietary panels and partners).*

Poland

Total Reach[1] 3.058.535 | **84%** Smartphone penetration[2] | **87%** Online penetration[3]

Age	Population 14+ individuals	Ipsos Panel 16+ members
14-17	5%	2%
18-24	8%	21%
25-34	15%	24%
35-44	19%	19%
45-54	16%	22%
55-64	14%	8%
65+	23%	3%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 16+ members
Male	48%	43%
Female	52%	57%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 16+ members
Centralny	21%	22%
Poludniowy	21%	20%
Wschodni	17%	14%
Północno-Zachodni	16%	15%
Poludniowo-Zachodni	10%	11%
Północny	15%	16%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

[2]Eurostat 2023; [3]Eurostat 2023

Romania

Total Reach[1] 1.504.626 | **88%** Smartphone penetration[2] | **89%** Online penetration[3]

Age	Population 14+ individuals	Ipsos Panel 16+ members
14-17	5%	0%
18-24	9%	19%
25-34	13%	23%
35-44	17%	29%
45-54	19%	21%
55-64	14%	7%
65+	23%	1%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 16+ members
Male	48%	39%
Female	52%	61%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 16+ members
Bucharest	12%	24%
Center	21%	20%
North	30%	27%
South	38%	30%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

[2]Eurostat 2023; [3]Eurostat 2023

Slovakia

Total Reach[1] 123.037 | **81%** Smartphone penetration[2] | **87%** Online penetration[3]

Age	Population 14+ individuals	Ipsos Panel 16+ members
14-17	5%	0%
18-24	8%	11%
25-34	15%	23%
35-44	19%	25%
45-54	17%	20%
55-64	15%	16%
65+	21%	5%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 16+ members
Male	49%	37%
Female	51%	63%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 16+ members
Bratislavský kraj	13%	16%
Žilinský kraj	13%	13%
Banskobystrický kraj	12%	11%
Prešovský kraj	14%	15%
Košický kraj	14%	14%
Nitriansky kraj	13%	11%
Trenčiansky kraj	11%	10%
Trnavský kraj	11%	10%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

[2]Eurostat 2023; [3]Eurostat 2023

[1]Total Reach - Represents the total reach we have online in that given market (proprietary panels and partners).

Spain

Total Reach[1] 6.320.248 | **96%** Smartphone penetration[2] | **95%** Online penetration[3]

Age	Population 14+ individuals	Ipsos Panel 16+ members
14-17	5%	1%
18-24	8%	26%
25-34	13%	22%
35-44	16%	21%
45-54	19%	18%
55-64	16%	9%
65+	23%	4%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 16+ members
Male	49%	47%
Female	51%	53%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 16+ members
East	30%	30%
Madrid and center	26%	31%
North west and North east	26%	16%
South and Canaries	19%	22%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

[2]*Eurostat 2023;* [3]*Eurostat 2023*

Sweden

Total Reach[1] 1.846.948 | **94%** Smartphone penetration[2] | **98%** Online penetration[3]

Age	Population 14+ individuals	Ipsos Panel 16+ members
14-17	6%	2%
18-24	9%	19%
25-34	16%	18%
35-44	15%	20%
45-54	15%	18%
55-64	14%	11%
65+	24%	12%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 16+ members
Male	50%	47%
Female	50%	53%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 16+ members
Norrland	9%	8%
Mellansverige	25%	24%
Stockholm	23%	26%
Västsverige	20%	19%
Södra Sverige	23%	23%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

[2]*Eurostat 2023;* [3]*Eurostat 2023*

Switzerland

Total Reach[1] 825.340 | **98%** Smartphone penetration[2] | **99%** Online penetration[3]

Age	Population 14+ individuals	Ipsos Panel 16+ members
14-17	5%	2%
18-24	8%	24%
25-34	16%	20%
35-44	17%	22%
45-54	16%	19%
55-64	16%	8%
65+	22%	5%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 16+ members
Male	49%	44%
Female	51%	56%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 16+ members
Région lémanique	19%	36%
Espace Mittelland	22%	26%
Nordwestschweiz	14%	9%
Zürich	18%	12%
Ostschweiz	14%	9%
Zentralschweiz	10%	6%
Ticino	4%	1%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

[2]*Eurostat 2023;* [3]*Eurostat 2023*

[1]***Total Reach*** *- Represents the total reach we have online in that given market (proprietary panels and partners).*

Turkey

Total Reach[1] 5.396.891

82% Smartphone penetration[2]

81% Online penetration[3]

Age	Population 14+ individuals	Ipsos Panel 18+ members
14-17	7%	0%
18-24	14%	33%
25-34	19%	25%
35-44	19%	13%
45-54	16%	22%
55-64	13%	5%
65+	12%	1%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 18+ members
Male	50%	40%
Female	50%	60%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 18+ members
Center	15%	14%
Istanbul	19%	29%
North	31%	25%
South	36%	32%
Total	100%	100%
Sources	*Eurostat 2023*	*IIS Jan 2025*

[2]Eurostat 2023; [3]Eurostat 2023

UK

Total Reach[1] 11.727.302

84% Smartphone penetration[2]

97% Online penetration[3]

