

A man and a woman are in a warehouse or storage room. The woman, wearing a maroon shirt, is holding a large binder. The man, wearing a red checkered shirt and glasses, is holding a smartphone. They are looking at the phone together. In the background, there are shelves filled with cardboard boxes. To the right, there is a white board with several small images or documents pinned to it. The overall scene suggests a business or logistics environment.

ENTREPRENEURIALISM

In the Time of the Pandemic

January 2021

<https://www.ipsos.com/en/entrepreneurialism-time-pandemic>

GAME CHANGERS



SUMMARY

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ABOUT THE STUDY

Many of Ipsos' clients, prospects and partners are interested in issues associated with entrepreneurialism.

This interest has been greatly heightened by the pandemic and the opinion, by many, that entrepreneurialism is central to a sustained recovery.

We conducted an international benchmark survey on entrepreneurialism in 2018.

We repeated this (with a few edits) in late 2020 across 28 countries.

(Note for international comparisons that the samples in Brazil, Chile, mainland China, Colombia, India, Malaysia, Mexico, Peru, Russia, Saudi Arabia, South Africa, and Turkey are more urban, more educated, and/or more affluent than the general population. The survey results for these countries should be viewed as reflecting the views of the more “connected” segment of their population).



Entrepreneurialism has been the cornerstone of economic development around the world for centuries. But we know that the potential for entrepreneurial activity to pull economies out of the malaise caused by the COVID-19 pandemic varies greatly by country. Our hope is that this study provides useful guidance to help the public and private sector maximize the role entrepreneurialism can play in fostering economic recovery moving into 2021.

**Dr. Darrell Bricker, Global CEO,
Public Affairs, Ipsos**

HIGH LEVEL OBSERVATIONS

THE ENTREPRENEURIAL SPIRIT IS ALIVE AND WELL MOVING INTO 2021

Globally, a full seven-in-ten worldwide citizens have the characteristics that are considered important for entrepreneurs, including one-third who do so strongly (as determined by Ipsos' proprietary index of 18 key entrepreneurial characteristics ranging from a strong work ethic to a liking to take calculated risks).

However, entrepreneurial spirit varies widely by country...

- Colombia tops the list, followed by South Africa and Peru.
- Belgium, Great Britain, France, Netherlands, South Korea, and Japan rank lowest.

BUSINESS ENTREPRENEURIALISM IS BEING CHALLENGED BY SOCIAL ENTREPRENEURIALISM

Entrepreneurialism is being manifested mostly in its traditional way – business creation (business entrepreneurialism).

However, it is also being manifested, sometimes in conjunction with business creation but sometimes not, in social entrepreneurialism (captured as those who've created an interest group).

As well, social entrepreneurialism tends to be a more recent phenomenon than business entrepreneurialism, with a greater proportion of those creating an interest group doing so in the past year.

This reflects the reality of who current and likely entrepreneurs are as people – they are much more likely than non-entrepreneurs to be participating/active in society generally.

HIGH LEVEL OBSERVATIONS

ENTREPRENEURIALISM INCREASING IN NON-TRADITIONAL GROUPS

While entrepreneurialism may have been the domain of men and higher socio-economic groups in this past, this is no longer the case.

Although entrepreneurial spirit is highest among Millennials, Gen X, higher education and higher income, is it evident across all demographic groups. Indeed, it has increased most among women, Gen Z, Millennials and Gen X, lower education and lower income.

Women, and those with lower income and education level have increased most in the last 2 years (since late 2018) in their entrepreneurial aspirations.

THE PANDEMIC HAS SPURRED SOME ENTREPRENEURIALISM

Either out of necessity or a new interest, three-in-ten of those who have started a business in the last year say that they had not intended to create a business, but the pandemic motivated them to do so.

But, and not surprising, starting a business is a risky endeavor. Half of those who say they have started a business in the past say that the business is no longer operating.

HIGH LEVEL OBSERVATIONS

GOVERNMENT, BUSINESS, BANKS NOT SEEN AS DOING A GOOD JOB

There is significant room for governments to position themselves on entrepreneurialism. Few countries are particularly enamoured with how their government has fostered entrepreneurialism.

Additionally, there is significant room for business, generally, and banks, specifically, to position themselves in this space. Few countries are particularly enamoured with how the private sector/business and financial institutions/banks have promoted entrepreneurialism.

THE BOTTOM LINE

There appears to be a significant untapped potential for entrepreneurial activity moving into 2021 and beyond.

And key to tapping this is recognizing that non-traditional groups, like women, lower education and lower income, are catching up with traditional groups in their entrepreneurial spirit and aspirations.

Also key in tapping into this is recognizing that business entrepreneurialism often goes hand in hand with social entrepreneurialism. So, if the goal is business creation, is there a way to promote the linkages between the two? i.e., if you are starting an interest group, also start a business to fund it.

CONTEXT



1

CONTEXT – CITIZEN/CONSUMER SENTIMENT

We know that how people view their lives at a high level helps shape their attitudes and behaviours toward almost everything, including entrepreneurialism. For example, in another area, consumer confidence is a known driver of consumer behaviour.

We have several metrics that we track for 28+ countries worldwide that provide this context. But the one which is likely most relevant is the Ipsos Disruption Barometer (IDB). This is a unique metric in the market and been validated to be:

- Sensitive to traditional “consumer confidence,” and
- Very sensitive to socio-political disruption.

Scoring high or low on the IDB could have different implications for entrepreneurialism. At a minimum, these should be considered in developing strategies to foster entrepreneurialism. For example:

- Higher citizen/consumer sentiment via the IDB could mean less urgency since people feel that things are going well already or more urgency as people want something to sustain/expand their positive situation.
- Similarly, lower citizen/consumer sentiment via the IDB could mean more urgency since people feel that things are going poorly and are looking for ways to improve, or more resistance because they are skeptical, cynical and under pressure to begin with.

CONTEXT – IPSOS DISRUPTION BAROMETER

Citizen/consumer context is negative in almost all countries and yet to rebound to pre-pandemic levels. However, there are some exceptions, most notably Australia, China and Saudi Arabia.

CHANGE VS PRE-PANDEMIC
Q4 (DEC) 2019

▲

◁▷

▼

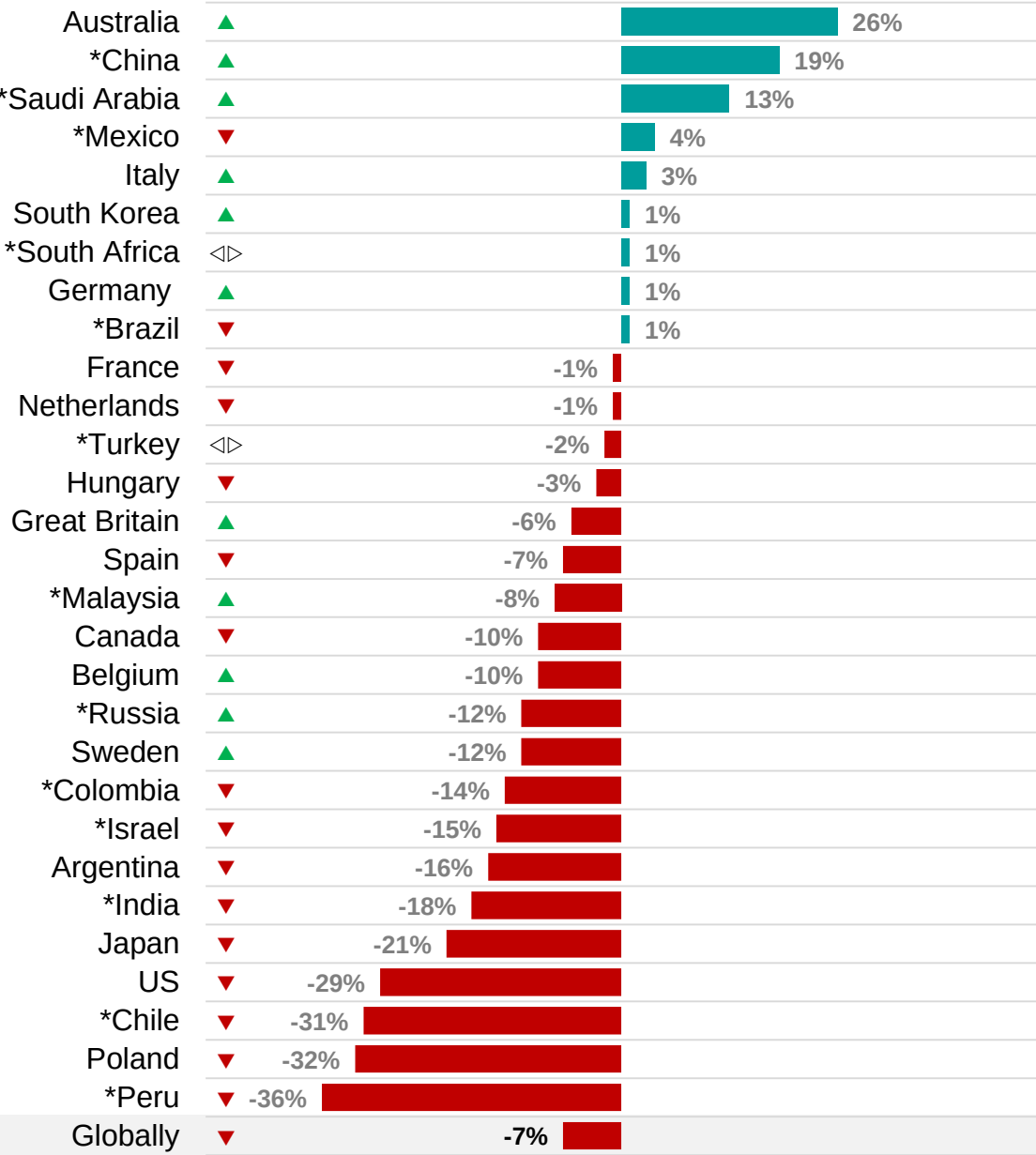
HIGHER

FLAT, NO CHANGE

LOWER

**samples represent a more affluent, connected population*

IPSOS DISRUPTION BAROMETER (IDB) DEC 2020



ENTREPRENEURIAL SPIRIT

2

ENTREPRENEURIAL SPIRIT

ENTREPRENEURIAL SPIRIT

The Entrepreneurial Spirit index was developed by combining responses to a series of attributes. The attributes were culled from a broader list of about 100 items first produced by an extensive literature review.

THE ENTREPRENEURIAL SPIRIT INDEX

The Entrepreneurial Spirit Index was created by combining responses where:

- **Very High** = average rate 6+ on the items
- **High** = average rate 5 on the items
- **Moderate** = average rate 4 on the items
- **Low** = average rate 3- on the items

To what extent do the following words/phrases describe you...

1 not at all to 7 completely?

- | | |
|--|------------------------------|
| ■ Passionate about what I do in life | ■ Disciplined |
| ■ Like to take calculated risks | ■ Competitive |
| ■ Creative | ■ Can control my own destiny |
| ■ Future oriented | ■ Flexible |
| ■ Resourceful | ■ Am well connected |
| ■ Strong self-belief (strong belief in my abilities) | ■ Am a good planner |
| ■ Self-Motivated | ■ Am a good manager of money |
| ■ Have a strong work ethic | ■ Can deal with failure |
| | ■ Innovative |
| | ■ Ambitious |

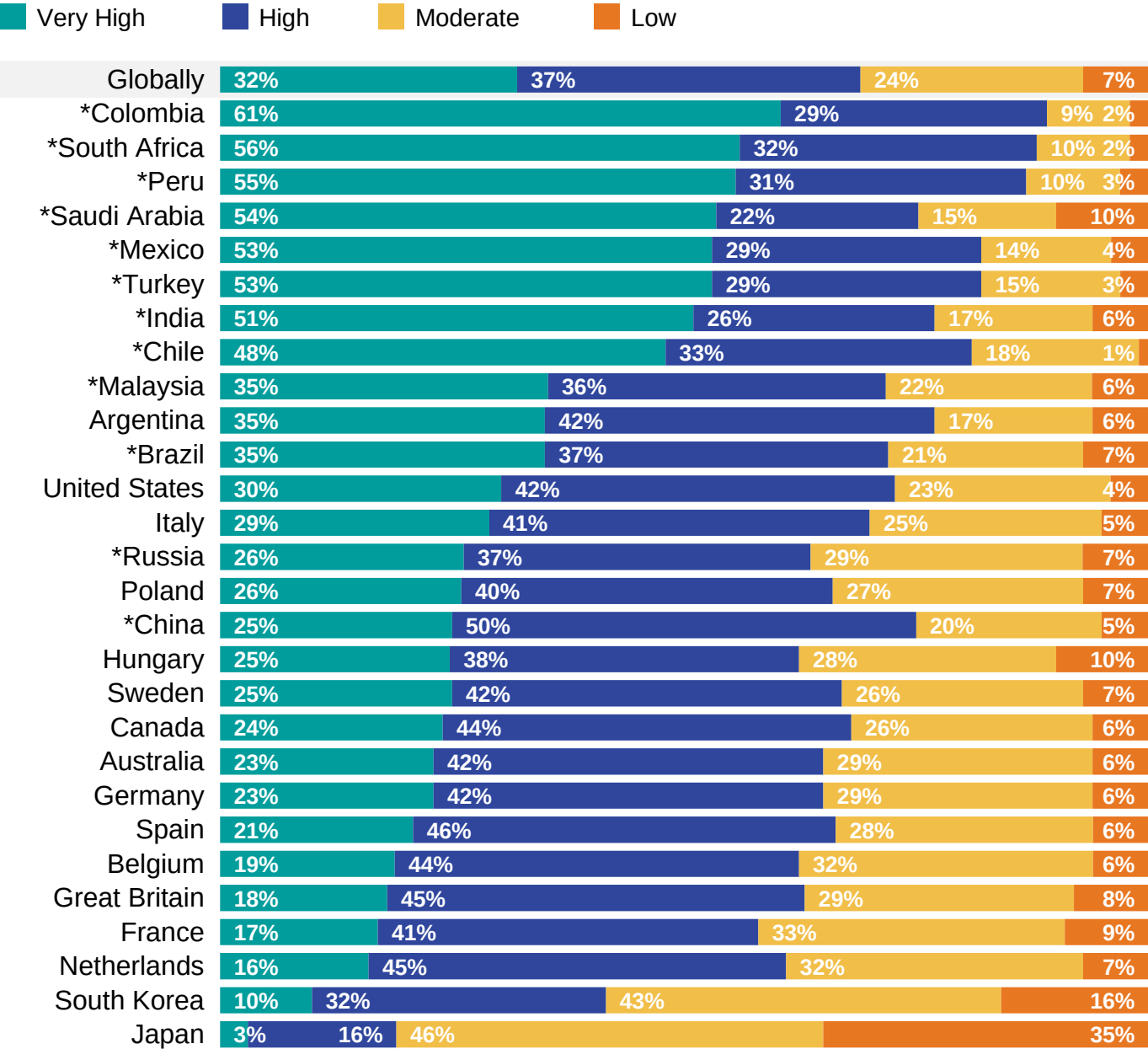
ENTREPRENEURIAL SPIRIT INDEX BY COUNTRY

Combining the individual items into an index, about one-third of global citizens have “very high” entrepreneurial spirit.

Colombia tops the list, followed by South Africa and Peru.

Belgium, Great Britain, France, Netherlands, South Korea, and Japan rank lowest.

