

GLOBAL HAPPINESS 2022

What makes people happy in the age of COVID-19

A 30-country Global Advisor survey
April 2022

For more information: <https://www.ipsos.com/en/global-happiness-survey-march-2022>

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GAME CHANGERS



LEVEL OF HAPPINESS BY COUNTRY

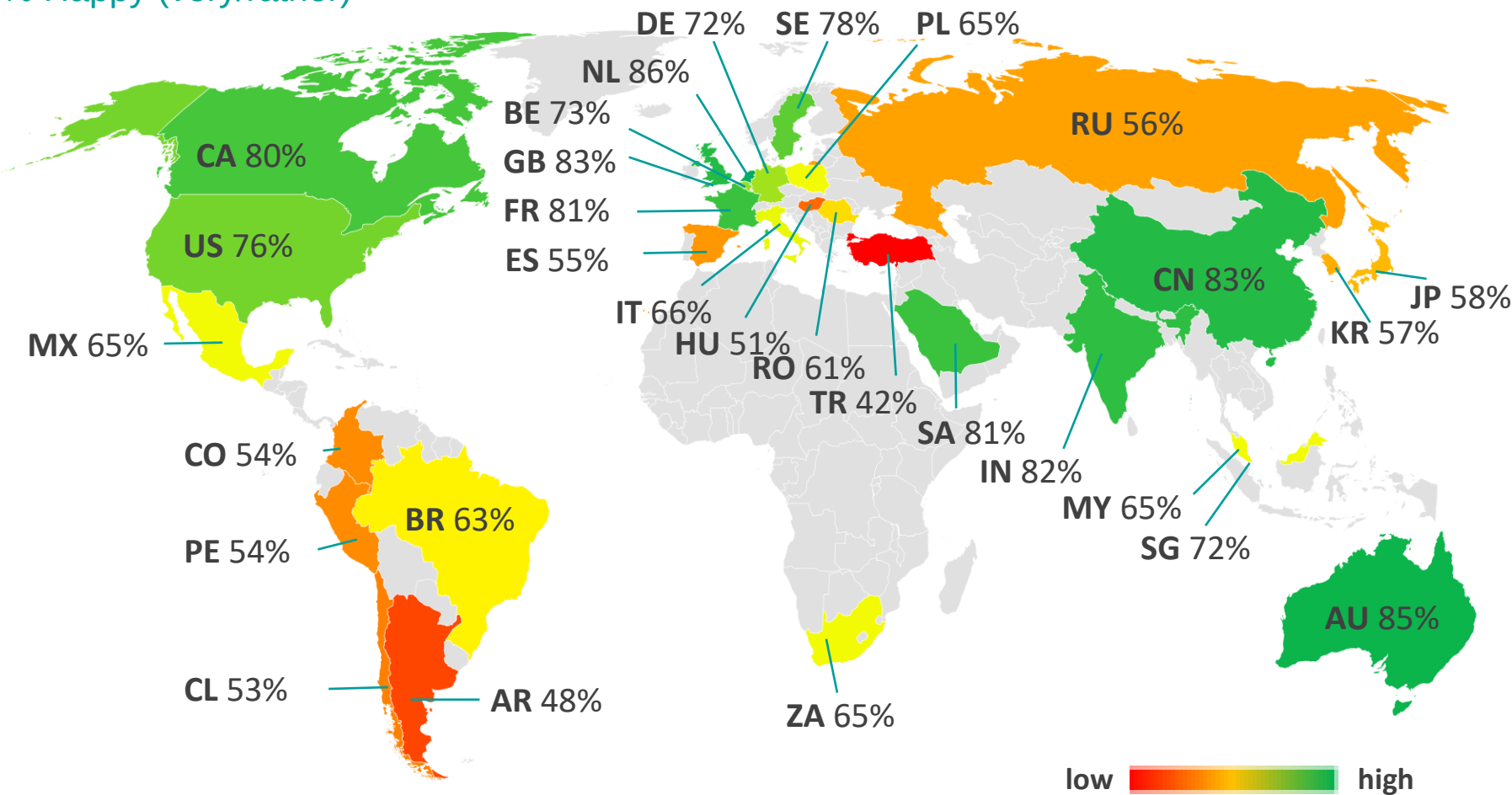
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HAPPINESS LEVEL BY COUNTRY

Q. Taking all things together, would you say you are: very happy, rather happy, not very happy, not happy at all?

- Among 30 countries surveyed, happiness is most prevalent in the Netherlands and Australia, with 86% and 85%, respectively, describing themselves as “very” or “rather” happy.
- China and Great Britain (both 83%), India (82%), France and Saudi Arabia (both 81%), and Canada (80%) follow.
- Happiness is least prevalent in Turkey (42%) and Argentina (48%).

% Happy (very/rather)

