



WOMEN'S FORUM BAROMETER

EDITION 2021: FOR AN INCLUSIVE RECOVERY IN THE G7 COUNTRIES

Ipsos Public Affairs
May 2021

GAME CHANGERS



METHODOLOGY



TARGET

3500 people interviewed in the 7 countries of the G7 (Canada, France, Germany, Italy, Japan, UK, US) – 500 interviews per country.

Representative samples of the population aged 18 y.o. and more in each country (both men and women interviewed).

Reading note : for Global results and sub-totals by clusters, each country weighs the same.



COLLECTION DATES

8th to 20th April 2021



METHOD

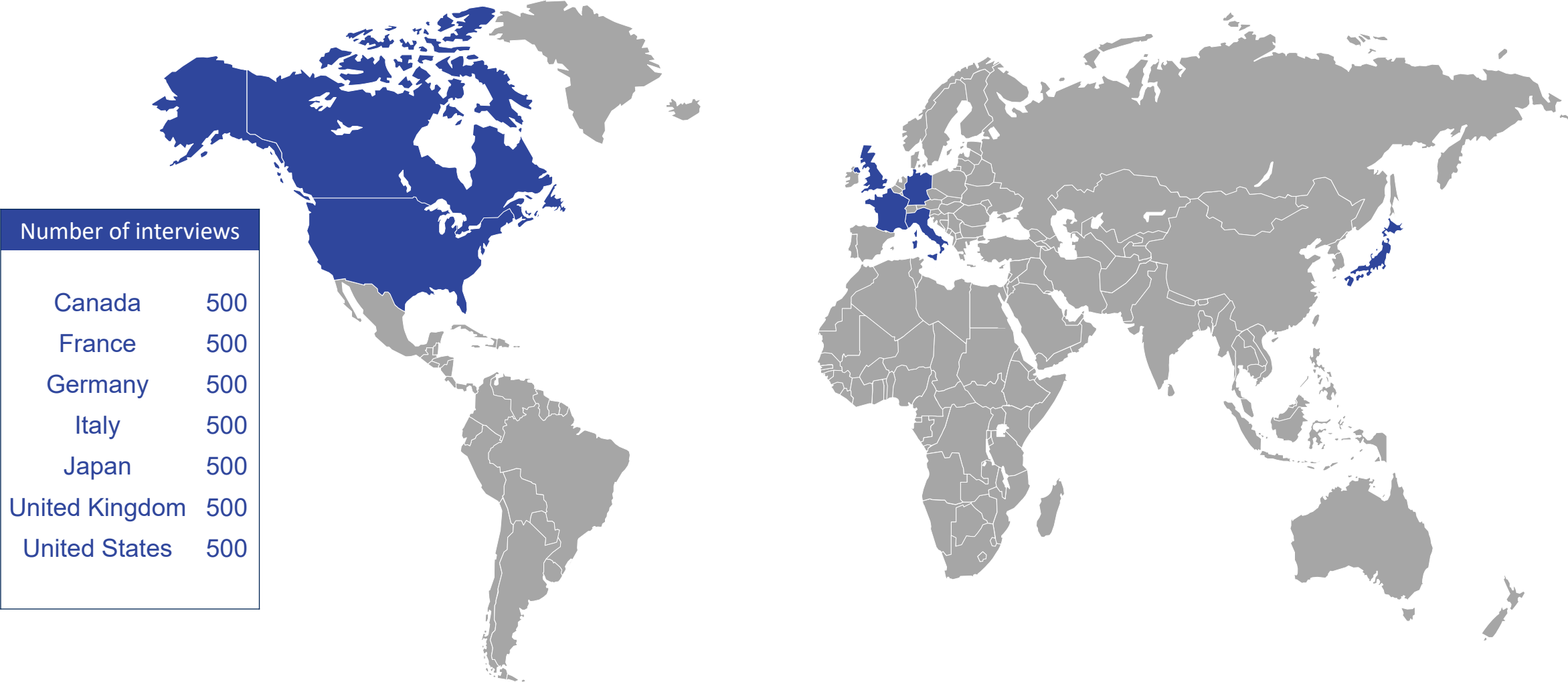
Online interviews via Ipsos Access Panel.

Quota method applied to gender, age, occupation, region and market size.



*This report has been produced in accordance with international standard ISO 20252 "Market, opinion and social research".
This report was proofread by Amandine Lama, account director.*

3500 PEOPLE INTERVIEWED IN THE G7 COUNTRIES





1

FIRST REASON TO ACT URGENTLY:

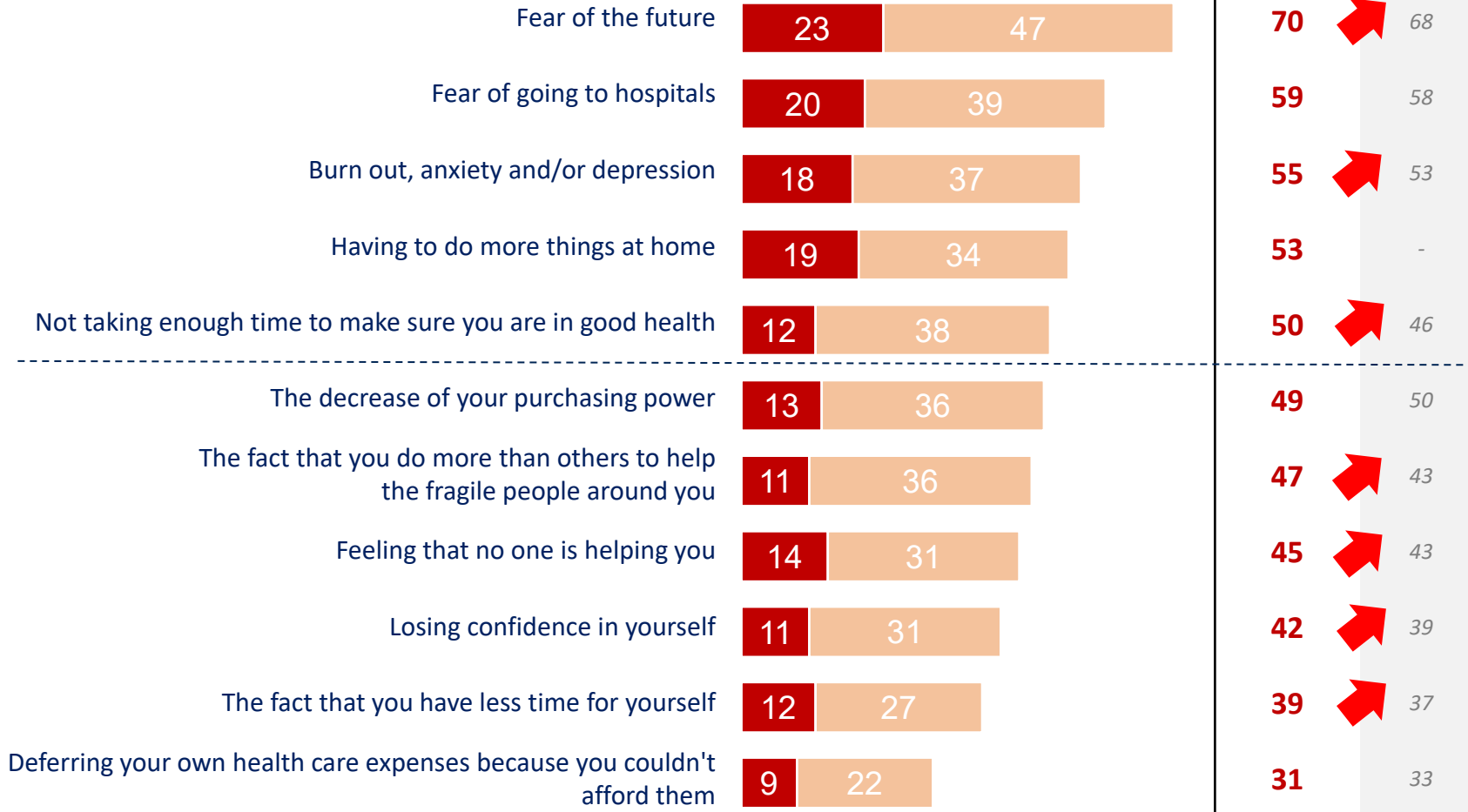
The Covid crisis has had devastating effects for many men,
but even more for women

IN A YEAR, THE PROPORTION OF THE POPULATIONS OF THE G7 AFFECTED IN MANY WAYS BY THE PANDEMIC HAS INCREASED



ALL COUNTRIES WOMEN & MEN

■ Yes, a lot ■ Yes, in part



More than half of the population concerned

More than 3 people in 10 concerned

Since the beginning of the pandemic, have you experienced any of the following situations because of its consequences?

IMPACT OF THE PANDEMIC

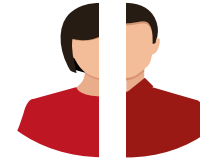


TOTAL POPULATION (MEN & WOMEN)

| | % Yes | ALL | EUROPE | France | Germany | UK | Italy | AMERICA | Canada | US | Japan |
|---|--------------|------------|---------------|--------|---------|----|-------|----------------|--------|----|-------|
| Fear of the future | 70 | 70 | 72 | 64 | 66 | 79 | 66 | 67 | 65 | 80 | |
| Fear of going to hospitals | 59 | 58 | 52 | 53 | 51 | 76 | 55 | 56 | 54 | 72 | |
| Burn out, anxiety and/or depression | 55 | 48 | 39 | 41 | 53 | 60 | 62 | 64 | 59 | 66 | |
| Having to do more things at home | 53 | 52 | 52 | 42 | 56 | 57 | 61 | 61 | 62 | 40 | |
| Not taking enough time to make sure you are in good health | 50 | 48 | 39 | 46 | 48 | 60 | 52 | 58 | 46 | 54 | |
| The decrease of your purchasing power | 49 | 49 | 44 | 46 | 39 | 66 | 46 | 47 | 45 | 59 | |
| The fact that you do more than others to help the fragile people around you | 47 | 49 | 44 | 44 | 42 | 64 | 50 | 50 | 50 | 37 | |
| Feeling that no one is helping you | 45 | 45 | 39 | 40 | 43 | 58 | 44 | 46 | 43 | 45 | |
| Losing confidence in yourself | 42 | 42 | 36 | 35 | 48 | 51 | 39 | 43 | 35 | 43 | |
| The fact that you have less time for yourself | 39 | 37 | 34 | 36 | 35 | 45 | 41 | 40 | 41 | 40 | |
| Deferring your own health care expenses because you couldn't afford them | 31 | 32 | 30 | 29 | 20 | 48 | 28 | 26 | 30 | 36 | |

Since the beginning of the pandemic, have you experienced any of the following situations because of its consequences?

THE PANDEMIC HAS HAD STRONG NEGATIVE IMPACT ON BOTH MEN AND WOMEN, BUT IN SEVERAL AREAS, WOMEN HAVE BEEN SIGNIFICANTLY MORE AFFECTED THAN MEN



ALL COUNTRIES

■ Yes, a lot ■ Yes, in part

Items for which there is at least a 4 points difference between men and women:

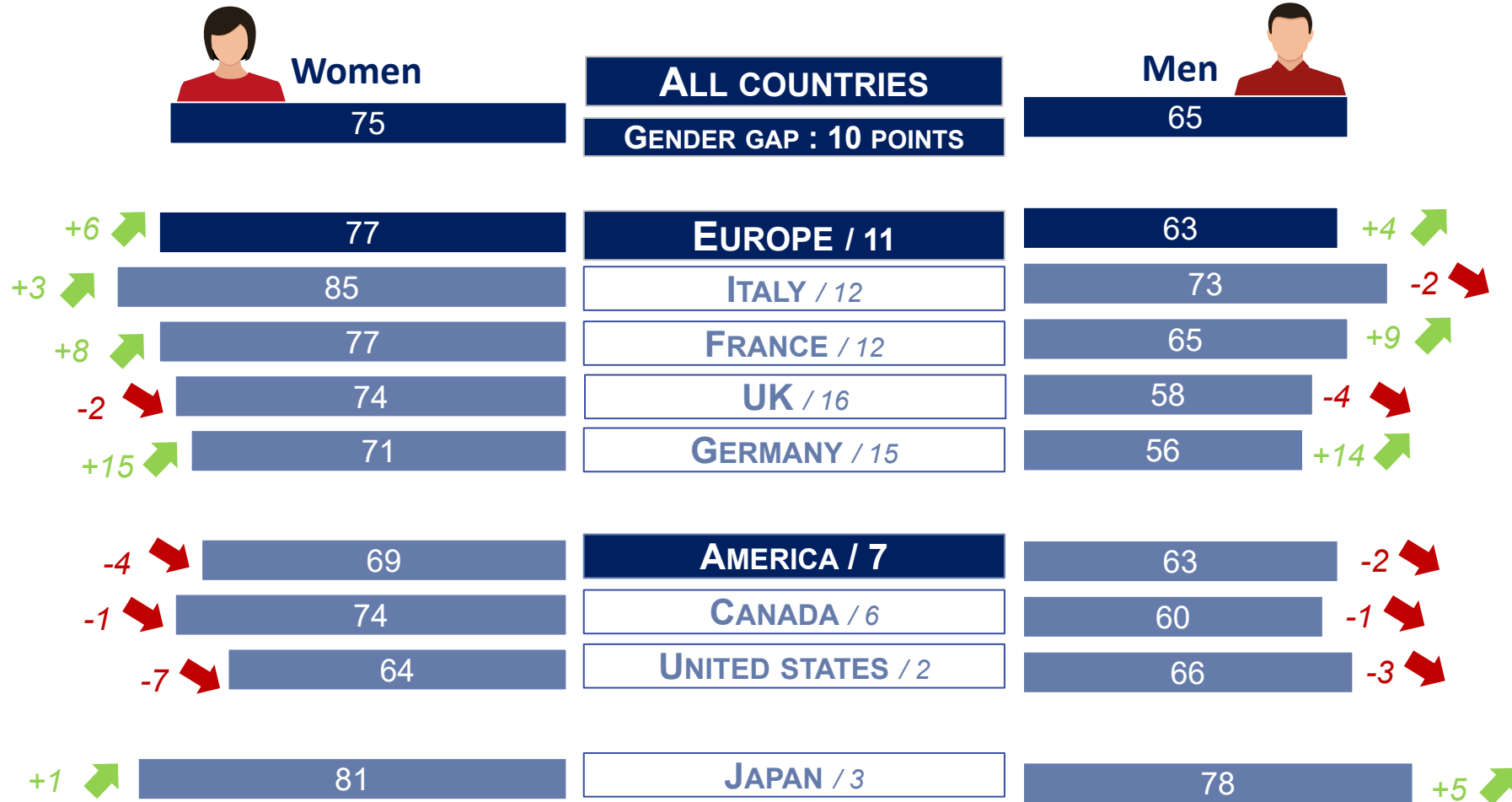
| | % YES | % 2020 |
|--|-------|--------|
| Fear of the future | 70 | 68 |
| Fear of going to hospitals | 59 | 58 |
| Burn out, anxiety and/or depression | 55 | 53 |
| Not taking enough time to make sure you are in good health | 50 | 46 |
| Feeling that no one is helping you | 45 | 43 |
| Losing confidence in yourself | 42 | 39 |

| | WOMEN | % 2020 | MEN | % 2020 |
|--|-------|--------|-----|--------|
| Fear of the future | 75 | 73 | 65 | 63 |
| Fear of going to hospitals | 62 | 61 | 56 | 54 |
| Burn out, anxiety and/or depression | 59 | 59 | 50 | 46 |
| Not taking enough time to make sure you are in good health | 52 | 49 | 48 | 43 |
| Feeling that no one is helping you | 47 | 46 | 43 | 39 |
| Losing confidence in yourself | 45 | 43 | 37 | 33 |

Since the beginning of the pandemic, have you experienced any of the following situations because of its consequences?

