GLOBAL ADVISOR 2022 PREDICTIONS

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GAME CHANGERS



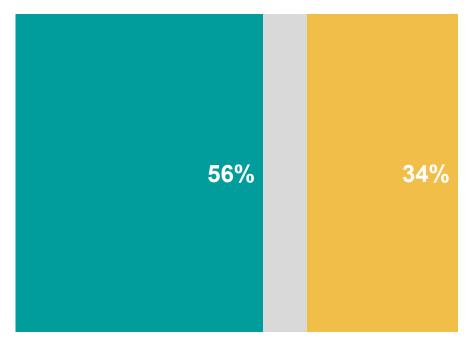
COVID-19



COVID-19

For each of the following, please tell me how likely or unlikely you think they are to happen...?

More than 80% of the world's population will receive at least one dose of a COVID-19 vaccine





Market

Global Country Average

Peru China

Malaysia

Brazil

India

Mexico

Hungary

Likely

Unlikely

81%

80%

79%

76%

75%

75%

For each of the following, please tell me how likely or unlikely you think they are to happen...?

More than 80% of the world's population will receive at least one dose of a COVID-19 vaccine

Argentina 73% Colombia 72% Singapore 70% 25% Chile 69% Turkev 67% 65% Australia South Korea 64% South Africa 63% Saudi Arabia 23% 61% 59% Israel Russia 59% 58% Spain 51% Italy Canada 50% **Great Britain** 47% 45% 39% Japan 43% 48% Denmark 42% France 41% Romania Sweden 40% Netherlands 39% **United States** 39% 38% Belgium Switzerland 34% 55% 54% 33% Germany Poland 33%

29%

56%



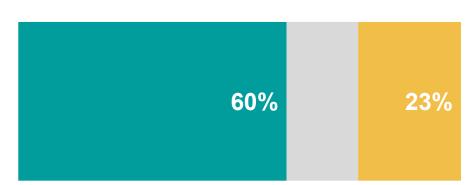
ENVIRONMENT



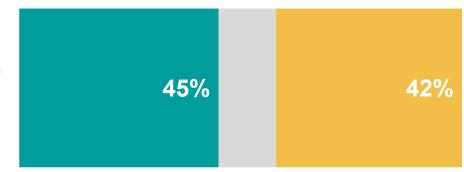
Environment

For each of the following, please tell me how likely or unlikely you think they are to happen...?

There will be more extreme weather events in my country in 2022 than there were in 2021



People will fly less than they did in 2019





Market Likely

Unlikely

For each of the following, please tell me how likely or unlikely you think they are to happen...?

There will be more extreme weather events in my country in 2022 than there were in 2021

Global Country Average 60% Netherlands 72% **Great Britain** 69% Australia 68% Italy 68% Canada 67% Singapore 67% Belgium 66% Chile 66% Denmark 66% 66% France Turkey 66% Israel 63% Brazil 62% 62% Hungary 62% India Argentina 61% Japan 61% 61% Poland 61% Spain **United States** 61% Malaysia 60% 60% 27% Sweden South Africa 59% 58% China Colombia 57% Mexico 57% 57% 24% Romania Germany 56% 56% South Korea 54% 30% Switzerland Peru 51% 51% Russia Saudi Arabia 27%



Market Likely

Unlikely

For each of the following, please tell me how likely or unlikely you think they are to happen...?

People will fly less than they did in 2019

Global Country Average 45% China 68% 67% Singapore Malaysia 66% Australia 57% 57% South Africa **Great Britain** 56% 52% India 52% Russia Canada 51% Sweden 50% Denmark 49% Switzerland 47% Italy 46% 44% Israel Romania 44% 43% 44% Argentina Peru 43% Poland 43% Chile 42% 44% **United States** 42% 40% Germany Mexico 40% 45% 39% 43% France Turkey 38% 37% Brazil 37% Hungary 37% 41% Spain Japan 36% 35% Netherlands South Korea 35% 54% Colombia 34% 53% Saudi Arabia 29% Belgium 27%



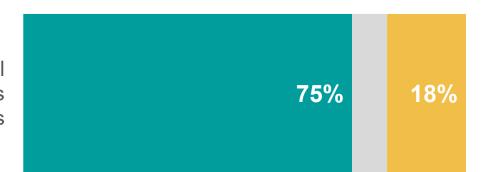
ECONOMY



Economy

For each of the following, please tell me how likely or unlikely you think they are to happen...?