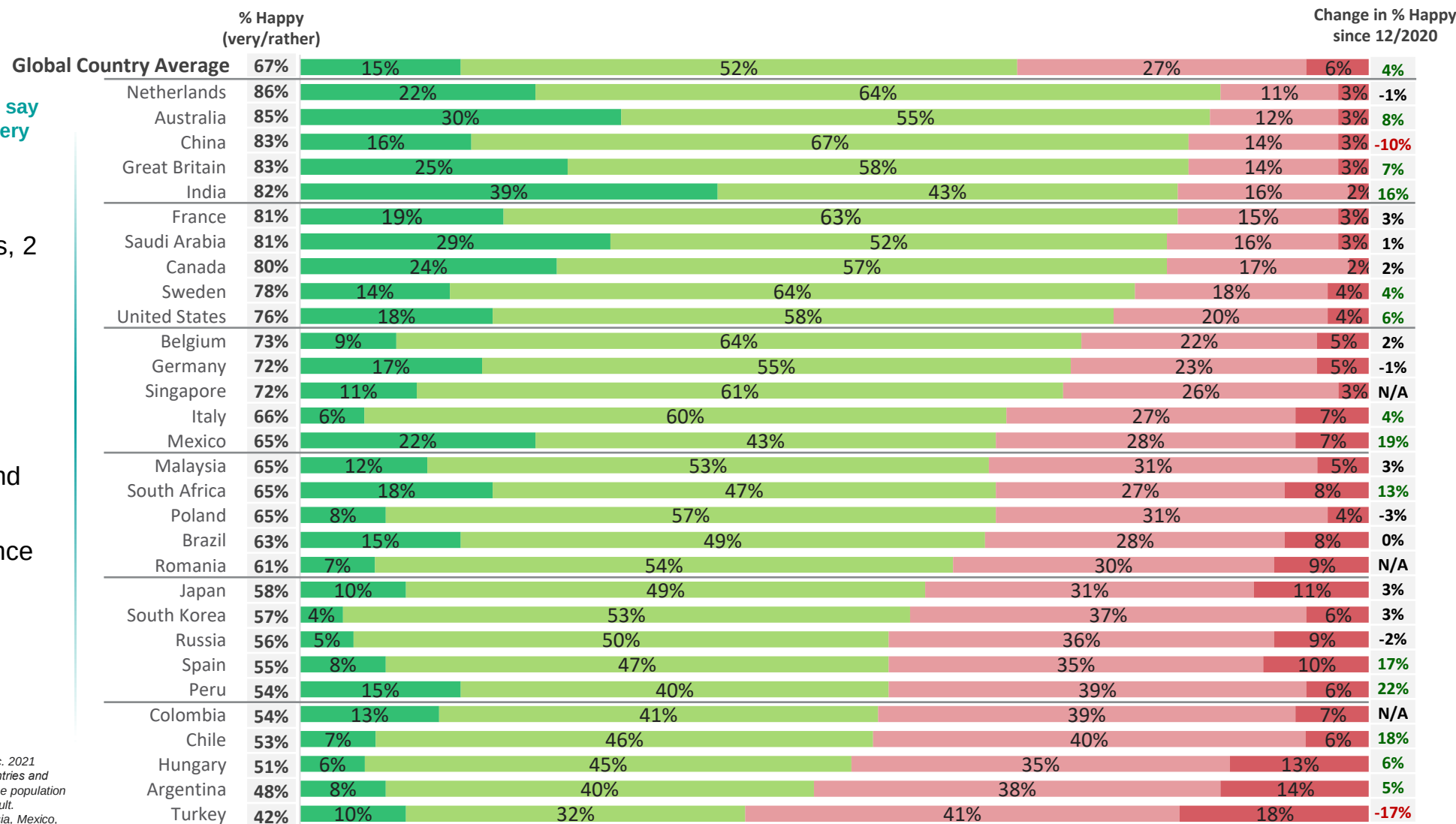


Base: ca. 500 or 1,000 adults under 75 in each country, Nov.–Dec. 2021
Online samples in Brazil, Chile, mainland China, Colombia, India, Malaysia, Mexico, Peru, Russia, Saudi Arabia, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population.

HAPPINESS LEVEL BY COUNTRY

Q. Taking all things together, would you say you are: very happy, rather happy, not very happy, not happy at all?

- On average across 30 countries, 2 in 3 adults (67%) report being happy: 15% very much so and 52% rather so.
- Countries with the highest proportion of adults considering themselves as very happy are India (39%), Australia (30%), and Saudi Arabia (29%).
- Those with the highest prevalence of adults saying they are not happy at all are Turkey (18%), Argentina (14%), and Hungary (13%).



Base: 20,504 online adults under age 75 across 30 countries, Nov.–Dec. 2021
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Very happy Rather happy Not very happy Not happy at all

CHANGE IN HAPPINESS LEVEL BY COUNTRY

Q. Taking all things together, would you say you are: very happy, rather happy, not very happy, not happy at all?

- Compared to mid-2020, the prevalence of happiness globally has increased by four points.
 - It has increased by five points or more in 11 countries, particularly in Peru (+22), Mexico (+19), Chile (+18), and Spain (+17).
 - It has decreased by five points or more in only two countries, Turkey (-17) and China (-10).
- Compared to early 2019 (one year before the pandemic started), it has increased by three points globally.
 - It is up by five points or more in nine countries, including Argentina, Malaysia, and Russia.
 - It is down by five points or more in four countries, including Poland, and Turkey.

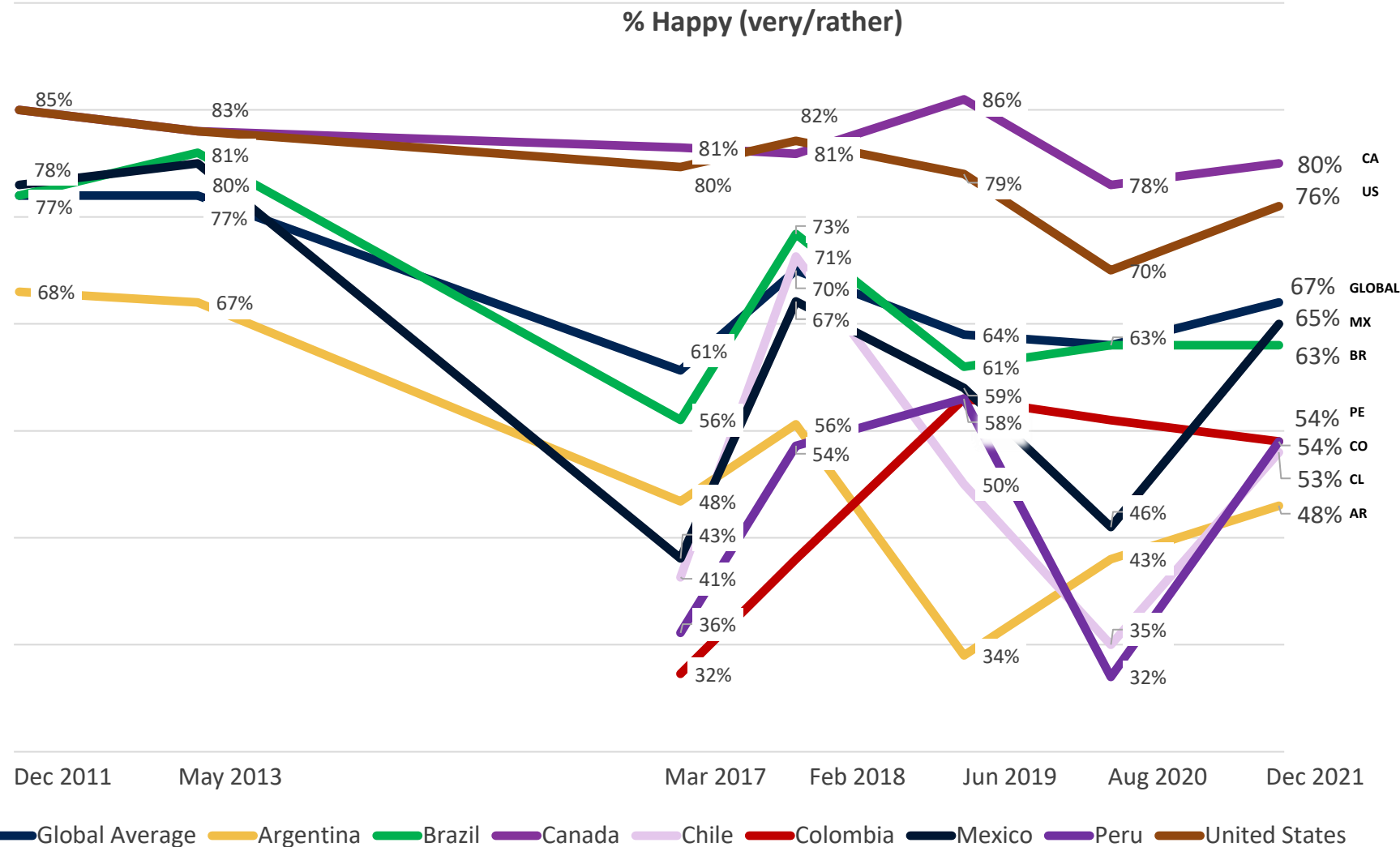
% Happy (very/rather)	Dec 2011	May 2013	Mar 2017	Feb 2018	Jun 2019	Aug 2020	Dec 2021	Change since Jun 2019	Change since Aug 2020
Global Country Average	77%	77%	61%	70%	64%	63%	67%	3%	4%
Netherlands						87%	86%	N/A	-1%
Australia	86%	84%	72%	82%	86%	77%	85%	-1%	8%
China	78%	79%	84%	85%	82%	93%	83%	1%	-10%
Great Britain	79%	81%	71%	78%	82%	76%	83%	1%	7%
India	89%	87%	78%	83%	77%	66%	82%	5%	16%
Saudi Arabia	83%	74%	75%	76%	78%	80%	81%	3%	1%
France	84%	81%	68%	77%	80%	78%	81%	1%	3%
Canada	85%	83%	81%	81%	86%	78%	80%	-6%	2%
Sweden	80%	87%	74%	81%	75%	74%	78%	3%	4%
United States	85%	83%	80%	82%	79%	70%	76%	-3%	6%
Belgium	80%	80%	71%	80%	73%	71%	73%	0%	2%
Germany	76%	77%	71%	68%	78%	73%	72%	-6%	-1%
Singapore							72%	N/A	N/A
Italy	73%	68%	53%	60%	57%	62%	66%	9%	4%
Poland	75%	72%	66%	71%	71%	68%	65%	-6%	-3%
Malaysia				69%	52%	62%	65%	13%	3%
South Africa	79%	83%	59%	72%	59%	52%	65%	6%	13%
Mexico	78%	80%	43%	67%	59%	46%	65%	6%	19%
Brazil	77%	81%	56%	73%	61%	63%	63%	2%	0%
Romania							61%	N/A	N/A
Japan	70%	69%	62%	60%	52%	55%	58%	6%	3%
South Korea	71%	62%	48%	57%	54%	54%	57%	3%	3%
Russia	61%	62%	56%	62%	47%	58%	56%	9%	-2%
Spain	63%	57%	43%	53%	46%	38%	55%	9%	17%
Peru			36%	54%	58%	32%	54%	-4%	22%
Colombia			32%		58%		54%	N/A	N/A
Chile			41%	71%	50%	35%	53%	3%	18%
Hungary	43%	52%	48%	48%	50%	45%	51%	1%	6%
Argentina	68%	67%	48%	56%	34%	43%	48%	14%	5%
Turkey	89%	83%	58%	60%	53%	59%	42%	-11%	-17%