ON AVERAGE, WOMEN HAVE MORE OFTEN EXPERIENCED FEAR OF THE FUTURE COMPARED TO MEN (10 POINTS MORE), THE BIGGEST GAP BEING OBSERVED IN THE UK (16 POINTS)

“Since the beginning of the pandemic, I have experienced fear of the future ” **70%** (+2 points / 2020)



IN BRIEF

Biggest gap between men and women in the UK: 16 points

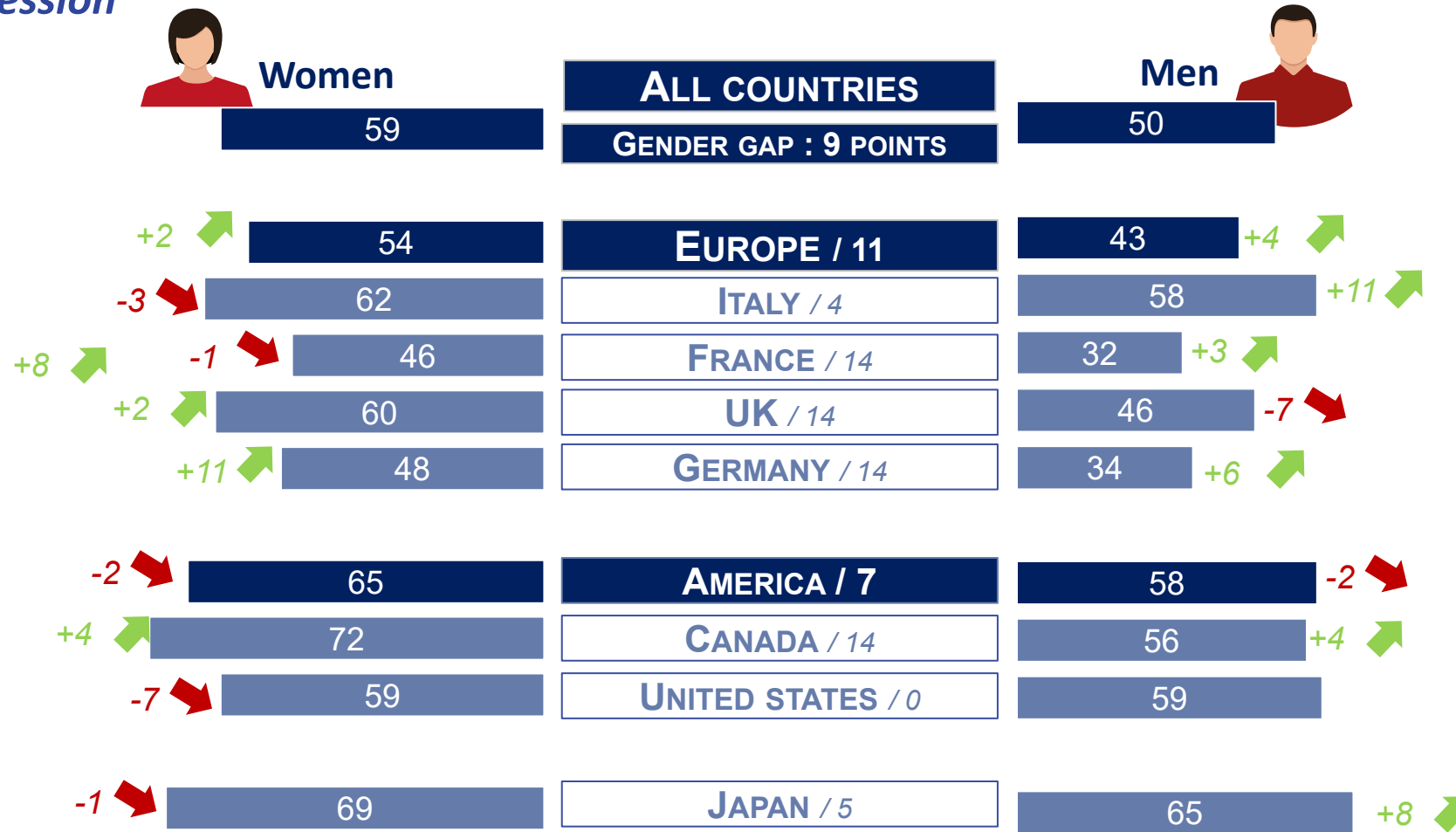
Worst result for women in Italy

Worst evolution for women in Germany

ON AVERAGE, WOMEN HAVE ALSO MORE OFTEN EXPERIENCED BURN OUT, ANXIETY AND/OR DEPRESSION (9 POINTS DIFFERENCE ON AVERAGE, UP TO 14 POINTS IN FRANCE, GERMANY, THE UK AND CANADA)

“Since the beginning of the pandemic, I have experienced burn out, anxiety and/or depression”

55% (+2 points / 2020)



IN BRIEF

Biggest gap between men and women in the UK, France, Germany and in Canada: 14 points

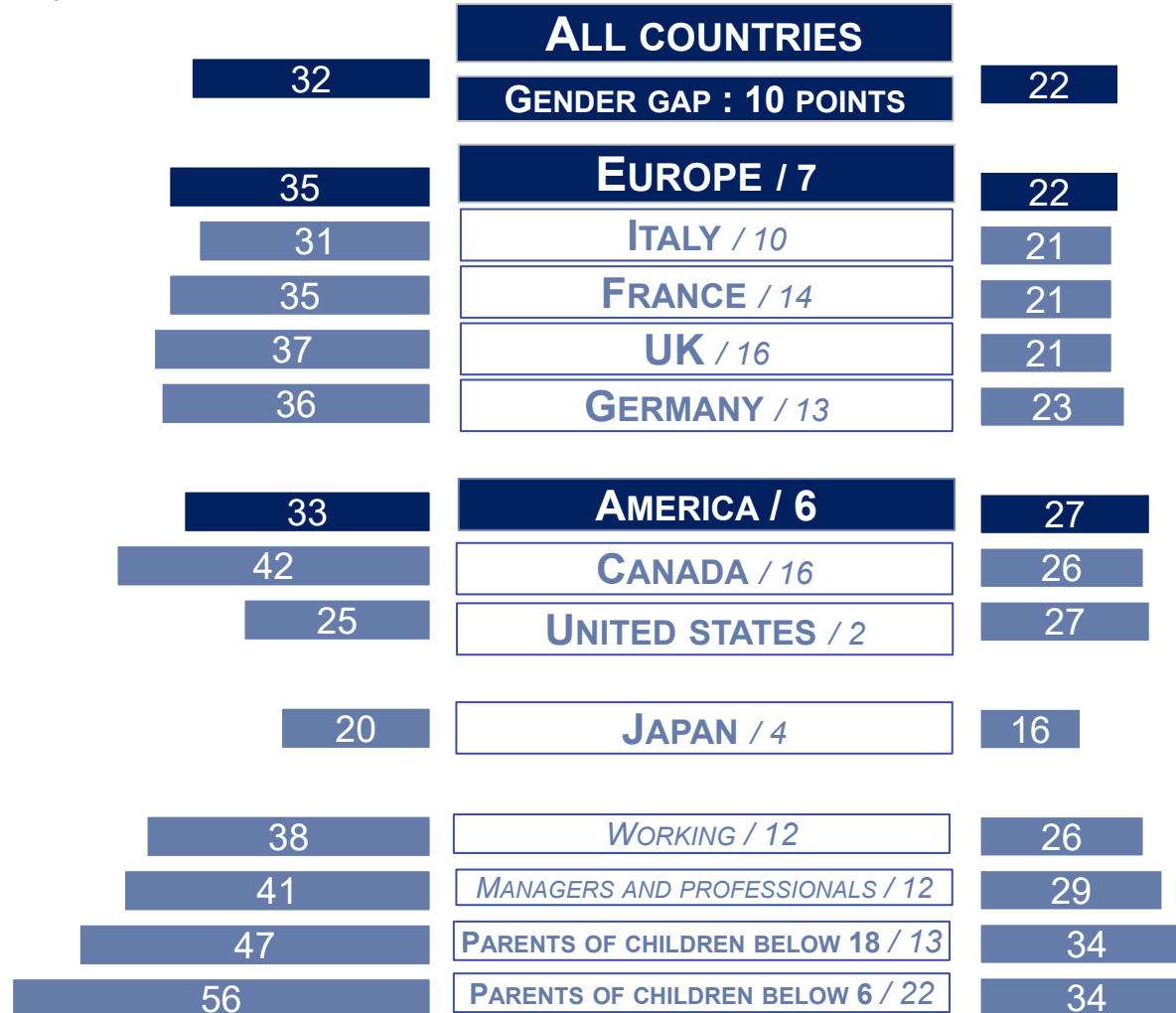
Worst result for women in Canada

Worst evolution for women in Germany

WOMEN EXPERIENCE MORE OFTEN EXTREME TIREDNESS AND STRESS

“I regularly feel that I am too tired and stressed by everything I do (working, domestic load, and taking care of children)”

27%



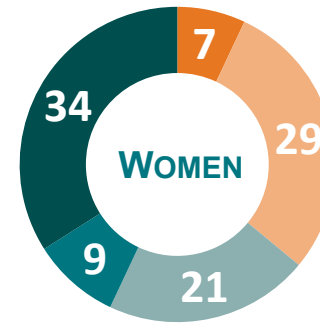
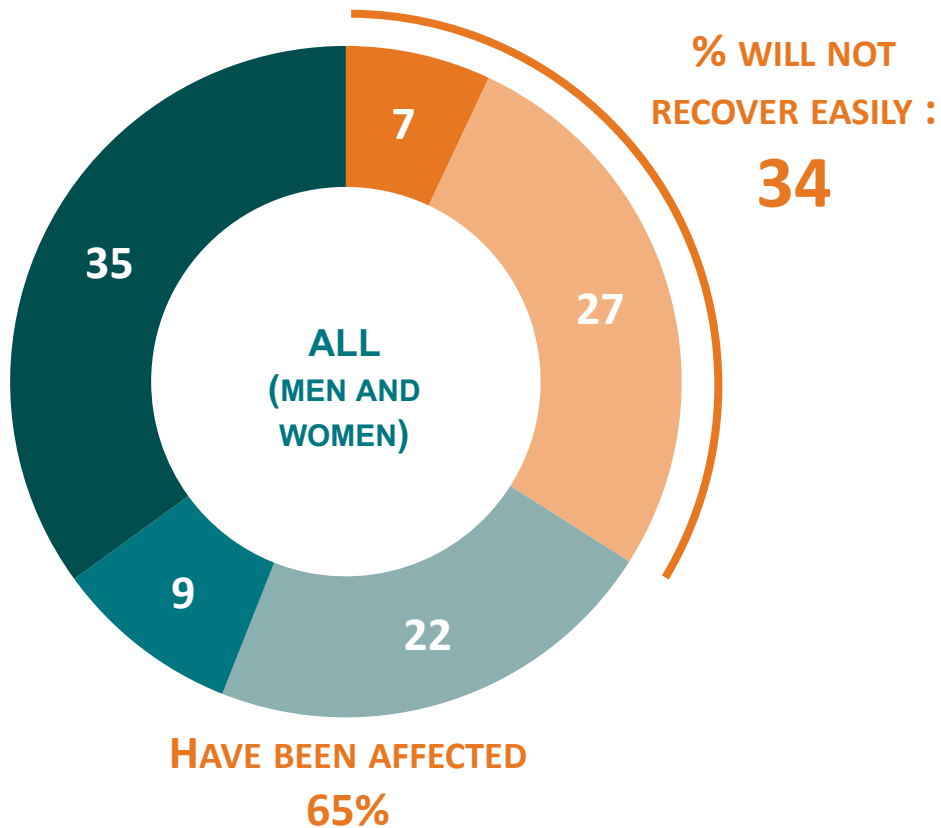
THE IMPACT OF THE PANDEMIC IS SO STRONG THAT A MAJORITY OF WOMEN WITH YOUNG CHILDREN AND SINGLE MOTHERS THINK THEY WILL HAVE DIFFICULTIES TO RECOVER



ALL COUNTRIES

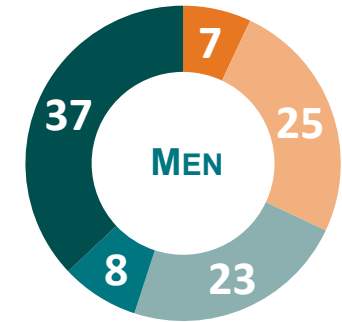
YOUR PHYSICAL HEALTH

- You will never fully recover, some choices you made or opportunities you lost will have a durable impact
- You will recover in the end, but with lots of efforts
- You will recover easily
- You will bounce back even higher than before, the pandemic generated new opportunities, you had to reinvent yourself
- You have not been affected at all, so it won't change