Prices in my country will increase faster than people's incomes



Unlikely

% Likely 2020

Major stock markets around the world will crash



lpsos

Market Likely

Unlikely

For each of the following, please tell me how likely or unlikely you think they are to happen...?

Prices in my country will increase faster than people's incomes

Global Country Average 75% Russia 88% Chile 85% Netherlands 85% Romania 85% Colombia 84% Belgium 83% Malaysia 83% South Africa 83% Canada 82% Poland 82% 82% Singapore France 81% 81% Germany 80% Argentina Brazil 80% **Great Britain** 79% **United States** 78% 77% Australia Hungary 77% Spain 77% 77% Turkey 76% 18% Italy Peru 75% 18% 74% Mexico Sweden 73% 72% Israel 69% 21% Denmark India 68% 67% Switzerland South Korea 65% 27% China 46% Saudi Arabia 45% 33% Japan



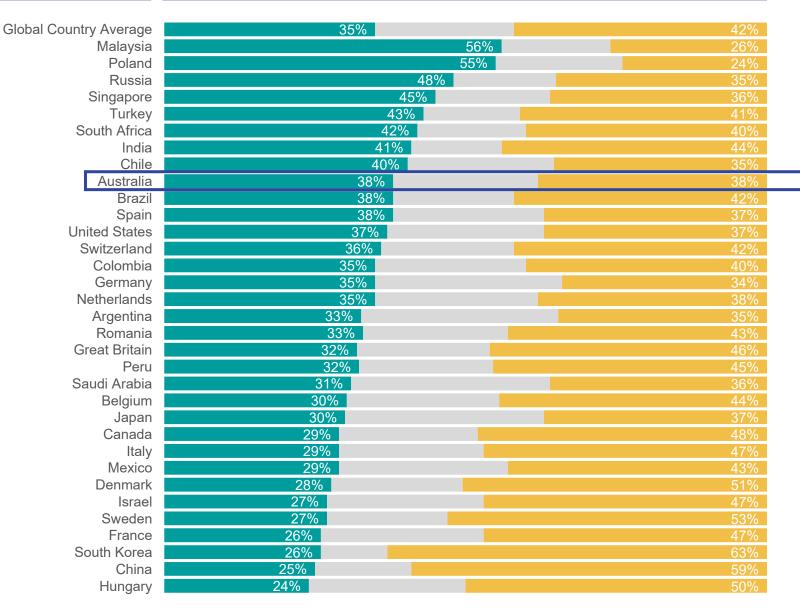
Market Likely

Unlikely

For each of the following, please tell me how likely or unlikely you think they are to happen...?

Major stock markets around the world will crash

5% Global Country Average decrease compared to those who thought likely in 2020 (40%)





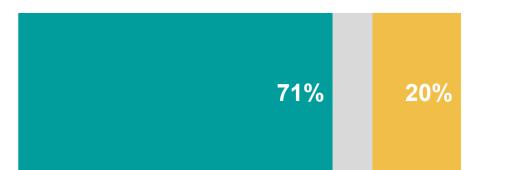
SOCIETY

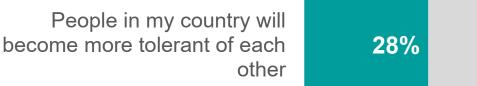


Society

For each of the following, please tell me how likely or unlikely you think they are to happen...?

City centers in my country will become busy again as people get back to working in offices on a regular basis





