



Survey Data Findings

Small Business Index

Q2 2021

Ipsos survey on behalf of MetLife – U.S. Chamber of Commerce

Washington, DC, June 15, 2021

These are the findings of an Ipsos poll conducted between April 21 – May 6, 2021. For this survey, a sample of roughly 754 small business owners and operators age 18+ from the continental U.S., Alaska and Hawaii was interviewed online in English.

The sample for this study was randomly drawn from Ipsos' online panel, partner online panel sources, and "river" sampling and does not rely on a population frame in the traditional sense. Ipsos uses fixed sample targets, unique to the study, in drawing sample. Small businesses are defined in this study as companies with fewer than 500 employees that are not sole proprietorships. Ipsos used fixed sample targets, unique to this study, in drawing sample. This sample calibrates respondent characteristics to be representative of the U.S. small business population using standard procedures such as raking-ratio adjustments. The source of these population targets is U.S. Census 2016 Statistics of U.S. Businesses dataset. The sample drawn for this study reflects fixed sample targets on firmographics. Post-hoc weights were made to the population characteristics on region, industry sector and size of business.

Statistical margins of error are not applicable to online non-probability polls. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error and measurement error. Where figures do not sum to 100, this is due to the effects of rounding. The precision of Ipsos online polls is measured using a credibility interval. In this case, the poll has a credibility interval of plus or minus 4.1 percentage points for all respondents. Ipsos calculates a design effect (DEFF) for each study based on the variation of the weights, following the formula of Kish (1965). This study had a credibility interval adjusted for design effect of the following (n=754, DEFF=1.5, adjusted Confidence Interval=+/-5.6 percentage points).

Starting with the March 2020 survey, small business decision makers are reached via an online survey, in place of the typical phone-based approach. This methodological shift is in response to lower anticipated response rates in dialing owners at their businesses as a result of mandated closures related to the COVID-19 outbreak. While significant changes in data points can largely be attributed to the recent economic environment, switching from a phone to online approach may have also generated a mode effect.

1. First, how would you rate the overall health of your business?

	<u>Q2- 2019</u>	<u>Q3- 2019</u>	<u>Q4- 2019</u>	<u>Q1- 2020</u>	<u>Q2-20* 3/25-28</u>	<u>Q2-20 4/21-28</u>	<u>Q2-20 5/21-27</u>	<u>Q3-20 7/9-16</u>	<u>Q3-20 8/21-27</u>	<u>Q4- 2020</u>	<u>Q1- 2021</u>	<u>Q2- 2021</u>
Very good	39	41	43	35	33	24	25	27	25	23	23	23
Somewhat good	26	25	26	30	24	26	28	27	28	27	28	30
About average	28	25	22	25	27	26	29	27	30	30	25	27
Somewhat poor	5	6	6	7	12	17	12	12	12	14	17	15
Very poor	2	3	3	2	3	7	7	6	5	4	7	5
Refused	0	0	0	0	--	--	--	--	--	--	--	--
Don't know	0	0	1	1	1	0	0	0	1	1	0	0

*Beginning in Q2 2020, an online approach was used in place of the typical phone methodology.



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2. How would you rate the overall health of the United States economy?

	<u>Q2- 2019</u>	<u>Q3- 2019</u>	<u>Q4- 2019</u>	<u>Q1- 2020</u>	<u>Q2-20 3/25-28</u>	<u>Q2-20 4/21-28</u>	<u>Q2-20 5/21-27</u>	<u>Q3-20 7/9-16</u>	<u>Q3-20 8/21-27</u>	<u>Q4- 2020</u>	<u>Q1- 2021</u>	<u>Q2- 2021</u>
Very good	25	28	29	29	12	6	6	10	7	7	8	8
Somewhat good	34	30	28	30	13	16	18	18	15	22	13	19
About average	24	25	25	26	20	15	18	15	20	20	19	26
Somewhat poor	13	11	12	9	36	34	39	31	39	37	42	36
Very poor	3	4	4	3	18	29	18	24	19	13	18	10
Refused	1	--	0	0	--	--	--	--	--	--	--	--
Don't know	0	28	2	1	1	1	0	1	0	1	0	1