Age	Population 14+ individuals	Ipsos Panel 16+ members
14-17	5%	2%
18-24	10%	17%
25-34	16%	20%
35-44	15%	21%
45-54	16%	20%
55-64	15%	11%
65+	22%	8%
Total	100%	100%
Sources	*Eurostat 2019*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 16+ members
Male	49%	39%
Female	51%	61%
Total	100%	100%
Sources	*Eurostat 2019*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 16+ members
Greater London	13%	13%
Midlands	16%	17%
North West	11%	12%
North&Yorkshire	12%	13%
Northern Ireland	3%	2%
Scotland	8%	8%
South East & Anglia	23%	23%
South West & Wales	13%	12%
Total	100%	100%
Sources	*Eurostat 2019*	*IIS Jan 2025*

[2]Eurostat 2023; [3]Eurostat 2023

*[1]**Total Reach** - Represents the total reach we have online in that given market (proprietary panels and partners).*



Ipsos Capabilities in MENA



Egypt

Total Reach[1] 1.884.386 | **80% Smartphone penetration[2]** | **72% Online penetration[3]**

Age	Population 14+ individuals	Ipsos Panel 15+ members
14-17	11%	5%
18-24	18%	38%
25-34	24%	32%
35-44	18%	17%
45-54	13%	6%
55-64	9%	2%
65+	6%	0%
Total	100%	100%
Sources	*CAPMAS 2017*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 15+ members
Male	52%	72%
Female	48%	28%
Total	100%	100%
Sources	*CAPMAS 2017*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 15+ members
Cairo	11%	21%
Alexandria	6%	10%
Delta (incl. Gharbia, Kaliobia)	43%	35%
Upper Egypt (incl. Giza)	38%	30%
Other (incl. Suez, Port Said)	2%	3%
Total	100%	100%
Sources	*CAPMAS 2017*	*IIS Jan 2025*

[2]Media Use in the Middle East, 2019 by Northwestern University in Qatar; [3]Data reportal 2024

Iraq

Total Reach[1] 59.286 | **NA Smartphone penetration** | **78% Online penetration[2]**

Age	Population 14+ individuals	Ipsos Panel 15+ members
14-17	14%	5%
18-24	22%	55%
25-34	23%	31%
35-44	18%	7%
45-54	11%	2%
55-64	7%	1%
65+	5%	0%
Total	100%	100%
Sources	*Iraq Statistics Estimates 2021*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 15+ members
Male	50%	81%
Female	50%	19%
Total	100%	100%
Sources	*Iraq Statistics Estimates 2021*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 15+ members
Babel	5%	5%
Baghdad	21%	28%
Basrah	8%	9%
Karbala	3%	4%
Kurdistan - Erbil	5%	6%
Kurdistan - Al Suleimaniah	6%	3%
Others	52%	46%
Total	100%	100%
Sources	*Iraq Statistics Estimates 2021*	*IIS Jan 2025*

[2]Data reportal 2024

Jordan

Total Reach[1] 118.055 | **91% Smartphone penetration[2]** | **91% Online penetration[3]**

Age	Population 14+ individuals	Ipsos Panel 15+ members
14-17	12%	2%
18-24	21%	28%
25-34	24%	34%
35-44	19%	24%
45-54	13%	11%
55-64	6%	3%
65+	5%	0%
Total	100%	100%
Sources	*Jordan Statistics Estimates 2023*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 15+ members
Male	54%	59%
Female	46%	41%
Total	100%	100%
Sources	*Jordan Statistics Estimates 2023*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 15+ members
Amman	42%	51%
Zarqa	14%	13%
Irbid	19%	17%
Other governorate	25%	19%
Total	100%	100%
Sources	*Jordan Statistics Estimates 2023*	*IIS Jan 2025*

[2]Media Use in the Middle East, 2019 by Northwestern University in Qatar; [3]Data reportal 2024

*[1]**Total Reach** - Represents the total reach we have online in that given market (proprietary panels and partners).*

Kuwait

Total Reach[1] 110.112 | **NA** Smartphone penetration | **100%** Online penetration[2]

Age	Population 14+ individuals	Ipsos Panel 15+ members
14-17	6%	4%
18-24	9%	19%
25-34	25%	37%
35-44	30%	29%
45-54	19%	9%
55-64	8%	2%
65+	3%	0%
Total	100%	100%
Sources	*Kuwait Statistics Estimates 2023*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 15+ members
Male	63%	61%
Female	37%	39%
Total	100%	100%
Sources	*Kuwait Statistics Estimates 2023*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 15+ members
Capital (Kuwait City)	11%	10%
Hawalli	22%	36%
Al-Ahmadi	19%	20%
Al-Farwaniya	27%	24%
Al-Jahra	12%	5%
Mubarak Al-Kabeer	9%	4%
Total	100%	100%
Sources	*Kuwait Statistics Estimates 2023*	*IIS Jan 2025*

[2]Data reportal 2024

Lebanon

Total Reach[1] 114.256 | **94%** Smartphone penetration[2] | **90%** Online penetration[3]