Likely

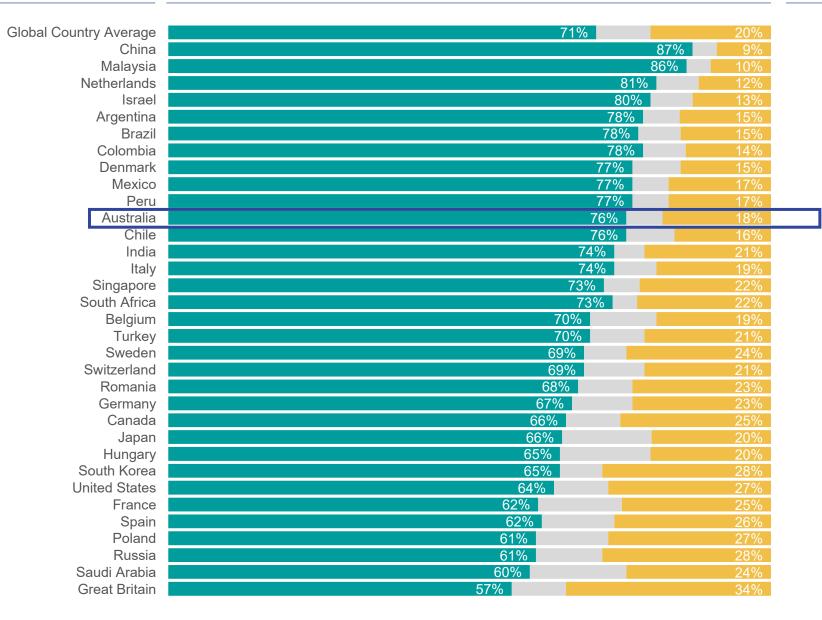




Likely

For each of the following, please tell me how likely or unlikely you think they are to happen...?

City centres in my country will become busy again as people get back to working in offices on a regular basis





Market Likely

Unlikely

For each of the following, please tell me how likely or unlikely you think they are to happen...?

People in my country will become more tolerant of each other

Global Country Average 28% China 83% 66% Malaysia 60% India Saudi Arabia 59% Singapore 39% South Africa 38% Mexico 33% 32% Australia Turkey 32% 28% Denmark Peru 28% Russia 28% Brazil 27% 27% Canada Switzerland 25% 65% Spain 22% Colombia 21% South Korea 21% Sweden 21% **United States** 21% 20% Germany 20% 71% Italy 19% 73% Argentina Chile 19% Poland 19% **Great Britain** 18% 18% Romania Japan 15% 15% Netherlands 12% Israel 11% Belgium 10% Hungary 9% France



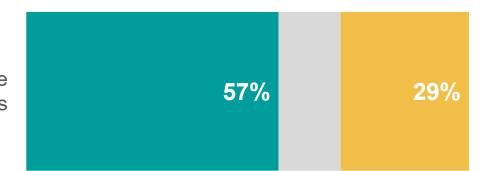
TECHNOLOGY



Technology

For each of the following, please tell me how likely or unlikely you think they are to happen...?

Many more people will live their lives in virtual worlds



Strict rules for large technology companies will be introduced by the Government in my country



Base: 22,023 adults aged 18-74 in the United States, Canada, Israel, Malaysia, South Africa and Turkey, and 16-74 in 27 other markets, 22 October – 5 November 2021.

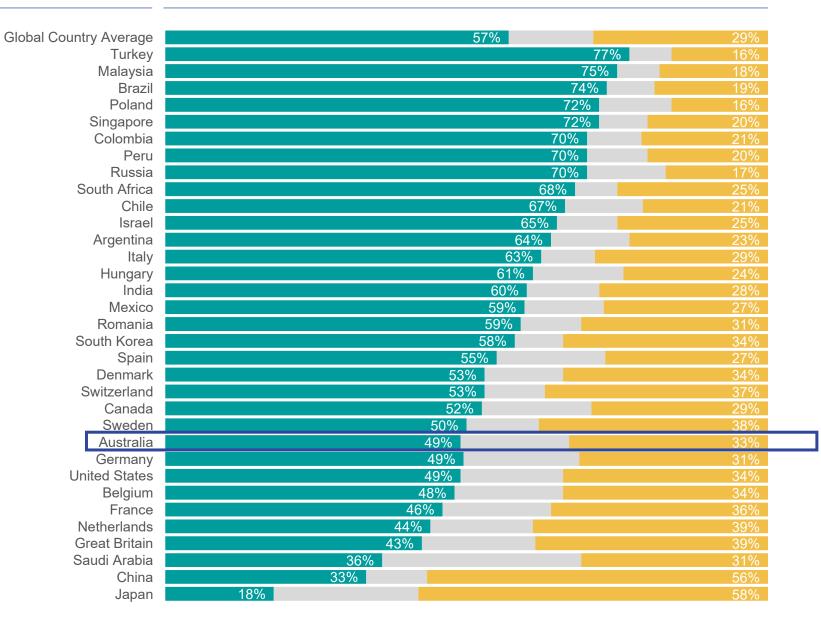


% Likely 2020

For each of the following, please tell me how likely or unlikely you think they are to happen...?