3. How would you rate the overall health of the economy in your local area?

	<u>Q2- 2019</u>	<u>Q3- 2019</u>	<u>Q4- 2019</u>	<u>Q1- 2020</u>	<u>Q2-20 3/25-28</u>	<u>Q2-20 4/21-28</u>	<u>Q2-20 5/21-27</u>	<u>Q3-20 7/9-16</u>	<u>Q3-20 8/21-27</u>	<u>Q4- 2020</u>	<u>Q1- 2021</u>	<u>Q2- 2021</u>
Very good	24	27	29	24	13	7	6	11	8	8	11	10
Somewhat good	26	29	30	28	19	18	21	19	19	24	17	23
About average	31	26	25	31	28	25	33	30	35	36	29	36
Somewhat poor	15	12	11	14	28	32	29	29	27	25	31	23
Very poor	4	5	5	3	11	17	10	10	9	8	12	6
Refused	--	--	0	0	--	--	--	--	--	--	--	--
Don't know	0	1	0	0	1	1	0	0	1	0	1	1

4. Compared to six months ago, does your business see more competition, less competition or about the same level of competition from smaller or local companies?

	<u>Q2- 2019</u>	<u>Q3- 2019</u>	<u>Q4- 2019</u>	<u>Q1- 2020</u>	<u>Q2-20 3/25-28</u>	<u>Q2-20 4/21-28</u>	<u>Q2-20 5/21-27</u>	<u>Q3-20 7/9-16</u>	<u>Q3-20 8/21-27</u>	<u>Q4- 2020</u>	<u>Q1- 2021</u>	<u>Q2- 2021</u>
More competition	18	15	14	14	25	23	21	31	29	26	24	26
Less competition	7	8	6	6	14	24	28	19	24	22	24	20
Stayed about the same	72	74	76	76	57	49	47	47	43	49	49	51
Refused	1	0	1	1	--	--	--	--	--	--	--	--
Don't know	2	4	3	3	4	4	5	3	4	3	2	4

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5. How comfortable are you with your company's current cash flow situation?

	<u>Q2- 2019</u>	<u>Q3- 2019</u>	<u>Q4- 2019</u>	<u>Q1- 2020</u>	<u>Q2-20 3/25-28</u>	<u>Q2-20 4/21-28</u>	<u>Q2-20 5/21-27</u>	<u>Q3-20 7/9-16</u>	<u>Q3-20 8/21-27</u>	<u>Q4- 2020</u>	<u>Q1- 2021</u>	<u>Q2- 2021</u>
Very comfortable	35	37	37	28	19	11	18	17	17	17	23	19
Somewhat comfortable	48	44	46	52	40	37	38	38	39	42	38	45
Not very comfortable	10	11	10	11	23	29	25	30	31	26	23	24
Not at all comfortable	5	6	4	6	17	22	18	15	11	14	14	11
Refused	1	1	1	1	--	--	--	--	--	--	--	--
Don't know	1	2	3	2	1	1	1	0	2	1	1	1

6. For the upcoming year, do you plan to...?

	<u>Q2- 2019</u>	<u>Q3- 2019</u>	<u>Q4- 2019</u>	<u>Q1- 2020</u>	<u>Q2-20 3/25-28</u>	<u>Q2-20 4/21-28</u>	<u>Q2-20 5/21-27</u>	<u>Q3-20 7/9-16</u>	<u>Q3-20 8/21-27</u>	<u>Q4- 2020</u>	<u>Q1- 2021</u>	<u>Q2- 2021</u>
Increase investment	27	26	26	29	30	25	27	35	33	31	35	33
Invest about as much in the business as you did last year	55	55	58	52	38	39	36	32	38	38	37	42
Reduce investment	12	12	10	13	15	19	22	18	17	20	18	16
Refused	1	1	1	1	--	--	--	--	--	--	--	--
Don't know	4	6	5	6	16	17	16	14	12	12	9	10

7. Compared to six months ago, has the time or resources you spend completing licensing, compliance or other government requirements increased, decreased or stayed the same?