ENTREPRENEURIAL SPIRIT INDEX



**samples represent a more affluent, connected population*

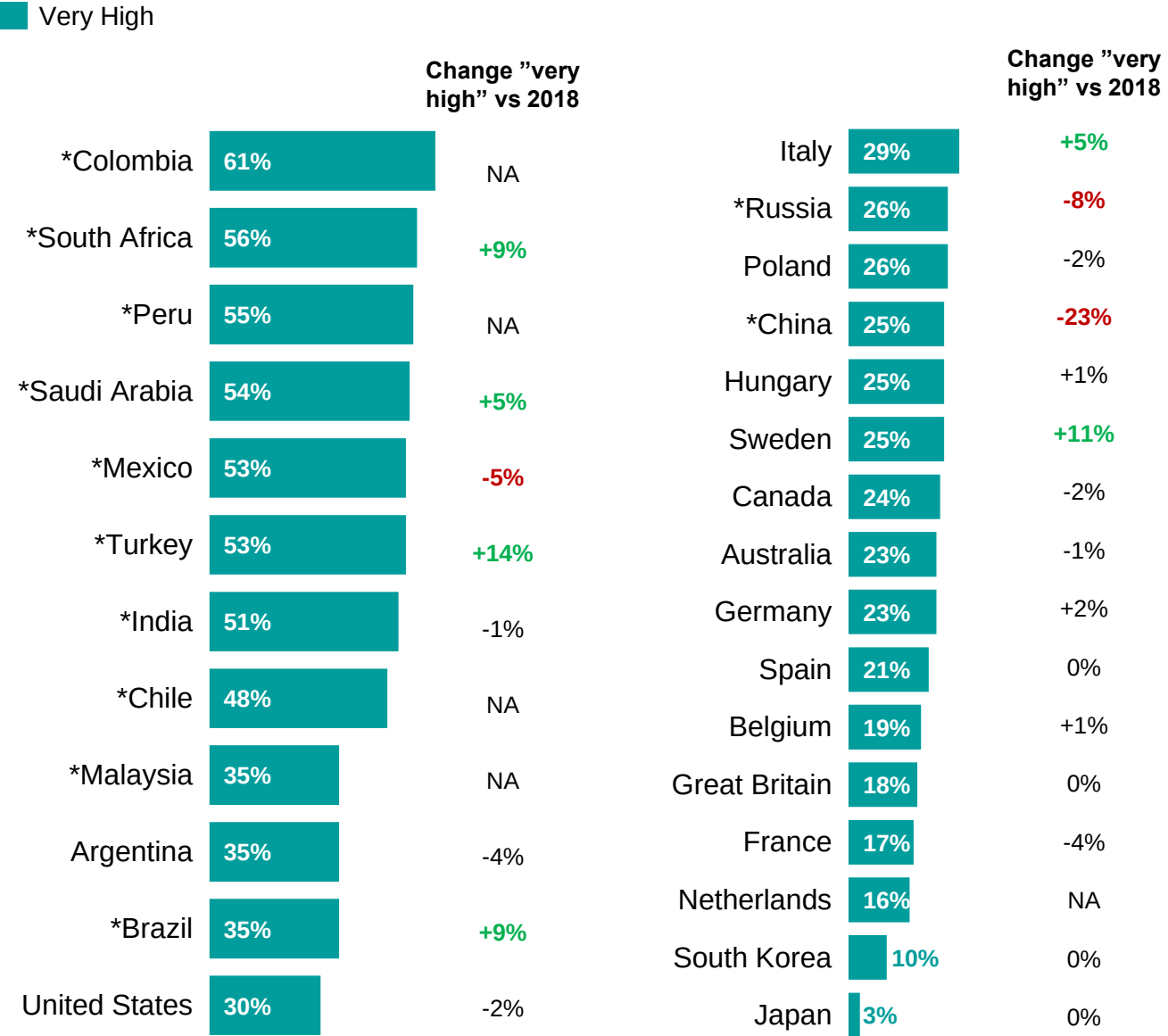
CHANGE IN ENTREPRENEURIAL SPIRIT INDEX BY COUNTRY

Entrepreneurial spirit has...

- Increased most in South Africa, Saudi Arabia, Turkey, Brazil, Italy and Sweden.
- Decreased most in Mexico, Russia and China.

**samples represent a more affluent, connected population*

ENTREPRENEURIAL SPIRIT INDEX

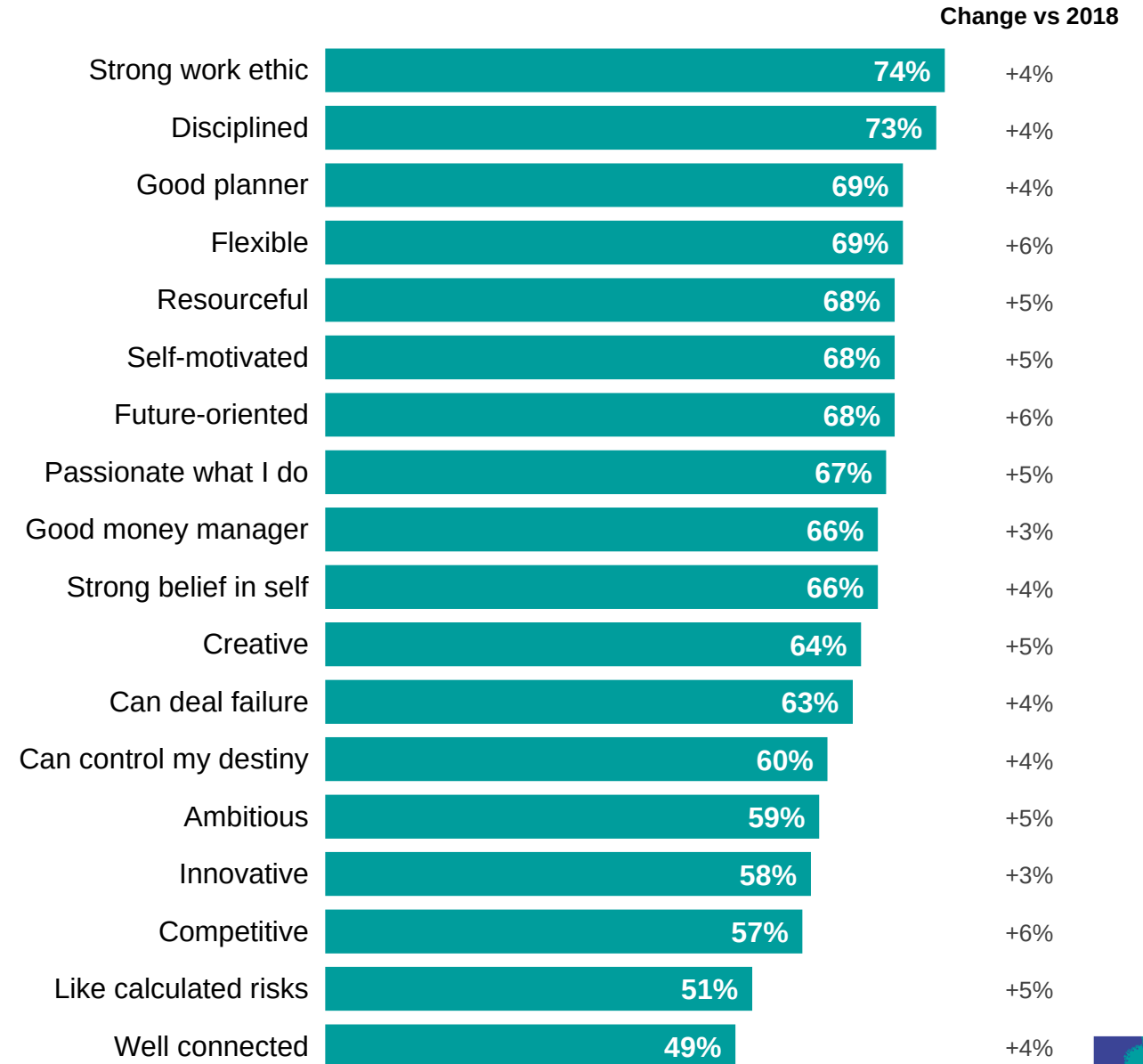


ENTREPRENEURIAL SPIRIT COMPONENTS

Global citizens are most likely to describe themselves as having a strong work ethic and being disciplined.

They are less likely to describe themselves as liking to take calculated risks and being well connected.

DESCRIBE SELF AS...



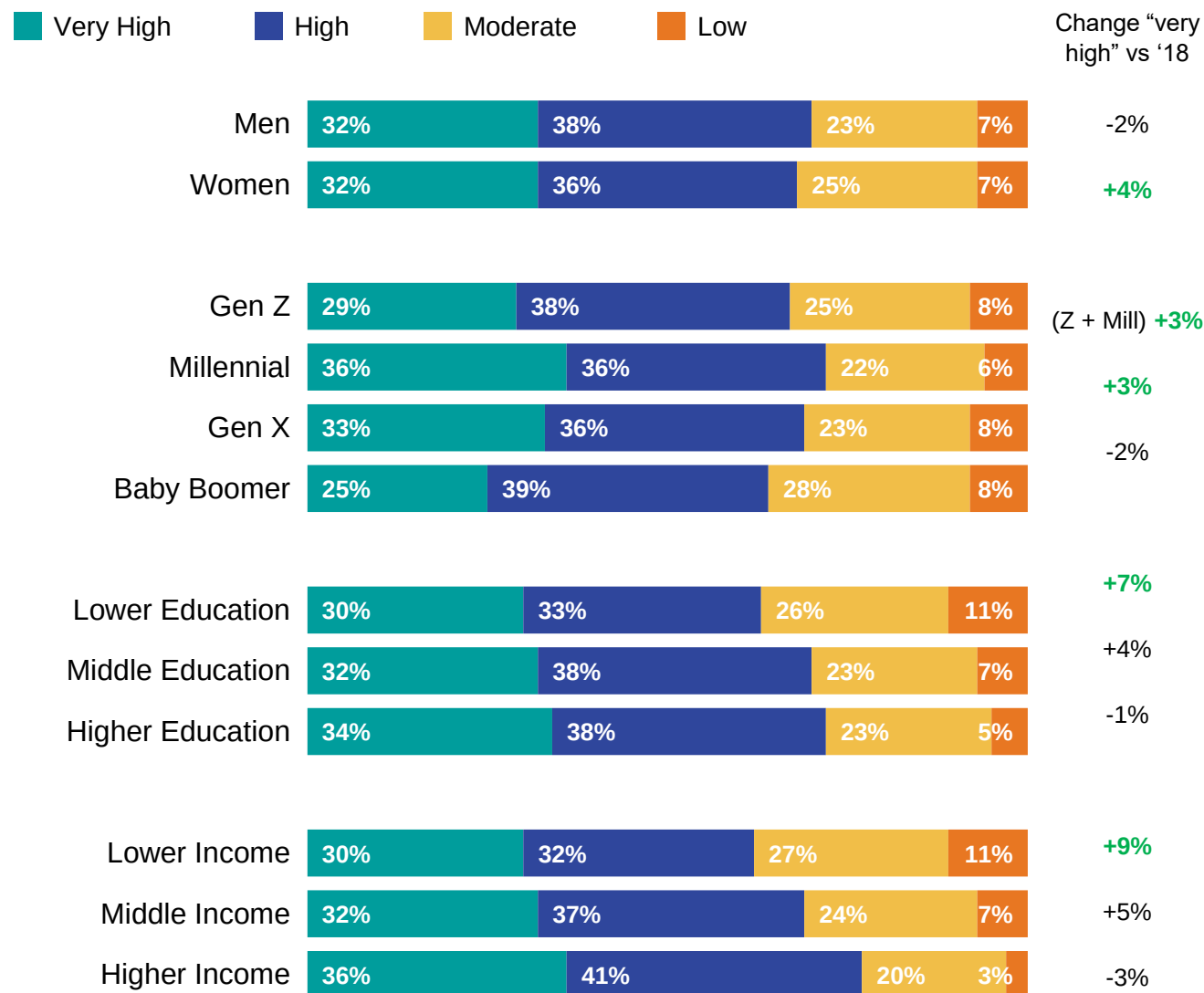
ENTREPRENEURIAL SPIRIT INDEX – BY DEMOGRAPHICS WORLDWIDE

While entrepreneurial spirit is highest among Millennials, Gen X, higher education and higher income, is it evident across all demographic groups.

Interestingly, entrepreneurial spirit has increased most among women, Gen Z, Millennials and Gen X, lower education and lower income.

**samples represent a more affluent, connected population*

ENTREPRENEURIAL SPIRIT INDEX



FAIRNESS IN ENTREPRENEURIALISM

3

FAIRNESS IN ENTREPRENEURIALISM

IS THERE A LEVEL PLAYING FIELD FOR ENTREPRENEURS?

We probed issues associated with women and other specific subsets of the population and entrepreneurialism by asking...

To what extent do you agree or disagree with the following

1 – strongly disagree to 7 – strongly agree?

- Women are treated fairly when they try to start a business
- Other groups like different races, LGBTQ, persons with disabilities are treated fairly when they try to start a business

(Other groups not asked in China, Saudi Arabia, Malaysia, South Korea)

FAIRNESS IN ENTREPRENEURIALISM

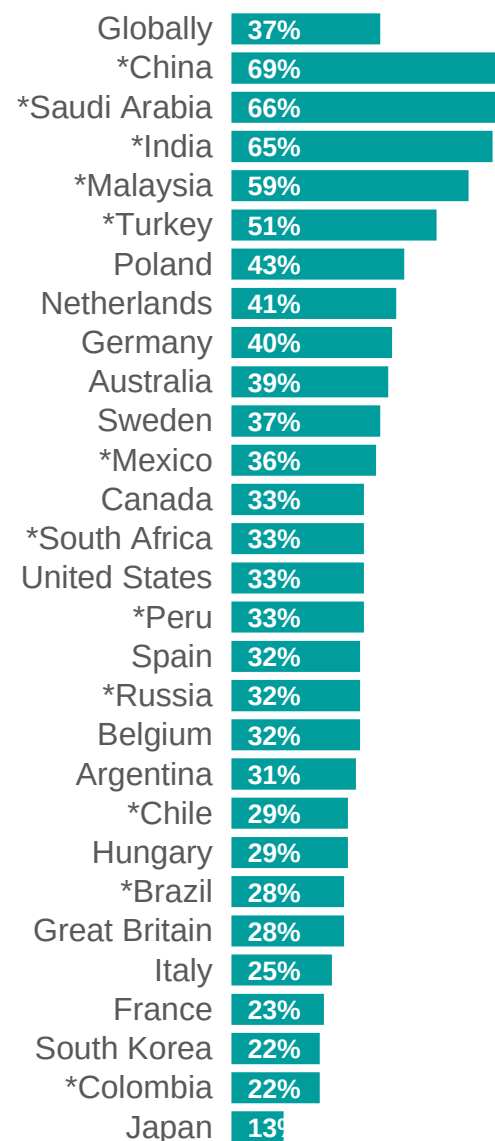
Most global citizens **do not** think that women are treated fairly when they try to start a business.

- A majority in only 5 of the 28 countries – China, Saudi Arabia, India, Malaysia and Turkey – do perceive fairness, while it is a minority in all remaining 23 countries.

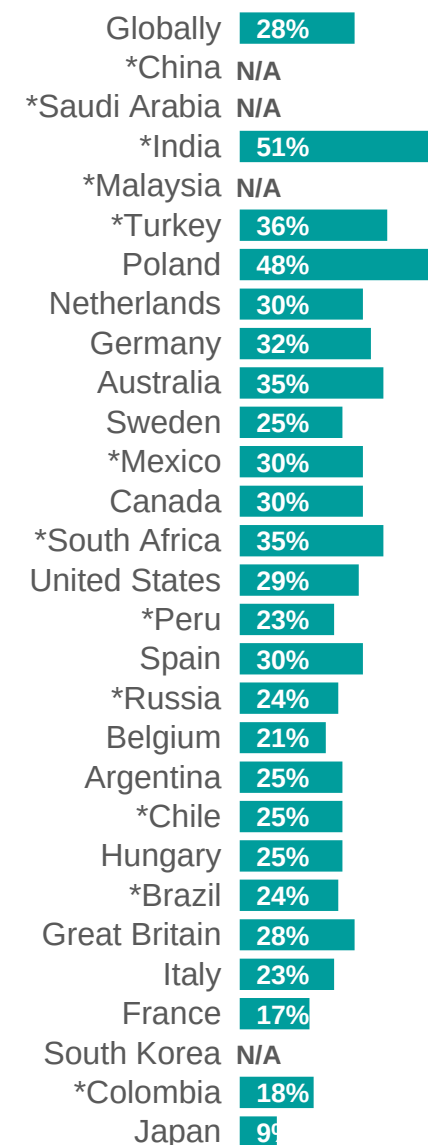
Similarly, in only 2 countries – a majority in India and almost half in Poland – is there a perception that other groups like LGBTQ, persons with disabilities are treated fairly when they try to start a business. This is a minority opinion in all remaining countries.