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 The samples in Brazil, Chile, China (mainland), Colombia, India, Malaysia, Mexico, Peru, Romania, Russia, Saudi Arabia, Singapore, South Africa, and Turkey are more urban, more educated, and/or more affluent than the general population.

HAPPINESS TRENDS: AMERICAS

Q. Taking all things together, would you say you are: very happy, rather happy, not very happy, not happy at all?

- Canada and the United States are the two countries in the Americas with the highest proportion of people saying they are very or rather happy.
- Argentina and Chile have the lowest rates of happiness in this region, both lower than the Global average by more than 10 points.
- Most countries in Latin America region have shown a great deal of volatility over the years.

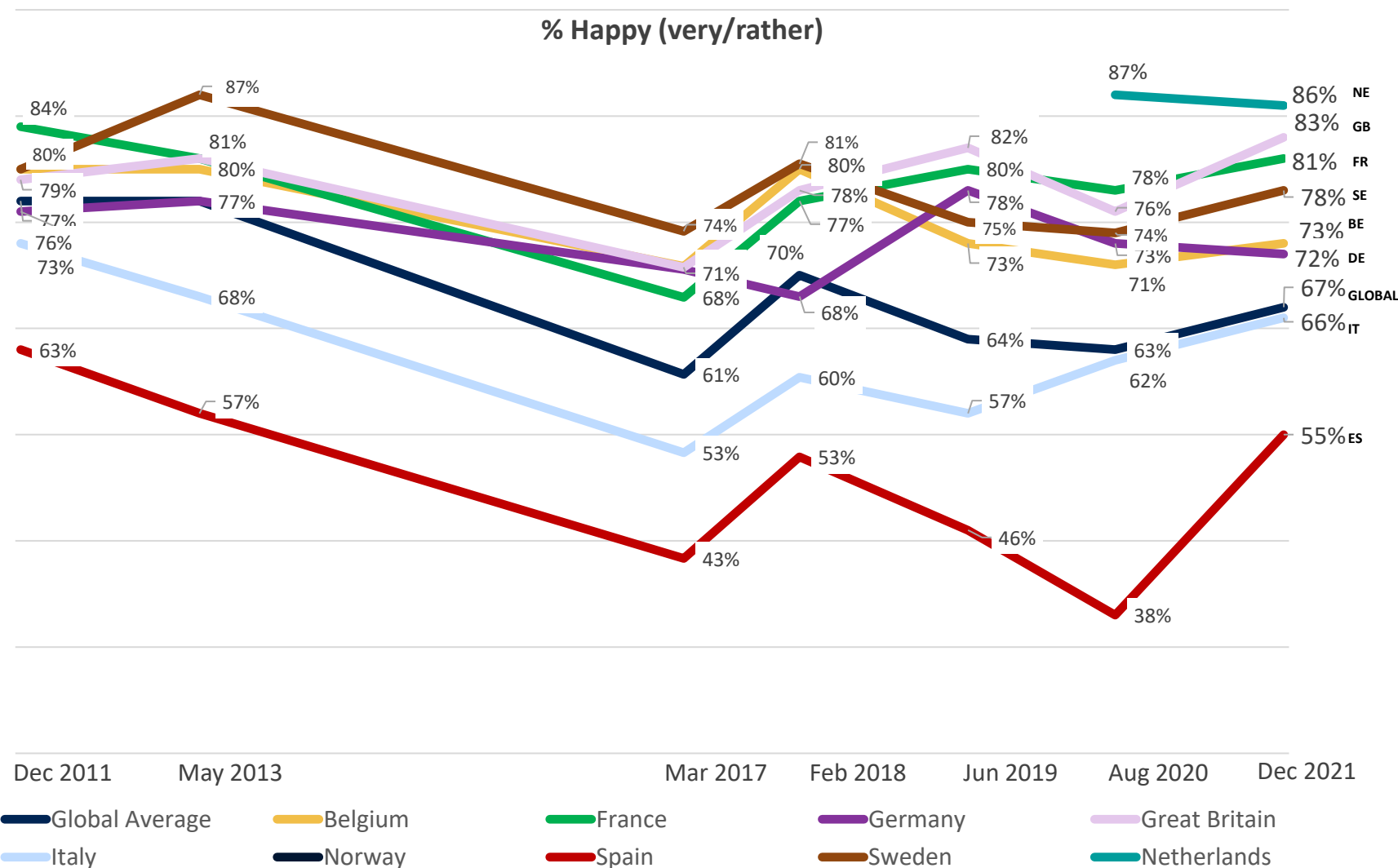


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HAPPINESS TRENDS: WESTERN EUROPE

Q. Taking all things together, would you say you are: very happy, rather happy, not very happy, not happy at all?

- The Netherlands and Great Britain have the highest percentage of adults who consider themselves very or rather happy in 2021, 19 and 16 points higher than the Global average, respectively.
- After a steep decline in 2020, Spain has recovered by 17 points to 55% happy. It remains the country with the lowest percentage of adults who consider themselves very or rather happy in the region.