	<u>Q2- 2019</u>	<u>Q3- 2019</u>	<u>Q4- 2019</u>	<u>Q1- 2020</u>	<u>Q2-20 3/25-28</u>	<u>Q2-20 4/21-28</u>	<u>Q2-20 5/21-27</u>	<u>Q3-20 7/9-16</u>	<u>Q3-20 8/21-27</u>	<u>Q4- 2020</u>	<u>Q1- 2021</u>	<u>Q2- 2021</u>
Increased	21	22	22	21	20	23	21	29	25	28	28	27
Decreased	3	3	3	4	11	16	19	13	15	18	14	14
Stayed the same	73	71	74	73	66	56	58	53	54	51	54	57
Refused	1	0	0	1	--	--	--	--	--	--	--	--
Don't know	2	4	2	2	3	5	2	5	5	3	3	2

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Survey Data Findings – continued –

8. Over the past year, would you say you have...?

	<u>Q2- 2019</u>	<u>Q3- 2019</u>	<u>Q4- 2019</u>	<u>Q1- 2020</u>	<u>Q2-20 3/25-28</u>	<u>Q2-20 4/21-28</u>	<u>Q2-20 5/21-27</u>	<u>Q3-20 7/9-16</u>	<u>Q3-20 8/21-27</u>	<u>Q4- 2020</u>	<u>Q1- 2021</u>	<u>Q2- 2021</u>
Increased staff	18	19	20	17	15	14	13	20	15	16	17	18
Retained the same size staff	70	68	66	66	71	67	67	60	64	64	55	57
Reduced staff	11	13	13	16	13	19	18	17	19	18	27	23
Refused	0	0	0	0	--	--	--	--	--	--	--	--
Don't know	1	0	1	0	1	0	1	4	2	1	1	1

9. In the next year, do you anticipate...?

	<u>Q2- 2019</u>	<u>Q3- 2019</u>	<u>Q4- 2019</u>	<u>Q1- 2020</u>	<u>Q2-20 3/25-28</u>	<u>Q2-20 4/21-28</u>	<u>Q2-20 5/21-27</u>	<u>Q3-20 7/9-16</u>	<u>Q3-20 8/21-27</u>	<u>Q4- 2020</u>	<u>Q1- 2021</u>	<u>Q2- 2021</u>
Increasing staff	28	29	28	30	23	24	23	30	28	27	32	32
Retaining the same size staff	65	65	65	64	60	55	60	53	58	52	49	52
Reducing staff	5	6	6	5	9	13	10	9	9	14	14	11
Refused	0	0	0	0	--	--	--	--	--	--	--	--
Don't know	1	1	1	2	9	7	7	8	5	7	5	4

10. Looking forward one year, do you expect next year's revenues to increase, decrease or stay the same?

	<u>Q2- 2019</u>	<u>Q3- 2019</u>	<u>Q4- 2019</u>	<u>Q1- 2020</u>	<u>Q2-20 3/25-28</u>	<u>Q2-20 4/21-28</u>	<u>Q2-20 5/21-27</u>	<u>Q3-20 7/9-16</u>	<u>Q3-20 8/21-27</u>	<u>Q4- 2020</u>	<u>Q1- 2021</u>	<u>Q2- 2021</u>
Increase	57	55	58	60	50	47	50	53	52	52	47	57
Decrease	7	8	9	7	19	25	19	18	16	14	14	9
Stay the same	34	35	30	31	23	22	21	22	25	27	32	30
Refused	1	0	0	0	--	--	--	--	--	--	--	--
Don't know	1	1	3	2	8	6	9	6	6	7	7	5

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Survey Data Findings – continued –