Age	Population 14+ individuals	Ipsos Panel 15+ members
14-17	11%	3%
18-24	17%	31%
25-34	18%	28%
35-44	17%	23%
45-54	17%	10%
55-64	10%	4%
65+	10%	1%
Total	100%	100%
Sources	*CAS 2009*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 15+ members
Male	50%	48%
Female	50%	52%
Total	100%	100%
Sources	*CAS 2009*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 15+ members
Beirut	10%	16%
Beqaa	12%	11%
Mount Lebanon	42%	44%
Nabatieh	6%	3%
North	19%	18%
South	10%	8%
Total	100%	100%
Sources	*CAS 2009*	*IIS Jan 2025*

[2]Media Use in the Middle East, 2019 by Northwestern University in Qatar; [3]Data reportal 2024

Morocco

Total Reach[1] 797.571 | **NA** Smartphone penetration | **91%** Online penetration[2]

Age	Population 14+ individuals	Ipsos Panel 15+ members
14-17	10%	4%
18-24	17%	41%
25-34	22%	31%
35-44	18%	16%
45-54	15%	6%
55-64	10%	2%
65+	8%	0%
Total	100%	100%
Sources	*HCP, 2014*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 15+ members
Male	49%	63%
Female	51%	37%
Total	100%	100%
Sources	*HCP, 2014*	*IIS Jan 2025*

[2]Data reportal 2024

Region	Population 14+ individuals	Ipsos Panel 15+ members
Fès-Meknès	13%	12%
Grand Casablanca-Settat	21%	24%
Marrakech-Safi	13%	11%
Drâa-Tafilalet	5%	3%
Oriental	7%	5%
Rabat-Salé-Kénitra	14%	15%
Souss-Massa	8%	10%
Tanger-Tetouan-Al Hoceima	11%	11%
Others	10%	9%
Total	100%	100%
Sources	*HCP, 2014*	*IIS Jan 2025*

*[1]**Total Reach** - Represents the total reach we have online in that given market (proprietary panels and partners).*

Qatar

Total Reach[1] 163.605 | **95%** Smartphone penetration[2] | **99%** Online penetration[3]

Age	Population 14+ individuals	Ipsos Panel 15+ members
14-17	3%	2%
18-24	10%	21%
25-34	37%	41%
35-44	30%	26%
45-54	13%	8%
55-64	5%	1%
65+	1%	0%
Total	100%	100%
Sources	*QSA Census 2020*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 15+ members
Male	75%	59%
Female	25%	41%
Total	100%	100%
Sources	*QSA Census 2020*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 15+ members
Al Daayen	3%	3%
Al Khor	5%	4%
Al Rayyan	34%	24%
Al Shamal	1%	1%
Al Wakra	9%	13%
Doha	43%	50%
Umm Slal	5%	4%
Total	100%	100%
Sources	*QSA Census 2020*	*IIS Jan 2025*

[2]Media Use in the Middle East, 2019 by Northwestern University in Qatar; [3]Data reportal 2024

Saudi Arabia

Total Reach[1] 1.811.960 | **99%** Smartphone penetration[2] | **99%** Online penetration[3]

Age	Population 14+ individuals	Ipsos Panel 15+ members
14-17	7%	3%
18-24	14%	24%
25-34	31%	42%
35-44	25%	23%
45-54	13%	6%
55-64	7%	1%
65+	3%	0%
Total	100%	100%
Sources	*Census 2022*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 15+ members
Male	64%	52%
Female	36%	48%
Total	100%	100%
Sources	*Census 2022*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 15+ members
Central (incl. Riyadh, Kasim)	32%	34%
Eastern (incl. Dammam, Khoubar, Dahran)	16%	19%
Northern (incl. Hael, Tabouk)	8%	5%
Southern (incl. Abha, Jazan, Khamis Mshit)	13%	8%
Western (incl. Medina, Makka, Jeddah)	32%	34%
Total	100%	100%
Sources	*Census 2022*	*IIS Jan 2025*

[2]Media Use in the Middle East, 2019 by Northwestern University in Qatar; [3]Data reportal 2024

UAE

Total Reach[1] 1.200.232 | **100%** Smartphone penetration[2] | **99%** Online penetration[3]

Age	Population 15+ individuals	Ipsos Panel 15+ members
15-17	4%	1%
18-24	16%	21%
25-34	39%	43%
35-44	25%	26%
45-54	11%	7%
55-64	3%	2%
65+	1%	0%
Total	100%	100%
Sources	*NBS 2005*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 15+ members
Male	72%	57%
Female	28%	43%
Total	100%	100%
Sources	*NBS 2005*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 15+ members
Abu Dhabi	33%	30%
Dubai	35%	40%
Sharjah	18%	16%
Others (Ajman, Fujairah, Ras Al Khaimah, Um Quiwan)	13%	13%
Total	100%	100%
Sources	*NBS 2005*	*IIS Jan 2025*

[2]Media Use in the Middle East, 2019 by Northwestern University in Qatar; [3]Data reportal 2024

*[1]**Total Reach** - Represents the total reach we have online in that given market (proprietary panels and partners).*

Ipsos Capabilities in NA



Canada

Total Reach[1] 5.842.184

84% Smartphone penetration[2]

97% Online penetration[3]