Many more people will live their lives in virtual worlds





Likely

Market



Unlikely

Market

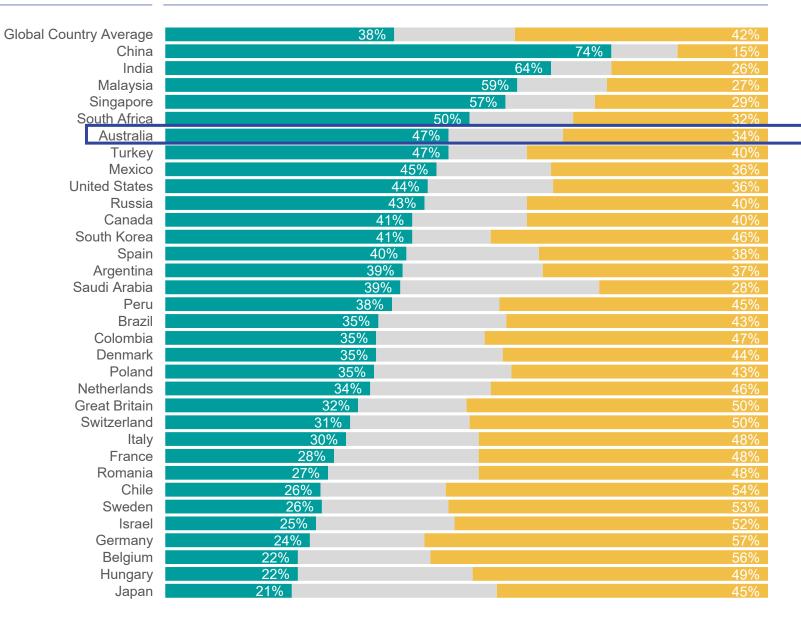
Likely

Unlikely

For each of the following, please tell me how likely or unlikely you think they are to happen...?

Strict rules for large technology companies will be introduced by the Government in my country





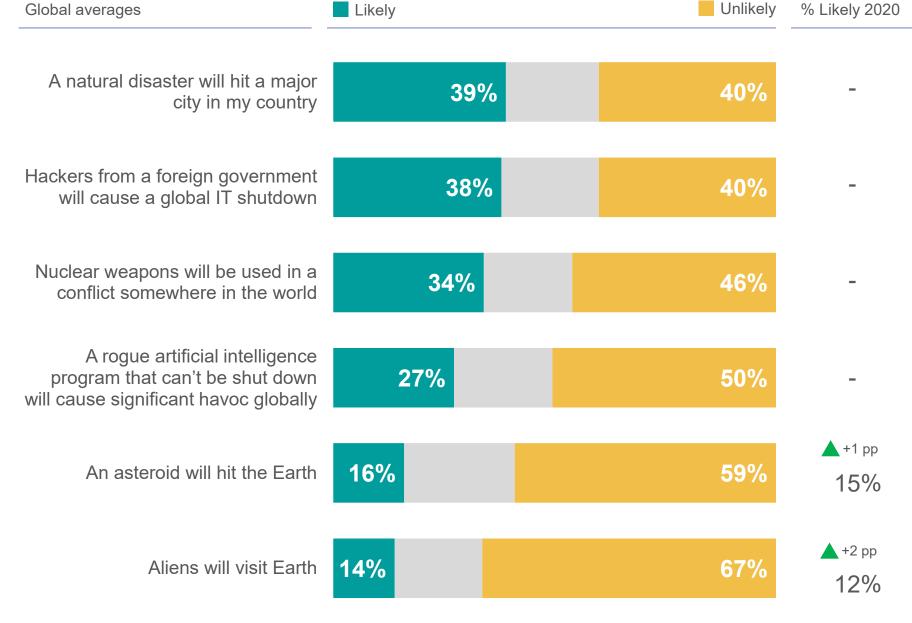


GLOBAL THREATS



Global threats

For each of the following, please tell me how likely or unlikely you think they are to happen...?





Market

Likely

Unlikely

For each of the following, please tell me how likely or unlikely you think they are to happen...?