* i.e., different races, LGBTQ, persons with disabilities

AGREE WOMEN TREATED FAIRLY



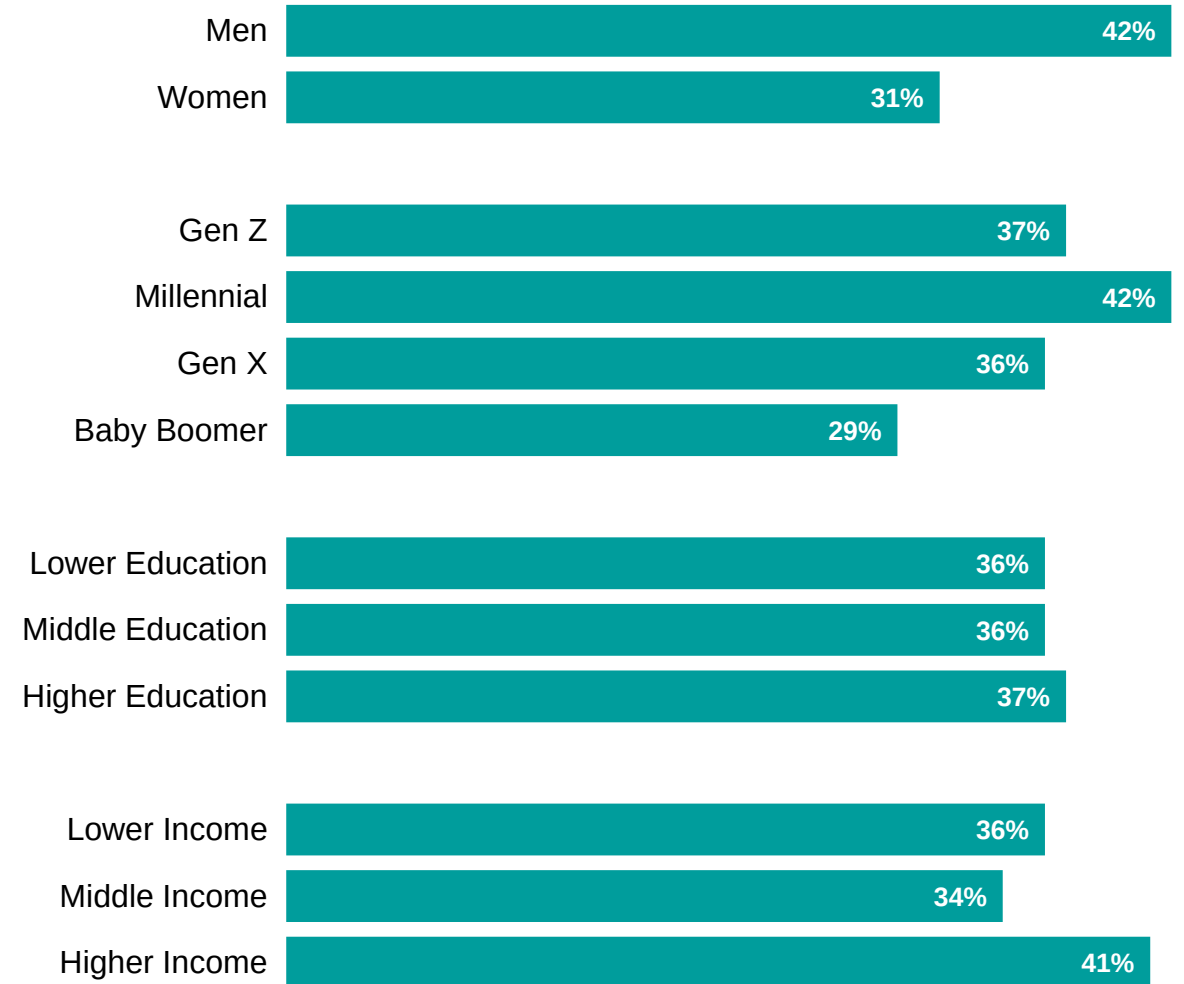
AGREE OTHERS* TREATED FAIRLY



FAIR TREATMENT OF WOMEN BY DEMOGRAPHICS— WORLDWIDE

Men, Millennials and higher income are more likely to believe that women are treated fairly when they try to start a business, although it is still only a minority opinion.

AGREE WOMEN TREATED FAIRLY



ENTREPRENEURIAL EXPERIENCE

4

ENTREPRENEURIAL EXPERIENCE

ENTREPRENEURIAL EXPERIENCE

We measured entrepreneurial experience in a traditional way – related to creation of a business.

But we also wanted to track whether entrepreneurialism was also expressed in the social world by the creation of an interest group.

We asked...

Have you ever...?

- Started your own business? (always first)
- Started your own interest group dealing with social causes, consumer issues, political issues, etc.

To Drill-down A Bit, We Then Probed On...

- **If Have Started a Business:** When was the last time you started a business?
- **If Started in Past Year:** Were you always planning on starting a new business at some point in the last year or did the pandemic motivate you to act?
- **If Started Any Business:** And generally what type of business was the last one you started?
 - Online selling products
 - Online selling services
 - In person/physical location/store selling products
 - In person/physical location/store selling services
 - Manufacturing/making something
 - Other (Specify)
- Is the latest business you have started still operating?
- **If Have Started Interest Group:** When was the last time you started an interest group?

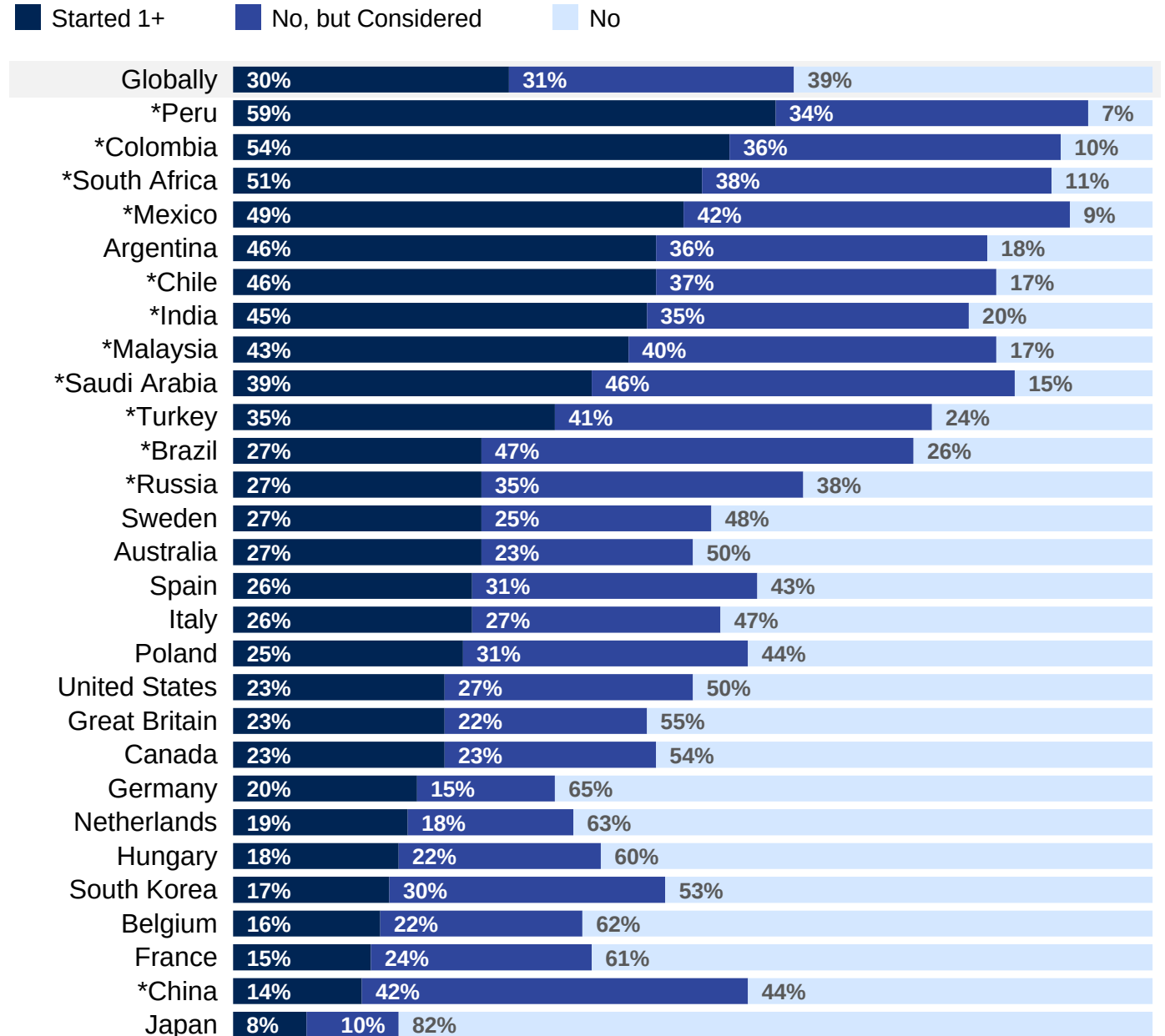
ENTREPRENEURIAL EXPERIENCE – BUSINESS

Three-in-ten worldwide citizens say they have started at least one business in the past. Another three-in-ten say they have not started a business but have seriously considered it.

Several LATAM countries and South Africa have the highest proportion of citizens who say that have started a business in the past. Japan has the lowest.

**samples represent a more affluent, connected population*

STARTED A BUSINESS



CHANGES IN ENTREPRENEURIAL EXPERIENCE – BUSINESS

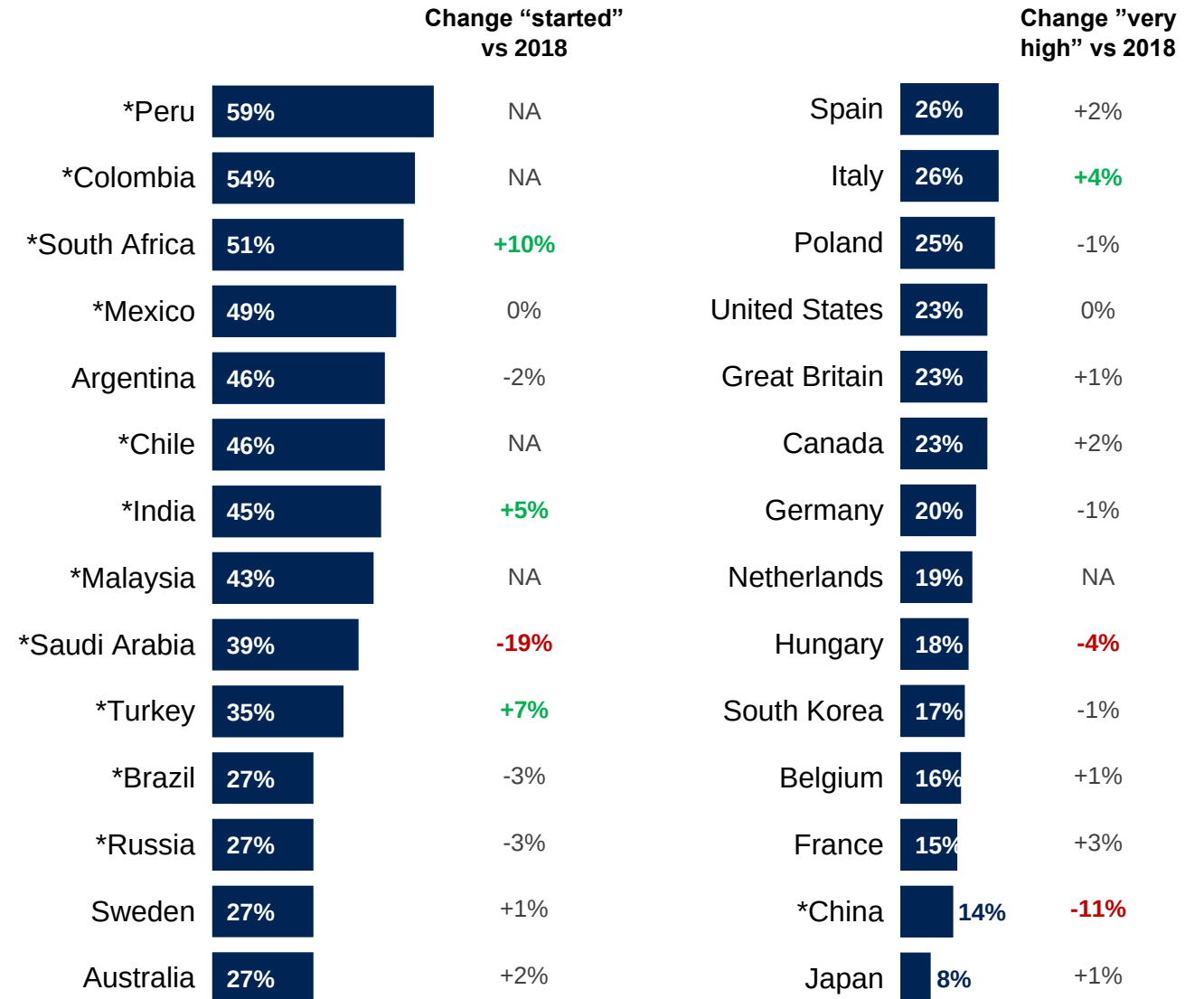
Starting a business shows...

- The biggest increases are in South Africa, India, Turkey, and Italy.
- The biggest decreases are in Saudi Arabia, Hungary and China.

**samples represent a more affluent, connected population*

STARTED A BUSINESS

■ Started 1+



ENTREPRENEURIAL EXPERIENCE – INTEREST GROUP

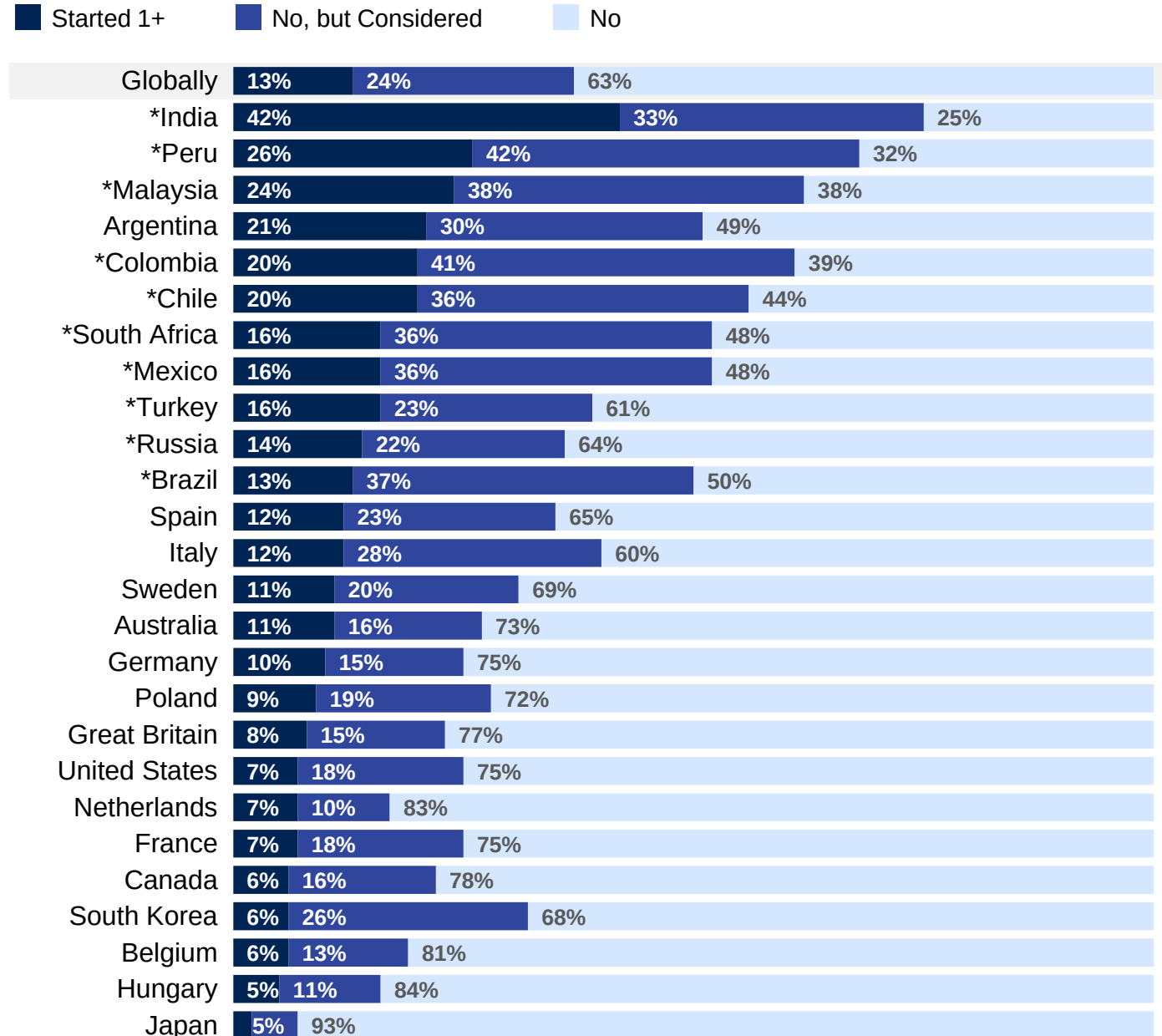
Just over one-in-ten worldwide citizens say they have started at least one interest group in the past. Another one-quarter say they have not started an interest group but have seriously considered it.