Age	Population 14+ individuals	Ipsos Panel 18+ members
14-17	5%	0%
18-24	10%	11%
25-34	16%	21%
35-44	16%	26%
45-54	15%	21%
55-64	17%	11%
65+	21%	10%
Total	100%	100%
Sources	*Census 2021*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 18+ members
Male	49%	34%
Female	51%	67%
Total	100%	100%
Sources	*Census 2021*	*IIS Oct 2024*

Region	Population 14+ individuals	Ipsos Panel 18+ members
British Columbia	14%	10%
Prairies	18%	16%
Ontario	39%	36%
Quebec	23%	32%
Atlantic	7%	7%
Territories	0%	0%
Total	100%	100%
Sources	*Census 2021*	*IIS Jan 2025*

[2]CIUS2020; [3]Digital Overview Report, 2022

USA

Total Reach[1] 55.341.532

94% Smartphone penetration[2]

96% Online penetration[3]

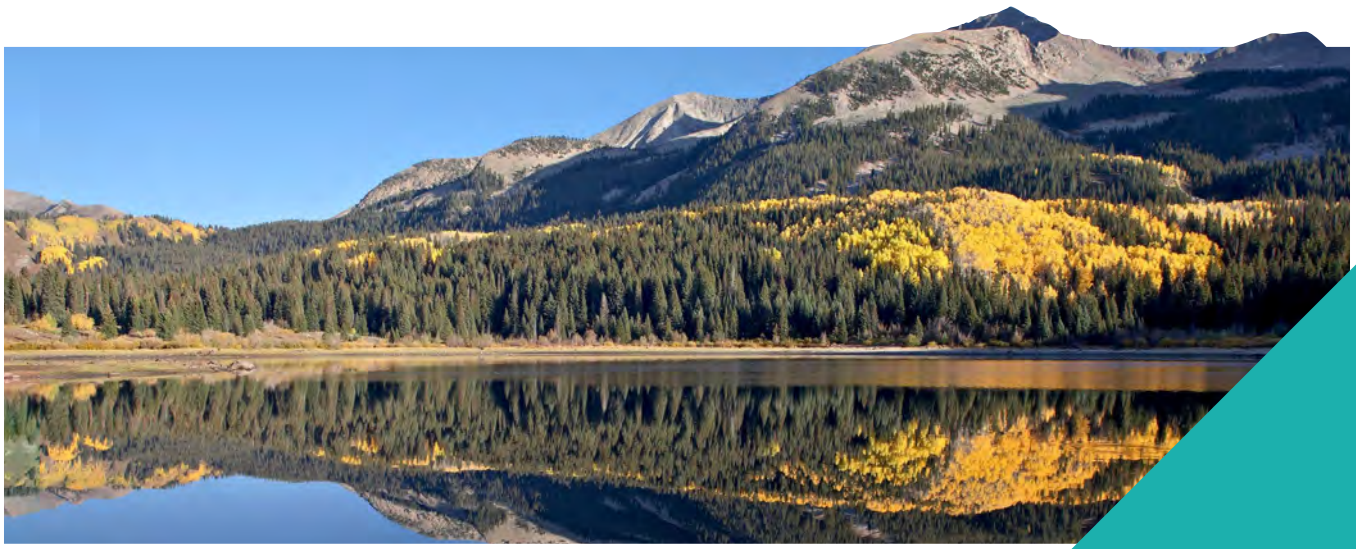
Age	Population 14+ individuals	Ipsos Panel 18+ members
14-17	7%	0%
18-24	10%	11%
25-34	16%	18%
35-44	16%	26%
45-54	15%	26%
55-64	15%	12%
65+	21%	7%
Total	100%	100%
Sources	*ACS 2023*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 18+ members
Male	49%	34%
Female	51%	66%
Total	100%	100%
Sources	*ACS 2023*	*IIS Oct 2024*

Region	Population 14+ individuals	Ipsos Panel 18+ members
New England	5%	3%
Middle Atlantic	12%	11%
East North Central	14%	15%
West North Central	6%	7%
South Atlantic	21%	22%
East South Central	6%	8%
West South Central	12%	14%
Mountain	8%	8%
Pacific	16%	12%
Total	100%	100%
Sources	*ACS 2023*	*IIS Jan 2025*

[2]Media Use in the Middle East, 2019 by Northwestern University in Qatar; [3]Data reportal 2024

*[1]**Total Reach** - Represents the total reach we have online in that given market (proprietary panels and partners).*



Ipsos Capabilities in SSA



South Africa

Total Reach[1] 3.869.019

92% **Smartphone penetration**[2]

58% **Online penetration**[3]

Age	Population 14+ individuals	Ipsos Panel 18+ members
14-17	9%	0%
18-24	17%	34%
25-34	23%	36%
35-44	19%	20%
45-54	14%	7%
55-64	9%	3%
65+	8%	1%
Total	100%	100%
Sources	*Labour Force Survey 2019 (Quarter4)*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 18+ members
Male	48%	29%
Female	52%	71%
Total	100%	100%
Sources	*Labour Force Survey 2019 (Quarter4)*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 18+ members
Eastern Cape	11%	7%
Free State	5%	4%
Gauteng	27%	41%
KwaZulu-Natal	19%	15%
Limpopo	10%	5%
Mpumalanga	8%	5%
Northern Cape	2%	2%
North West	7%	4%
Western Cape	12%	17%
Total	100%	100%
Sources	*Labour Force Survey 2019 (Quarter4)*	*IIS Jan 2025*