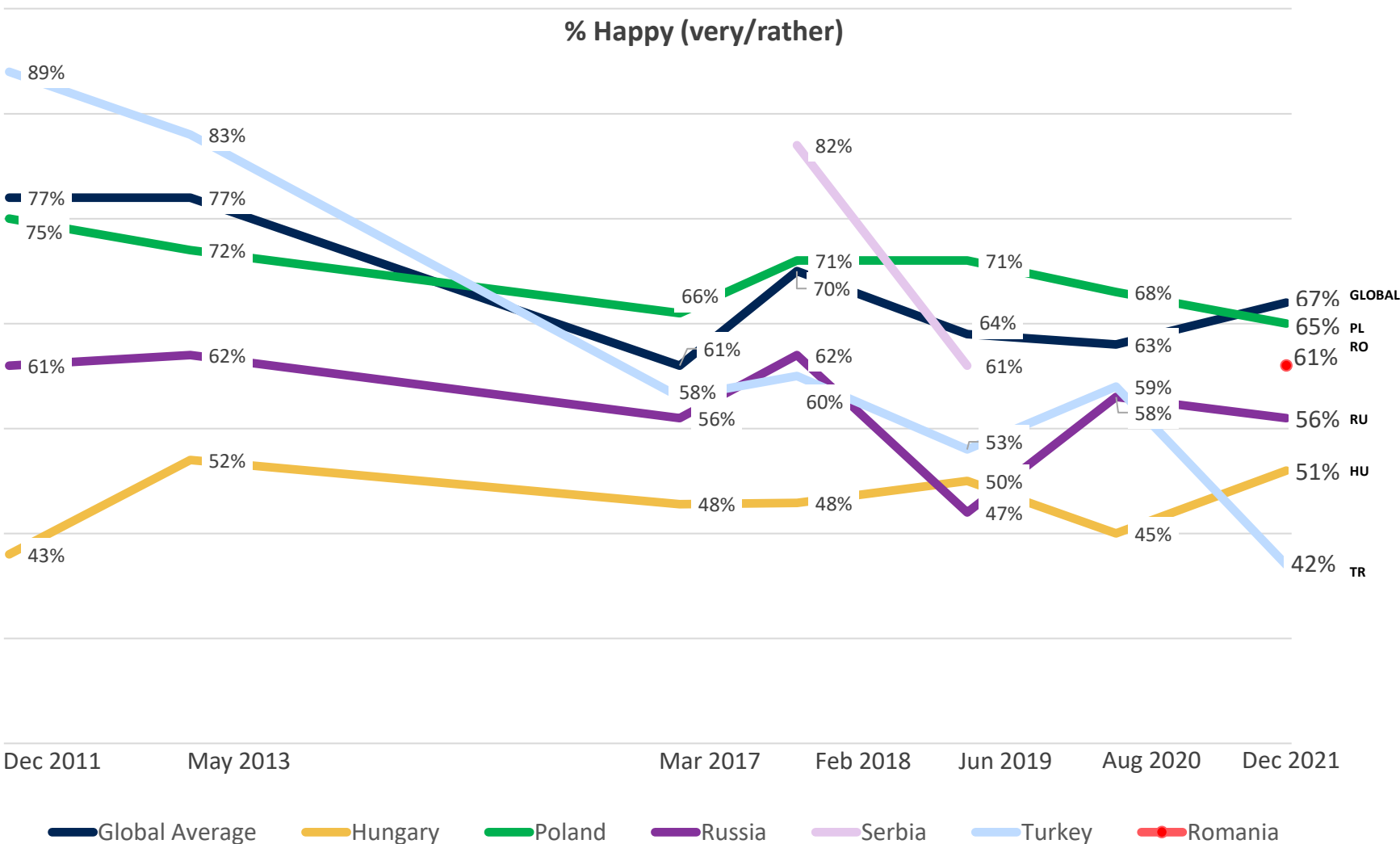


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HAPPINESS TRENDS: CENTRAL/EASTERN EUROPE

Q. Taking all things together, would you say you are: very happy, rather happy, not very happy, not happy at all?

- Turkey shows the steepest decline in happiness over the years: 17 points in the past year, 45 points over 10 years.
- Poland shows a 3-point decline for the second year in a row.
- Hungary experienced a 6-point increase over the last year
- Russia remains stable
- Romania is newly added this year and is one of the countries with the highest happiness levels in the region.



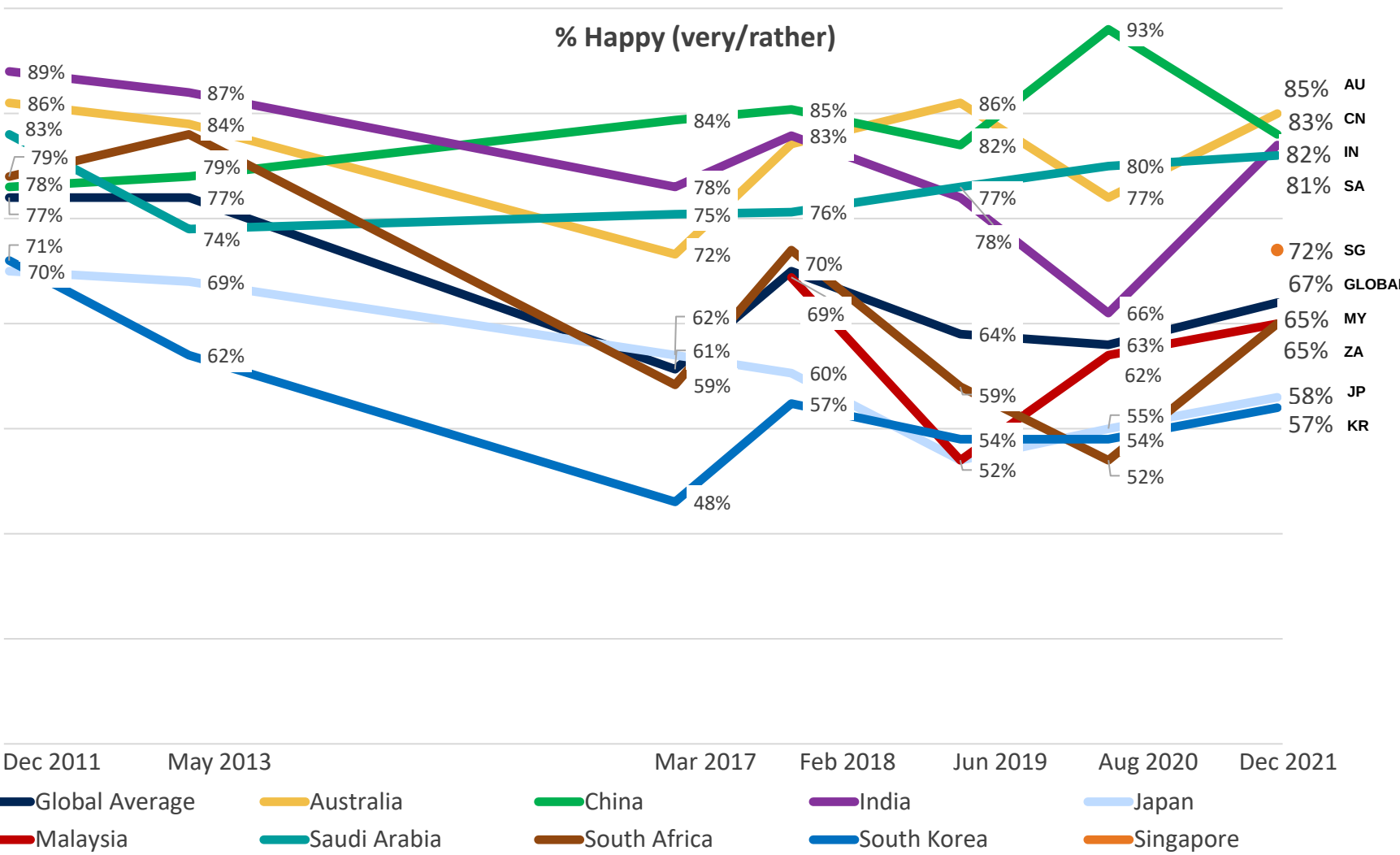
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HAPPINESS TRENDS: ASIA-PACIFIC, SAUDI ARABIA AND SOUTH AFRICA