A natural disaster will hit a major city in my country

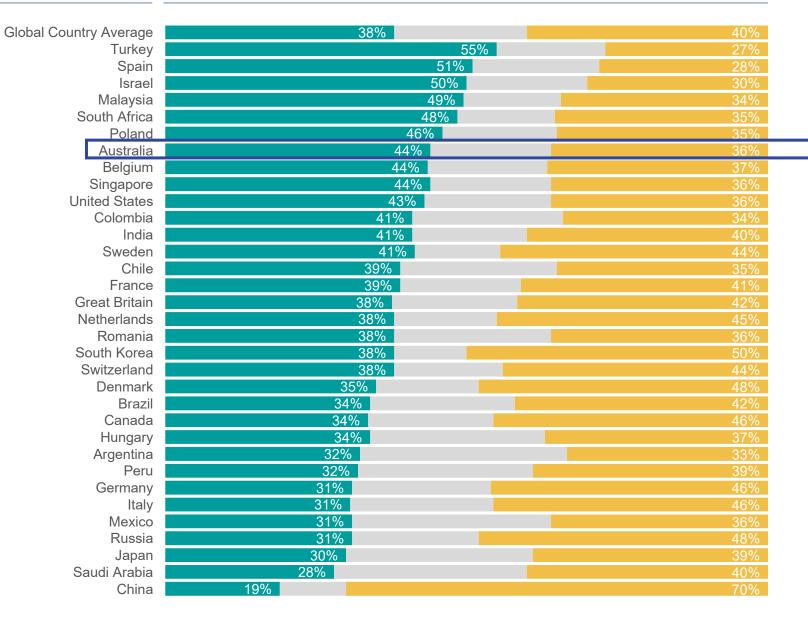
Global Country Average 39% **United States** 63% Chile 61% Japan 60% Turkey 58% Peru 53% 52% Malaysia India 50% 49% Australia Spain 49% 48% Mexico Colombia 45% Russia 45% Belgium 42% 42% Italy 40% Brazil France 40% Poland 38% 37% Canada Germany 36% Argentina 34% China 33% South Korea 33% 56% 30% 51% Netherlands 45% 29% Israel **Great Britain** 28% South Africa 28% 28% 58% Switzerland Romania 27% Sweden 24% 21% 66% Denmark Saudi Arabia 19% Singapore 18% 16% Hungary



For each of the following, please tell me how likely or unlikely you think they are to happen...?

Hackers from a foreign government will cause a global IT shutdown

Base: 22,023 adults aged 18-74 in the United States, Canada, Israel, Malaysia, South Africa and Turkey, and 16-74 in 27 other markets, 22 October – 5 November 2021.



Likely

Market



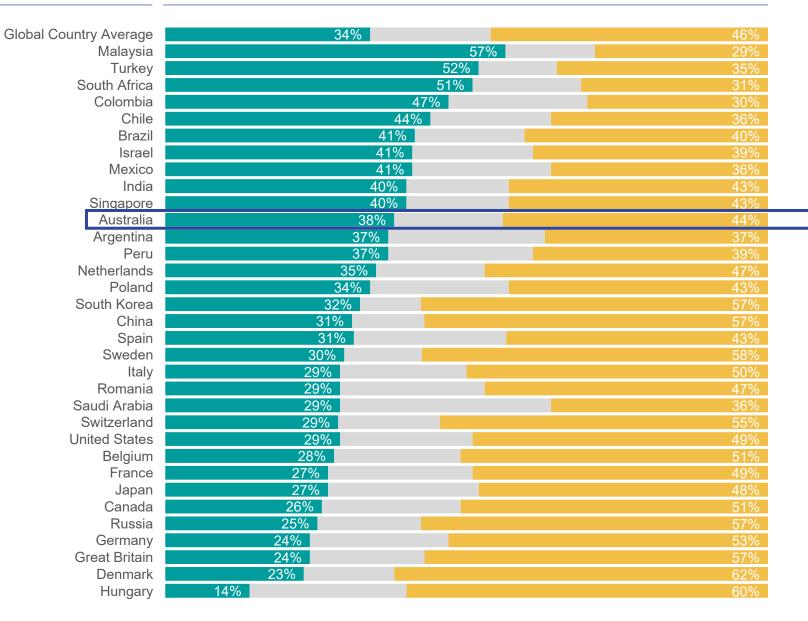
Unlikely

ل.

For each of the following, please tell me how likely or unlikely you think they are to happen...?

Nuclear weapons will be used in a conflict somewhere in the world

Base: 22,023 adults aged 18-74 in the United States, Canada, Israel, Malaysia, South Africa and Turkey, and 16-74 in 27 other markets. 22 October – 5 November 2021.