[2]South Africa's Census 2022; [3]IWS, 2020

[1]***Total Reach*** *- Represents the total reach we have online in that given market (proprietary panels and partners).*



Ipsos Capabilities in LATAM



Argentina

Total Reach[1] 5.486.090 | **98%** Smartphone penetration[2] | **89%** Online penetration[3]

Age	Population 14+ individuals	Ipsos Panel 16+ members
14-17	8%	4%
18-24	14%	31%
25-34	19%	27%
35-44	18%	20%
45-54	15%	12%
55-64	11%	5%
65+	15%	2%
Total	100%	100%
Sources	*INDEC: Census 2022*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 16+ members
Male	48%	38%
Female	52%	62%
Total	100%	100%
Sources	*INDEC: Census 2022*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 16+ members
AMBA	30%	39%
Resto de Bs. As.	15%	14%
North West	12%	11%
Cuyo	8%	8%
Middle	19%	17%
North East	9%	7%
Patagonia	6%	4%
Total	100%	100%
Sources	*INDEC: Census 2022*	*IIS Jan 2025*

[2]Digital 2024 Report; [3]INDEC. EPH + TIC Q4 2023

Brazil

Total Reach[1] 20.780.499 | **88%** Smartphone penetration[2] | **87%** Online penetration[3]

Age	Population 14+ individuals	Ipsos Panel 16+ members
14-17	7%	3%
18-24	13%	21%
25-34	19%	27%
35-44	19%	24%
45-54	16%	16%
55-64	13%	7%
65+	14%	2%
Total	100%	100%
Sources	*IBGE. Pesquisa Nacional Contínua por Amostra de Domicílios, Q4 2023*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 16+ members
Male	48%	31%
Female	52%	69%
Total	100%	100%
Sources	*IBGE. Pesquisa Nacional Contínua por Amostra de Domicílios, Q4 2023*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 16+ members
North	8%	6%
North East	27%	20%
South East	43%	52%
South	14%	15%
Middle West	8%	7%
Total	100%	100%
Sources	*IBGE. Pesquisa Nacional Contínua por Amostra de Domicílios, Q4 2023*	*IIS Jan 2025*

[2]CETIC 2024; [3]CETIC 2024

Chile

Total Reach[1] 1.967.830 | **98%** Smartphone penetration[2] | **91%** Online penetration[3]

Age	Population 14+ individuals	Ipsos Panel 16+ members
14-17	6%	3%
18-24	11%	20%
25-34	20%	27%
35-44	18%	26%
45-54	16%	16%
55-64	14%	6%
65+	16%	2%
Total	100%	100%
Sources	*MDS. CASEN 2022*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 16+ members
Male	49%	30%
Female	51%	70%
Total	100%	100%
Sources	*MDS. CASEN 2022*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 16+ members
Centro	63%	67%
Norte Chico	6%	5%
Norte Grande	7%	6%
Austral	1%	1%
Sur	23%	20%
Total	100%	100%
Sources	*MDS. CASEN 2022*	*IIS Jan 2025*

[2]Digital 2024 Report; [3]DataReportal 2024; We Are Social; Kepios

*[1]**Total Reach** - Represents the total reach we have online in that given market (proprietary panels and partners).*

Colombia

Total Reach[1] 5.371.792 | **66%** Smartphone penetration[2] | **73%** Online penetration[3]

Age	Population 14+ individuals	Ipsos Panel 16+ members
14-17	8%	3%
18-24	14%	23%
25-34	20%	28%
35-44	18%	25%
45-54	15%	14%
55-64	12%	6%
65+	13%	1%
Total	100%	100%
Sources	*DANE. ECV 2022*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 16+ members
Male	48%	38%
Female	52%	62%
Total	100%	100%
Sources	*DANE. ECV 2022*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 16+ members
Centro Oriente	33%	41%
Caribe	22%	19%
Pacífico	16%	12%
Eje Cafetero	19%	21%
Centro Sur	6%	5%
Llano	4%	3%
Total	100%	100%
Sources	*DANE. ECV 2022*	*IIS Jan 2025*

[2]DANE. ECV 2022; [3]DANE. ECV 2022

Ecuador

Total Reach[1] 982.496 | **58%** Smartphone penetration[2] | **77%** Online penetration[3]

Age	Population 14+ individuals	Ipsos Panel 16+ members
14-17	11%	3%
18-24	16%	33%
25-34	18%	32%
35-44	17%	19%
45-54	14%	9%
55-64	11%	3%
65+	13%	1%
Total	100%	100%
Sources	*INEC. ENEMDU 2022*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 16+ members
Male	48%	43%
Female	52%	57%
Total	100%	100%
Sources	*INEC. ENEMDU 2022*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 16+ members
Pichincha	19%	29%
Guayas	25%	28%
Azuay	5%	5%
Manabí	9%	7%
Tungurahua	4%	3%
Resto	39%	29%
Total	100%	100%
Sources	*INEC. ENEMDU 2022*	*IIS Jan 2025*