Q. Taking all things together, would you say you are: very happy, rather happy, not very happy, not happy at all?

- After a sharp increase in China last year, the percentage of adults who consider themselves happy had dropped by 10 points and, on par with previous levels.
- On the contrary, India, South Africa, and Australia who saw sharp decreases between 2019 and 2020 all record large gains this year (+16, +13, and +8 points respectively), also on par with earlier readings.
- Happiness levels are steadier in Japan (+3), South Korea (+3), Malaysia (+2), and Saudi Arabia (+1).



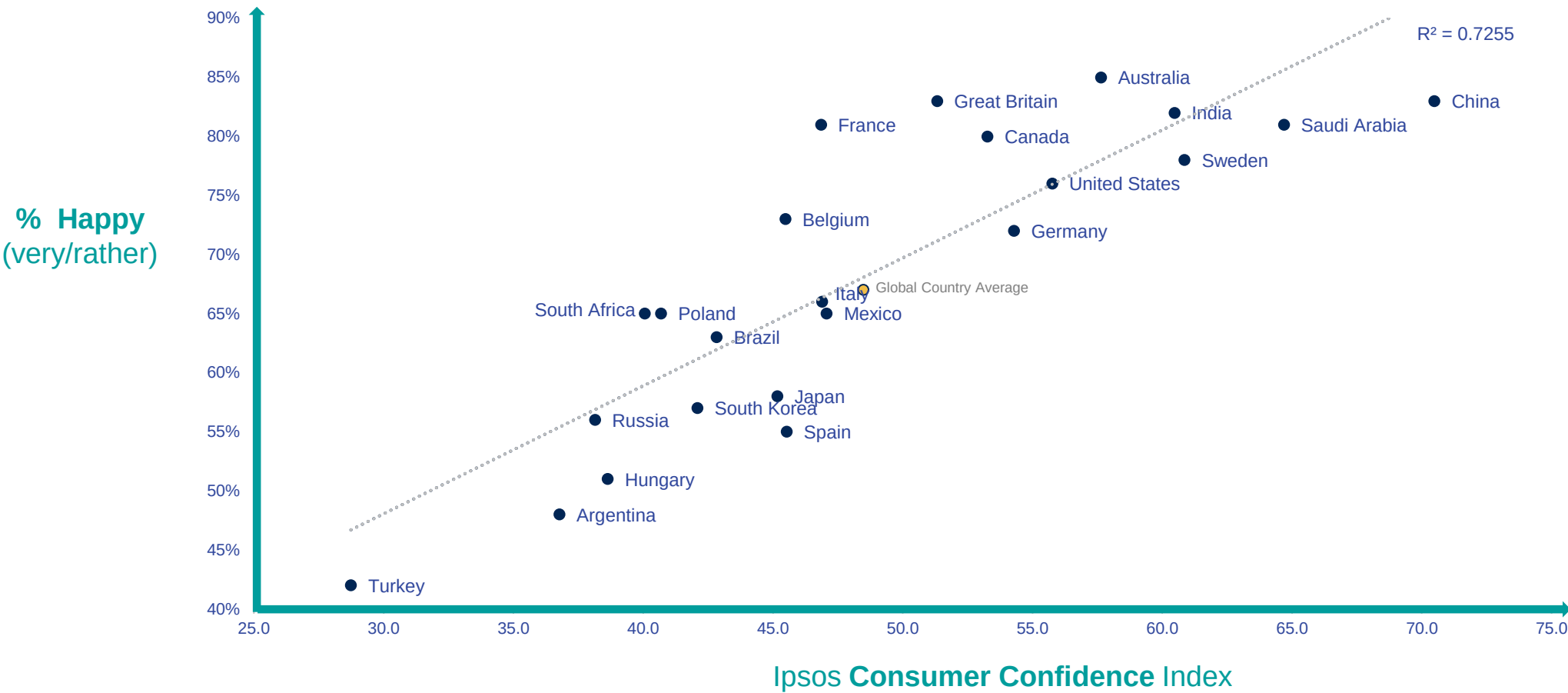
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HAPPINESS VS. CONSUMER CONFIDENCE AND OPINIONS ON COUNTRY'S DIRECTION