Several LATAM countries, India and Malaysia have the highest proportion of citizens who say that have started an interest group in the past. Canada, South Korea, Belgium, Hungary and Japan are the lowest.

Not asked in China, Saudi Arabia

**samples represent a more affluent, connected population*

STARTED AN INTEREST GROUP



CHANGE ENTREPRENEURIAL EXPERIENCE – INTEREST GROUP

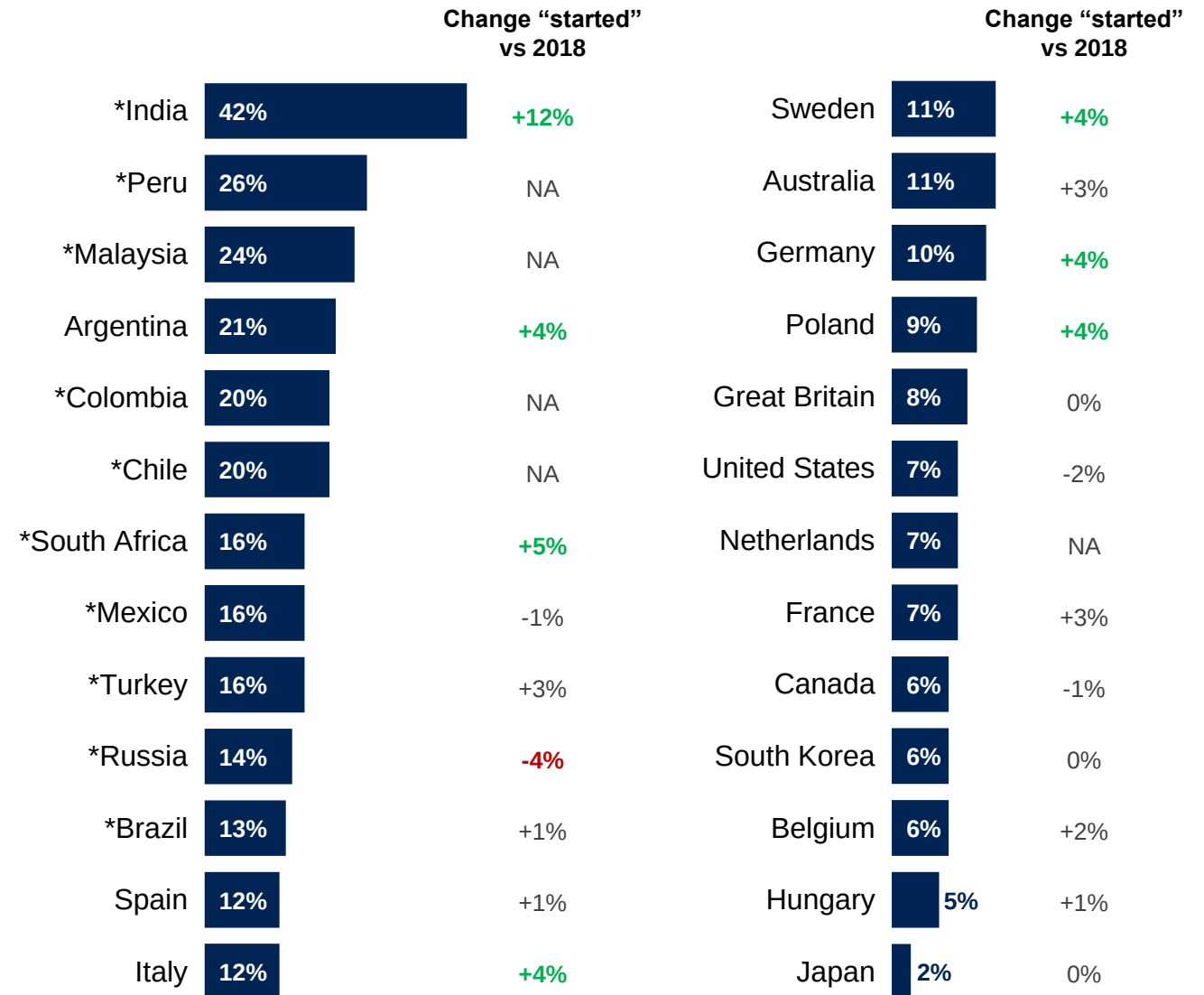
Starting an interest group shows...

- The biggest increases are in India, Argentina, South Africa, Italy, Sweden, Germany and Poland.
- The biggest decrease is in Russia.

**samples represent a more affluent, connected population*

STARTED AN INTEREST GROUP

■ Started 1+



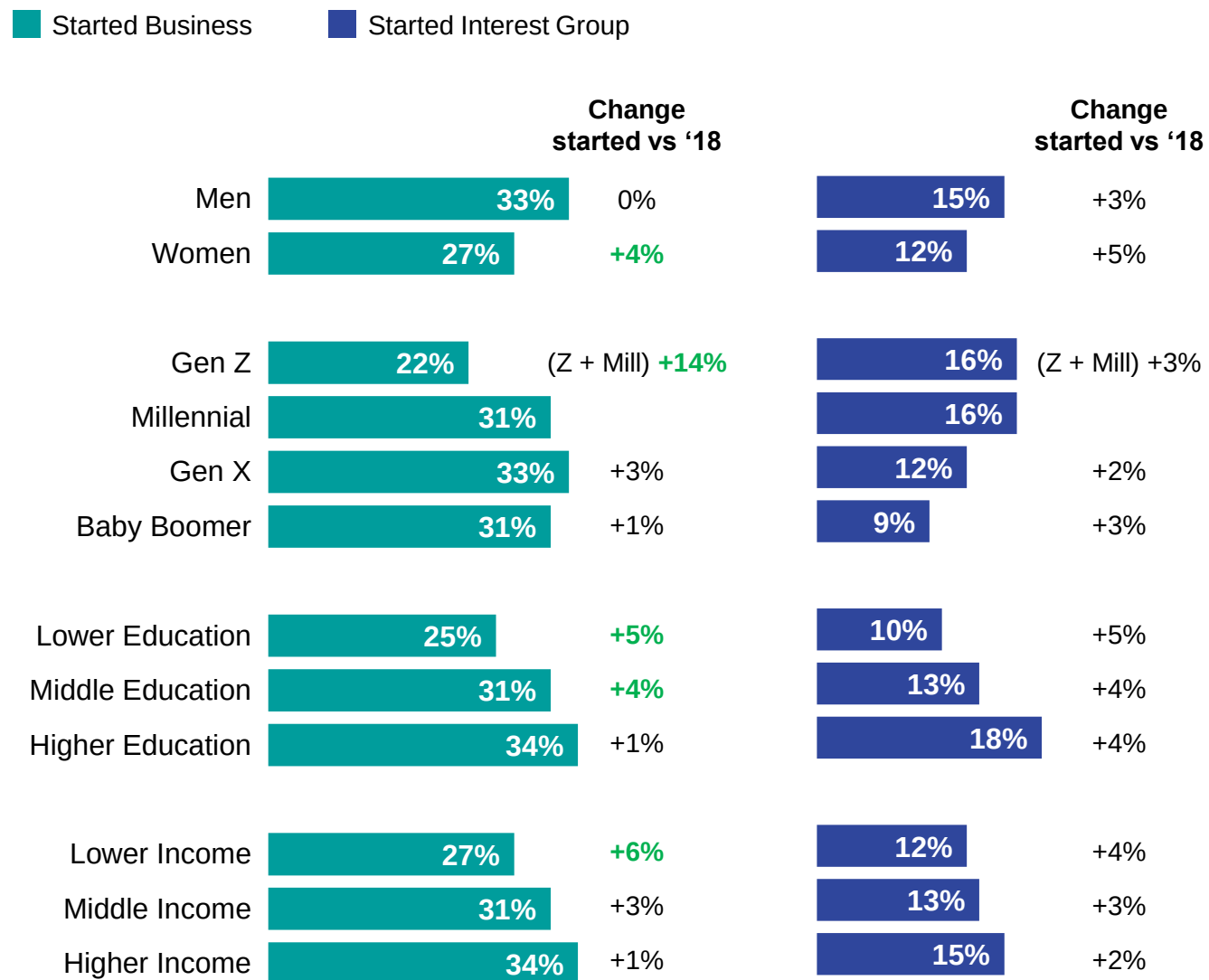
ENTREPRENEURIAL EXPERIENCE BY DEMOGRAPHICS – WORLDWIDE

Past business entrepreneurialism is higher among men, higher education and income.

- But, since 2018 women, Gen Z and Millennials, lower income and lower and middle education have increased most.

Past social entrepreneurialism (interest group creation) has also been somewhat higher among men, higher education and higher income, but also Gen Z and Millennials.

- Increases in social entrepreneurialism tend to be distributed across demographic groups.

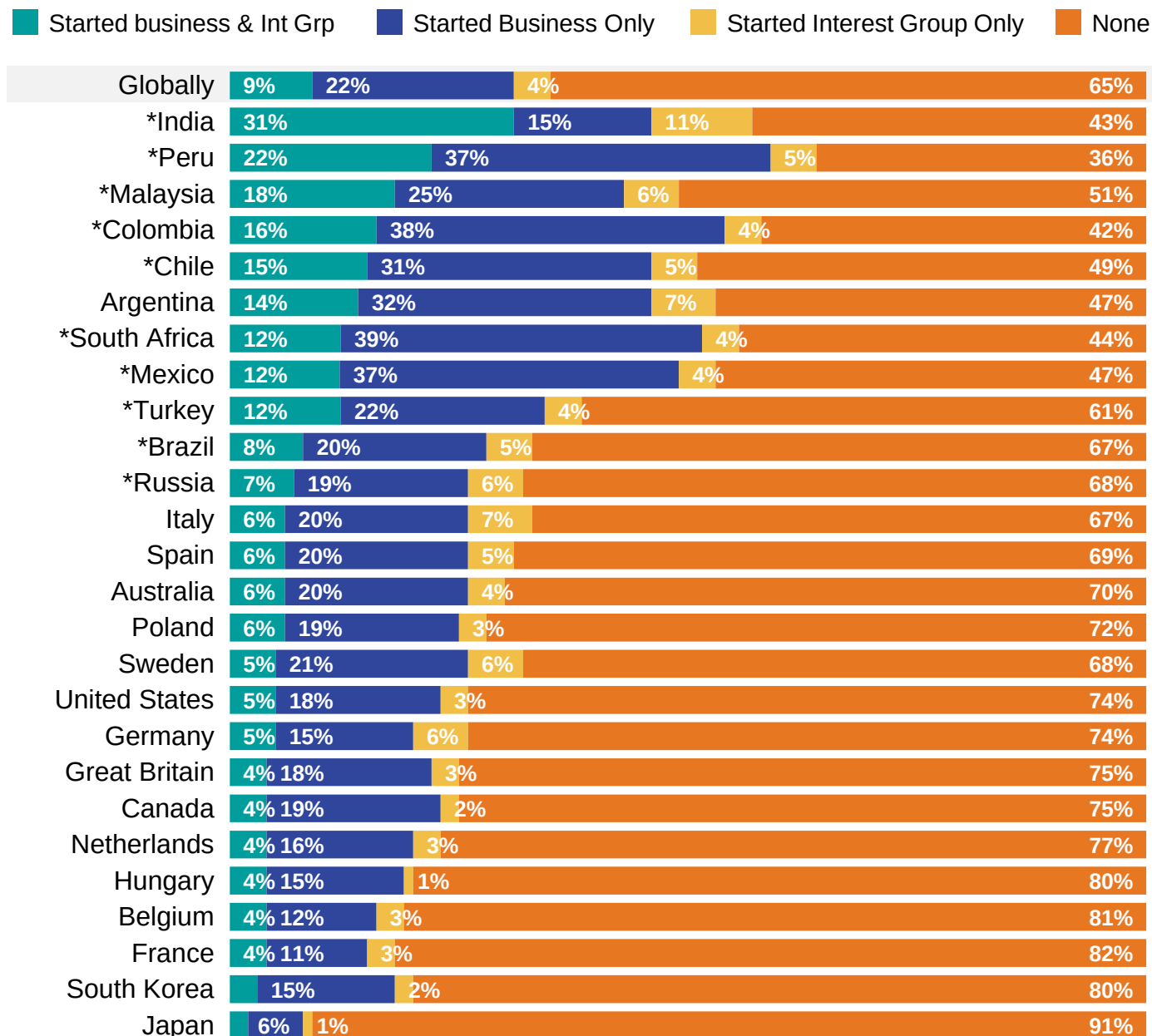


ENTREPRENEURIAL EXPERIENCE – BUSINESS AND INTEREST GROUP

Entrepreneurs in India, Peru, Colombia, South Africa, Mexico, Argentina, Chile, Malaysia and Turkey are most likely to have split their attention between starting both a business and an interest group.

*Interest group not asked in China and Saudi Arabia
samples represent a more affluent, connected population

STARTED A BUSINESS AND/OR INTEREST GROUP



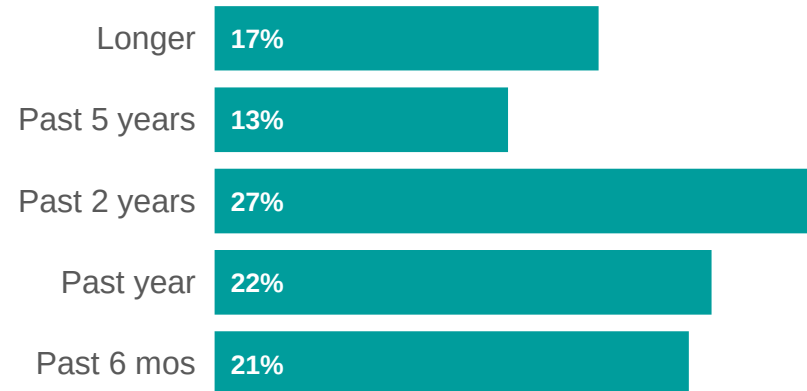
ENTREPRENEURIAL EXPERIENCE: DRILL- DOWN – WORLDWIDE

Social entrepreneurialism (have started an interest group) tends to be more recent than economic entrepreneurialism (have started a business).

LAST TIME STARTED A BUSINESS (Among the 30% Who Have)



LAST TIME STARTED AN INTEREST GROUP (Among the 13% Who Have)



ENTREPRENEURIAL EXPERIENCE: DRILL-DOWN – WORLDWIDE

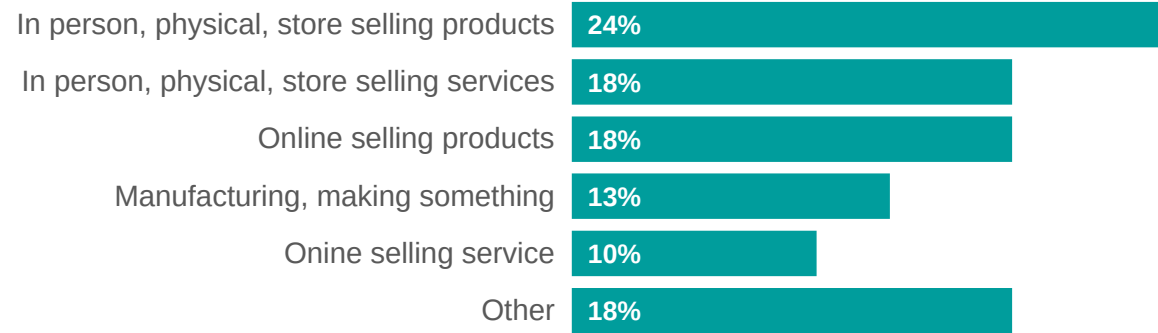
The types of businesses started by entrepreneurs who have started a business vary. The largest proportion say that their most recent business was a physical location selling products or services. Online selling products or services comes next, followed by manufacturing something.