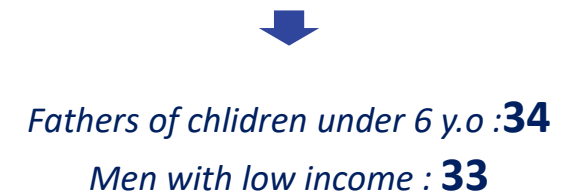
Affected: 66%

including will not recover easily : 36%



Affected: 63%

including will not recover easily : 32%



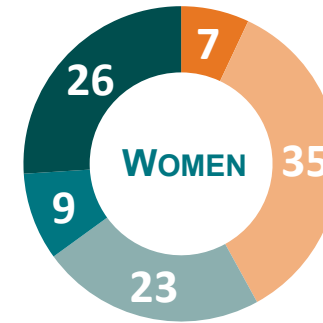
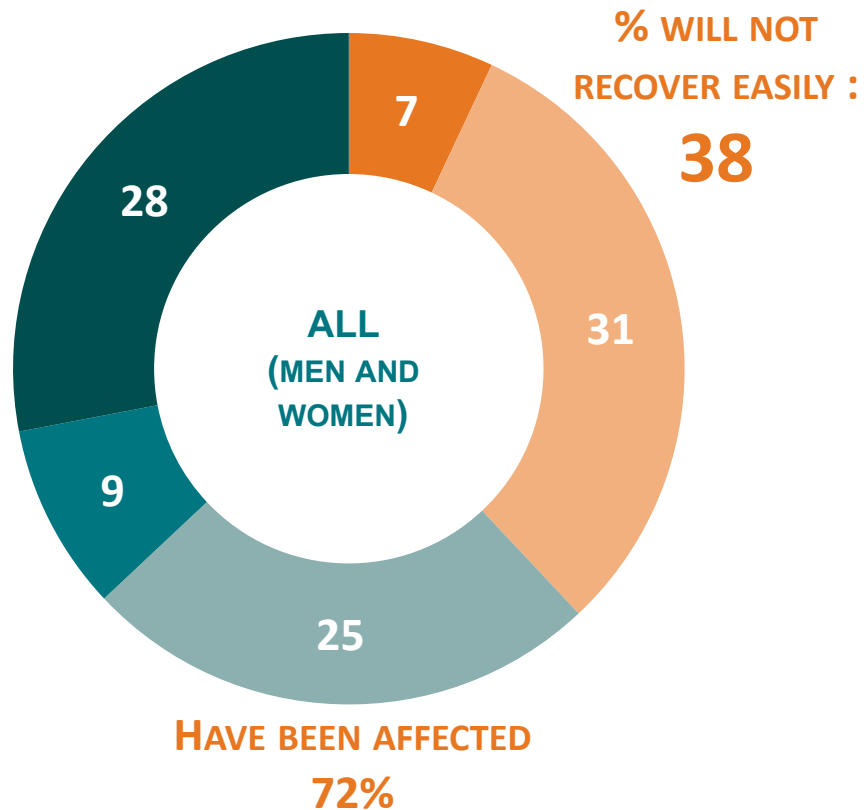
WOMEN ARE EVEN MORE WORRIED OF THE DIFFICULTIES THEY WILL HAVE TO RECOVER PSYCHOLOGICALLY



ALL COUNTRIES

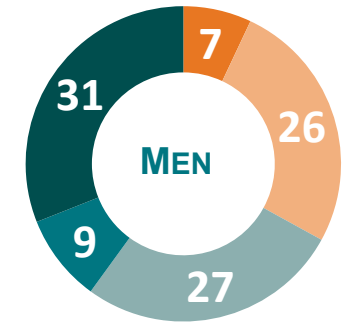
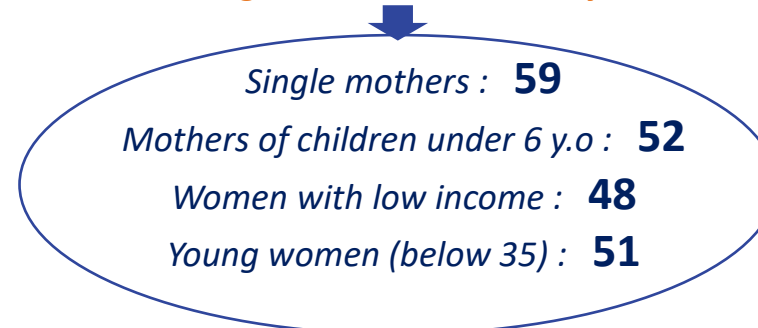
YOUR PSYCHOLOGICAL HEALTH

- You will never fully recover, some choices you made or opportunities you lost will have a durable impact
- You will recover in the end, but with lots of efforts
- You will recover easily
- You will bounce back even higher than before, the pandemic generated new opportunities, you had to reinvent yourself
- You have not been affected at all, so it won't change



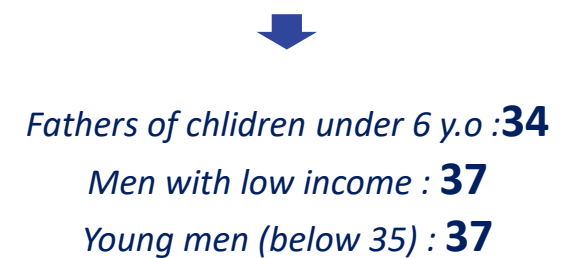
Affected: 74%

including will not recover easily : 42%



Affected: 69%

including will not recover easily : 33%

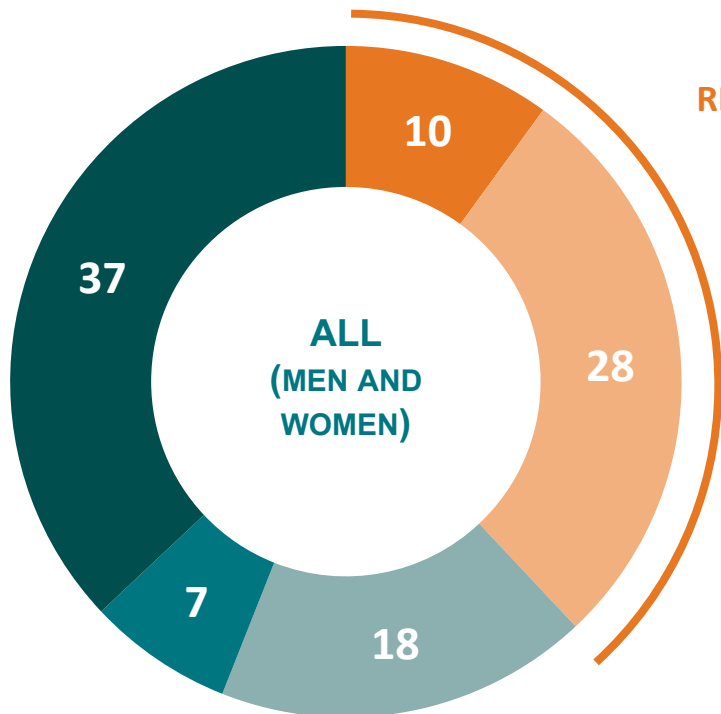


THESE DIFFICULTIES COME IN ADDITION TO THE ECONOMIC DIFFICULTIES, WHICH ARE OF PARTICULAR CONCERN TO PARENTS, AND MORE PARTICULARLY TO MOTHERS



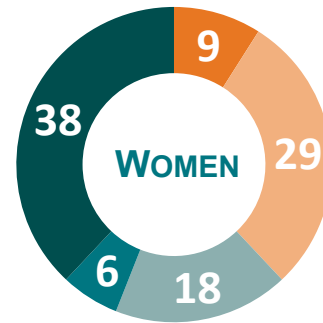
ALL COUNTRIES YOUR PERSONAL ECONOMIC SITUATION

- You will never fully recover, some choices you made or opportunities you lost will have a durable impact
- You will recover in the end, but with lots of efforts
- You will recover easily
- You will bounce back even higher than before, the pandemic generated new opportunities, you had to reinvent yourself
- You have not been affected at all, so it won't change



**HAVE BEEN AFFECTED
63%**

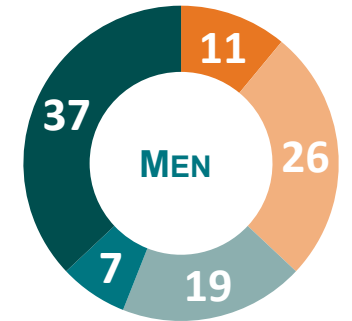
**%WILL NOT
RECOVER EASILY :
38**



Affected: 62%

including will not recover easily : 38%

- Single mothers : 54**
- Mothers of children under 6 y.o : 49**
- Women with low income : 49**



Affected: 63%

including will not recover easily : 37%

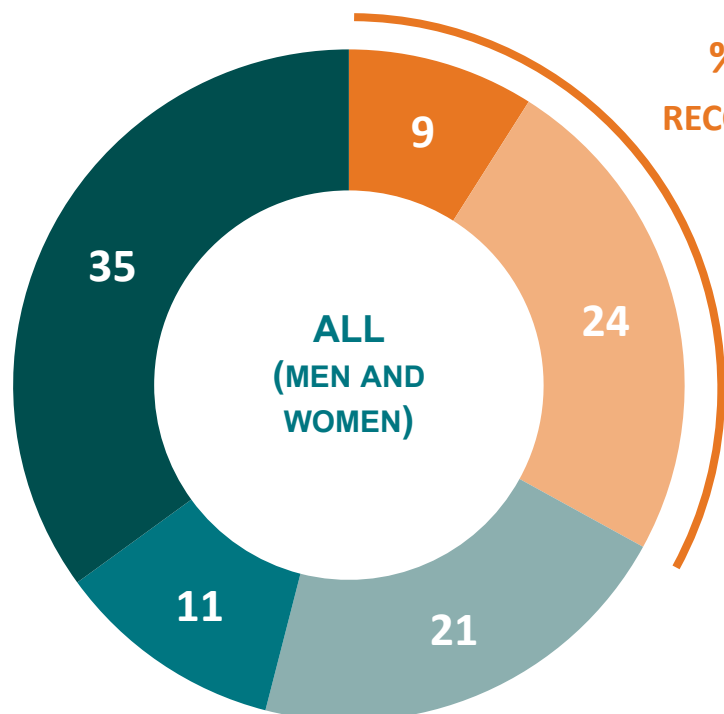
- Fathers of children under 6 y.o : 44**
- Men with low income : 45**

MANY PEOPLE ALSO FEEL IT WILL BE COMPLICATED FOR THEM TO RECOVER IN TERMS OF PROFESSIONAL AMBITIONS, THIS IS PARTICULARLY THE CASE FOR WOMEN WITH YOUNG CHILDREN WHO HAD TO COPE WITH DAY CARE AND SCHOOL CLOSURES



ALL COUNTRIES YOUR PROFESSIONAL AMBITIONS (ASKED ONLY TO PEOPLE WORKING)

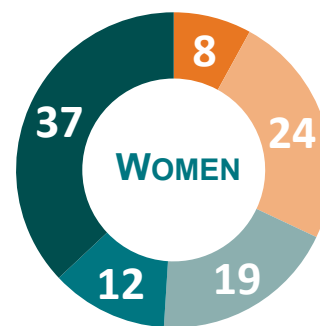
- You will never fully recover, some choices you made or opportunities you lost will have a durable impact
- You will recover in the end, but with lots of efforts
- You will recover easily
- You will bounce back even higher than before, the pandemic generated new opportunities, you had to reinvent yourself
- You have not been affected at all, so it won't change



HAVE BEEN AFFECTED

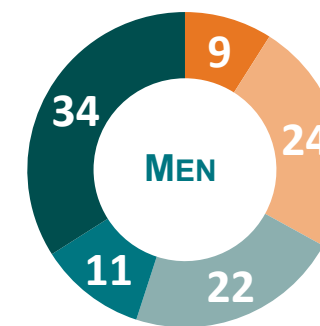
65%

% WILL NOT RECOVER EASILY : 33



Affected: 63%

including will not recover easily : 32%



Affected: 66%

including will not recover easily : 33%

Young women (below 35) : **36**
 Mothers of children under 6 y.o : **42**
 Women with low income : **40**

Young men (below 35) : **33**
 Fathers of children under 6 y.o : **35**
 Men with low income : **38**

ITALIANS HAVE BEEN PARTICULARLY IMPACTED AND WORRIED THEY WILL NOT RECOVER EASILY



TOTAL POPULATION (MEN & WOMEN)

% ST Have been affected / ST Will not recover easily

| | All | EUROPE | France | Germany | UK | Italy | AMERICA | Canada | US | Japan |
|---|-------|--------|--------|---------|-------|-------|---------|--------|-------|-------|
| Your personal economic situation | 63 38 | 61 37 | 58 32 | 61 30 | 57 33 | 69 55 | 65 37 | 65 39 | 64 35 | 63 41 |
| Your psychological health | 72 38 | 70 38 | 66 31 | 70 33 | 70 41 | 76 46 | 74 36 | 77 39 | 72 34 | 72 38 |
| Your physical health | 65 34 | 64 33 | 57 28 | 65 30 | 66 35 | 67 39 | 67 35 | 72 38 | 63 33 | 63 34 |
| Your professional ambitions (asked only to people working) | 65 33 | 64 33 | 56 26 | 70 32 | 62 30 | 67 43 | 64 32 | 65 33 | 64 31 | 68 35 |

When you think of the impact of this pandemic in each of the following areas, you would say that...