[2]INEC. TIC 2024; [3]INEC. TIC 2024

Mexico

Total Reach[1] 10.909.894 | **79%** Smartphone penetration[2] | **79%** Online penetration[3]

Age	Population 14+ individuals	Ipsos Panel 16+ members
14-17	10%	2%
18-24	14%	33%
25-34	19%	33%
35-44	17%	19%
45-54	16%	9%
55-64	12%	3%
65+	12%	0%
Total	100%	100%
Sources	*INEGI. ENDUTIH 2022*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 16+ members
Male	47%	45%
Female	53%	55%
Total	100%	100%
Sources	*INEGI. ENDUTIH 2022*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 16+ members
Area I - Noroeste	9%	12%
Area II - Noreste	18%	21%
Area III - Centro - Oeste	17%	14%
Area IV - Centro - Este	19%	15%
Area V - AM Mexico	19%	22%
Area VI - Sur	18%	15%
Total	100%	100%
Sources	*INEGI. Census 2020*	*IIS Jan 2025*

[2]INEGI. ENDUTIH 2022; [3]INEGI. ENDUTIH 2022

*[1]**Total Reach** - Represents the total reach we have online in that given market (proprietary panels and partners).*

Peru

Total Reach[1] 3.106.509

61% Smartphone penetration[2]

80% Online penetration[3]

Age	Population 14+ individuals	Ipsos Panel 16+ members
14-17	10%	2%
18-24	15%	30%
25-34	19%	29%
35-44	21%	22%
45-54	14%	12%
55-64	12%	5%
65+	10%	1%
Total	100%	100%
Sources	*INEI. ENAHO Q2 2024*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 16+ members
Male	50%	44%
Female	50%	56%
Total	100%	100%
Sources	*INEI. ENAHO Q2 2024*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 16+ members
Centro	11%	7%
Lima	34%	53%
Norte	21%	22%
Selva	11%	5%
Sur	23%	14%
Total	100%	100%
Sources	*INEI. ENAHO Q2 2024*	*IIS Jan 2025*

[2]Statista 2024; [3]INEI. ENAHO Q2 2024

*[1]**Total Reach** - Represents the total reach we have online in that given market (proprietary panels and partners).*





Ipsos Capabilities in APEC



Australia

Total Reach[1] 2.949.053 | **95% Smartphone penetration[2]** | **99% Online penetration[3]**

Age	Population 14+ individuals	Ipsos Panel 18+ members
14-17	6%	0%
18-24	10%	24%
25-34	17%	20%
35-44	17%	18%
45-54	15%	15%
55-64	14%	11%
65+	21%	12%
Total	100%	100%
Sources	*Census 2021*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 18+ members
Male	49%	32%
Female	51%	68%
Total	100%	100%
Sources	*Census 2021*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 18+ members
South Australia	7%	8%
Australian Capital Territory	2%	1%
New South Wales	32%	31%
Northern Territory	1%	1%
Victoria	26%	26%
Western Australia	10%	10%
Tasmania	2%	2%
Queensland	20%	21%
Total	100%	100%
Sources	*Census 2021*	*IIS Jan 2025*

[2]ACMA 2023; [3]ACMA 2024

India

Total Reach[1] 32.759.970 | **71% Smartphone penetration[2]** | **55% Online penetration[3]**

Age	Population 14+ individuals	Ipsos Panel 18+ members
14-17	11%	0%
18-24	19%	49%
25-34	22%	25%
35-44	18%	19%
45-54	13%	5%
55-64	9%	1%
65+	8%	0%
Total	100%	100%
Sources	*Census 2011*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 18+ members
Male	51%	69%
Female	49%	31%
Total	100%	100%
Sources	*Census 2011*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 18+ members
Central Zone	8%	5%
Eastern Zone	22%	13%
North-Eastern Zone	4%	3%
Northern Zone	29%	31%
Southern Zone	23%	31%
Western Zone	15%	17%
Total	100%	100%
Sources	*Census 2011*	*IIS Jan 2025*

[2]Statista 2023; [3]Kantar ICUBE &IAMAI 2023

Japan

Total Reach[1] 17.155.358 | **79% Smartphone penetration[2]** | **86% Online penetration[3]**

Age	Population 14+ individuals	Ipsos Panel 18+ members
14-17	4%	3%
18-24	8%	11%
25-34	11%	18%
35-44	14%	18%
45-54	17%	20%
55-64	14%	17%
65+	32%	13%
Total	100%	100%
Sources	*Census 2020*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 18+ members
Male	48%	58%
Female	52%	42%
Total	100%	100%
Sources	*Census 2020*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 18+ members
Chubu	18%	16%
Chugoku	6%	5%
Hokkaido	4%	5%
Kansai	16%	17%
Kanto	35%	40%
Kyushu / Okinawa	11%	9%
Shikoku	3%	3%
Tohoku	7%	6%
Total	100%	100%
Sources	*Census 2020*	*IIS Jan 2025*