Only half of entrepreneurs who have started a business say their most recent start-up is still operating.

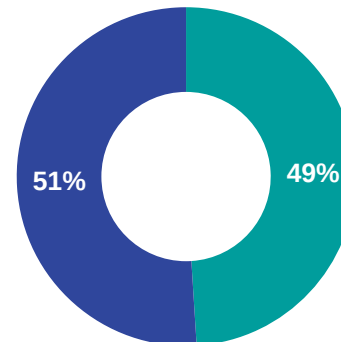
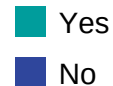
Interestingly, a full three-in-ten of entrepreneurs who have started a business in the last year say that they were motivated to do so by the pandemic.

* i.e., different races, LGBTQ, persons with disabilities

STARTED BUSINESS ANYTIME MOST RECENT TYPE STARTED (Among the 30% Who Have)

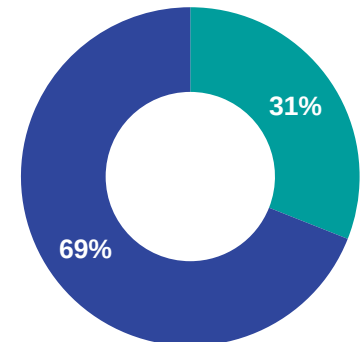
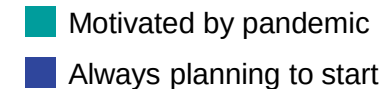


STARTED BUSINESS ANYTIME MOST RECENT STILL OPERATING (Among the 13% Who Have)



IF STARTED BUSINESS PAST YEAR

(Among 29% of the 30% Who Have Started a Business)

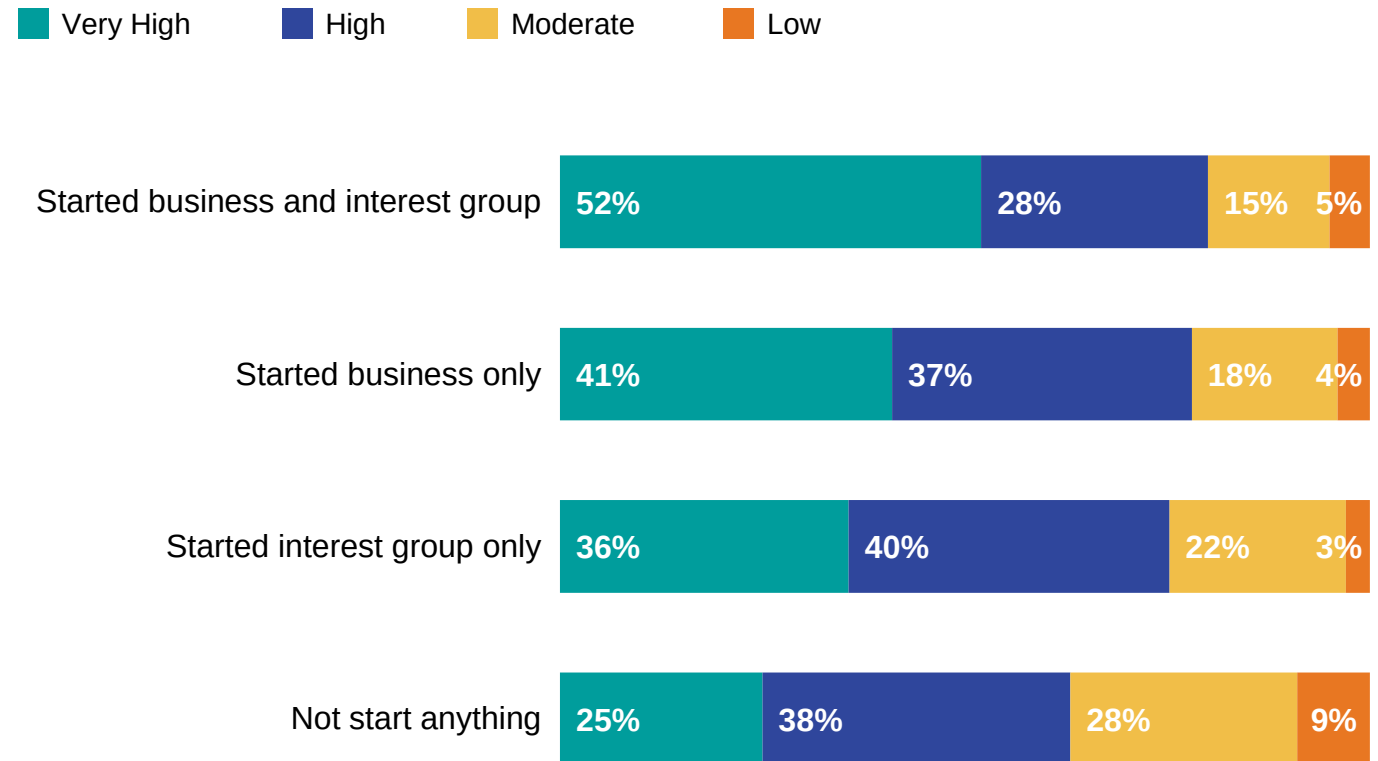


ENTREPRENEURIAL EXPERIENCE BY ENTREPRENEURIAL SPIRIT—WORLDWIDE

The importance of fostering entrepreneurial spirit among citizens is evident by findings that show that, not surprisingly, entrepreneurial spirit and entrepreneurial experience are related.

Those who have started something, especially a business, have much higher entrepreneurial spirit than those who have not.

ENTREPRENEURIAL SPIRIT BY STARTING SOMETHING



**samples represent a more affluent, connected population*

ENTREPRENEURIAL ASPIRATIONS

5

ENTREPRENEURIAL ASPIRATIONS

ENTREPRENEURIAL ASPIRATIONS

Entrepreneurial aspirations were measured by asking...

How likely are you to start... in the next two years?

1 – not at all likely to 7 – extremely likely

A new business

**An interest group dealing with social causes,
consumer issues, political issues, etc.**

We also probed by asking: Which of the following is the key barrier to you in starting a new business?

(One response)

- No interest
- Money/funding
- Don't know what to do/how to start
- Economy is bad/not a good time
- Other (Specify)

Not asked in China and Saudi Arabia

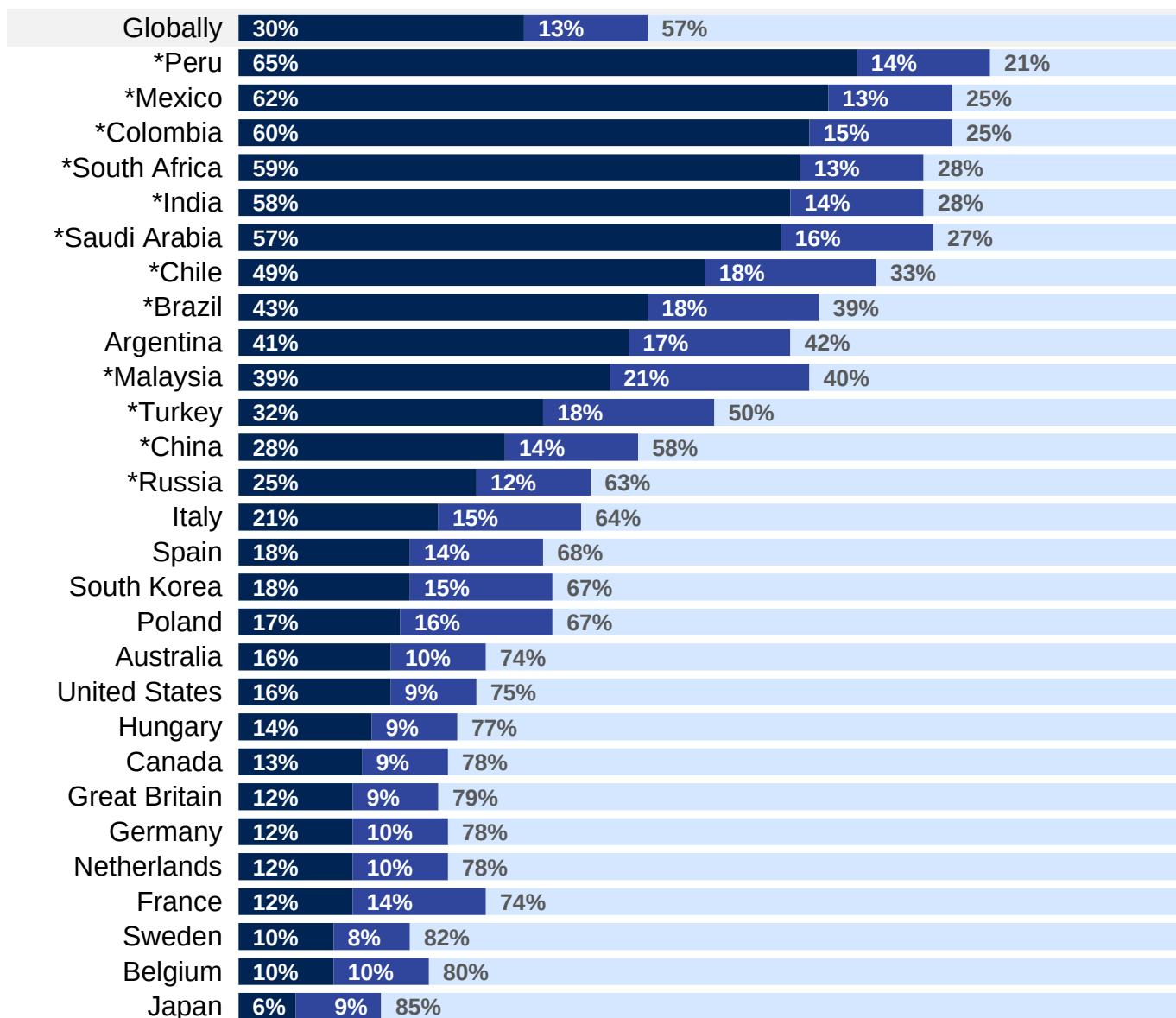
ENTREPRENEURIAL ASPIRATIONS – BUSINESS

Three-in-ten global citizens say they are likely to start a new business in the next two years.

Likelihood to start a business is highest in many LATAM countries, South Africa, India and Saudi Arabia.

START BUSINESS NEXT 2 YEARS

■ Likely
 ■ Neutral
 ■ Unlikely



**samples represent a more affluent, connected population*

CHANGES IN ENTREPRENEURIAL EXPERIENCE – BUSINESS

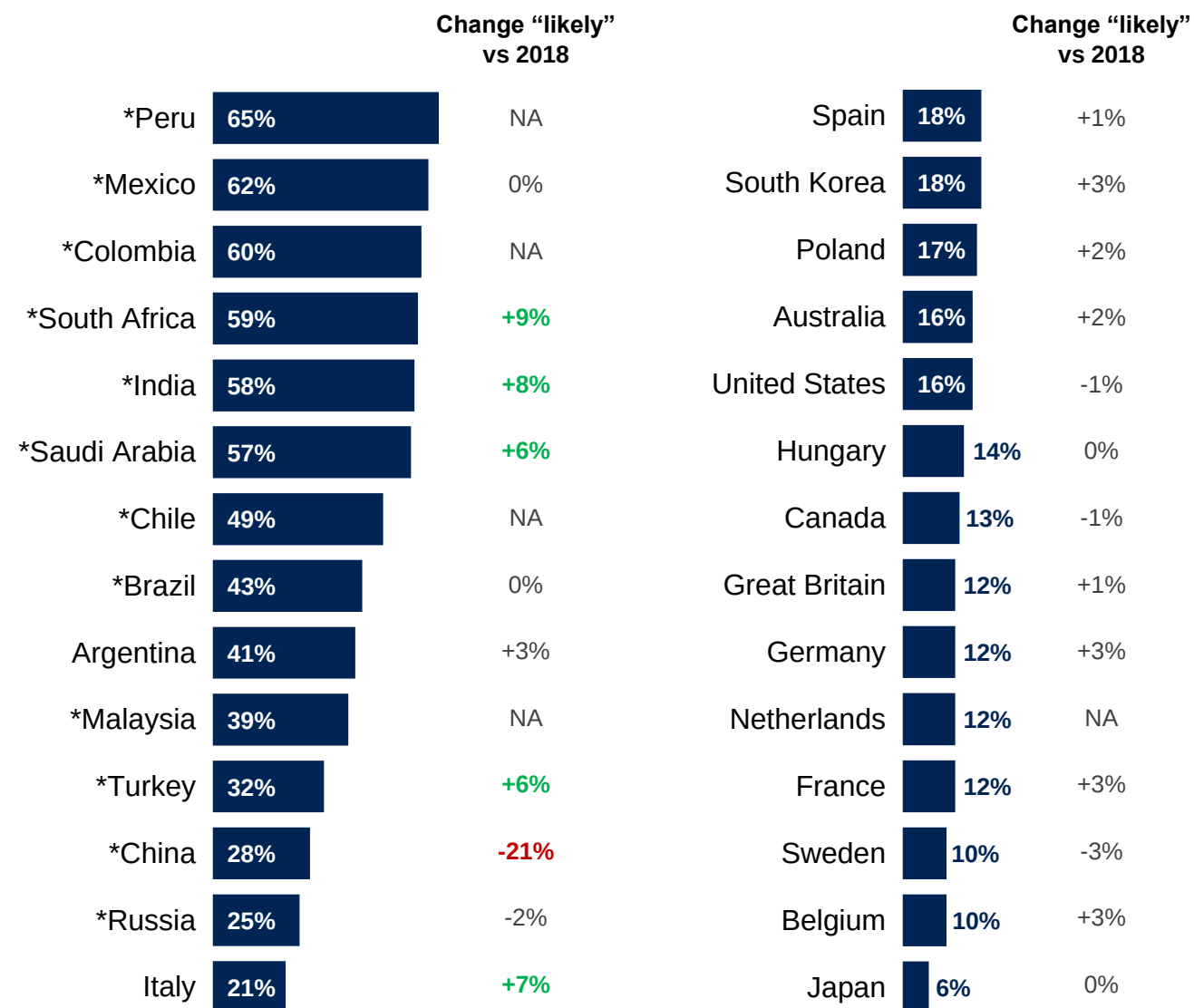
Likelihood to start a business in the next 2 years shows...

- The biggest increases are in South Africa, India, Saudi Arabia, Turkey and Italy.
- The biggest decline is in China.

**samples represent a more affluent, connected population*

START BUSINESS NEXT 2 YEARS

■ Likely



ENTREPRENEURIAL ASPIRATIONS – INTEREST GROUP

Two-in-ten global citizens say they are likely to start a new interest group in the next two years.