2

SECOND REASON TO ACT URGENTLY:

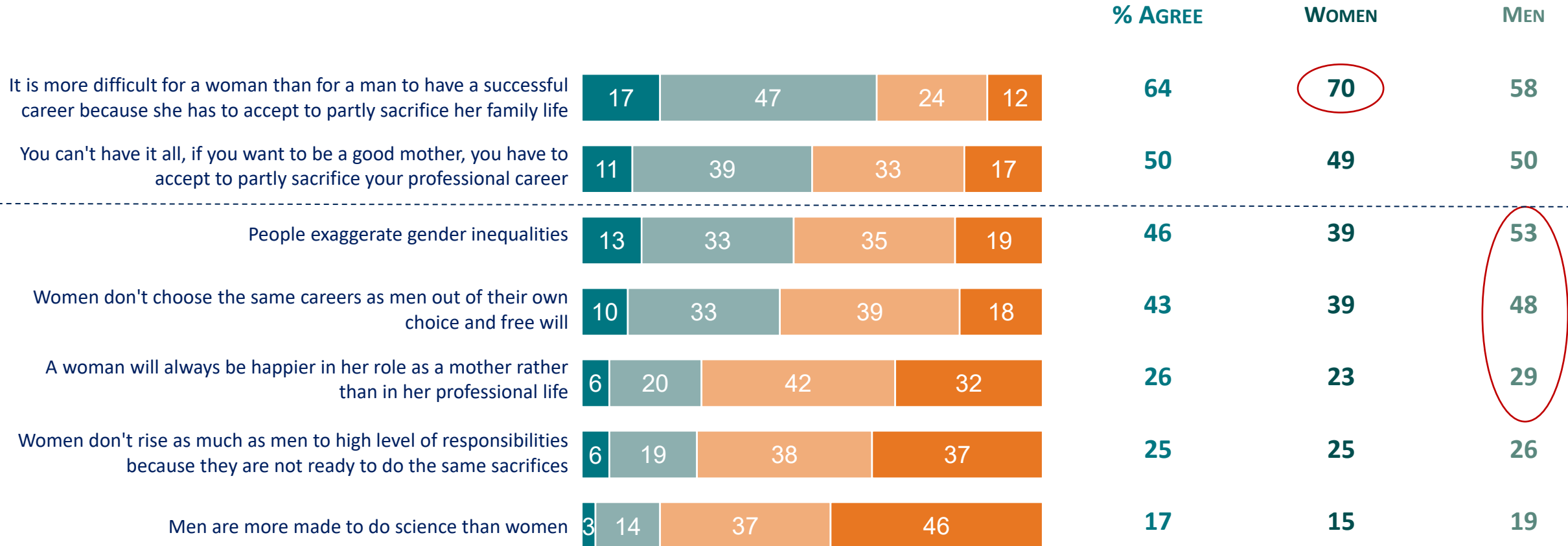
Stereotypes about the role and place of women in society are still very widespread, making the risk of women's withdrawal from the economic scene real

GENDER STEREOTYPES REMAIN EXTREMELY WIDESPREAD, AMONG BOTH MEN AND WOMEN



ALL COUNTRIES

■ I agree very much
 ■ I agree somewhat
 ■ I disagree somewhat
 ■ I disagree very much



To what extent do you agree or disagree with the following statements?

WOMEN FACE STRONG STEREOTYPES IN ALL THE G7 COUNTRIES, BUT TRADITIONAL ROLE MODELS ARE ESPECIALLY ALIVE IN GERMANY AND IN JAPAN



TOTAL POPULATION (MEN & WOMEN)

| Agree % | ALL | EUROPE | France | Germany | UK | Italy | AMERICA | Canada | US | Japan |
|---|-----|--------|--------|---------|----|-------|---------|--------|----|-------|
| It is more difficult for a woman than for a man to have a successful career because she has to accept to partly sacrifice her family life | 64 | 68 | 63 | 77 | 65 | 66 | 59 | 58 | 60 | 58 |
| You can't have it all, if you want to be a good mother, you have to accept to partly sacrifice your professional career | 50 | 51 | 45 | 59 | 57 | 42 | 46 | 41 | 51 | 53 |
| People exaggerate gender inequalities | 46 | 45 | 35 | 46 | 46 | 51 | 44 | 36 | 52 | 51 |
| Women don't choose the same careers as men out of their own choice and free will | 43 | 45 | 43 | 50 | 52 | 34 | 48 | 46 | 51 | 25 |
| A woman will always be happier in her role as a mother rather than in her professional life | 26 | 26 | 22 | 35 | 22 | 24 | 20 | 15 | 26 | 36 |
| Women don't rise as much as men to high level of responsibilities because they are not ready to do the same sacrifices | 25 | 29 | 33 | 44 | 25 | 12 | 20 | 19 | 22 | 23 |
| Men are more made to do science than women | 17 | 15 | 8 | 23 | 18 | 11 | 15 | 11 | 19 | 32 |

To what extent do you agree or disagree with the following statements?

3

THIRD REASON TO ACT URGENTLY:

People broadly agree that gender inequalities are widespread including in the G7 countries and have to be fought



ITALIANS, AMERICANS AND JAPANESE CONSIDER THAT GENDER INEQUALITIES ARE MORE WIDESPREAD IN THEIR COUNTRIES THAN IN THE REST OF THE G7



TOTAL POPULATION (MEN & WOMEN)

| % very widespread (8-10) | ALL | EUROPE | France | Germany | UK | Italy | AMERICA | Canada | US | Japan |
|-----------------------------|--------------|--------|--------|---------|----|-------|---------|--------|----|-------|
| | In the world | 44 | 48 | 46 | 50 | 47 | 49 | 50 | 57 | 44 |
| the G7 countries | 22 | 22 | 20 | 20 | 23 | 26 | 24 | 24 | 23 | 15 |
| In your country | 28 | 28 | 21 | 21 | 25 | 42 | 28 | 21 | 34 | 30 |

| Average | ALL | EUROPE | France | Germany | UK | Italy | AMERICA | Canada | US | Japan |
|------------------|--------------|--------|--------|---------|-----|-------|---------|--------|-----|-------|
| | In the world | 7 | 7,1 | 6,9 | 7,2 | 7,1 | 7,2 | 7,1 | 7,4 | 6,9 |
| the G7 countries | 5,9 | 6 | 6 | 5,9 | 6 | 6,2 | 5,9 | 6 | 5,8 | 5,7 |
| In your country | 6 | 6,1 | 5,9 | 5,7 | 5,9 | 6,8 | 5,9 | 5,7 | 6,1 | 6,2 |

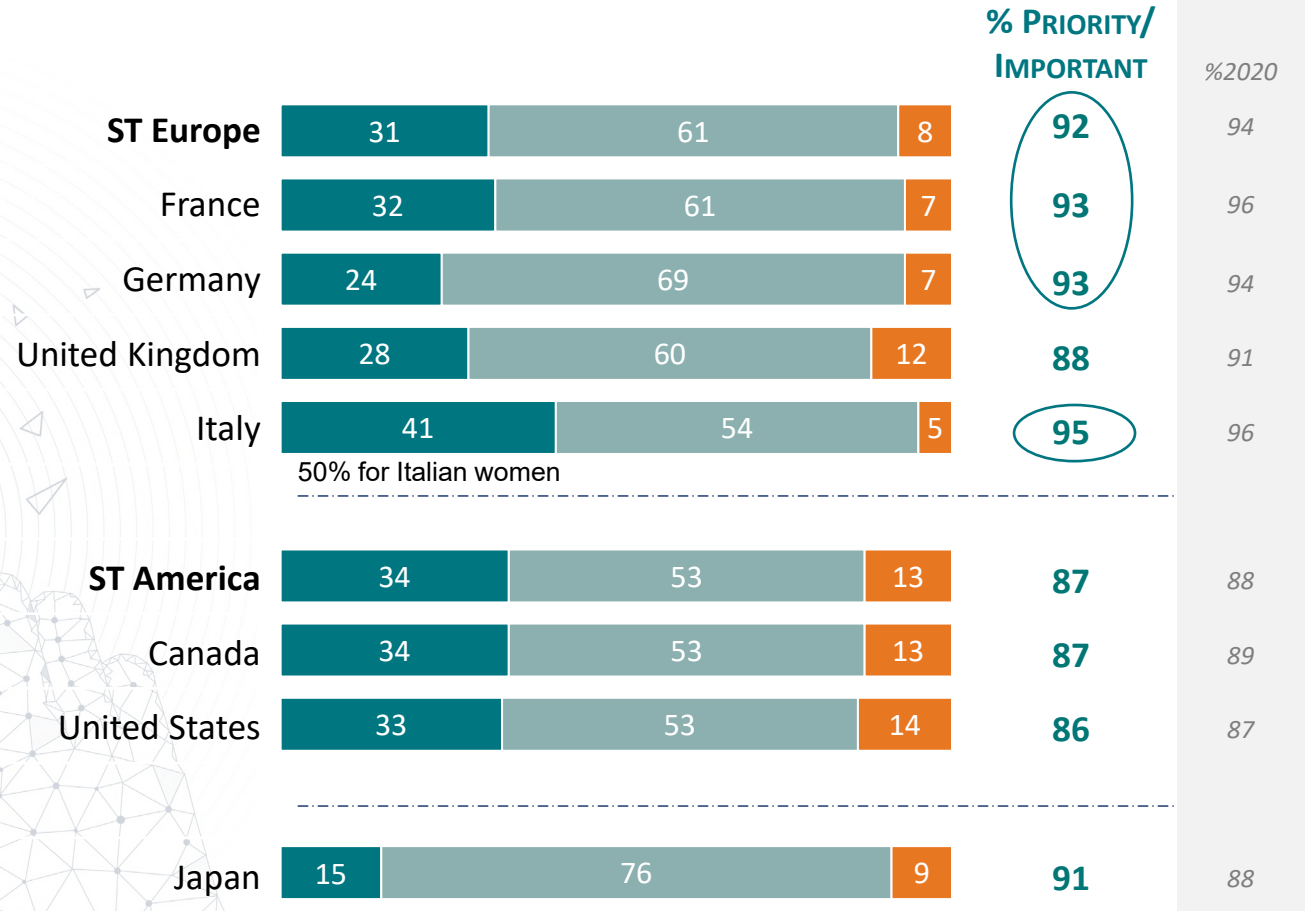
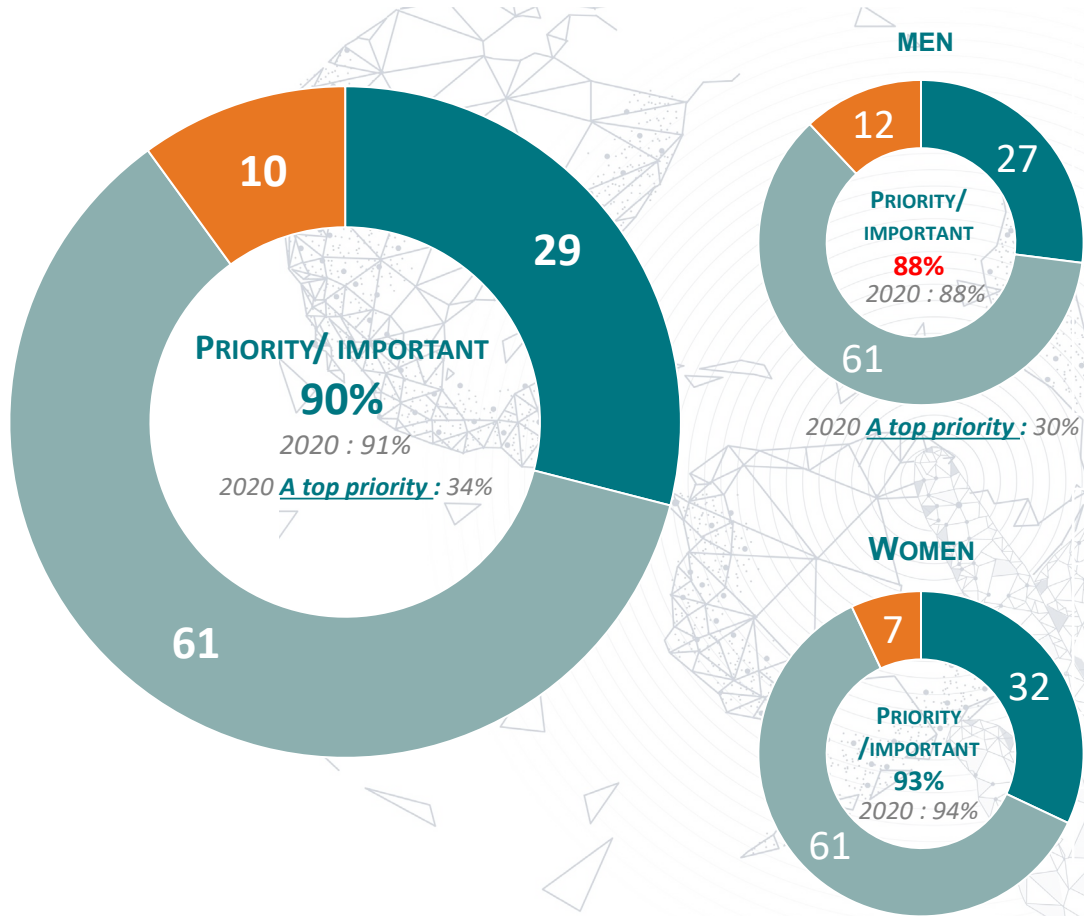
If you had to evaluate the level of gender inequalities today from 0 to 10, how much would you evaluate it ? 0 meaning that you think that gender inequalities are non-existent today and 10 meaning that you think they are extremely widespread

THE VAST MAJORITY OF G7 POPULATIONS BELIEVE THAT CLOSING THE GENDER GAP IS IMPORTANT : A MAJORITY OF ITALIAN WOMEN THINK IT SHOULD EVEN BE A TOP PRIORITY



ALL COUNTRIES

■ A top priority
 ■ Something important but not a top priority
 ■ Something secondary