Q1 2021 Storyline Questions

11. How concerned are you about the impact of the coronavirus or COVID-19 outbreak on your business?

	<u>Q2-2020</u> <u>3/25-28</u>	<u>Q2-2020</u> <u>4/21-28</u>	<u>Q2-2020</u> <u>5/21-27</u>	<u>Q3-2020</u> <u>7/9-16</u>	<u>Q3-2020</u> <u>8/21-27</u>	<u>Q4-2020</u>	<u>Q1-2021</u>	<u>Q2-2021</u>
Very concerned	58	53	43	47	35	38	42	24
Somewhat concerned	26	32	38	31	39	38	35	40
Not very concerned	9	10	11	14	18	17	12	24
Not at all concerned	6	5	7	8	8	7	10	12
Don't know	1	0	1	0	0	0	1	0
<i>Concerned (Net)</i>	<i>84</i>	<i>85</i>	<i>82</i>	<i>78</i>	<i>73</i>	<i>75</i>	<i>76</i>	<i>64</i>
<i>Not concerned (Net)</i>	<i>15</i>	<i>15</i>	<i>18</i>	<i>22</i>	<i>27</i>	<i>24</i>	<i>23</i>	<i>36</i>

12. Other than the COVID-19 pandemic, what are your biggest concerns regarding the current small business environment in the U.S.? You may select up to two.

	<u>Q2-2021</u>
Taxes	23
Consumer spending or demand	23
Supply costs	19
Employee morale and mental health	18
Inflation	16
Healthcare	14
Access to capital	13
Availability of workers	13
Workforce skills and training	12
Racial tension	10
Poor or outdated infrastructure	9
Other	2
None of these	3

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Survey Data Findings – continued –

13. From the following list, what items are critical to your small business' ability to succeed in 2021? Select all that apply.

	<u>Q2-2021</u>
A decrease in current COVID-19 restrictions from your state or local government	29
Widespread COVID-19 vaccinations in your area	28
Help in growing the business's digital presence	24
Federal small business relief funds	19
Federal small business grants	18
Clarity from state or local government on safe reopening procedures	18
Small Business Association (SBA) loans	16
State and local emergency support programs	14
Guidance on healthcare, insurance, or accounting/financial issues	13
Assistance identifying and hiring qualified employees	13
Rent forbearance	9
None of these	15

14. Please select the option that best fits your current situation.

	<u>Q2-2020</u> <u>5/21-27</u>	<u>Q3-2020</u> <u>7/9-16</u>	<u>Q2-2021</u>
My business is fully open	41	52	72
My business is partially open	38	34	24
My business is temporarily closed	19	12	3
My business is permanently closed	1	1	1
Don't know	1	1	1
<i>Open (Net)</i>	<i>79</i>	<i>86</i>	<i>96</i>
<i>Closed (Net)</i>	<i>20</i>	<i>13</i>	<i>4</i>

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Survey Data Findings – continued –

15. **[Skipped if business is permanently closed]** Regardless of your business' current operating status, how do you feel today about your business' operating or reopening strategy? Please select all that apply.

	<u>Q2-2021</u>
	N=750
Hopeful	44
Comfortable	31
Concerned	24
Excited	23
Nervous	21
Worried	17
Coping	15
Pessimistic	12
Uncomfortable	11
Relieved	10
Overwhelmed	9
Other	2
Don't know	1

16. What specifically about your business' current operating status and reopening strategy is making you feel this way?

Open-ended responses provided separately

17. In light of the current circumstances, how long do you think it will be before the U.S. small business climate returns to normal?

	<u>Q2-2020</u> <u>3/25-28</u>	<u>Q2-2020</u> <u>4/21-28</u>	<u>Q2-2020</u> <u>5/21-27</u>	<u>Q3-2020</u> <u>7/9-16</u>	<u>Q3-2020</u> <u>8/21-27</u>	<u>Q4-2020</u>	<u>Q1-2021</u>	<u>Q2-2021</u>
Less than a month	3	2	1	2	2	1	1	2
1-2 months	10	9	11	8	7	8	10	12
3-under 6 months	28	30	20	21	19	16	14	17
6 months – 1 year	46	50	55	56	55	56	59	54
Never	3	6	6	7	8	9	7	8
Don't know	9	2	6	7	8	9	9	7

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Survey Data Findings – continued –

18. Which of the following adaptations have you made at your business **since the start of the COVID-19 pandemic**? Please select all that apply.