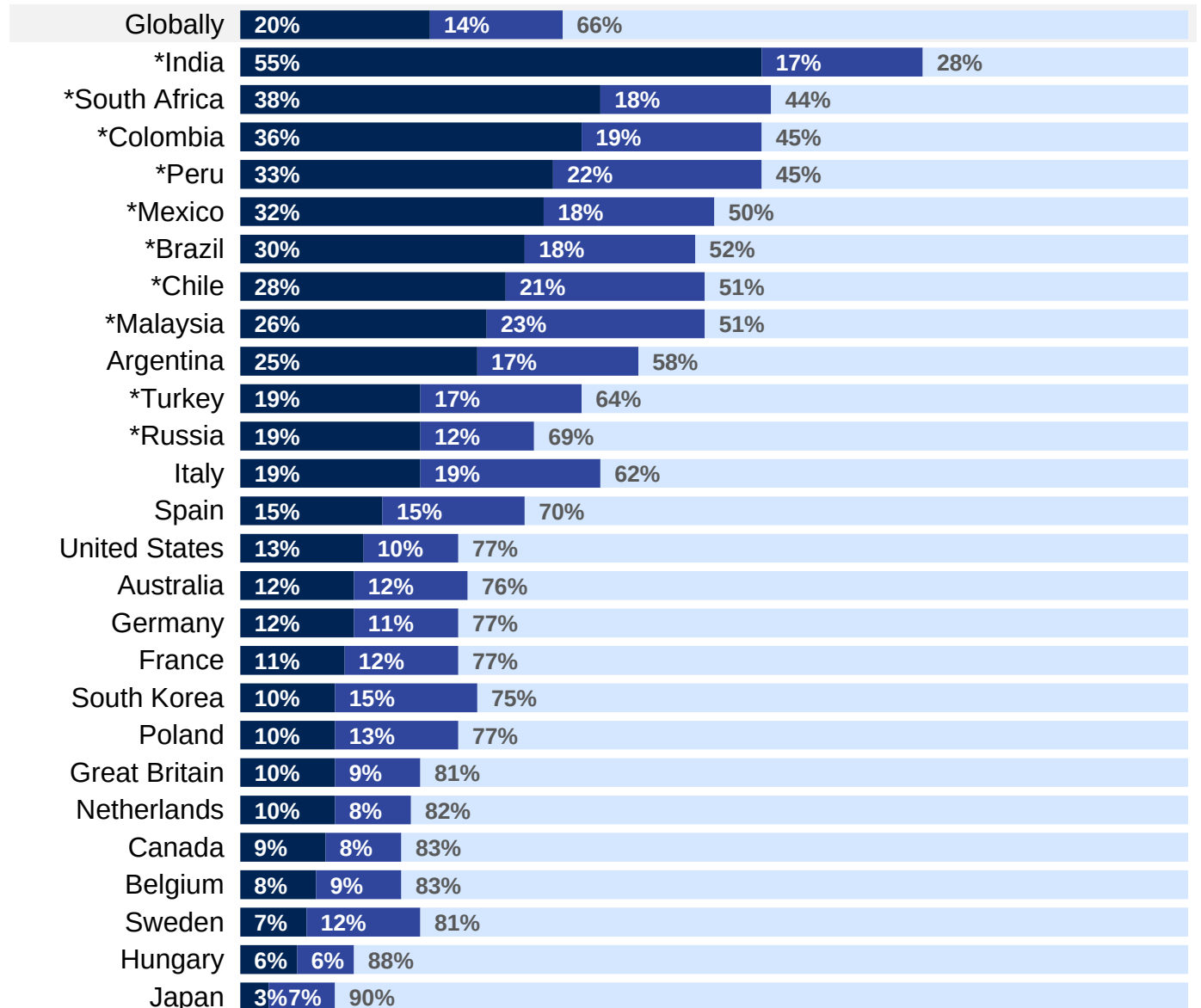
Likelihood to start an interest group is highest in many LATAM countries, South Africa and India.

Not asked in China, Saudi Arabia

**samples represent a more affluent, connected population*

START INTEREST GROUP NEXT 2 YEARS

Likely
 Neutral
 Unlikely



CHANGES IN ENTREPRENEURIAL EXPERIENCE – INTEREST GROUP

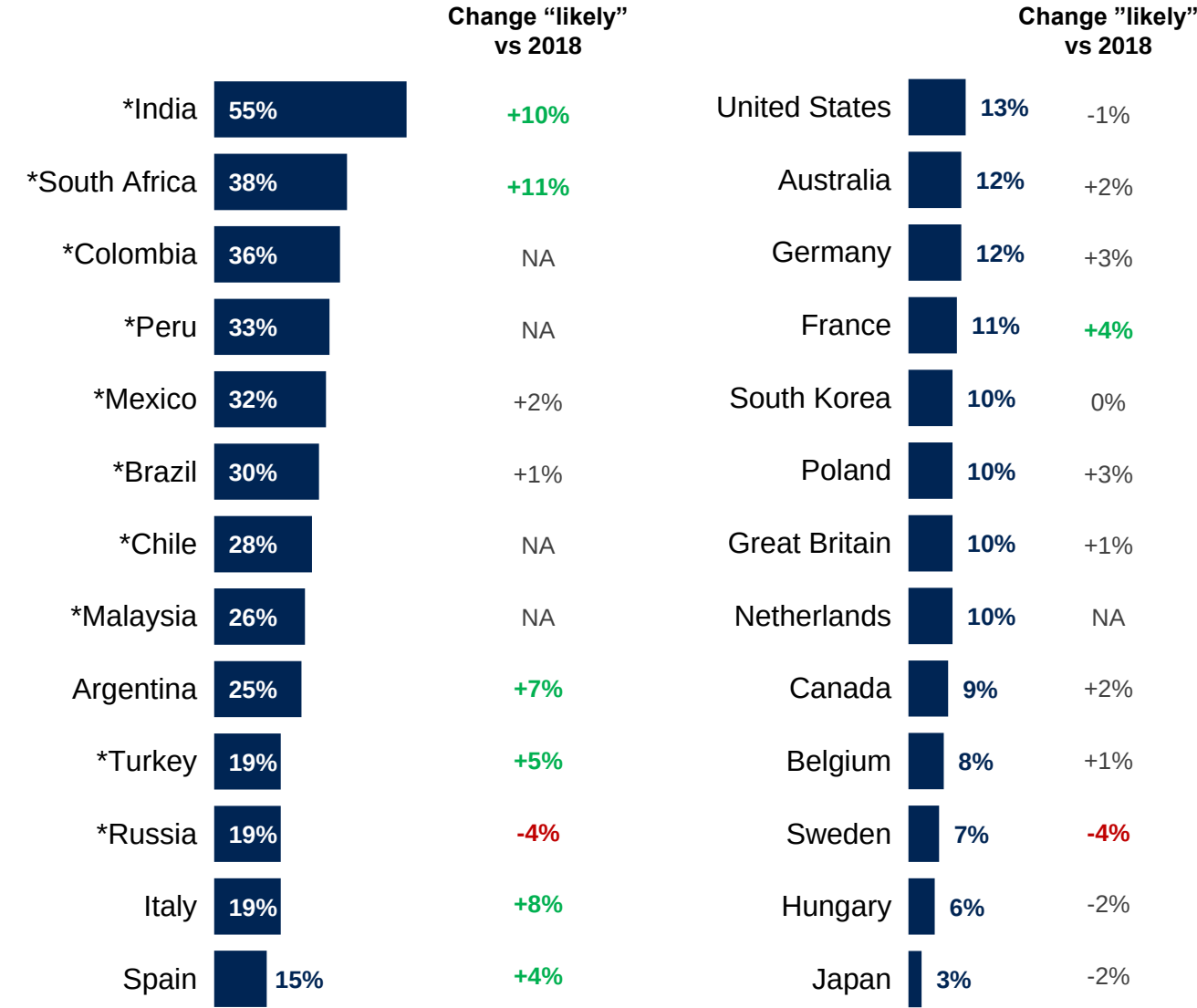
Likelihood to start an interest group in the next 2 years shows...

- The biggest increases are in India, South Africa, Argentina, Turkey, Italy, Spain and France.
- The biggest declines are in Russia and Sweden.

*Not asked in China, Saudi Arabia
samples represent a more affluent, connected population

START INTEREST GROUP NEXT 2 YEARS

■ Likely



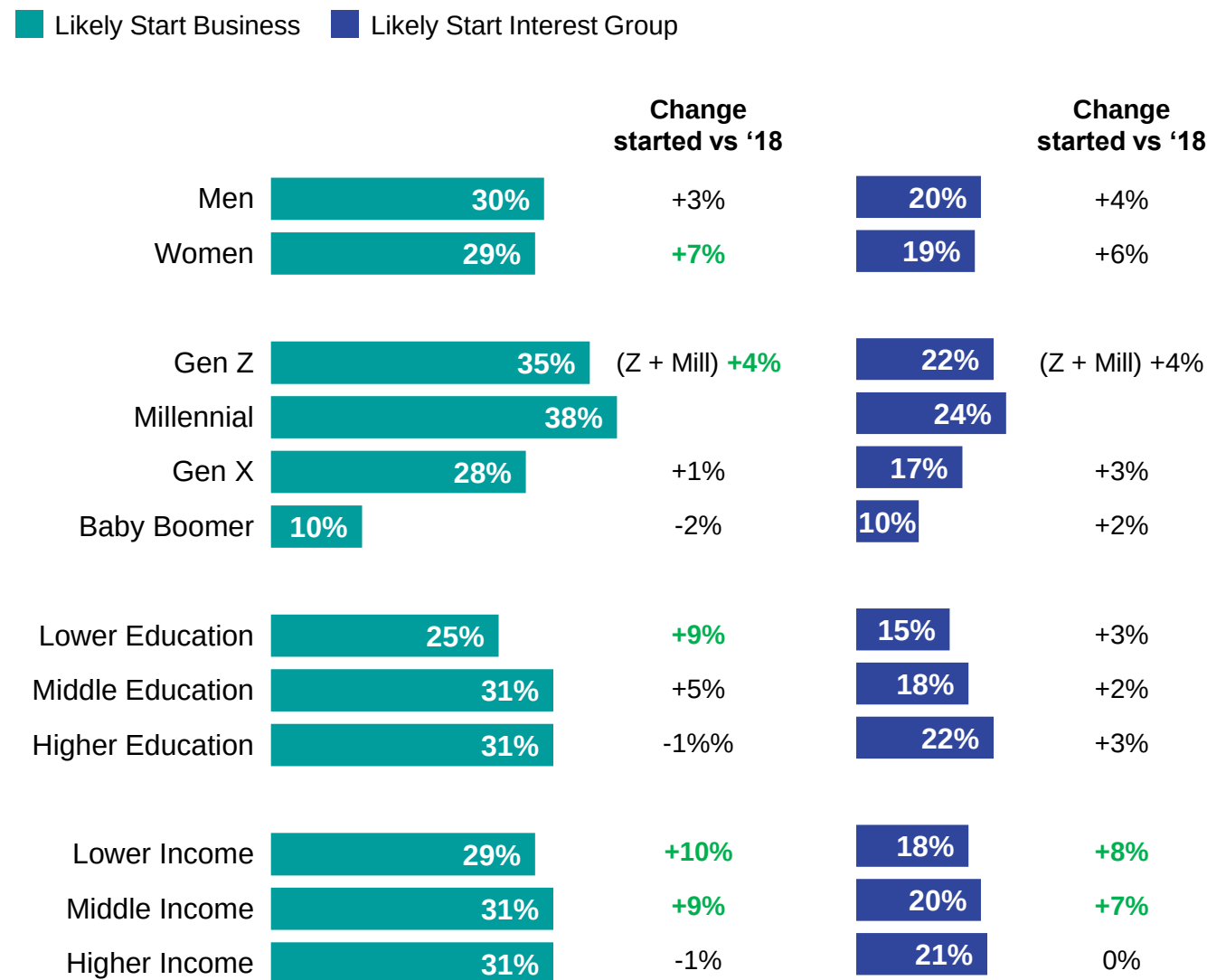
ENTREPRENEURIAL ASPIRATIONS BY DEMOGRAPHICS – WORLDWIDE

Potential future business entrepreneurialism is higher among Gen Z and Millennials, and marginally higher among middle and higher education.

- But the biggest increase in entrepreneurial aspirations since 2018 is among women, Gen Z and Millennials, lower education and lower and middle income.

Potential future social entrepreneurialism (interest group) is higher among higher education and younger citizens.

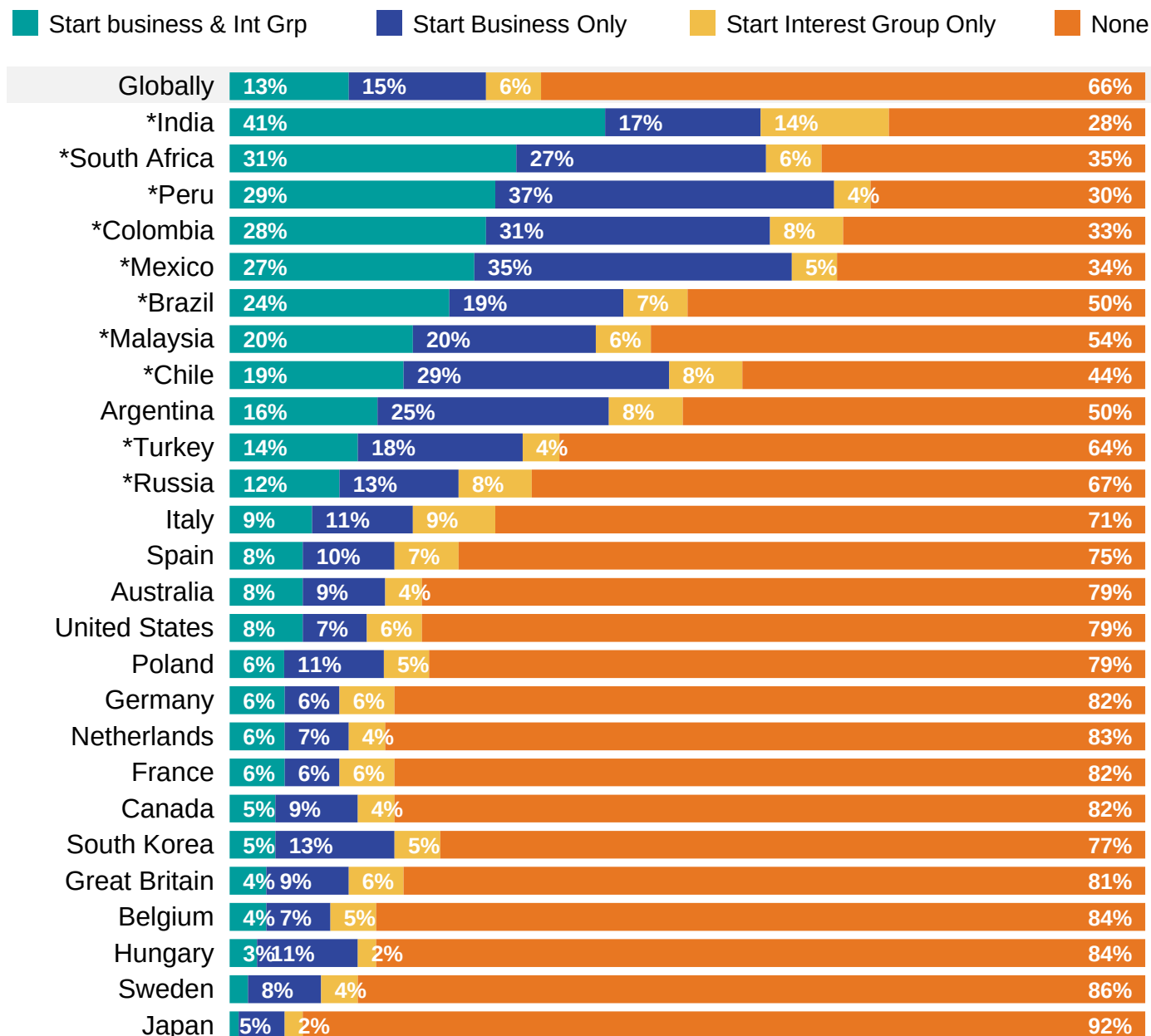
- The biggest increase in future social entrepreneurialism is among lower and middle income.



ENTREPRENEURIAL ASPIRATIONS – BUSINESS AND INTEREST GROUP

Entrepreneurs in India, South Africa, most LATAM countries and Malaysia are most likely to split their aspirations between wanting to start both a business and an interest group.