[2]Communication usage trend survey 2023; [3]Communication usage trend survey 2023

*[1]**Total Reach** - Represents the total reach we have online in that given market (proprietary panels and partners).*

Indonesia

Total Reach[1] 12.840.526 | **82%** Smartphone penetration[2] | **80%** Online penetration[3]

Age	Population 14+ individuals	Ipsos Panel 18+ members
14-17	9%	0%
18-24	15%	33%
25-34	20%	40%
35-44	20%	20%
45-54	16%	6%
55-64	11%	1%
65+	8%	0%
Total	100%	100%
Sources	*Census 2020*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 18+ members
Male	50%	65%
Female	50%	35%
Total	100%	100%
Sources	*Census 2020*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 18+ members
Java	57%	66%
Kalimantan	6%	6%
Lesser Sunda Islands	6%	3%
Maluku Islands	1%	0%
Papua	2%	0%
Sulawesi	7%	5%
Sumatera	21%	19%
Total	100%	100%
Sources	*Census 2020*	*IIS Jan 2025*

[2]Statista 2023; [3]APJII, 2024

Malaysia

Total Reach[1] 4.309.319 | **89%** Smartphone penetration[2] | **93%** Online penetration[3]

Age	Population 14+ individuals	Ipsos Panel 18+ members
14-17	9%	0%
18-24	16%	35%
25-34	22%	34%
35-44	18%	21%
45-54	14%	7%
55-64	11%	2%
65+	10%	1%
Total	100%	100%
Sources	*Malaysia Statistics 2020*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 18+ members
Male	50%	46%
Female	50%	54%
Total	100%	100%
Sources	*Malaysia Statistics 2020*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 18+ members
Central Region	29%	46%
East Coast Region	15%	8%
Northern Region	22%	18%
Southern Region	15%	14%
East Malaysia	19%	14%
Total	100%	100%
Sources	*Malaysia Statistics 2020*	*IIS Jan 2025*

[2]Statista 2024; [3]Malaysian Communications and Multimedia Commision, Internet Users Survey 2022

Singapore

Total Reach[1] 774.277 | **96%** Smartphone penetration[2] | **91%** Online penetration[3]

Age	Population 14+ individuals	Ipsos Panel 18+ members
14-17	5%	0%
18-24	9%	23%
25-34	17%	26%
35-44	17%	25%
45-54	17%	16%
55-64	17%	8%
65+	18%	3%
Total	100%	100%
Sources	*Malaysia Statistics 2020*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 18+ members
Male	49%	49%
Female	51%	51%
Total	100%	100%
Sources	*Malaysia Statistics 2020*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 18+ members
Central	23%	21%
East	17%	20%
North	14%	17%
North-East	23%	20%
West	23%	23%
Total	100%	100%
Sources	*Malaysia Statistics 2020*	*IIS Jan 2025*

[2]IMDA, 2023; [3]IMDA, 2023

*[1]**Total Reach** - Represents the total reach we have online in that given market (proprietary panels and partners).*

South Korea

Total Reach[1] 2.791.277 | **95% Smartphone penetration[2]** | **94% Online penetration[3]**

Age	Population 14+ individuals	Ipsos Panel 14+ members
14-17	4%	5%
18-24	10%	17%
25-34	15%	28%
35-44	17%	25%
45-54	19%	16%
55-64	18%	6%
65+	18%	2%
Total	100%	100%
Sources	*Census 2020*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 14+ members
Male	50%	59%
Female	50%	41%
Total	100%	100%
Sources	*Census 2020*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 14+ members
Seoul	19%	21%
Gyeonggi and Gangwon	34%	37%
Gyeongsang	25%	23%
Jeolla	10%	8%
Chungcheong	11%	10%
Jeju	1%	1%
Total	100%	100%
Sources	*Census 2020*	*IIS Jan 2025*

[2]Statista & KISDI 2023; [3]Korea Statistics 2023

New Zealand

Total Reach[1] 613.683 | **97% Smartphone penetration[2]** | **96% Online penetration[3]**

Age	Population 14+ individuals	Ipsos Panel 18+ members
14-17	6%	0%
18-24	11%	20%
25-34	17%	26%
35-44	15%	23%
45-54	16%	15%
55-64	15%	9%
65+	19%	6%
Total	100%	100%
Sources	*Census 2018*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 18+ members
Male	49%	31%
Female	51%	69%
Total	100%	100%
Sources	*Census 2018*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 18+ members
North	76%	77%
South	24%	23%
Sources	*Census 2018*	*IIS Jan 2025*

[2]Statista 2024; [3]ITU, 2022

Philippines

Total Reach[1] 11.503.435 | **74% Smartphone penetration[2]** | **86% Online penetration[3]**

Age	Population 14+ individuals	Ipsos Panel 18+ members
14-17	11%	0%
18-24	18%	22%
25-34	22%	33%
35-44	18%	24%
45-54	13%	16%
55-64	10%	4%
65+	7%	1%
Total	100%	100%
Sources	*Census 2020*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 18+ members
Male	50%	46%
Female	50%	54%
Total	100%	100%
Sources	*Census 2020*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 18+ members
Luzon	58%	68%
Mindanao	23%	15%
Visayas	19%	17%
Total	100%	100%
Sources	*Census 2020*	*IIS Jan 2025*