2

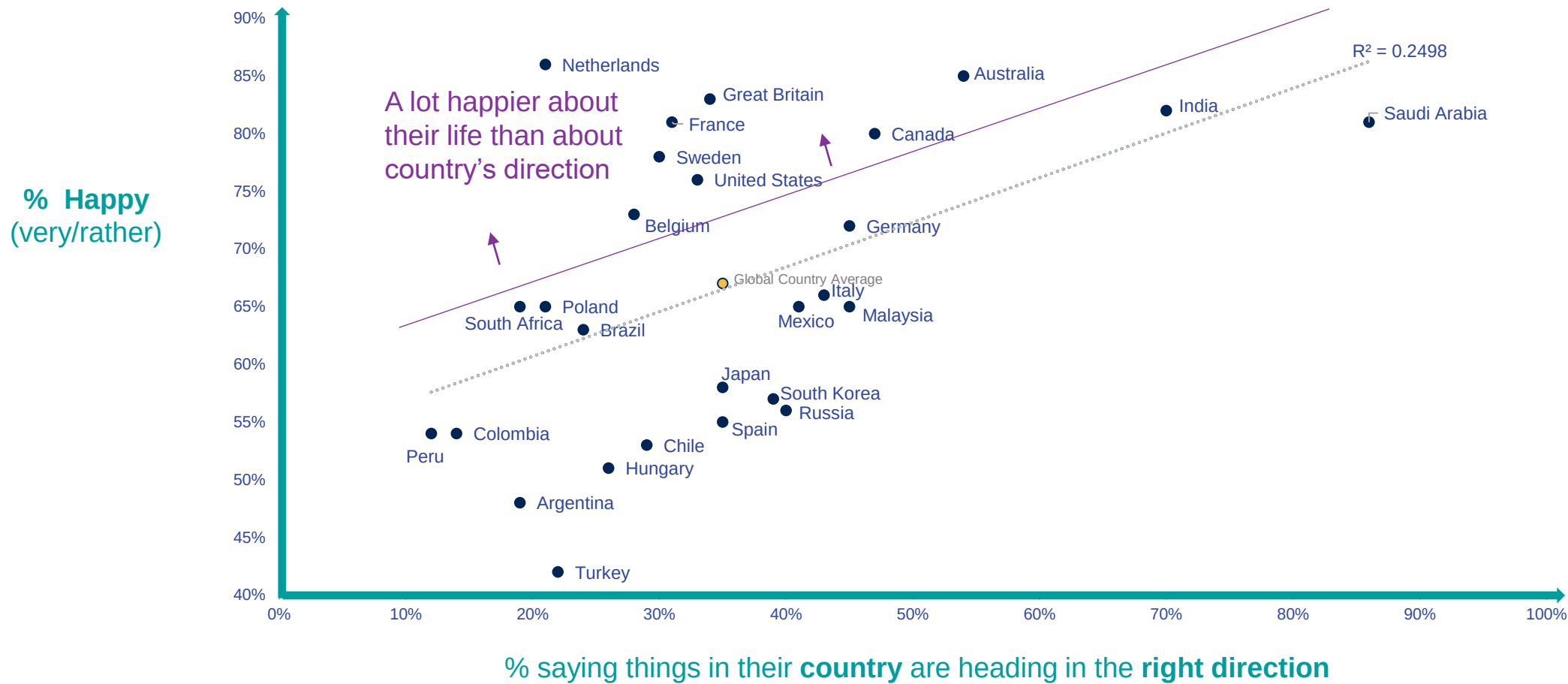
HAPPINESS AND CONSUMER CONFIDENCE ARE HIGHLY CORRELATED



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HAPPINESS AND PERCEIVED DIRECTION OF THE COUNTRY ARE NOT ALIGNED IN HIGH-INCOME ECONOMIES



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SOURCES OF HAPPINESS

3

SOURCES OF HAPPINESS GLOBALLY

Q. What does or could make you, personally, happiest in your life? For each of the following, please indicate what does or could bring happiness in your life: Does or could give me the greatest happiness, does or could give me some happiness, doesn't or couldn't make me happy or happier, or does not apply to me

- Among the 31 propositions, 16 procure at least some happiness to a global average of 80% or more.
- However, only two are described as a source of *greatest* happiness by a majority: “my *physical* health and well-being (54%), followed closely by “my *mental* health and well-being (53%)”, which were offered as separate items this year.

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The samples in Brazil, Chile, China (mainland), Colombia, India, Malaysia, Mexico, Peru, Romania, Russia, Saudi Arabia, Singapore, South Africa, and Turkey are more urban, more educated, and/or more affluent than the general population.

	% any happiness (greatest/some)	Global Country Averages				Change since Aug 2020 % any happiness	% greatest h'ness
My physical health and well-being*	90%	54%	36%	6%	3%	-2%	-1%
My mental health and well-being	89%	53%	36%	7%	4%	N/A	N/A
My relationship with my partner/spouse	77%	49%	28%	7%	17%	0%	0%
Feeling that my life has meaning	88%	49%	39%	7%	5%	0%	1%
My children	69%	48%	21%	5%	25%	0%	-1%
My living conditions (water, food, shelter)	89%	47%	42%	7%	4%	0%	2%
My personal safety and security	88%	46%	43%	8%	4%	-1%	1%
Feeling in control of my life	87%	44%	43%	8%	5%	0%	1%
Being in nature	86%	43%	43%	9%	5%	N/A	N/A
Having a meaningful job/employment	80%	42%	38%	8%	12%	0%	-1%
Having more money	85%	42%	42%	11%	5%	0%	2%
Satisfaction with the direction my life is going	86%	40%	46%	10%	4%	0%	0%
My personal financial situation	84%	40%	44%	13%	4%	-1%	1%
My hobbies/interests	88%	40%	48%	8%	4%	0%	3%
My friends	85%	38%	47%	9%	6%	-1%	0%
The amount of free time I have	84%	38%	46%	10%	6%	1%	4%
Finding someone to be with	70%	37%	33%	9%	21%	3%	2%
Freedom to express my beliefs	80%	36%	45%	11%	8%	1%	2%
Having a good sex life	75%	35%	41%	10%	14%	-1%	1%
The well-being of my country	80%	34%	47%	14%	6%	-2%	0%
Being forgiven for something I did	71%	29%	42%	12%	17%	3%	2%
My religious or spiritual well-being	62%	29%	33%	16%	22%	3%	2%
Being recognized as a successful person	66%	28%	38%	21%	13%	-1%	0%
My access to entertainment and sports	73%	28%	46%	16%	11%	3%	5%
The state of the economy	73%	27%	46%	21%	7%	-1%	0%
Forgiving someone for something	71%	27%	44%	16%	12%	2%	2%
The amount of time or money I donate to charity/help others	68%	24%	44%	17%	15%	0%	0%
My material possessions (ie computer, fashion items, car)	73%	24%	49%	20%	7%	3%	3%
New political leadership in my country	57%	23%	34%	28%	14%	4%	2%
Moving to another country	46%	18%	28%	28%	26%	4%	2%
Time spent on social media	48%	13%	35%	38%	14%	3%	2%

* “My health and well-being” before 2021

CHANGE IN SOURCES OF HAPPINESS GLOBALLY

Global Country Averages

Q. What does or could make you, personally, happiest in your life? For each of the following, please indicate what does or could bring happiness in your life: Does or could give me the greatest happiness, does or could give me some happiness, doesn't or couldn't make me happy or happier, or does not apply to me

- Nearly all sources of happiness have remained stable since mid-2020, with “new political leadership in my country” and “moving to another country” experiencing the highest increases (both up 4 points).
- Compared to 2019 (pre-pandemic), the sources seeing the greatest gains are “being forgiven” (+8), “finding someone to be with” (+7), “forgiving someone” (+6) and “spending time on social media” (+6).