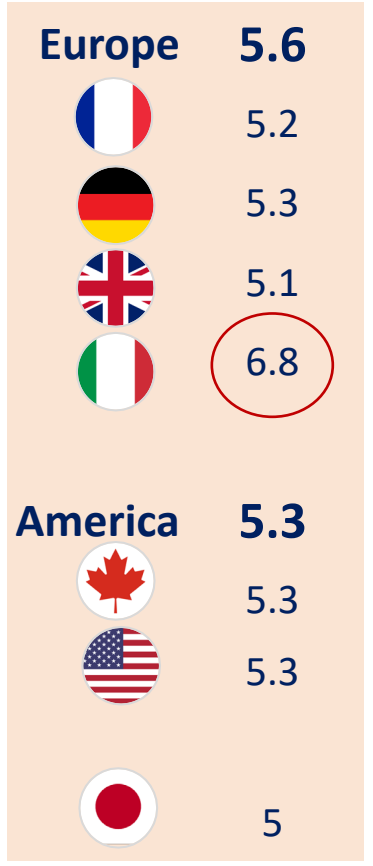
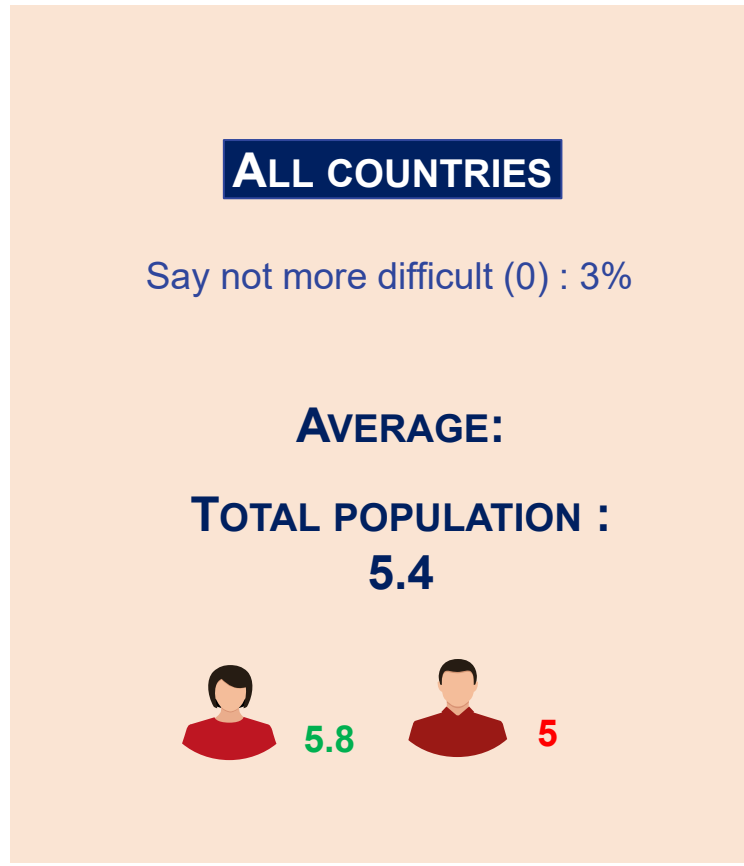
Do you think closing the gender gap should be addressed as:

Canada : 41%
 Italy : 50%

NEARLY ALL PEOPLE CONSIDER IT IS GOING TO BE MORE DIFFICULT NOW, WITH THE CRISIS, TO CLOSE THE GENDER GAP ; WOMEN BEING EVEN MORE PESSIMISTIC



ALL COUNTRIES



If you had to evaluate the increase in the level of difficulty in closing the gender gap after the shock of the pandemic from 0 to 10, how much would you evaluate - 0 meaning that you evaluate closing the gender gap is not going to be more difficult than before the pandemic and 10 meaning it will be much more difficult



4 4TH REASON TO ACT URGENTLY

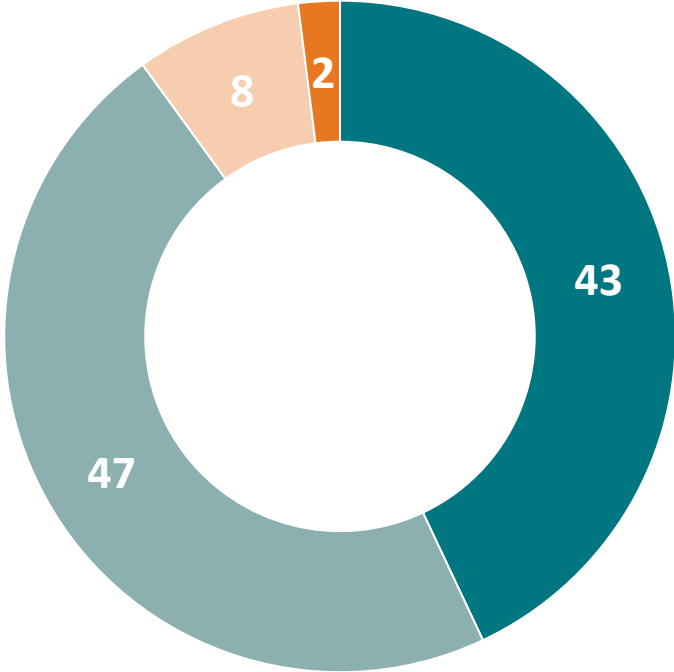
People are convinced that reducing gender inequalities would be for the common good

THERE IS A BROAD CONSENSUS THAT THE OUTCOMES OF DECISIONS ARE POSITIVE WHEN BOTH MEN AND WOMEN ARE INVOLVED



ALL COUNTRIES

■ I agree very much
 ■ I agree somewhat
 ■ I disagree somewhat
 ■ I disagree very much



% AGREE : 90

 **89**

 **91**

| | % AGREE | % 2020 |
|-------------------|-----------|--------|
| ST Europe | 93 | 90 |
| France | 93 | 92 |
| Germany | 91 | 89 |
| United Kingdom | 91 | 90 |
| Italy | 96 | 89 |
| <hr/> | | |
| ST America | 91 | 92 |
| Canada | 92 | 92 |
| United States | 90 | 92 |
| <hr/> | | |
| Japan | 80 | 82 |

To what extent do you agree or disagree with the following statements? Outcomes of decisions are positive when both women and men are involved in the design of solutions

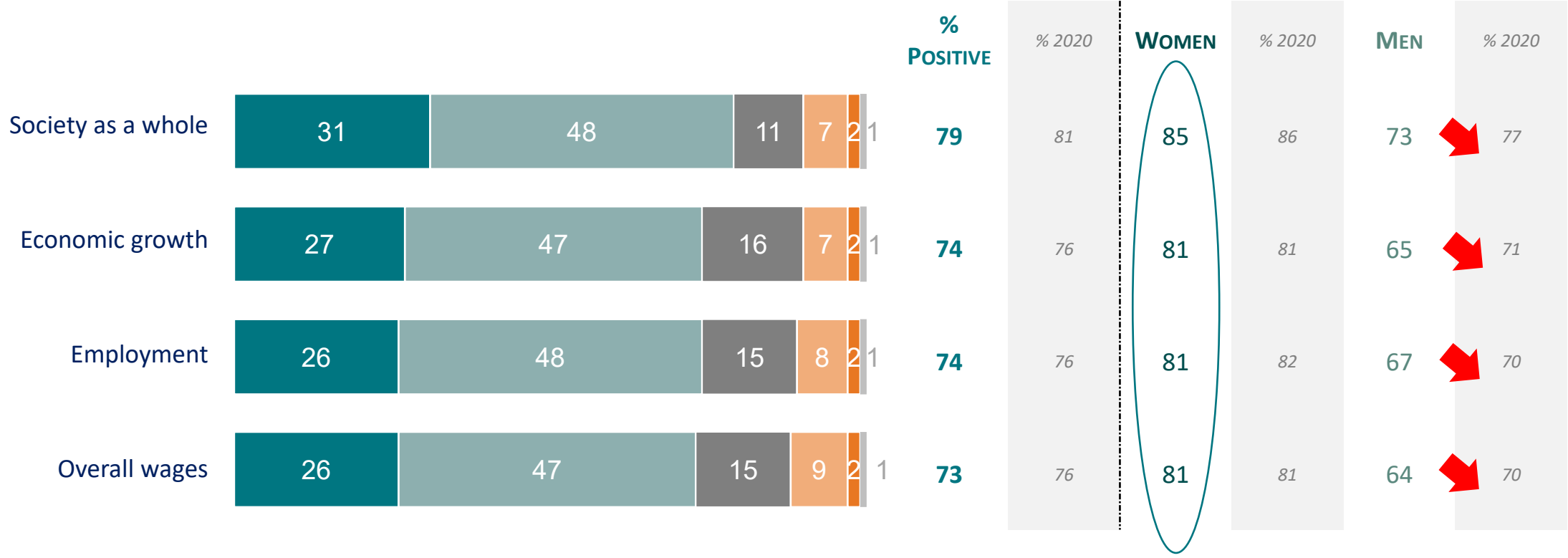




MOST PEOPLE BELIEVE THAT IF WOMEN HAD THE SAME OPPORTUNITIES AS MEN IT WOULD HAVE POSITIVE CONSEQUENCES IN MANY AREAS, INCLUDING ECONOMY, ALTHOUGH THE PROPORTION OF MEN THINKING SO HAS SLIGHTLY DECLINED AS SOME OF THEM MIGHT FEEL THREATENED

ALL COUNTRIES

■ Very positive
 ■ Rather positive
 ■ No impact
 ■ Rather negative
 ■ Very negative
 ■ No answer



If women had the same opportunities as men, do you think this would have consequences on :



A MAJORITY OF PEOPLE ARE YET CONVINCED OF THE POSITIVE OUTCOMES OF GENDER EQUALITY IN ALL THE COUNTRIES, AND ESPECIALLY IN ITALY WHERE THE DEMAND FOR MORE OPPORTUNITIES FOR WOMEN IS EXTREMELY HIGH



TOTAL POPULATION (MEN & WOMEN)

| % Positive | ALL | EUROPE | France | Germany | UK | Italy | AMERICA | Canada | US | Japan |
|--------------------|-----|--------|--------|---------|----|-------|---------|--------|----|-------|
| Society as a whole | 79 | 80 | 78 | 82 | 77 | 84 | 78 | 80 | 77 | 77 |
| Economic growth | 74 | 73 | 69 | 72 | 68 | 82 | 75 | 73 | 78 | 74 |
| Employment | 74 | 74 | 69 | 78 | 69 | 82 | 75 | 74 | 76 | 74 |
| Overall wages | 73 | 74 | 75 | 76 | 64 | 81 | 73 | 73 | 73 | 69 |

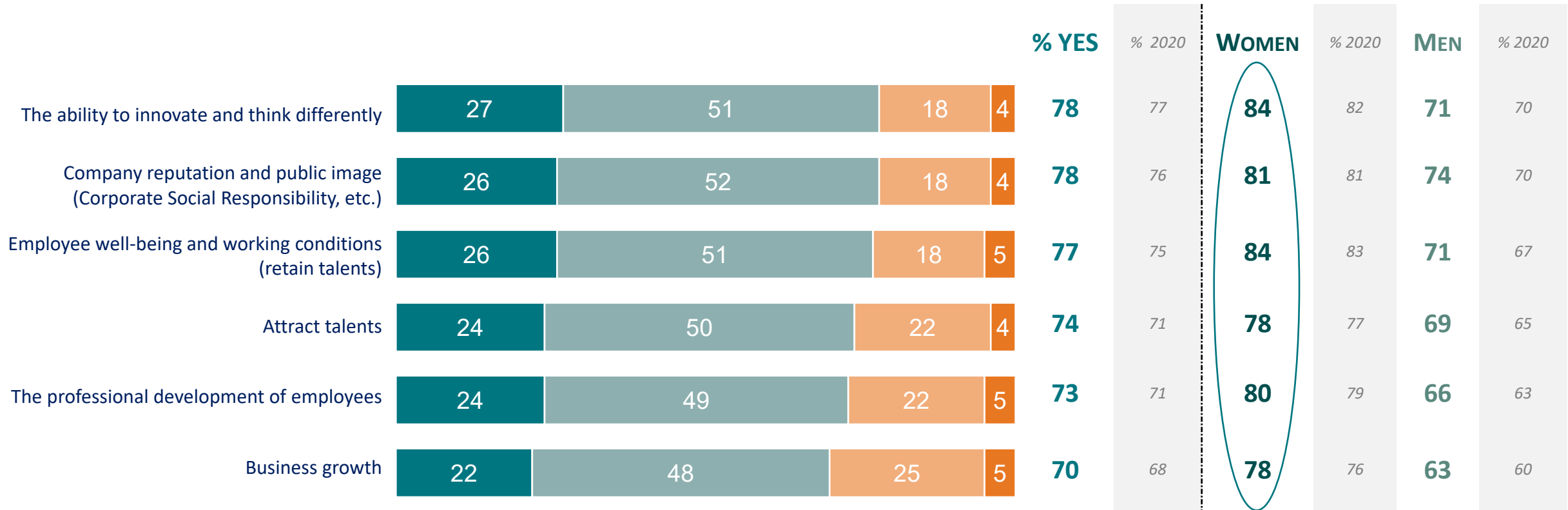
If women had the same opportunities as men, do you think this would have consequences on :

MOREOVER, A MAJORITY OF PEOPLE ARE CONVINCED A BETTER ACCESS OF WOMEN TO SENIOR MANAGEMENT POSITIONS WOULD HAVE POSITIVE OUTCOMES