Likely

Market



Unlikely

Market Likely

Malaysia

India

Turkey Singapore

Global Country Average

Unlikely

For each of the following, please tell me how likely or unlikely you think they are to happen...?

A rogue artificial intelligence program that can't be shut down will cause significant havoc globally

South Africa 33% South Korea 33% Colombia 31% Mexico 31% Spain 31% 30% Brazil Switzerland 29% Chile 28% Argentina 27% 27% Peru Australia 26% 26% Germany Poland 26% Saudi Arabia 26% China 25% 25% France 25% Italy 24% 50% Belgium 24% 54% Romania 24% Russia 22% Israel **United States** 22% 21% Japan **Great Britain** 20% 18% Canada 18% 56% Denmark 18% Netherlands Sweden 16% 15% Hungary

53%

46%

43%

36%

27%



For each of the following, please tell me how likely or unlikely you think they are to happen...?

An asteroid will hit the Earth

28% India Turkey 26% Colombia 21% Singapore 21% 20% Australia 20% Spain Chile 18% Denmark 18% Saudi Arabia 18% South Africa 18% Mexico 17% Argentina 16% Canada 16% Russia 62% 16% Switzerland 16% Brazil 15% 15% France South Korea 15% China 14% 14% Netherlands 14% 63% **United States** 13% 67% Germany **Great Britain** 13% Italy 13% 13% Peru 13% 64% Poland Sweden 13% 12% Romania 11% Israel 10% Belgium 8% Hungary 8% Japan

Likely

16%

33%

Market

Global Country Average

Malaysia

Base: 22,023 adults aged 18-74 in the United States, Canada, Israel, Malaysia, South Africa and Turkey, and 16-74 in 27 other markets, 22 October – 5 November 2021.



Unlikely

For each of the following, please tell me how likely or unlikely you think they are to happen...?

Aliens will visit Earth

Global Country Average 14% India 30% Saudi Arabia 28% Chile 21% Mexico 19% Turkey 19% 18% Brazil 17% Australia Colombia 17% Romania 17% 57% 16% Argentina Malaysia 15% Russia 15% South Africa 15% 14% Denmark Peru 59% 14% 14% Singapore Switzerland 14% **United States** 13% 12% 72% Italy Canada 11% 11% China South Korea 11% 74% 10% 77% Germany **Great Britain** 10% Japan 10% Poland 10% 10% Spain Hungary 9% 9% Israel 9% Netherlands Sweden 8% 6% Belgium 6% France

Likely

Market

Base: 22,023 adults aged 18-74 in the United States, Canada, Israel, Malaysia, South Africa and Turkey, and 16-74 in 27 other markets, 22 October – 5 November 2021.



Unlikely

% Likely 2020

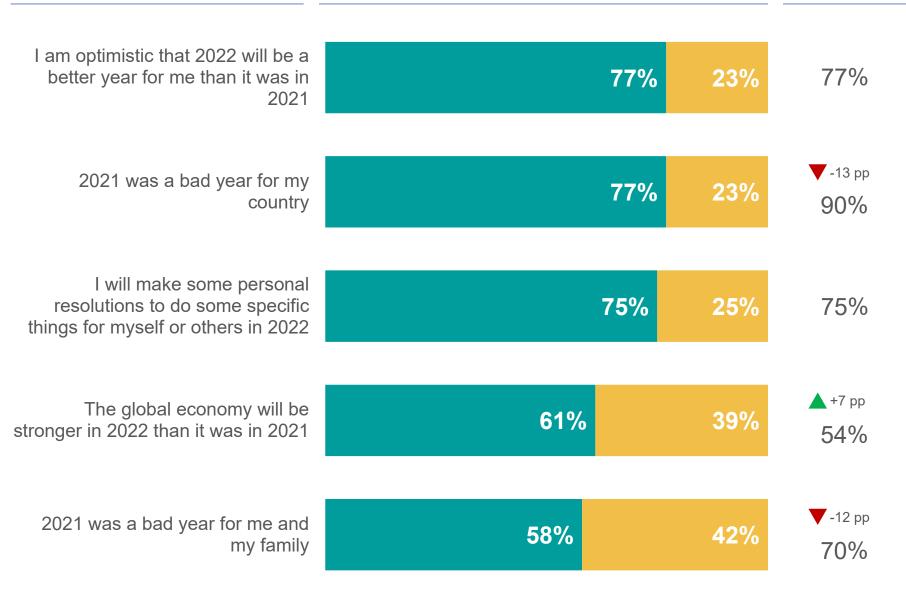
OUTLOOK FOR 2022



Outlook for 2022

Global averages

Please indicate if you agree very much, agree somewhat, disagree somewhat or disagree very much with the following statements:



Agree

Base: 22,023 adults aged 18-74 in the United States, Canada, Israel, Malaysia, South Africa and Turkey, and 16-74 in 27 other markets, 22 October – 5 November 2021.



Disagree

% Agree 2020

Market

Global Country Average

China

Mexico

Saudi Arabia

Agree

Disagree

94%

90%

90%

77%

Please indicate if you agree very much, agree somewhat, disagree somewhat or disagree very much with the following statements:

I am optimistic that 2022 will be a better year for me than it was in 2021

Colombia 88% Peru 87% Chile 86% South Africa 84% India 83% Australia 82% 82% Brazil Malaysia 82% Israel 80% Romania 80% 79% 21% Argentina Denmark 79% Hungary 79% Singapore 79% Sweden 78% 23% Canada 77% Switzerland 75% 74% Netherlands 73% 27% Italy 73% 27% Russia **Great Britain** 72% Spain 72% Poland 71% South Korea 71% **United States** 71% 65% Germany 60% 40% France 59% Turkev 58% Belgium 54% Japan



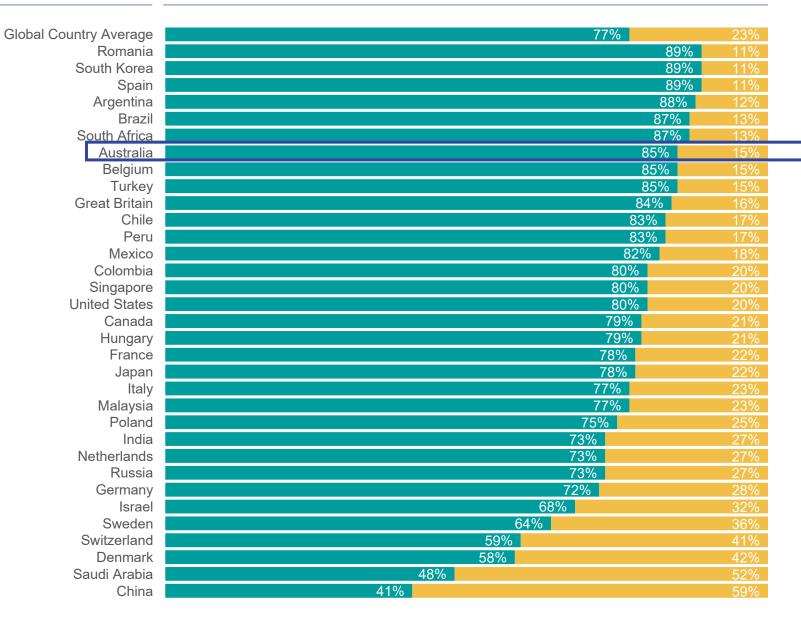
Market Agree

Disagree

Please indicate if you agree very much, agree somewhat, disagree somewhat or disagree very much with the following statements:

2021 was a bad year for my country

13% Global Country Average decrease compared to those who agreed in 2020 (90%)





Market Agree

China

Global Country Average

Disagree

96% 4

75%

Please indicate if you agree very much, agree somewhat, disagree somewhat or disagree very much with the following statements:

I will make some personal resolutions to do some specific things for myself or others in 2022

Colombia 93% Mexico 92% Peru 92% Argentina 89% South Africa 89% Chile 88% Romania 88% Spain 85% 84% Israel 83% Italy Brazil 82% Malaysia 82% Saudi Arabia 82% 81% Singapore 80% India 78% Denmark Russia 77% South Korea 76% Switzerland 76% Turkey 74% 72% Australia Poland 71% Germany 70% 68% France Canada 67% **United States** 67% Belgium 66% 64% **Great Britain** 57% 43% Hungary 50% Netherlands Japan 44% Sweden 23%