	<u>Q2-2021</u>
Implemented frequent cleaning/disinfecting of surfaces	35
Required employees to wear protective gear and socially distance	31
Asked employees to self-monitor for symptoms and stay home if feeling ill	31
Decreased in-person services or offerings for customers	27
Required customers to wear protective gear and socially distance	27
Decreased hours of operation	23
Managed the number of employees and customers in the workplace	21
Decreased occupancy or capacity	20
Decreased payroll/headcount	18
Added/expanded delivery, curbside, e-commerce and other remote offering of services or offerings	16
Offered financial assistance to employees seeking childcare	10
Other	4
None of these	14

19. **[Skipped if business is permanently closed]** Which of the following adaptations have you made, or plan to make, at your business **in the next six months**?

	<u>Q2-2021</u>
	N=750
Expand in-person services or offerings for customers	24
Increase hours of operation	24
Return to full capacity in the workplace for employees and customers	23
Relax COVID-19 restrictions and precautions for customers	19
Relax COVID-19 restrictions and precautions for employees	17
Increase occupancy or capacity	16
Require all employees to show proof of COVID-19 vaccination or negative COVID-19 test	16
Require all customers to show proof of COVID-19 vaccination or negative COVID-19 test	13
Increase payroll/headcount	11
Decrease delivery, curbside, e-commerce and other remote offering of services or offerings	9
Other	2
None of these	21

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Survey Data Findings – continued –

20. How likely, if at all, are you to...?

a. Get the COVID-19 vaccine as soon as it is made available to you

	<u>Q1-2021</u>	<u>Q2-2021</u>
Very likely	42	28
Somewhat likely	28	19
Not very likely	13	11
Not at all likely	15	13
Don't know	2	1
Already vaccinated (at least one shot)	--	27
<i>Vaccinated or Likely (Net)</i>	<i>70</i>	<i>74</i>
<i>Not likely (Net)</i>	<i>28</i>	<i>24</i>

b. **[Skipped if business is permanently closed]** Require your employees to get the COVID-19 vaccine once it's made available to them

	<u>Q1-2021</u>	<u>Q2-2021</u>
	<i>Asked of all</i>	<i>N=750</i>
Very likely	27	35
Somewhat likely	25	24
Not very likely	19	11
Not at all likely	20	21
Don't know	9	8
<i>Likely (Net)</i>	<i>52</i>	<i>59</i>
<i>Not likely (Net)</i>	<i>39</i>	<i>32</i>

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Survey Data Findings – continued –

21. **[Skipped if business is permanently closed]** How many of your employees, to your knowledge, have received at least one dose of the COVID-19 vaccine?

	<u>Q2-2021</u>
	N=750
None	19
Fewer than half	19
More than half	22
Almost all	33
Don't know	7
<hr/>	
<i>None/Fewer than half (Net)</i>	38
<i>More than half/Almost all (Net)</i>	55

22. Do you agree or disagree with each of the following statements?

Total Agree Summary

	<u>Q4-2020</u>	<u>Q2-2021</u>
[Asked if business is fully open] I opened my business fully as soon as my state allowed it	--	N=523 81
[Asked if business is partially open or temporarily closed] I will open my business fully as soon as my state allows it	--	N=224 78
[Skipped if business is permanently closed] I plan to keep all COVID-19 safety precautions in place until the coronavirus pandemic ends	--	N=750 76
I have a business plan to adapt to a changing economy	67	73
When it comes to COVID-19, I believe the worst is behind us	44	65
I support shops, restaurants, offices, and other businesses in my area requiring customers to show proof of COVID-19 vaccination for entry or service	--	64

- a. I have a business plan to adapt to a changing economy

	<u>Q4-2020</u>	<u>Q2-2021</u>
Strongly agree	22	25
Somewhat agree	45	48
Somewhat disagree	22	21
Strongly disagree	8	4
Don't know	3	2
<hr/>		
<i>Agree (Net)</i>	67	73
<i>Disagree (Net)</i>	30	25