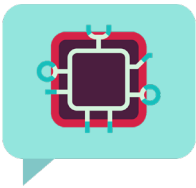
ALL COUNTRIES

■ Yes, a lot
 ■ Yes, a little
 ■ No, not really
 ■ No, not at all



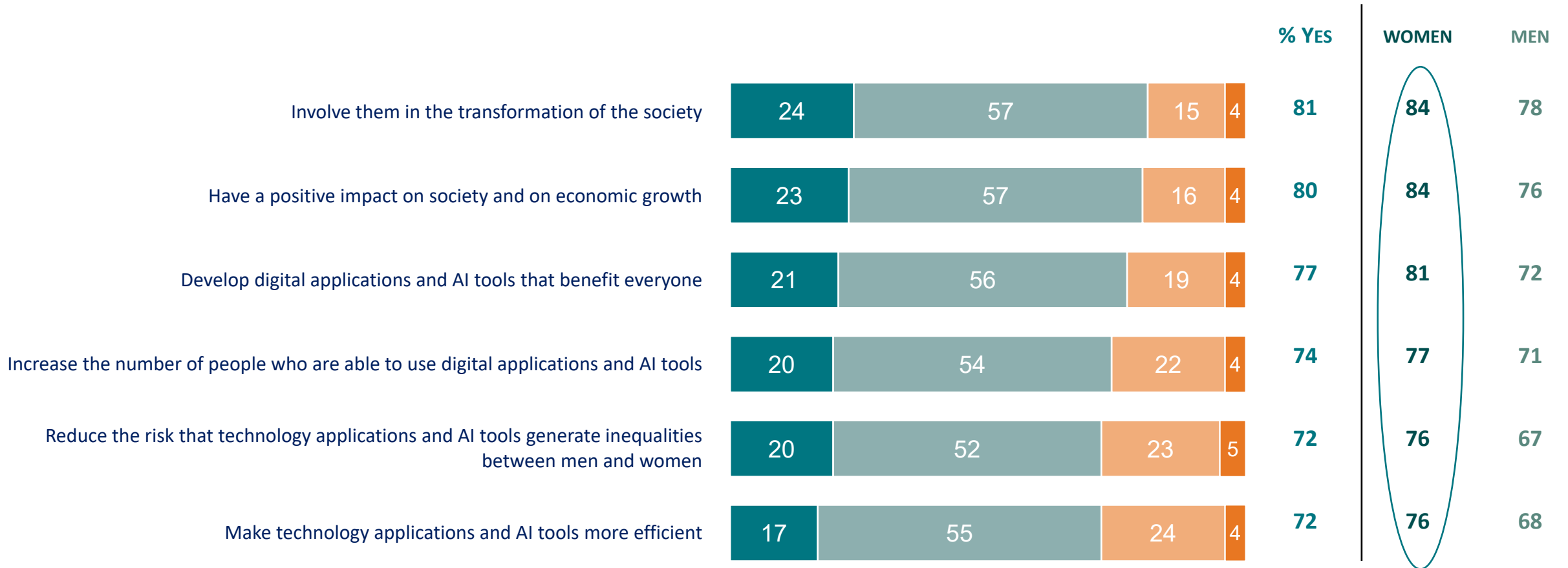
If women had a better access to senior management positions of large companies, do you think that this would have positive consequences on:

A MAJORITY OF PEOPLE ALSO BELIEVE A BETTER ACCESS OF WOMEN TO JOBS IN STEM WOULD BE BENEFICIAL IN MANY WAYS



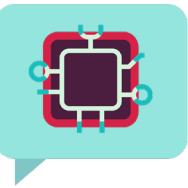
ALL COUNTRIES

■ Yes, certainly
 ■ Yes, probably
 ■ No, probably not
 ■ No, certainly not



If women had a better access to jobs in STEM (science, technology, engineering and mathematics) companies and in particular in AI (artificial intelligence) businesses, do you think this would help to:

AGAIN, ITALIANS ARE AMONG THE MOST CONVINCED THIS WOULD HAVE A STRONG POSITIVE IMPACT



TOTAL POPULATION (MEN & WOMEN)

| | % Yes | ALL | EUROPE | France | Germany | UK | Italy | AMERICA | Canada | US | Japan |
|---|-------|-----|--------|--------|---------|----|-------|---------|--------|----|-------|
| Involve them in the transformation of the society | | 81 | 82 | 80 | 81 | 77 | 88 | 81 | 81 | 82 | 78 |
| Have a positive impact on society and on economic growth | | 80 | 79 | 75 | 77 | 75 | 88 | 83 | 81 | 84 | 81 |
| Develop digital applications and AI tools that benefit everyone | | 77 | 76 | 75 | 73 | 72 | 82 | 69 | 68 | 80 | 78 |
| Increase the number of people who are able to use digital applications and AI tools | | 74 | 73 | 71 | 70 | 68 | 82 | 76 | 75 | 77 | 77 |
| Make technology applications and AI tools more efficient | | 72 | 69 | 68 | 67 | 62 | 80 | 75 | 72 | 78 | 76 |
| Reduce the risk that technology applications and AI tools generate inequalities between men and women | | 72 | 73 | 72 | 70 | 70 | 79 | 73 | 72 | 75 | 65 |

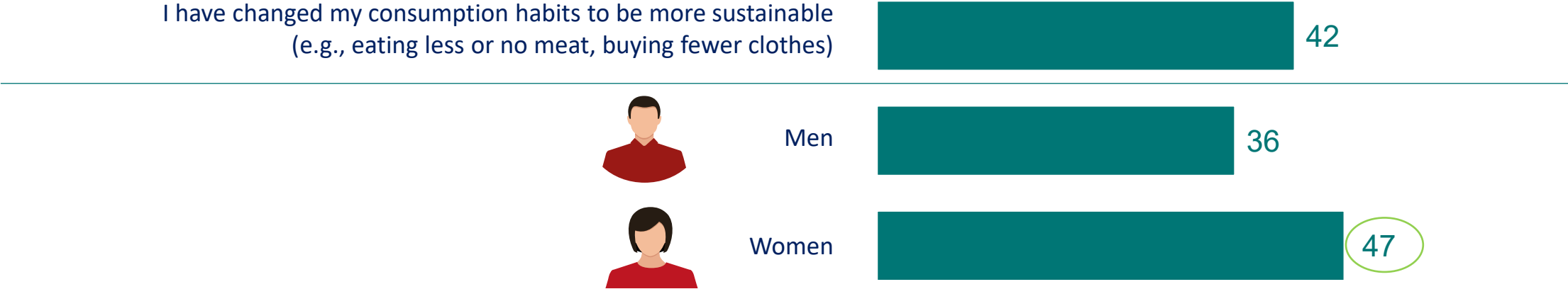
If women had a better access to jobs in STEM (science, technology, engineering and mathematics) companies and in particular in AI (artificial intelligence) businesses, do you think this would help to:

WOMEN HAVE MORE OFTEN THAN MEN CHANGED THEIR CONSUMPTION HABITS TO BE MORE SUSTAINABLE



ALL COUNTRIES

Only 32% agree with the extent that women are doing more than others to promote action against climate change, yet ...



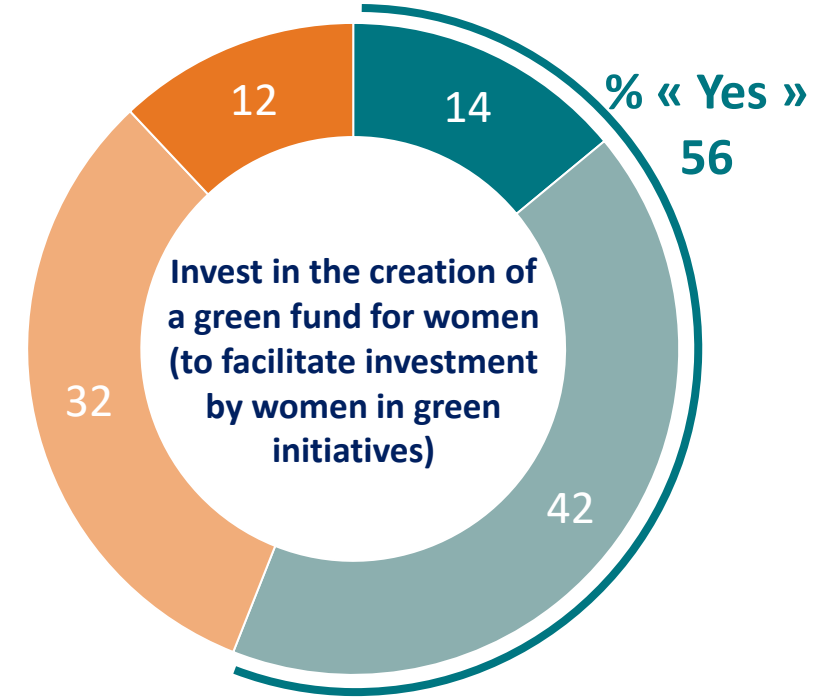
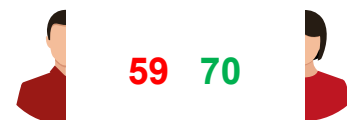
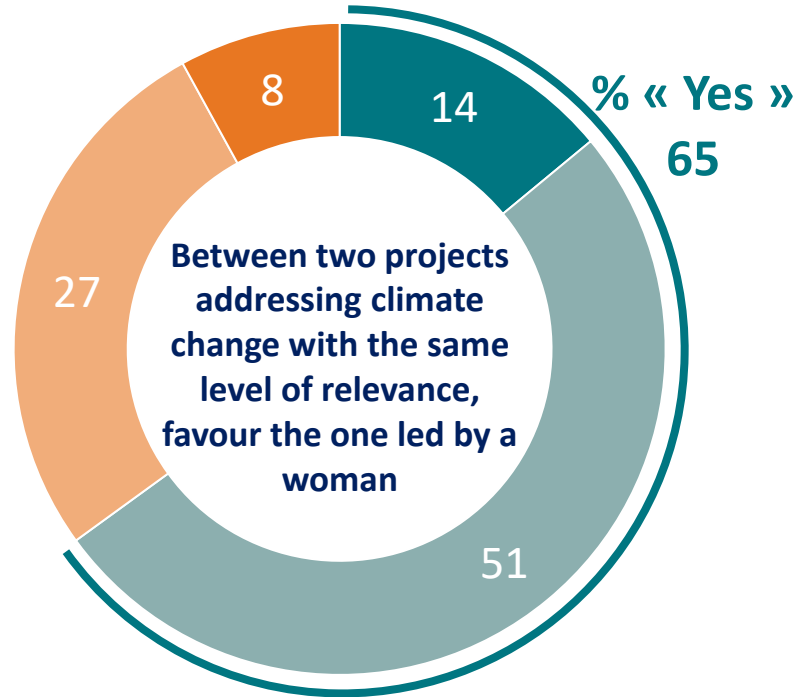
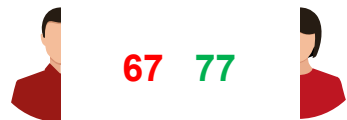
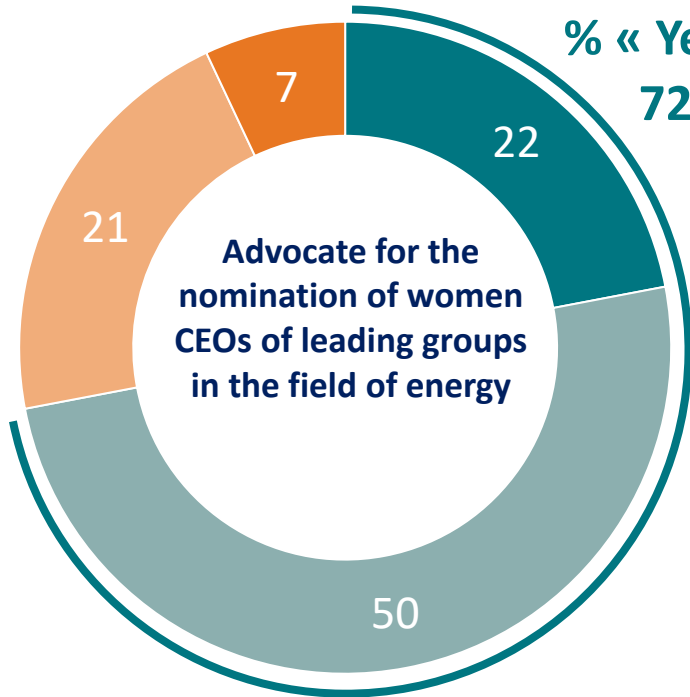
Please select all of the statements below that apply to you

G7 POPULATIONS ARE WILLING TO SUPPORT GREEN INITIATIVES LED BY WOMEN



ALL COUNTRIES

■ Yes, certainly
 ■ Yes, probably
 ■ No, probably not
 ■ No, certainly not



To fight climate change, are you willing to?