LIKELY START A BUSINESS AND/OR INTEREST GROUP



*Interest group not asked in China and Saudi Arabia
samples represent a more affluent, connected population

ENTREPRENEURIAL ASPIRATIONS

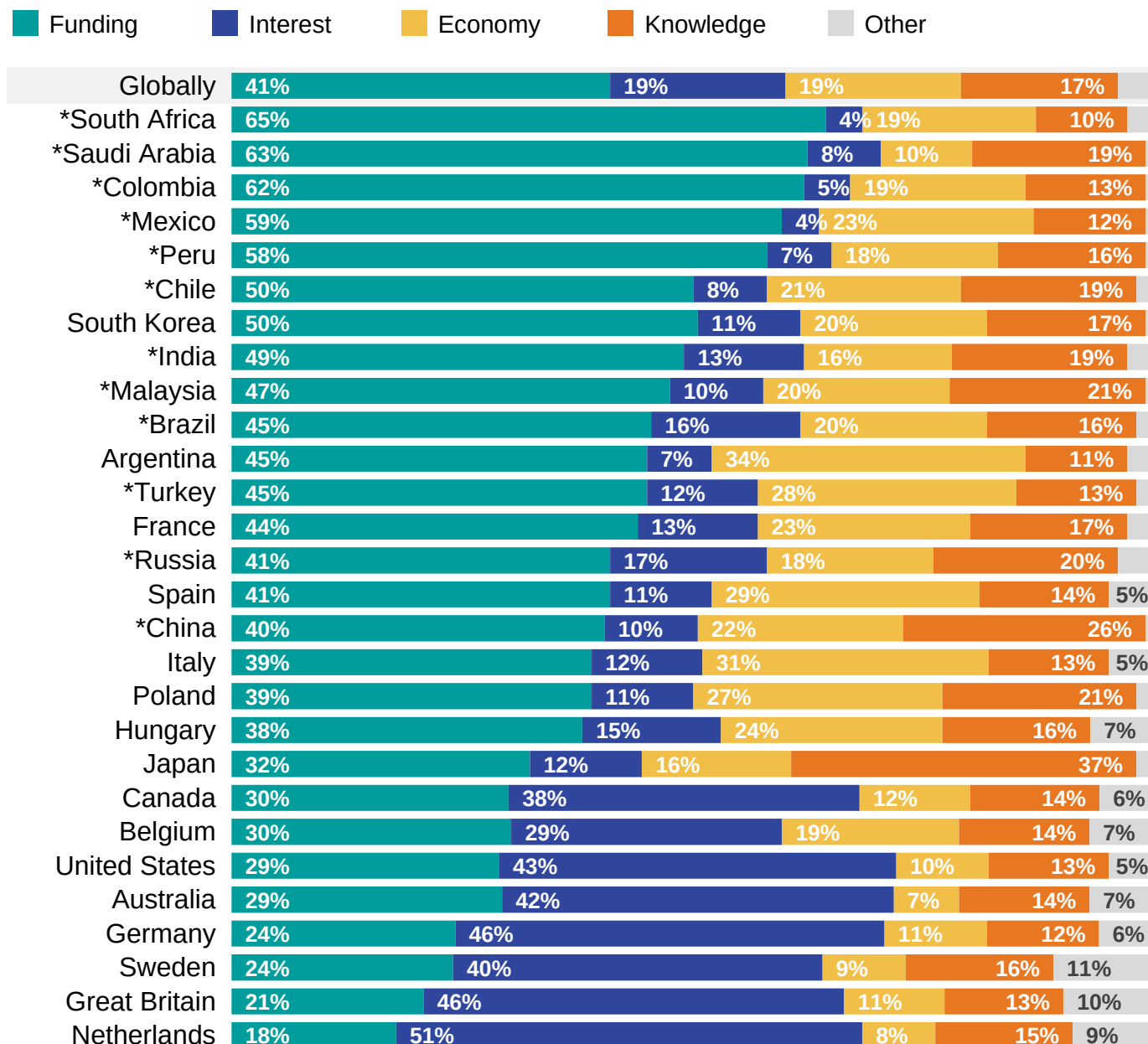
KEY BARRIERS TO START A BUSINESS

Barriers to starting a business vary widely by country. While funding is a top barrier in most countries...

- Interest is the top barrier in Canada, Belgium, US, Australia, Germany, Sweden, Great Britain and Netherlands.
- The economy is a higher barrier in Chile, South Korea, Malaysia, Brazil, Argentina, Turkey, France, Spain, China, Italy, Poland and Hungary.
- Knowledge is a higher barrier in Saudi Arabia, Chile, India, Malaysia, Russia, China and Japan.

**samples represent a more affluent, connected population*

KEY BARRIERS TO STARTING NEW BUSINESS

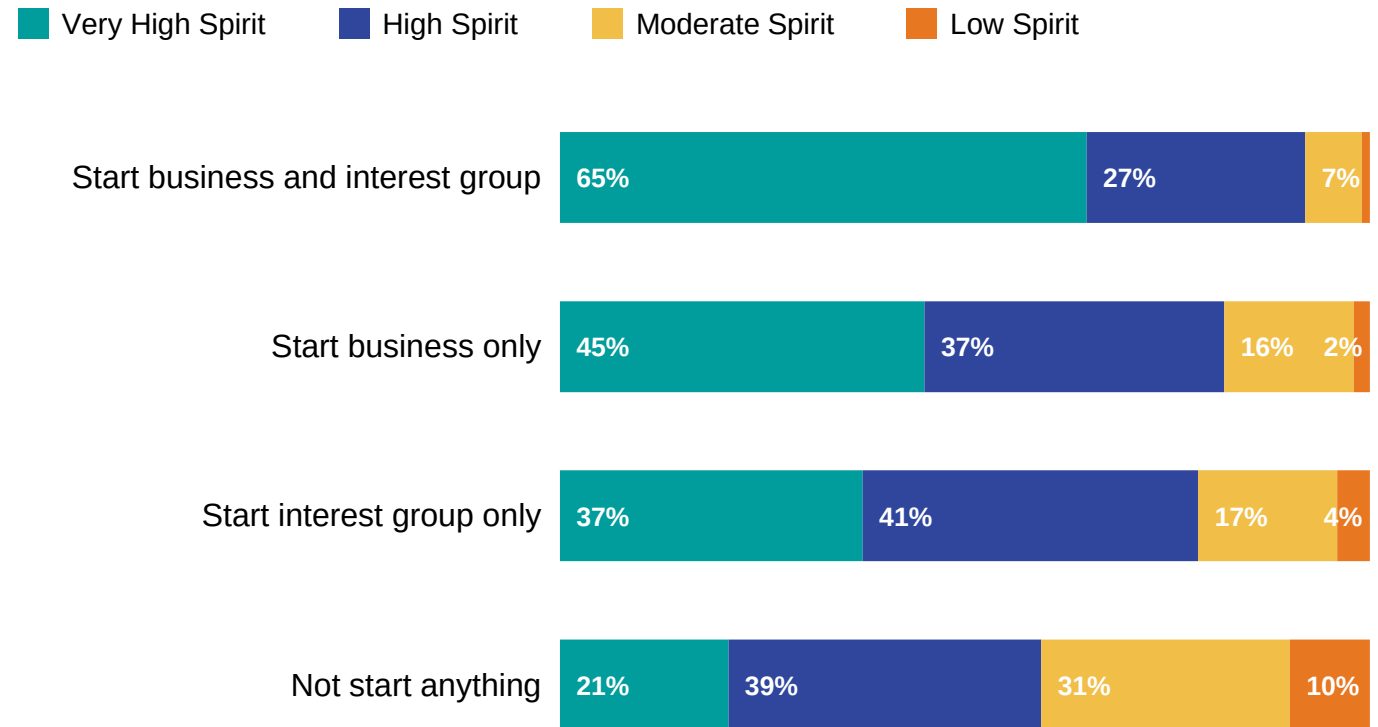


ENTREPRENEURIAL ASPIRATIONS BY ENTREPRENEURIAL SPIRIT—WORLDWIDE

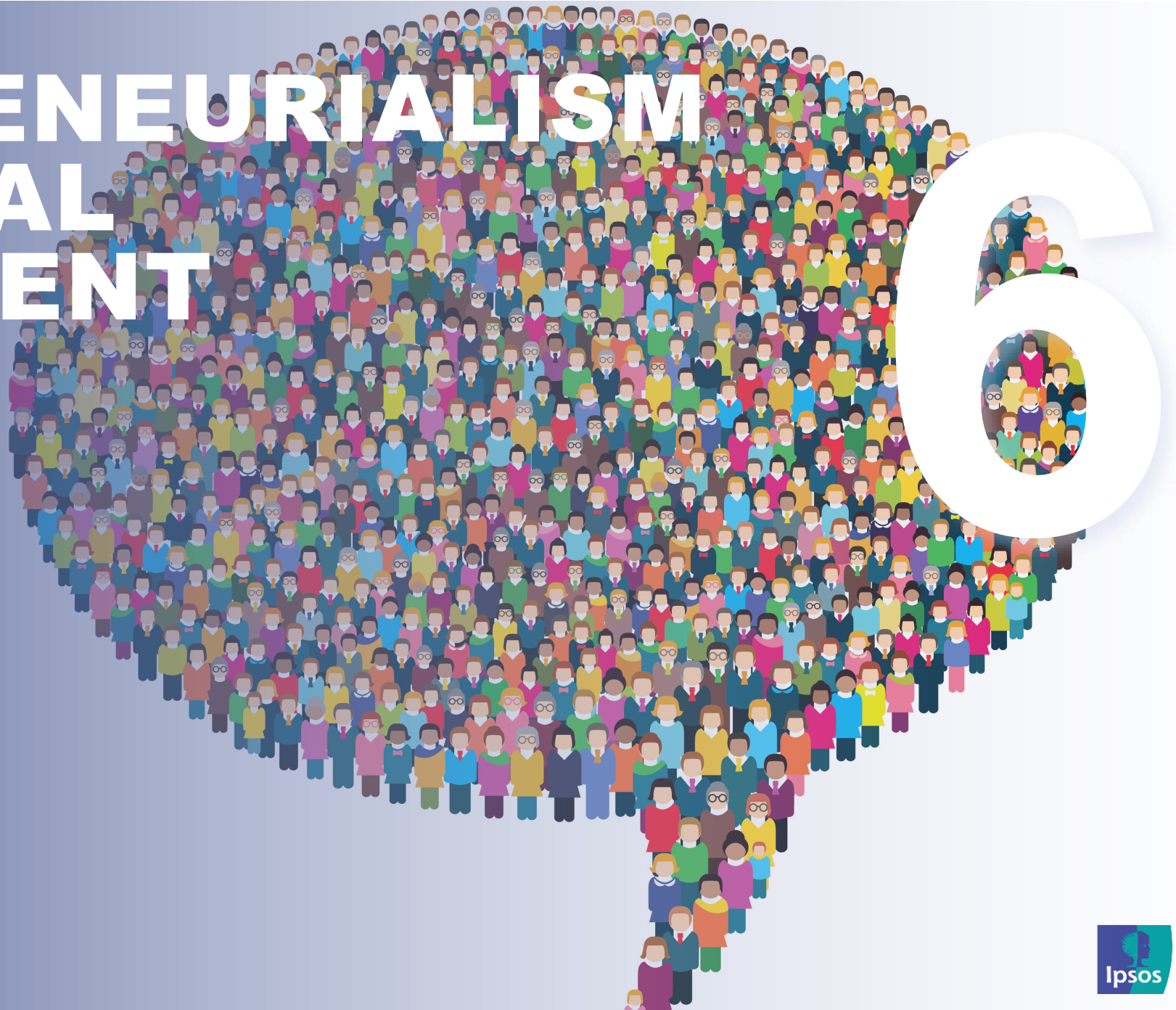
The importance of fostering entrepreneurial spirit among citizens is evident by findings that show that, not surprisingly, entrepreneurial spirit and entrepreneurial aspirations are related.

Those who aspire to start something, especially a business, have much higher entrepreneurial spirit than those who do not.

ENTREPRENEURIAL SPIRIT BY ASPIRE START SOMETHING



ENTREPRENEURIALISM AND SOCIAL ENGAGEMENT



SOCIAL ENGAGEMENT

We wanted to see if entrepreneurship was related to engagement/participation in society/activism.

SOCIAL ENGAGEMENT INDEX

A Social Engagement Index was created by combining responses to the below, where:

- **High Participation** = done 4+ items
- **Moderate Participation** = done 2-3 times
- **Low Participation** = done 0-1 items

**Not asked in China and Saudi Arabia*

Which of these things*, if any, you have done in the last 12 months? (Select all that apply) [RANDOMIZE]

- Attended a public meeting, rally, speech or protest
- Changed a purchase behaviour/boycotted a product/company because of social, environmental, ethical concerns
- Contributed time/money to a charity/cause/community organization
- Written a comment or original ideas online regarding a social issue or political issue
- Engaged in discussions with friends or family on political or social issues and tried to convince them of your point of view
- Spent time searching out information to inform yourself/learn more about a particular social, political or consumer issue you might be concerned with/interested in
- Regularly stayed up-to-date on news and current events

SOCIAL ENGAGEMENT INDEX BY COUNTRY

One-in-five (20%) citizens worldwide tend to be leading any debates about or trends in social, political or economic issues (“high” on social engagement).

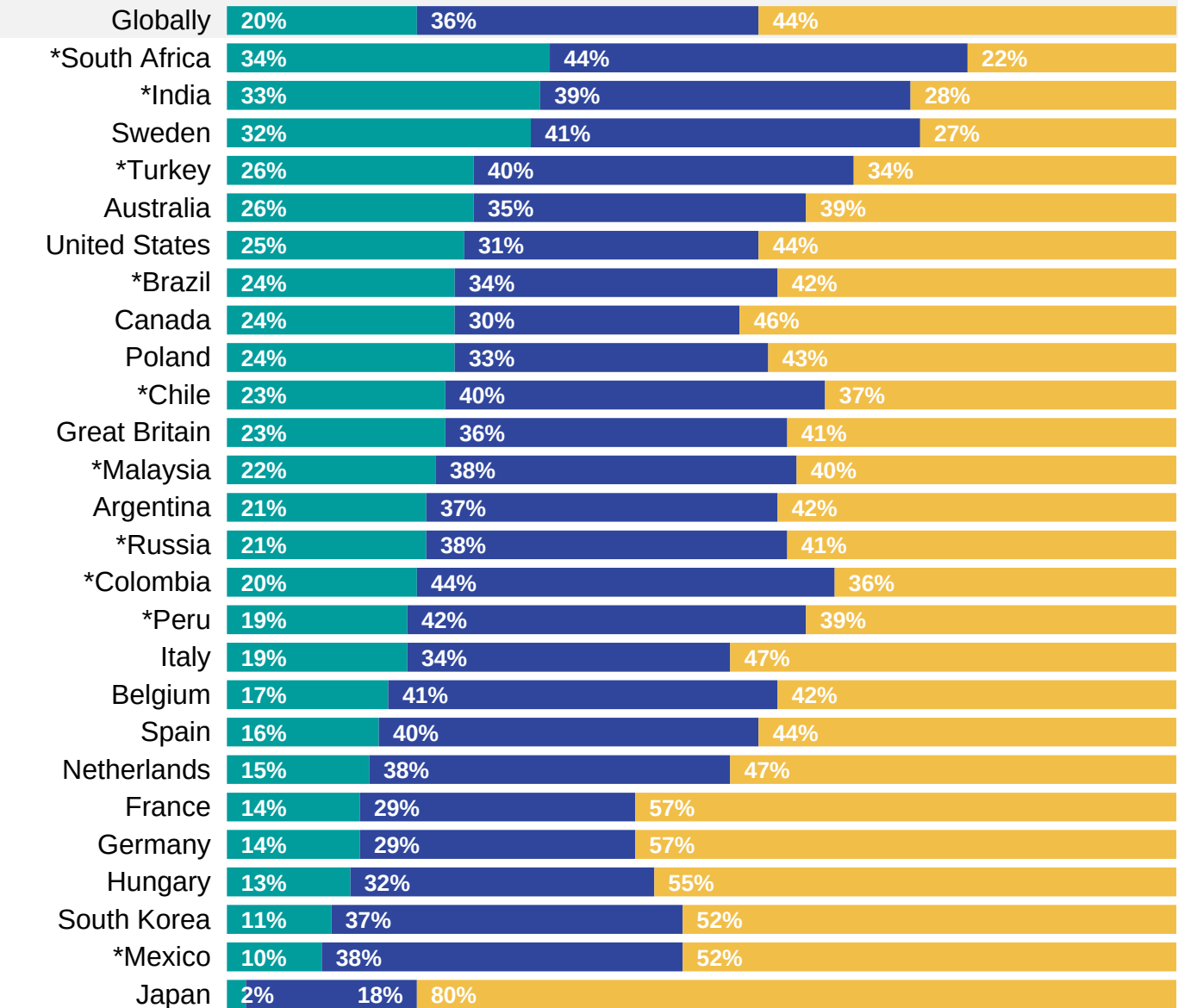
The highest levels of social engagement are found in South Africa, India, and Sweden.