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% any happiness (greatest/some)	Dec 2011	Mar 2017	Feb 2018	Jun 2019	Aug 2020	Dec 2021	Change since Jun 2019	Change since Aug 2020
My physical health and well-being*	90%	89%	89%	88%	92%	90%	2%	-2%
My mental health and well-being						89%		
My living conditions (water, food, shelter)	85%	87%	86%	86%	89%	89%	3%	0%
Feeling that my life has meaning	86%	86%	86%	85%	88%	88%	3%	0%
My personal safety and security	86%	86%	86%	85%	89%	88%	3%	-1%
My hobbies/interests	84%	84%	85%	85%	88%	88%	3%	0%
Feeling in control of my life	84%	85%	85%	84%	87%	87%	3%	0%
Being in nature						86%		
Satisfaction with the direction my life is going	86%	86%	85%	84%	86%	86%	2%	0%
Having more money	85%	84%	84%	84%	85%	85%	1%	0%
My friends	85%	84%	84%	83%	86%	85%	2%	-1%
My personal financial situation	86%	86%	84%	83%	85%	84%	1%	-1%
The amount of free time I have	79%	82%	81%	82%	83%	84%	2%	1%
Having a meaningful job/employment	81%	82%	82%	79%	80%	80%	1%	0%
The well-being of my country	82%	82%	81%	79%	82%	80%	1%	-2%
Freedom to express my beliefs	74%	77%	78%	76%	79%	80%	4%	1%
My relationship with my partner/spouse	78%	78%	78%	75%	77%	77%	2%	0%
Having a good sex life	77%	76%	76%	74%	76%	75%	1%	-1%
The state of the economy	77%	77%	75%	73%	74%	73%	0%	-1%
My access to entertainment or sports	67%	71%	70%	69%	70%	73%	4%	3%
My material possessions	70%	68%	70%	69%	70%	73%	4%	3%
Forgiving someone for something	66%	67%	70%	65%	69%	71%	6%	2%
Being forgiven for something I did	64%	64%	68%	63%	68%	71%	8%	3%
Finding someone to be with	63%	63%	69%	63%	67%	70%	7%	3%
My children	69%	68%	70%	67%	69%	69%	2%	0%
Amount of time or money I donate to charity/help others	65%	66%	67%	65%	68%	68%	3%	0%
Being recognized as a successful person	68%	67%	67%	64%	67%	66%	2%	-1%
My religious or spiritual well-being	56%	59%	62%	57%	59%	62%	5%	3%
New political leadership in my country				56%	53%	57%	1%	4%
Time spent on social media				42%	45%	48%	6%	3%
Moving to another country	36%	45%	44%	44%	42%	46%	2%	4%

* “My health and well-being” before 2021

SOURCES OF GREATEST HAPPINESS BY COUNTRY - GLOBAL TOP 5

The top 5 sources of greatest happiness at the global level are: my *physical* health and well-being, my *mental* health and well-being, relationship with my partner/spouse, feeling that my life has meaning, and my children. Each of them is in the top 12 of almost every country.

Only exceptions are:

- My mental health and well-being: Japan
- My relationship with my partner/spouse: Argentina, Brazil, Saudi Arabia, Turkey, Malaysia, Colombia, Chile, Peru
- My children: Brazil, Singapore, South Korea, Malaysia

	Global Country Average	Argentina	Australia	Belgium	Brazil	Canada	China	France	Germany	Hungary	India	Italy	Japan	Mexico	Netherlands	Poland	Russia	Saudi Arabia	Singapore	South Africa	South Korea	Spain	Sweden	Turkey	Great Britain	United States	Malaysia	Colombia	Romania	Chile	Peru
My physical health and well-being	1	1	3	1	2	1	1	2	2	1	2	1	8	2	2	4	2	4	1	3	3	1	2	3	3	1	4	2	1	2	1
My mental health and well-being	2	2	3	3	1	2	5	6	3	3	1	1	11	1	3	1	5	3	2	3	6	2	3	1	4	3	2	1	1	1	1
My relationship with my partner/spouse	3	12	1	2	20	2	5	6	1	2	2	3	6	9	1	2	3	11	2	10	6	3	4	13	1	2	11	11	4	11	11
Feeling that my life has meaning	3	3	9	5	4	5	9	4	6	5	2	8	6	3	7	4	6	5	7	1	4	4	6	7	8	8	6	3	5	3	1
My children	5	7	1	3	17	6	5	1	5	3	9	5	10	6	5	3	1	5	13	8	14	7	1	5	2	6	16	9	3	7	4

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SOURCES OF GREATEST HAPPINESS BY COUNTRY - GLOBAL #6-10

Four sources of greatest happiness ranking #6-10 globally rank in the top 3 of a few countries:

- My living conditions: Japan and Malaysia
- My personal safety and security: China and Saudi Arabia
- Feeling in control of my life: Brazil, South Africa, and Turkey
- Being in nature: China and Turkey

	Global Country Average	Argentina	Australia	Belgium	Brazil	Canada	China	France	Germany	Hungary	India	Italy	Japan	Mexico	Netherlands	Poland	Russia	Saudi Arabia	Singapore	South Africa	South Korea	Spain	Sweden	Turkey	Great Britain	United States	Malaysia	Colombia	Romania	Chile	Peru
My living conditions (water, food, shelter)	6	4	5	6	6	7	10	8	10	6	6	5	2	6	4	7	8	16	5	7	10	5	4	13	5	4	2	4	10	5	9
My personal safety and security	7	5	6	7	11	12	2	13	8	9	9	12	14	5	11	9	10	2	5	8	12	8	7	10	8	6	4	5	6	6	6
Feeling in control of my life	8	9	6	13	3	7	14	13	10	12	14	9	4	9	7	6	11	9	8	2	20	5	8	2	6	5	9	7	8	8	9
Being in nature	9	11	14	11	12	7	3	10	6	6	6	5	23	12	12	9	9	9	15	12	16	15	12	3	13	15	11	6	10	4	8
Having a meaningful job/employment	10	7	17	13	5	17	10	17	17	15	8	4	19	4	14	15	12	13	10	5	8	11	14	9	17	20	9	7	12	9	4

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SOURCES OF GREATEST HAPPINESS BY COUNTRY - GLOBAL #11-20

Five of the sources of greatest happiness ranking #11-20 globally are among the top 5 in one or several countries:

- Having more money: Canada, China, France, Saudi Arabia, Singapore, South Africa, and South Korea
- My personal financial situation: France
- My hobbies/interests: Japan
- The amount of free time I have: Japan and South Korea
- Finding someone to be with: China, Germany, Japan, and Russia