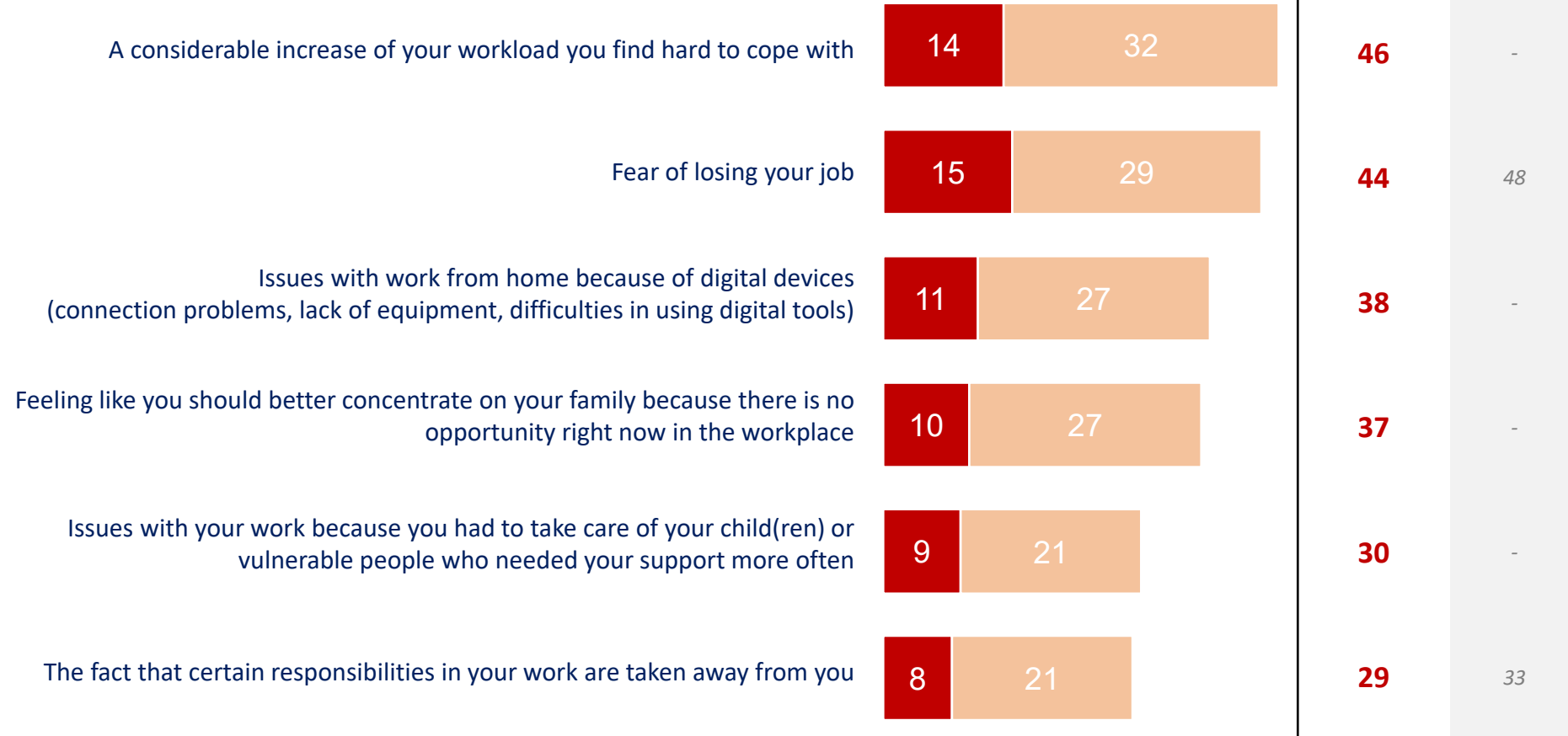
APPENDIX

IN THE WORKPLACE, A SIGNIFICANT PROPORTION OF THE G7 POPULATION EXPERIENCED STRONG DIFFICULTIES



**ALL COUNTRIES
WOMEN & MEN
WORKING**

■ Yes, a lot ■ Yes, in part

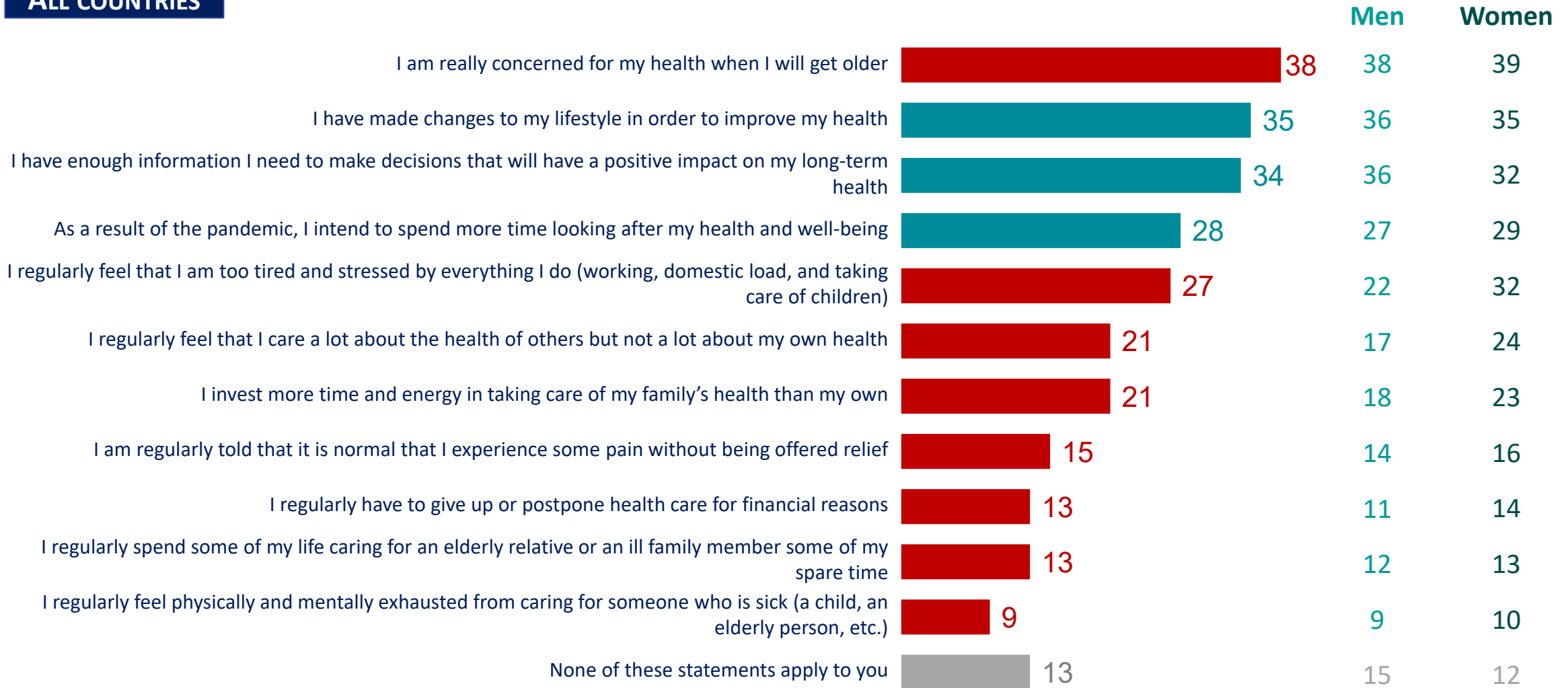


Since the beginning of the pandemic, have you experienced any of the following situations because of its consequences? (asked to people working)

OPINION ON ONE'S HEALTH (FULL LIST OF ITEMS)



ALL COUNTRIES



Please select all of the statements below that apply to you

OPINION ON ONE'S HEALTH (FULL LIST OF ITEMS BY COUNTRY)



TOTAL POPULATION (MEN & WOMEN)

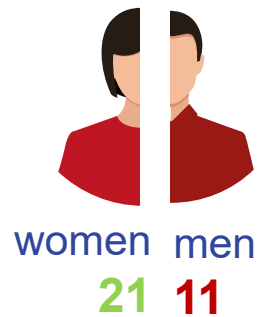
| | % | ALL | EUROPE | France | Germany | UK | Italy | AMERICA | Canada | US | Japan |
|--|---|-----|--------|--------|---------|----|-------|---------|--------|----|-------|
| I am really concerned for my health when I will get older | | 38 | 33 | 33 | 31 | 36 | 30 | 42 | 42 | 43 | 54 |
| I have made changes to my lifestyle in order to improve my health | | 35 | 34 | 29 | 33 | 38 | 34 | 46 | 48 | 43 | 22 |
| I have enough information I need to make decisions that will have a positive impact on my long-term health | | 34 | 33 | 26 | 35 | 39 | 30 | 44 | 44 | 44 | 18 |
| As a result of the pandemic, I intend to spend more time looking after my health and well-being | | 28 | 27 | 26 | 21 | 30 | 31 | 30 | 32 | 28 | 29 |
| I regularly feel that I am too tired and stressed by everything I do (working, domestic load, and taking care of children) | | 27 | 28 | 29 | 29 | 30 | 26 | 30 | 34 | 26 | 18 |
| I regularly feel that I care a lot about the health of others but not a lot about my own health | | 21 | 21 | 22 | 16 | 23 | 25 | 22 | 24 | 21 | 16 |
| I invest more time and energy in taking care of my family's health than my own | | 21 | 20 | 18 | 17 | 20 | 26 | 22 | 21 | 23 | 20 |
| I am regularly told that it is normal that I experience some pain without being offered relief | | 15 | 14 | 15 | 11 | 16 | 14 | 20 | 23 | 18 | 9 |
| I regularly have to give up or postpone health care for financial reasons | | 13 | 12 | 12 | 9 | 8 | 21 | 14 | 15 | 12 | 11 |
| I regularly spend some of my life caring for an elderly relative or an ill family member some of my spare time | | 13 | 12 | 10 | 14 | 13 | 11 | 15 | 13 | 17 | 11 |
| I regularly feel physically and mentally exhausted from caring for someone who is sick (a child, an elderly person, etc.) | | 9 | 10 | 11 | 7 | 10 | 11 | 9 | 10 | 9 | 6 |

Please select all of the statements below that apply to you

INTEREST FOR BUYING PRODUCTS PROVIDED BY WOMEN-OWNED BUSINESSES



“I would buy more products/services provided by women-owned businesses if there was a label/certification that would allow me to easily identify them”



ALL COUNTRIES 16 %

EUROPE 14



14



12



12



20

AMERICA 21



19



23

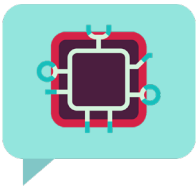
JAPAN



12

Please select all of the statements below that apply to you.

INTEREST FOR STEM



ALL COUNTRIES

■ Strongly agree
 ■ Somewhat agree
 ■ Neither agree nor disagree
 ■ Somewhat disagree
 ■ Strongly disagree

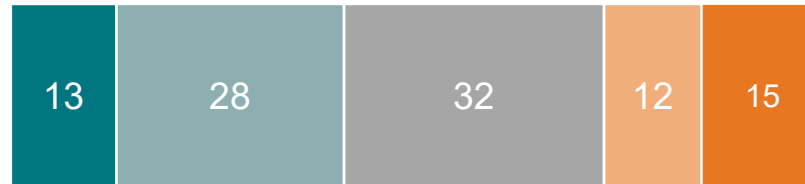
% AGREE MEN WOMEN

I would advise someone who wants to have a positive societal or environmental impact through their work to study STEM subjects



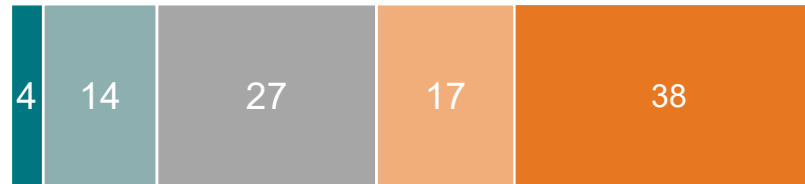
52 **53** **51**

I would be interested in retraining/gaining new skills in science, technology, mathematics and engineering (STEM) if courses were made easily available to me



41 **44** **38**

I am likely to lose my job because of digitization and automation



18 **20** **15**

To what extent do you agree with each of the following statements?

INTEREST FOR STEM (DETAIL BY COUNTRY)



TOTAL POPULATION (MEN & WOMEN)

| | % Agree | ALL | EUROPE | France | Germany | UK | Italy | AMERICA | Canada | US | Japan |
|---|----------------|------------|---------------|--------|---------|----|-------|----------------|--------|----|-------|
| I would advise someone who wants to have a positive societal or environmental impact through their work to study STEM subjects | 52 | | 50 | 41 | 47 | 58 | 57 | 58 | 56 | 61 | 43 |
| I would be interested in retraining/gaining new skills in science, technology, mathematics and engineering (STEM) if courses were made easily available to me | 41 | | 38 | 33 | 27 | 38 | 55 | 42 | 40 | 43 | 50 |
| I am likely to lose my job because of digitisation and automation | 18 | | 14 | 15 | 12 | 13 | 15 | 14 | 12 | 15 | 42 |

To what extent do you agree with each of the following statements?

CLIMATE ACTION

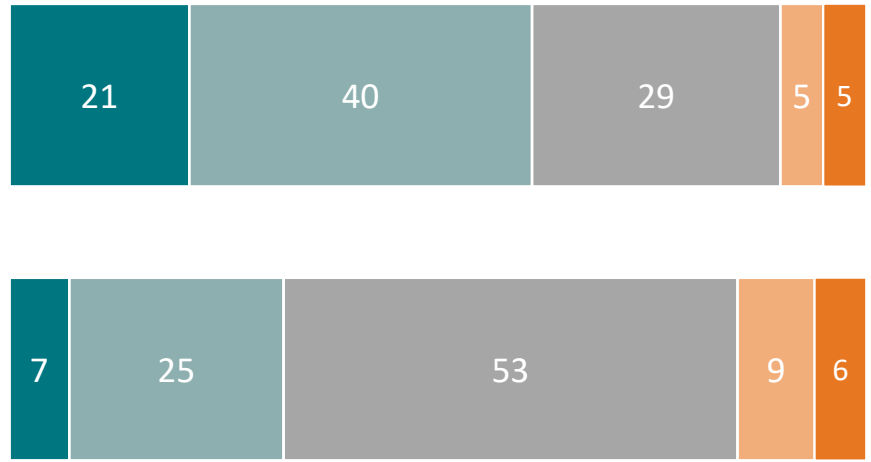


ALL COUNTRIES

■ Strongly agree
 ■ Somewhat agree
 ■ Neither agree nor disagree
 ■ Somewhat disagree
 ■ Strongly disagree

The more institutions (e.g., businesses, governments) take action to address climate change, the better I feel about them

Women are doing more than others in their daily lives to promote action against climate change



To what extent do you agree with the following statements?

GREEN INITIATIVES AND WOMEN (DETAIL BY COUNTRY)



TOTAL POPULATION (MEN & WOMEN)

| % Yes | ALL | EUROPE | France | Germany | UK | Italy | AMERICA | Canada | US | Japan |
|--|--|--------|--------|---------|----|-------|---------|--------|----|-------|
| | Advocate for the nomination of women CEOs of leading groups in the field of energy | 72 | 74 | 73 | 76 | 64 | 83 | 70 | 71 | 69 |
| Between two projects addressing climate change with the same level of relevance, favour the one led by a woman | 65 | 66 | 65 | 64 | 54 | 80 | 64 | 64 | 63 | 61 |
| Invest in the creation of a green fund for women (to facilitate investment by women in green initiatives) | 56 | 55 | 54 | 48 | 47 | 72 | 58 | 56 | 60 | 54 |

To fight climate change, are you willing to?