Market

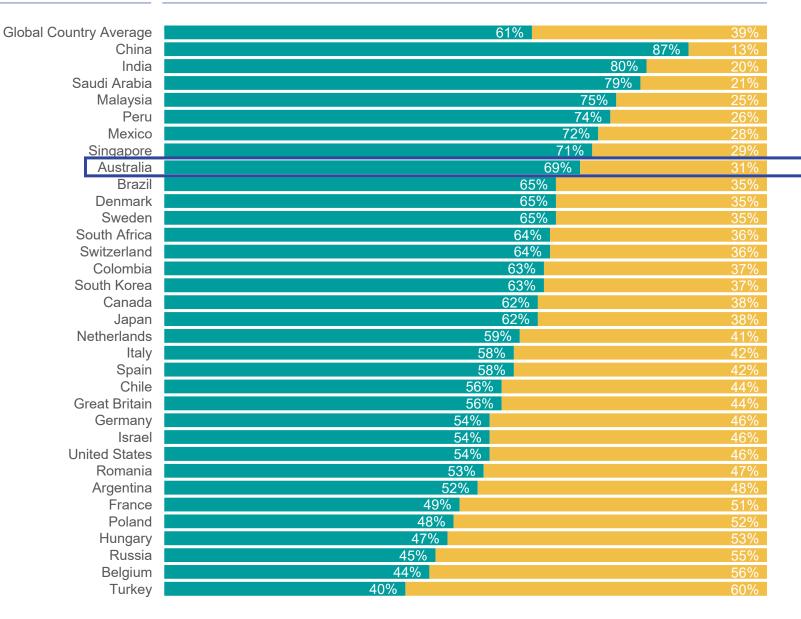
Agree

Disagree

Please indicate if you agree very much, agree somewhat, disagree somewhat or disagree very much with the following statements:

The global economy will be stronger in 2022 than it was in 2021

7% Global Country Average increase compared to those who agreed in 2020 (54%)





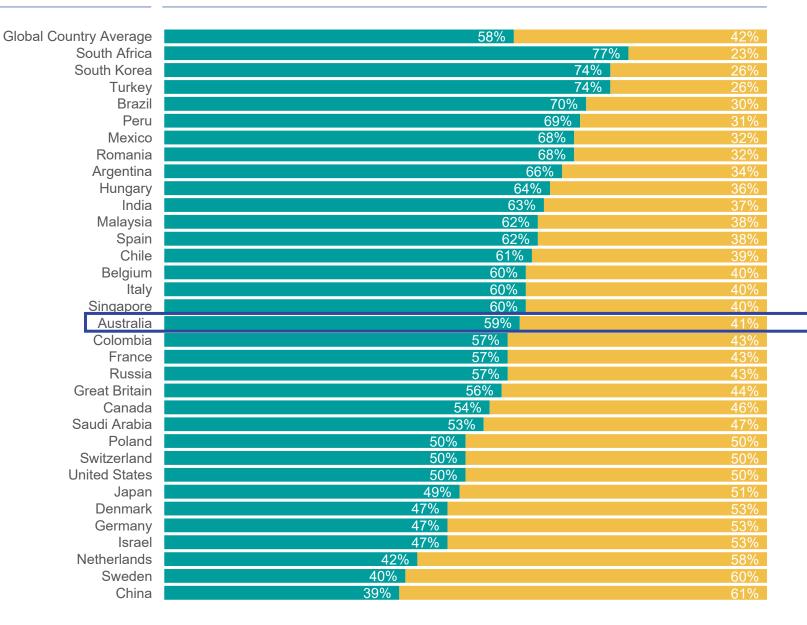
Market Agree

Disagree

Please indicate if you agree very much, agree somewhat, disagree somewhat or disagree very much with the following statements:

2021 was a bad year for me and my family

12% Global Country Average decrease compared to those who agreed in 2020 (90%)





TECHNICAL NOTE

These are the results of a 33-market survey conducted by Ipsos on its Global Advisor online platform. Ipsos interviewed a total of 22,023 adults aged 18-74 in the United States, Canada, Israel, Malaysia, South Africa, and Turkey, aged 21-74 in Singapore and 16-74 in 27 other markets between Friday, October 22 and Friday, November 5, 2021.

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

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

The samples in Brazil, Chile, mainland China, Colombia, India, Israel, 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 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.

"The Global Country Average" reflects the average result for all the countries and markets where the survey was conducted. 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 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.



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.



THANK YOU

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