Survey Data Findings – continued –

- b. When it comes to COVID-19, I believe the worst is behind us

	<u>Q4-2020</u>	<u>Q2-2021</u>
Strongly agree	17	23
Somewhat agree	27	42
Somewhat disagree	24	24
Strongly disagree	25	6
Don't know	6	5
<hr/>		
<i>Agree (Net)</i>	44	65
<i>Disagree (Net)</i>	50	30

- c. **[Skipped if business is permanently closed]** I plan to keep all COVID-19 safety precautions in place until the coronavirus pandemic ends

	<u>Q2-2021</u>
	N=750
Strongly agree	40
Somewhat agree	36
Somewhat disagree	16
Strongly disagree	6
Don't know	2
<hr/>	
<i>Agree (Net)</i>	76
<i>Disagree (Net)</i>	22

- d. **[Asked if business is partially open or temporarily closed]** I will open my business fully as soon as my state allows it

	<u>Q2-2021</u>
	N=224
Strongly agree	42
Somewhat agree	37
Somewhat disagree	13
Strongly disagree	2
Don't know	7
<hr/>	
<i>Agree (Net)</i>	78
<i>Disagree (Net)</i>	15



Survey Data Findings – continued –

- e. **[Asked if business is fully open]** I opened my business fully as soon as my state allowed it

	<u>Q2-2021</u>
	N=523
Strongly agree	51
Somewhat agree	30
Somewhat disagree	12
Strongly disagree	4
Don't know	3
<hr/>	
<i>Agree (Net)</i>	<i>81</i>
<i>Disagree (Net)</i>	<i>16</i>

- f. I support shops, restaurants, offices, and other businesses in my area requiring customers to show proof of COVID-19 vaccination for entry or service

	<u>Q2-2021</u>
Strongly agree	33
Somewhat agree	31
Somewhat disagree	17
Strongly disagree	16
Don't know	3
<hr/>	
<i>Agree (Net)</i>	<i>64</i>
<i>Disagree (Net)</i>	<i>34</i>

23. Do you use a professional employer organization (PEO) for your business' human resources and/or employee benefits needs?

	<u>Q1-2021</u>	<u>Q2-2021</u>
Yes, currently	25	24
Yes, previously	18	19
No, never	57	57



Survey Data Findings – continued –

About Ipsos

Ipsos is a global independent Insights and Analytics company. Our team of 18,000 across 90 countries serves 5,000 clients and undertakes 70,000 different projects each year. Our polling practice is a non-partisan, objective, survey-based research practice made up of seasoned professionals. We conduct strategic research initiatives for a diverse number of American and international organizations, based not only on public opinion research, but elite stakeholder, corporate, and media opinion research.

As a global research and insights organization, Ipsos aims to make our changing world easier and faster to navigate and to inspire our clients to make smarter decisions. We are committed to driving the industry with innovative, best-in-class research techniques that are meaningful in today's connected society. We deliver research with security, speed, simplicity, and substance. Our tagline "Game Changers" summarizes our ambition.

Our broad range of industry experts offer an intimate understanding of people, markets, brands and society. Whether testing communications content, bringing concepts to market, assessing customer experience, or gauging public opinion, Ipsos strives to identify and offer the right solutions to our client's specific challenges.

Ipsos is committed to building an organization dedicated to a single endeavor: providing our clients with the best service, using qualitative or quantitative methods, at local, regional, and international levels. This is what drives us to ask and probe, to subject our hypotheses to rigorous analyses, and, finally, to deliver reliable data and the most effective recommendations in the shortest time possible.

Ipsos has been listed on the Paris Stock Exchange since 1999 and generated global revenues of €1,749.5 million in 2018.

GAME CHANGERS

« Game Changers » is the Ipsos signature.

At Ipsos we are passionately curious about people, markets, brands and society.

We make our changing world easier and faster to navigate and inspire clients to make smarter decisions.

We deliver with security, speed, simplicity and substance. We are Game Changers.

Ipsos is listed on Eurolist – NYSE-Euronext.

The company is part of the SBF 120 and the Mid-60 index

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ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg IPS:FP

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