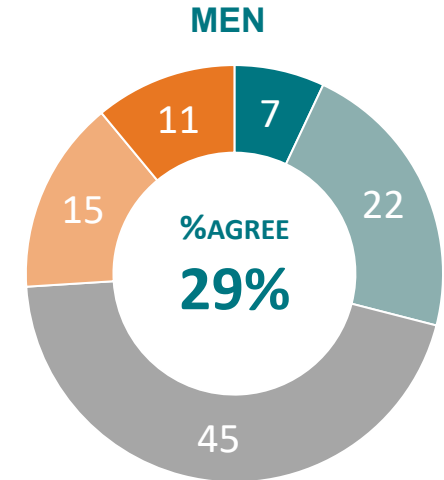
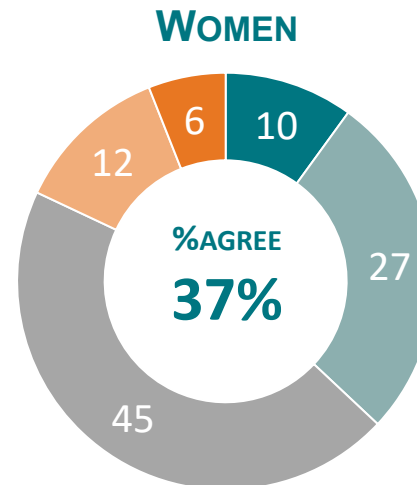
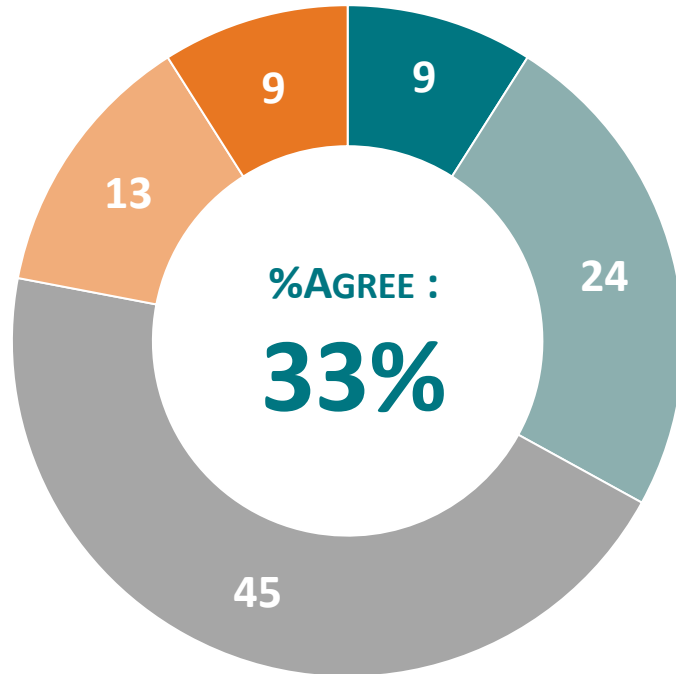
AWARENESS OF DISPROPORTIONATE IMPACT OF CLIMATE CHANGE ON WOMEN



ALL COUNTRIES

Strongly agree Somewhat agree Neither agree nor disagree Somewhat disagree Strongly disagree

“Globally, women are likely to be more negatively affected by the impacts of climate change than other people (because they work more in agriculture, because they are more involved in fetching water, etc.)”

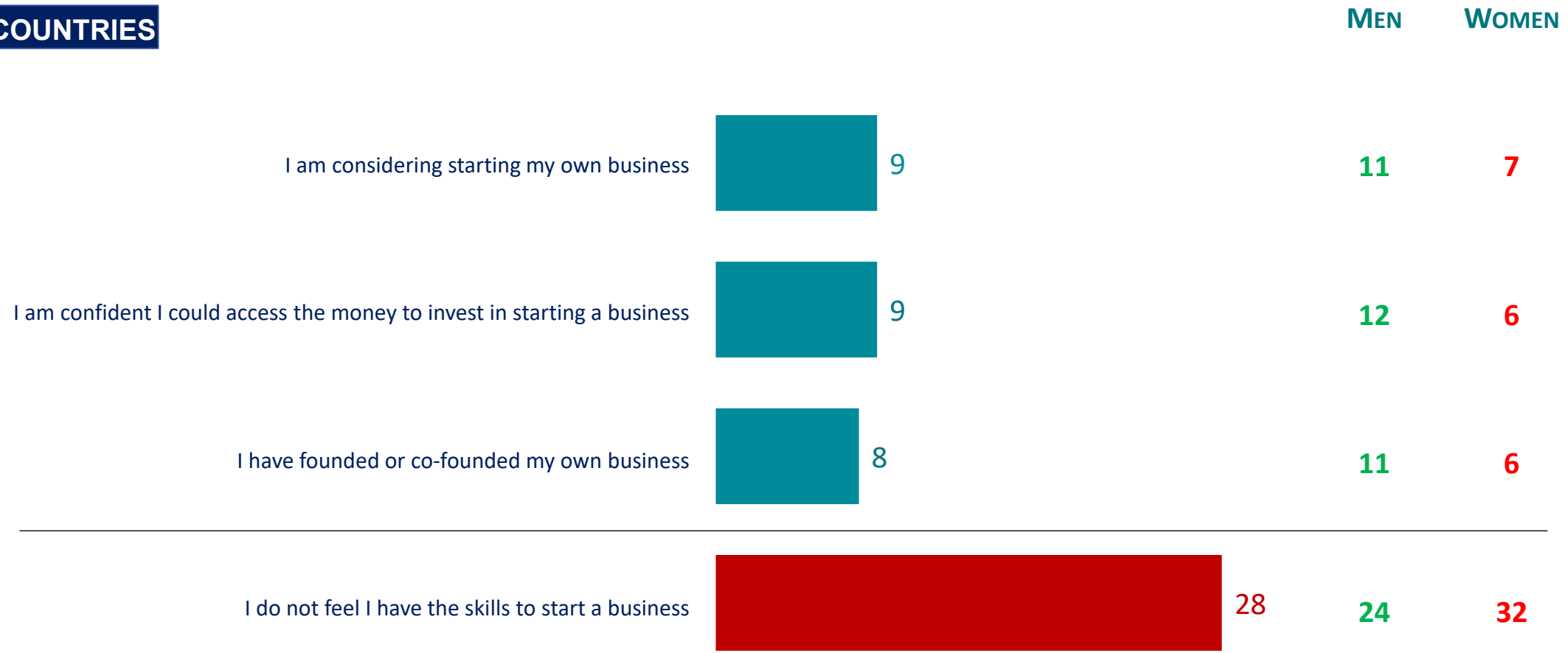


To what extent do you agree with the following statements?

CREATING A BUSINESS



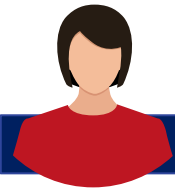
ALL COUNTRIES



Please select all of the statements below that apply to you.



WOMEN CREATING THEIR BUSINESS (DETAIL BY COUNTRY)



WOMEN

| | % | Women | EUROPE | France | Germany | UK | Italy | AMERICA | Canada | US | Japan |
|--|---|-------|--------|--------|---------|----|-------|---------|--------|----|-------|
| I am considering starting my own business | | 7 | 7 | 4 | 6 | 9 | 9 | 9 | 12 | 6 | 2 |
| I am confident I could access the money to invest in starting a business | | 6 | 5 | 4 | 5 | 7 | 5 | 9 | 8 | 9 | 3 |
| I have founded or co-founded my own business | | 6 | 6 | 5 | 5 | 10 | 4 | 8 | 7 | 8 | 5 |
| I do not feel I have the skills to start a business | | 32 | 31 | 32 | 36 | 31 | 24 | 28 | 33 | 24 | 44 |

Please select all of the statements below that apply to you.

CONSEQUENCES OF A BETTER ACCESS OF WOMEN TO SENIOR MANAGEMENT POSITIONS (DETAIL BY COUNTRY)



TOTAL POPULATION (MEN & WOMEN)

| | % Yes | ALL | EUROPE | France | Germany | UK | Italy | AMERICA | Canada | US | Japan |
|---|-------|-----|--------|--------|---------|----|-------|---------|--------|----|-------|
| The ability to innovate and think differently | 78 | 78 | 76 | 78 | 73 | 71 | 85 | 80 | 81 | 80 | 79 |
| Company reputation and public image (Corporate Social Responsibility, etc.) | 78 | 78 | 77 | 76 | 77 | 72 | 81 | 78 | 78 | 78 | 83 |
| Employee well-being and working conditions (retain talents) | 77 | 77 | 77 | 75 | 77 | 75 | 81 | 76 | 76 | 76 | 82 |
| Attract talents | 74 | 74 | 71 | 70 | 68 | 69 | 76 | 76 | 74 | 78 | 80 |
| The professional development of employees | 73 | 73 | 73 | 71 | 72 | 69 | 78 | 75 | 75 | 75 | 73 |
| Business growth | 70 | 70 | 67 | 65 | 66 | 60 | 78 | 71 | 69 | 72 | 82 |

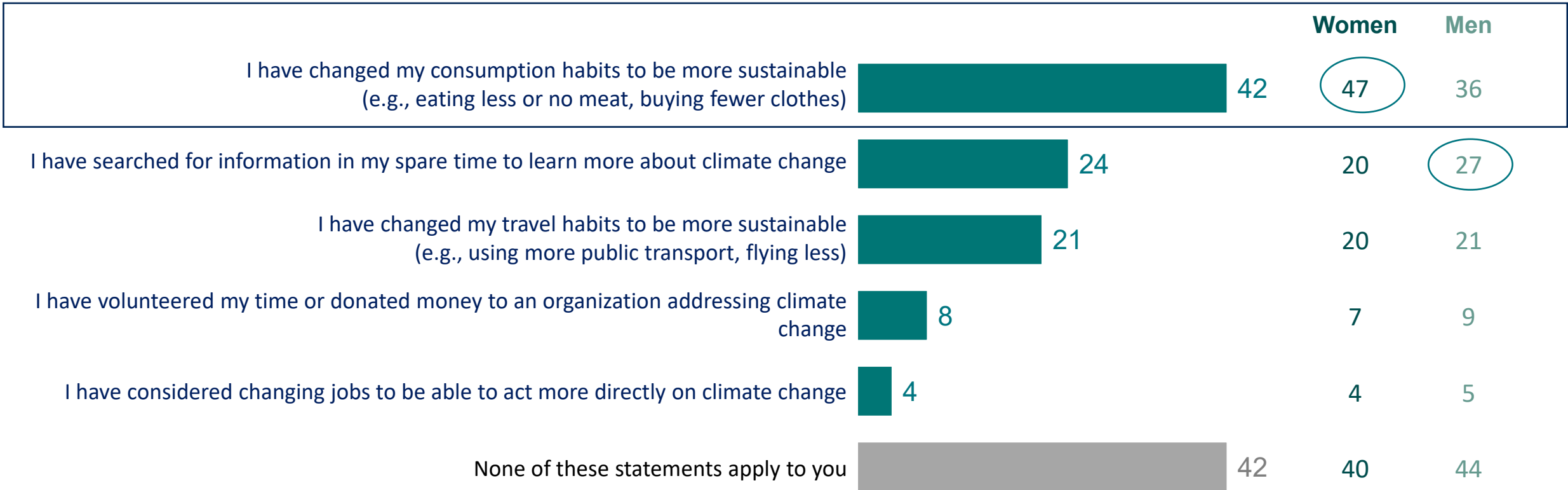
If women had a better access to senior management positions of large companies, do you think that this would have positive consequences on:

WOMEN HAVE MORE OFTEN THAN MEN CHANGED THEIR CONSUMPTION HABITS TO BE MORE SUSTAINABLE



ALL COUNTRIES

ONLY **32%** AGREE WITH THE EXTENT THAT WOMEN ARE DOING MORE THAN OTHERS TO PROMOTE ACTION AGAINST CLIMATE CHANGE, YET ...



Please select all of the statements below that apply to you

OUR COMMITMENT



Professional codes, quality certification and data protection

Ipsos is a member of the following French and European professional Market Research and Opinion bodies:

- SYNTEC (www.syntec-etudes.com), French Union of Market Research companies
- ESOMAR (www.esomar.org) the European Society for Opinion and Market Research

Ipsos France is consequently committed to applying **the ICC/ESOMAR code** for opinion and market research. This code of conduct defines the ethical rules for Market Research professionals and sets out the protection offered to participants.

Ipsos France complies with the applicable laws. Ipsos has appointed a Data Protection Officer and has implemented a compliance plan to GDPR (Règlement (UE) 2016/679). For more information about the Ipsos Data Protection & Privacy Policy relative to personal data : <https://www.ipsos.com/en/privacy-data-protection>

The retention period applicable to interviewees' personal data be as follows, unless otherwise agreed with the client :



- 12 months upon Ad Hoc Study completion
- 3 years upon each wave completion of a Continuous Study.

Ipsos France has received ISO 20252: 2012 certification by AFNOR CERTIFICATION



- This document was drawn up in accordance with these international Codes and Quality standards. The technical elements relative to the execution of the project are described in methodological approach or survey overview in the report.
- This project was carried out in accordance with these international Codes and Quality standards

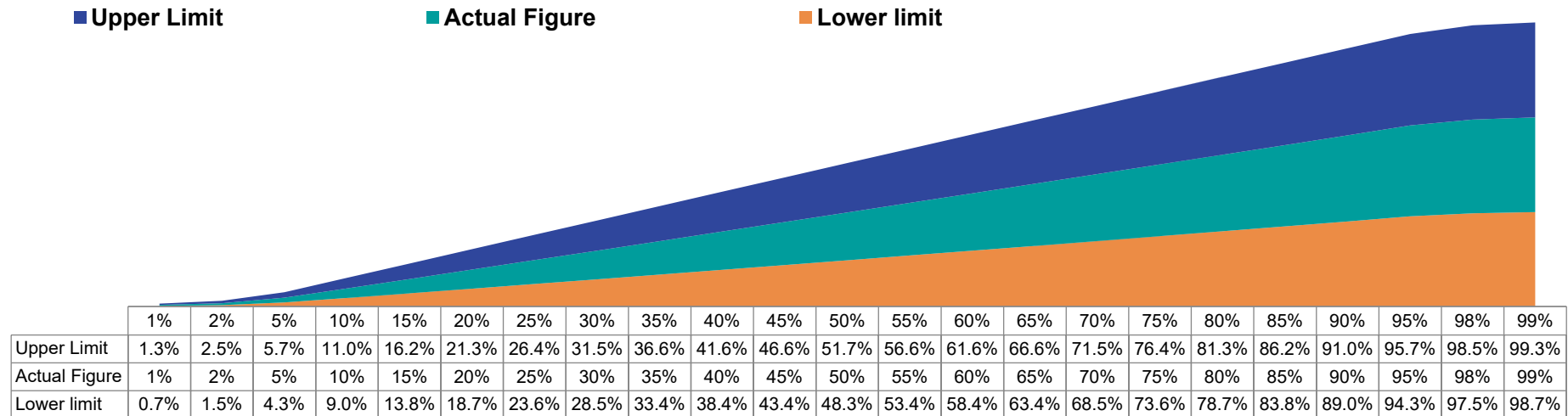


RELIABILITY OF RESULTS SPREADSHEET

In this instance, with regard to this study:

- Confidence interval: **95%**
- Size of sample: **3500**

The proportions observed are between :



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).

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

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.