	Global Country Average	Argentina	Australia	Belgium	Brazil	Canada	China	France	Germany	Hungary	India	Italy	Japan	Mexico	Netherlands	Poland	Russia	Saudi Arabia	Singapore	South Africa	South Korea	Spain	Sweden	Turkey	Great Britain	United States	Malaysia	Colombia	Romania	Chile	Peru
Having more money	10	14	8	11	6	4	4	3	13	16	14	12	11	9	19	7	12	5	2	5	1	13	18	10	10	9	6	14	14	12	15
Satisfaction w/ direction my life is going	12	13	11	13	15	10	16	16	15	11	11	18	19	8	16	13	15	13	12	14	11	13	14	24	11	12	16	9	7	9	7
My personal financial situation	12	19	11	13	8	12	14	4	16	9	24	11	8	14	17	12	6	16	11	15	8	10	12	26	13	12	26	12	8	18	15
My hobbies/interests	12	15	11	7	12	10	13	11	10	12	19	14	2	13	9	11	18	19	16	17	12	19	11	15	11	17	16	15	13	12	15
My friends	15	6	9	7	17	12	23	9	9	17	17	14	17	17	10	17	17	20	16	23	16	8	8	26	6	9	23	22	19	16	19
The amount of free time I have	15	17	15	18	14	15	19	13	13	12	27	10	1	14	12	15	15	27	13	23	2	12	14	20	13	15	11	17	16	12	21
Finding someone to be with	17	20	16	7	29	18	5	17	4	18	22	20	4	19	6	13	4	22	9	21	14	15	17	20	16	11	22	21	23	21	23
Freedom to express my beliefs	18	17	19	17	15	19	24	19	19	20	19	17	17	17	14	19	21	22	22	12	18	20	10	7	19	12	21	17	14	15	13
Having a good sex life	19	16	17	18	19	16	17	11	17	6	26	16	15	14	18	17	12	#N/A	22	18	22	15	19	20	17	17	25	20	21	19	22
The well-being of my country	20	9	21	20	8	22	17	20	22	23	11	19	11	19	21	21	18	8	20	20	25	18	22	15	22	21	14	13	16	16	12

Base: 20,504 online adults under age 75 across 30 countries, Nov.–Dec. 2021

The "Global Country Average" reflects the average result for all the countries and markets where the survey was conducted in that given year. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result. The samples in Brazil, Chile, China (mainland), Colombia, India, Malaysia, Mexico, Peru, Romania, Russia, Saudi Arabia, Singapore, South Africa, and Turkey are more urban, more educated, and/or more affluent than the general population.

SOURCES OF GREATEST HAPPINESS BY COUNTRY - GLOBAL #21-31

Only three sources of greatest happiness ranking #21-31 globally are among the top 5 in any country:

- My religious/spiritual well-being: Malaysia and Saudi Arabia
- Being recognized as a successful person: India and Turkey
- The state of the economy: South Korea

	Global Country Average	Argentina	Australia	Belgium	Brazil	Canada	China	France	Germany	Hungary	India	Italy	Japan	Mexico	Netherlands	Poland	Russia	Saudi Arabia	Singapore	South Africa	South Korea	Spain	Sweden	Turkey	Great Britain	United States	Malaysia	Colombia	Romania	Chile	Peru
Being forgiven for something I did	21	23	20	20	24	20	26	26	19	24	19	23	25	26	20	25	23	20	18	15	23	22	24	17	20	21	8	22	23	22	20
My religious or spiritual well-being	21	28	23	29	8	24	28	27	27	29	13	23	22	24	27	24	26	1	18	10	23	29	26	10	26	17	1	15	26	25	18
Being recognized as a successful person	23	22	26	24	26	21	21	23	25	22	5	29	26	22	25	25	26	13	24	22	18	25	26	5	24	25	23	22	29	22	13
My access to entertainment and sports	23	20	24	22	27	26	22	21	23	27	24	23	15	22	21	21	29	18	28	27	26	21	23	18	21	27	26	17	28	19	25
Forgiving someone for something	25	25	22	27	22	23	27	29	21	21	17	23	27	21	23	25	23	25	20	18	26	24	24	25	24	23	16	22	21	26	24
The state of the economy	25	24	27	29	23	24	10	22	27	25	27	21	24	25	29	25	20	25	25	27	5	23	20	30	29	27	28	22	18	22	25
My material possessions (e.g., computer, fashion items, car)	27	29	27	22	27	28	20	23	24	27	23	21	19	28	26	21	22	24	25	27	21	26	28	20	29	27	14	30	26	30	30
The amount of time or money I donate to charity/help others	27	29	29	27	25	28	25	30	27	25	14	27	27	27	27	29	25	12	25	25	28	28	28	18	27	26	16	27	23	29	27
New political leadership in my country	29	25	25	24	20	27	#N/A	23	25	19	29	28	29	30	23	20	26	#N/A	30	26	29	26	20	28	22	24	30	29	20	27	28
Moving to another country	30	27	30	26	30	30	30	27	30	30	30	30	31	29	30	31	30	28	29	30	29	31	28	29	27	30	31	28	30	28	29
Time spent on social media	31	31	30	31	31	31	29	31	30	31	31	31	29	31	31	30	31	29	31	31	31	30	31	31	31	31	29	31	31	31	31

Base: 20,504 online adults under age 75 across 30 countries, Nov.–Dec. 2021

The “Global Country Average” reflects the average result for all the countries and markets where the survey was conducted in that given year. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result. The samples in Brazil, Chile, China (mainland), Colombia, India, Malaysia, Mexico, Peru, Romania, Russia, Saudi Arabia, Singapore, South Africa, and Turkey are more urban, more educated, and/or more affluent than the general population.

Methodology

These are the findings of a 30-country Ipsos survey conducted November 19 – December 3, 2021, among 20,504 adults aged 18-74 in the United States, Canada, Malaysia, South Africa, and Turkey, 21-74 in Singapore, and 16-74 in 24 other countries, via Ipsos's Global Advisor online survey platform.

Each country's sample consists of 1000+ individuals in Australia, Brazil, Canada, China (mainland), France, Germany, Great Britain, Italy, Japan, Spain, and the United States, and 500+ individuals in Argentina, Belgium, Chile, Colombia, Hungary, India, Malaysia, Mexico, the Netherlands, Peru, Poland, Russia, Saudi Arabia, Singapore, 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, Switzerland, and the United States can be taken as representative of these countries' general adult population under the age of 75.

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

Prior fieldwork waves were also conducted on Ipsos's Global Advisor online survey platform. The Aug 2020 wave was conducted Jul 24 – Aug 7, 2020, among 19,516 adults in 27 countries. The June 2019 wave was conducted May 24 - Jun 7, 2019, among 20,327 adults in 28 countries. The February 2018 wave was conducted Jan 26 - Feb 9, 2018, among 19,428 adults in 27 countries. The March 2017 wave was conducted Feb 17 - Mar 3, 2017, among 18,523 adults in 26 countries. The May 2013 wave was conducted May 7 - 21, 2013, among 18,513 adults in 25 countries. The Dec 2011 wave was conducted Dec 6 - 19, 2011, among 21,245 adults in 24 countries.

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

The Global average reflects the average result of all the countries and markets where the survey was conducted that year. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result.

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 knows 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 +/- 4.8 percentage points. For more information on Ipsos's use of credibility intervals, please visit the Ipsos website.

The publication of these findings abides by local rules and regulations.

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.

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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.

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