The lowest levels of social engagement are found in South Korea, Mexico and Japan.

*Not asked in China and Saudi Arabia
samples represent a more affluent, connected population

SOCIAL ENGAGEMENT INDEX

High Moderate Low



SOCIAL ENGAGEMENT INDEX BY COUNTRY

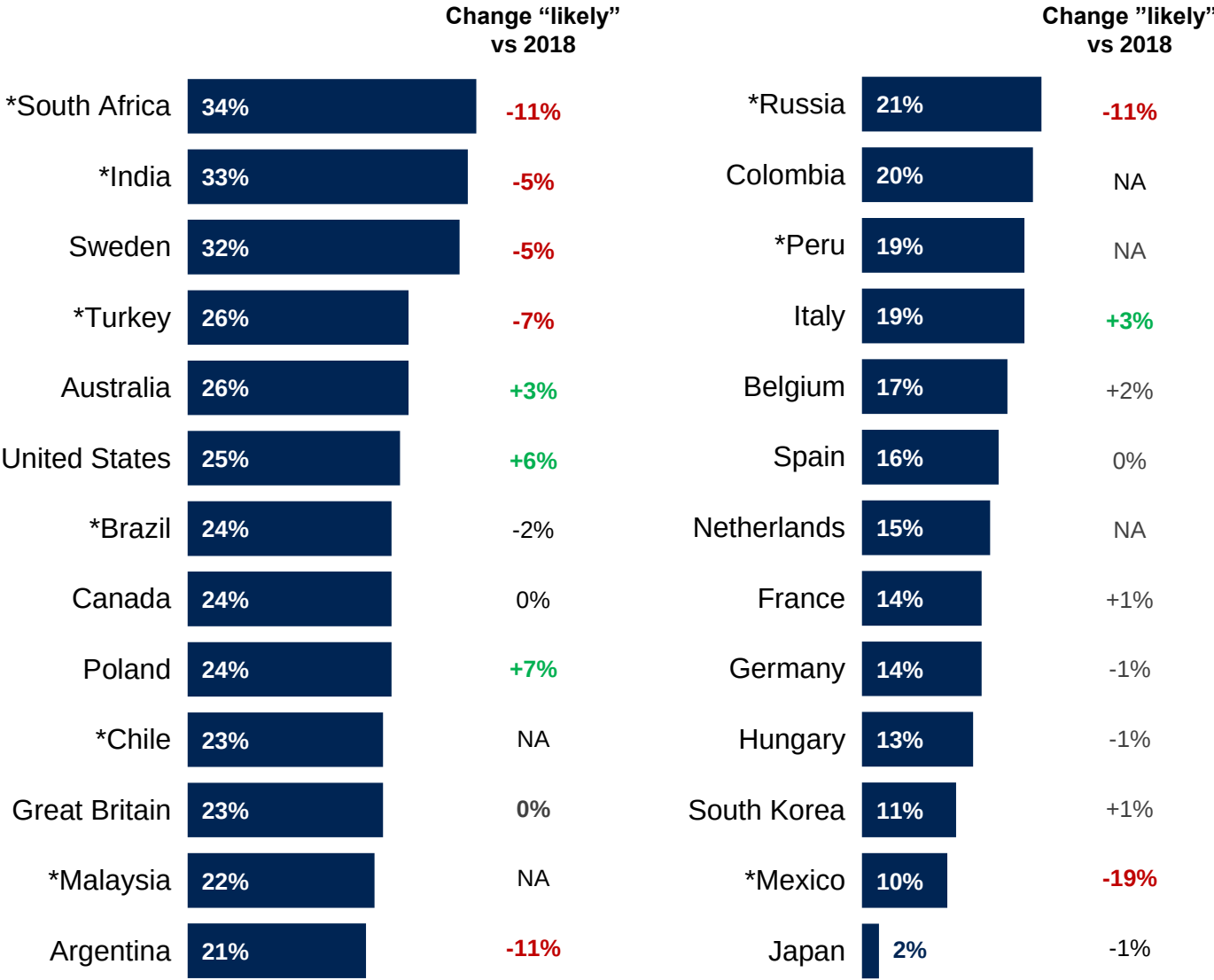
Social Engagement globally has...

- Increased most in Australia, the US, Poland and Italy.
- Decreased most in South Africa, Turkey, Argentina, Russia and Mexico.

*Not asked in China, Saudi Arabia
samples represent a more affluent, connected population

SOCIAL ENGAGEMENT INDEX

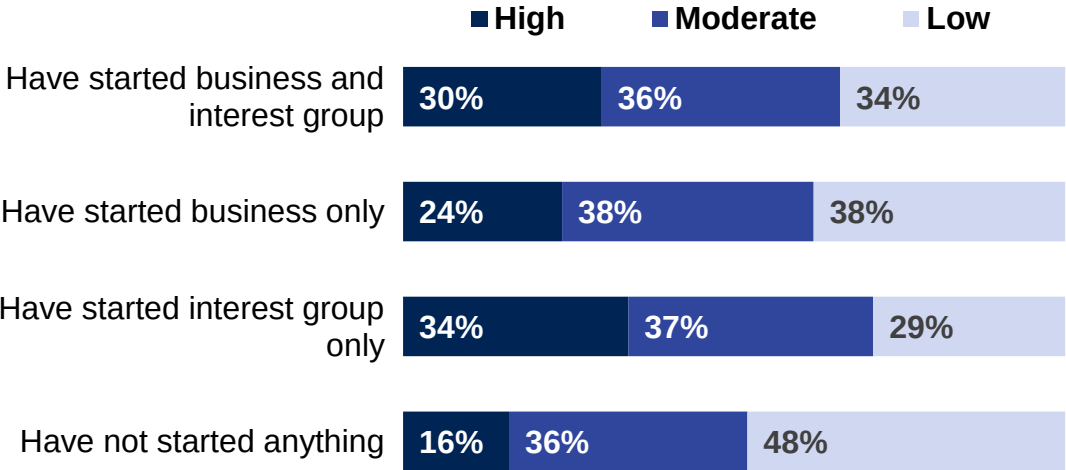
■ High



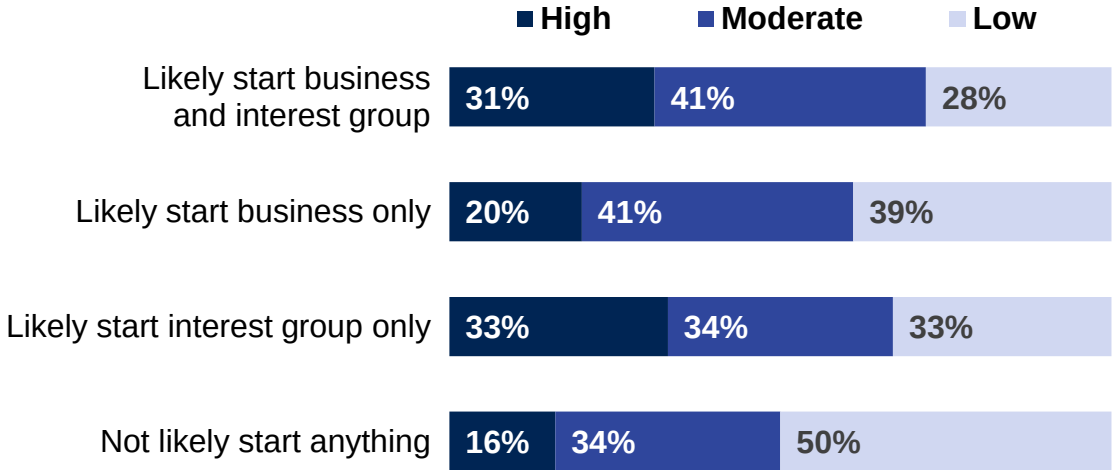
ENTREPRENEURIAL EXPERIENCE AND ASPIRATIONS BY SOCIAL ENGAGEMENT—WORLDWIDE

While we cannot determine which comes first, actions related to entrepreneurialism are related to actions related to social engagement. Those who have started a business and/or an interest group, or are likely to do so in the future, rate much higher on social engagement than those who have not or are unlikely to do so.

ENTREPRENEURIAL EXPERIENCE AND SOCIAL ENGAGEMENT INDEX



ENTREPRENEURIAL ASPIRATIONS AND SOCIAL ENGAGEMENT INDEX



GOVERNMENT, BUSINESS AND ENTREPRENEURIALISM

7

GOVERNMENT AND BUSINESS

GOVERNMENT, BUSINESS

We probed issues associated with government, business and entrepreneurialism by asking...

To what extent do you agree or disagree with the following

1 – not at all likely to 7 – extremely likely

- Government in my country does a good job in actively assisting entrepreneurs
- The private sector/business in my country does a good job in actively assisting entrepreneurs
- Financial institutions/banks in my country do a good job in actively assisting entrepreneurs

GOVERNMENT, BUSINESS ASSIST ENTREPRENEURIALISM

Neither government, the private sector/business, nor banks are seen as doing a good job in actively assisting entrepreneurs globally.

Government is seen to be doing a better job in India, Poland, Malaysia and Mexico, lowest in Belgium, Italy, Peru, Hungary and Japan.

Business and financial institutions are seen to be doing a better job in China, Saudi Arabia, India, Poland, and Malaysia, lowest in Argentina, Colombia, Belgium, Italy, Peru, Hungary and Japan.

*Government not asked in China and Saudi Arabia
samples represent a more affluent, connected population

DOES A GOOD JOB IN ACTIVELY ASSISTING ENTREPRENEURS

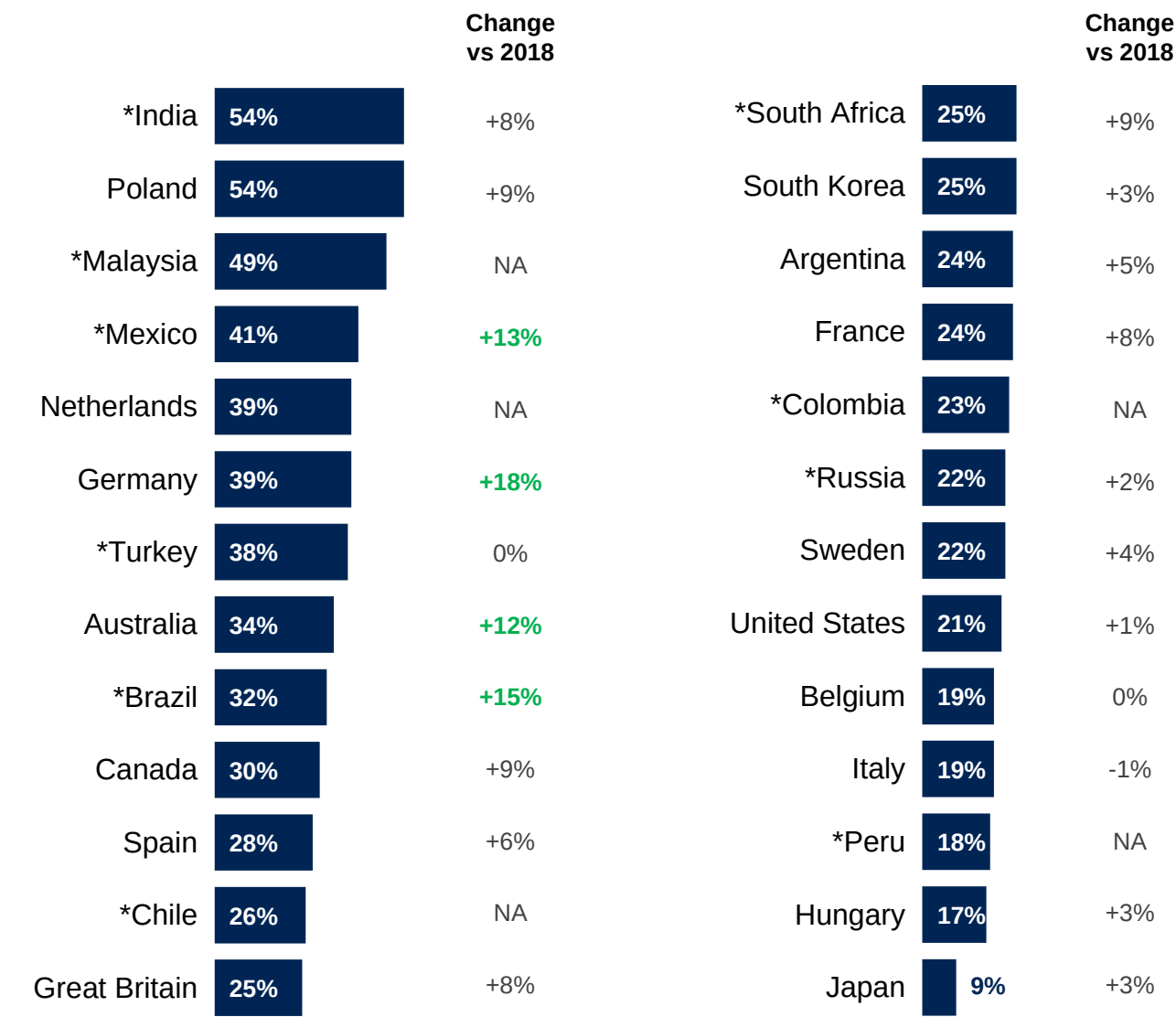


CHANGE IN GOVERNMENT ASSIST ENTREPRENEURIALISM

However, there has been some improvement in perceived government performance assisting entrepreneurs since 2018 in most countries.

The biggest improvements are seen in Mexico, Germany, Australia and Brazil.

GOVERNMENT DOES A GOOD JOB IN ACTIVELY ASSISTING ENTREPRENEURS



Government not asked in China and Saudi Arabia
*samples represent a more affluent, connected population

METHODOLOGY

The survey was conducted in 28 countries via the Ipsos Online Panel system between November 20 and December 4, 2020.

Interviews were conducted with 20,504 adults aged 18-74 in Canada, the U.S.A., South Africa, Malaysia and Turkey and 16-74 in all other countries.

The sample consists of approximately 1,000 individuals in Australia, Belgium, Brazil, Canada, mainland China, France, Germany, Great Britain, Italy, Japan, Spain, and the U.S., and 500 individuals in Argentina, Chile, Colombia, Hungary, India, Malaysia, Mexico, the Netherlands, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, Sweden, and Turkey.

The samples in Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, Italy, Japan, the Netherlands, Poland, South Korea, Spain, Sweden, and the U.S. can be taken as representative of their general adult population under the age of 75.

The samples in Brazil, Chile, mainland China, Colombia, India, Malaysia, Mexico, Peru, Russia, Saudi Arabia, South Africa, and Turkey are more urban, more educated, and/or more affluent than the general population. The survey results for these countries should be viewed as reflecting the views of the more “connected” segment of their population.

The data is weighted so that each country’s sample composition best reflects the demographic profile of the adult population according to the most recent census data.

Where results do not sum to 100 or the ‘difference’ appears to be +/- 1 more/less than the actual, this may be due to rounding, multiple responses, or the exclusion of “don’t know” or not stated responses.

The precision of Ipsos online polls is calculated using a credibility interval with a poll of 1,000 accurate to +/- 3.5 percentage points and of 500 accurate to +/- 5.0 percentage points. For more information on Ipsos' use of credibility intervals, please visit the Ipsos website. The publication of these findings abides by local rules and regulations.

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ABOUT IPSOS

Ipsos is the third largest market research company in the world, present in 90 markets and employing more than 18,000 people.

Our research professionals, analysts and scientists have built unique multi-specialist capabilities that provide powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 business solutions are based on primary data coming from our surveys, social media monitoring, and qualitative or observational techniques.

“Game Changers” – our tagline – summarises our ambition to help our 5,000 clients to navigate more easily our deeply changing world.

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

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GAME CHANGERS

In our world of rapid change, the need for reliable information to make confident decisions has never been greater.

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder.
Ultimately, success comes down to a simple truth:
You act better when you are sure.