[2]Statista 2023; [3]IWS, 2024

*[1]**Total Reach** - Represents the total reach we have online in that given market (proprietary panels and partners).*

Thailand

Total Reach[1] 5.417.978 | **96%** Smartphone penetration[2] | **89%** Online penetration[3]

Age	Population 14+ individuals	Ipsos Panel 20+ members
14-17	6%	0%
18-24	11%	28%
25-34	17%	40%
35-44	18%	23%
45-54	19%	7%
55-64	15%	1%
65+	14%	1%
Total	100%	100%
Sources	*Thailand Statistics 2020*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 20+ members
Male	48%	62%
Female	52%	38%
Total	100%	100%
Sources	*Thailand Statistics 2020*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 20+ members
Central Region	20%	23%
Northern Region	18%	16%
Southern Region	14%	13%
Greater Bangkok	14%	19%
Northeastern Region	34%	29%
Total	100%	100%
Sources	*Thailand Statistics 2020*	*IIS Jan 2025*

[2]Household Survey on The use of Information and Communication Technology Q2 2024; [3]Statistics Thailand - ICT Survey Q2 2024

Vietnam

Total Reach[1] 6.163.845 | **71%** Smartphone penetration[2] | **86%** Online penetration[3]

Age	Population 14+ individuals	Ipsos Panel 18+ members
14-17	7%	0%
18-24	12%	59%
25-34	23%	29%
35-44	19%	9%
45-54	16%	2%
55-64	12%	1%
65+	10%	0%
Total	100%	100%
Sources	*Census 2019*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 18+ members
Male	49%	69%
Female	51%	31%
Total	100%	100%
Sources	*Census 2019*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 18+ members
Central Highlands	6%	5%
Mekong River Delta	18%	14%
North Central Coast	11%	8%
Northeast	8%	9%
Northwest	5%	3%
Red River Delta	23%	28%
South Central Coast	10%	10%
South East	19%	23%
Total	100%	100%
Sources	*Census 2019*	*IIS Jan 2025*

[2]MIC 2021; [3]IWS, 2022

*[1]**Total Reach** - Represents the total reach we have online in that given market (proprietary panels and partners).*



Ipsos Capabilities in Greater China



China

Total Reach[1] 64.866.226 | **68%** Smartphone penetration | **78%** Online penetration[2]

Age	Population 14+ individuals	Ipsos Panel 14+ members
14-17	6%	0%
18-24	9%	23%
25-34	19%	47%
35-44	17%	26%
45-54	20%	3%
55-64	14%	0%
65+	15%	0%
Total	100%	100%
Sources	*Census 2021*	*IIS Jan 2025*

Gender	Population 14+ individuals	Ipsos Panel 14+ members
Male	51%	38%
Female	49%	62%
Total	100%	100%
Sources	*Census 2021*	*IIS Jan 2025*

Region	Population 14+ individuals	Ipsos Panel 14+ members
North China	12%	20%
Northeast China	8%	3%
East China	31%	37%
South Central China	28%	28%
Southwest China	14%	9%
Northwest China	7%	3%
Total	100%	100%
Sources	*Census 2021*	*IIS Jan 2025*

[2]*China Internet Network Information Center February 2023*

Hong Kong

Total Reach[1] 814.245 | **97%** Smartphone penetration | **96%** Online penetration[2]

Age	Population 15+ individuals	Ipsos Panel 18+ members
15-19	4%	0%
20-24	5%	4%
25-34	14%	34%
35-44	17%	38%
45-54	17%	14%
55-64	18%	7%
65+	24%	2%
Total	100%	100%
Sources	*Hong Kong Annual Digest of Statistics 2024*	*IIS Jan 2025*

Gender	Population 15+ individuals	Ipsos Panel 18+ members
Male	45%	38%
Female	55%	62%
Total	100%	100%
Sources	*Hong Kong Annual Digest of Statistics 2024*	*IIS Jan 2025*

Region	Population 15+ individuals	Ipsos Panel 18+ members
Hong Kong Island	16%	29%
Kowloon	30%	28%
The New Territories	54%	43%
Total	100%	100%
Sources	*Census 2024*	*IIS Jan 2025*

[2]*All individuals 10+ y.o. - Census 2024*

[1]***Total Reach*** *- Represents the total reach we have online in that given market (proprietary panels and partners).*



Trust Pilot scores



I reached the threshold of points with Ipsos iSay and was able to claim my Amazon voucher, which arrived by email, within a couple of days. I have been answering their surveys for a number of years. They are always well written, challenging but answerable. Very happy to recommend.

June 15, 2025

Easy to do when you have spare time, earn points to convert. Multiple choice questions, just need to be honest.

July 15, 2025

I have been with Ipsos iSay for many years and have always found the surveys varied and interesting. I enjoy spending my voucher at Aldi when I do my shopping.

July 18, 2025

Good service and good time.

July 20, 2025

A great survey company I just applied for a payment and received it within 5 minutes what great service I would recommend Ipsos iSay to all my friends.

July 09, 2025

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