

# IPSOS GLOBAL INFLATION MONITOR

**A 33-country Ipsos  
Global Advisor survey**

**November 2023**

**GAME CHANGERS**



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*This document is interactive,  
please click the [links](#) to jump to the findings*

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# INTRODUCTION

Welcome to the fifth edition of the Ipsos Global Inflation Monitor, a 33-country survey which tracks consumer perceptions of the cost-of-living crisis. In this issue, we see the number of people who think [their disposable income and standard of living](#) will rise outnumber those who think it is going to fall over the next year. The first time this has happened. We have also recorded the lowest figure for those who think the rate of inflation will increase in 2024, highlighting that we are perhaps over the worst of rising prices.

While people's outlook for the future may be improving, their current financial situation is not looking any better than it was in April 2023. Twenty-three per cent say they are finding it financially difficult.

In a new series of questions in this issue, we look at the topic which has been generating a lot of headlines: shrinkflation.

[One in two \(46%\)](#) say they have noticed products are getting smaller while the price remains the same. Forty-eight per cent say they think this practice is unacceptable, while 22% feel it is acceptable. Brands must be careful around this issue, with many thinking businesses making excessive profits is one of the biggest causes of the cost-of-living crisis.

In terms of [what's driving inflation](#), the global economy and interest rates are still perceived as the biggest influences. However, immigration and workers demanding pay rises are beginning to be seen as more and more of a factor.

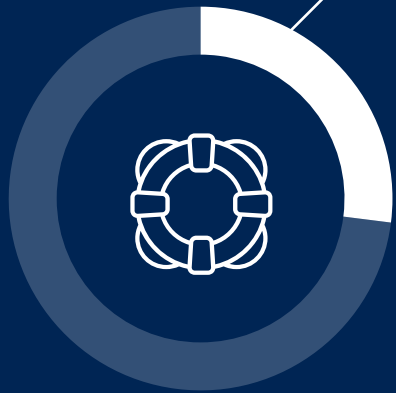
To learn more about consumer attitudes to inflation and previous issues of the Ipsos Global Inflation Monitor go to: <https://www.ipsos.com/en/inflation>



# TALKING POINTS



# AT A GLANCE



**27%**

say they are finding it financially difficult.  
*Down 1pp compared to April 2023.*



**21%**

say they think inflation will never return to normal in their country.  
*Up 2pp since April 2023.*

**48%**



say it is unacceptable for businesses and retailers to reduce the size of their products while keeping the price the same, what is known as shrinkflation.

**64%**



think their motoring fuel costs will rise over the next year.  
*Up 4pp since April 2023.*

**33%**



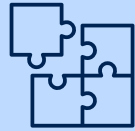
think their standard of living will rise over the next year. *The highest since we started the Ipsos Global Inflation Monitor.*

**+14**

The number of people who blame workers demanding pay increases for fuelling inflation has risen every wave and now 54% say this is the case, *up 14pp since April 2022.*



# HOW PEOPLE ARE DOING



## Finding it difficult

### **Twenty-seven per cent are finding it financially difficult**

In Europe things seem to be improving with those struggling financially falling. Germany and Poland, in particular, have seen those finding it difficult fall (down 7pp and 9pp since April) and are at a similar level to April 2022.

Conversely, those struggling in North America has risen. In the US, this figure is up 4pp since the last wave and in Canada it has reached 28%, the country's highest figure across all waves.

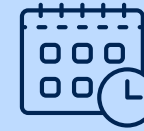


## Living comfortably

### **Two in five say they are living comfortably/doing alright**

This figure (38%) has increased 1pp since the last wave in April 2023. In China, 75% say they are living comfortably/doing alright, the highest across the 33 countries surveyed.

At the other end of the scale in Argentina only 16% say they are living comfortably/doing alright. Argentina was also bottom on this question in April 2023.



## When will inflation end?

### **One in five think inflation in their country will never return to normal**

This number (21%) has increased 2pp since April 2023. The number of people in Türkiye saying this has increased 13pp since April 2023, while in India this has risen 8pp. Indians, along with South Africans, are most likely to say they think inflation will never return to normal in their country (both 37%).

Thirty-two per cent across 33 countries think things will return to normal within the next year or sooner, while 43% believe it will be more than 12 months.



# WHY ARE PRICES RISING?



## A global problem

### Seventy per cent blame the global economy for inflation

The cost-of-living crisis has always been seen as a global issue. The state of the global economy has been viewed as a biggest cause of inflation across all five waves of the *Ipsos Global Inflation Monitor*.

However, the number saying this is the case has been steadily falling. In April 2022 77% said the global economy was contributing to the cost-of-living crisis and has now fallen 7pp across the five waves.



## Interest rates

### Sixty-eight per cent say interest rates are fuelling inflation

They are seen as the second biggest driver of the cost-of-living crisis across 33 countries.

Looking at a country level, many countries have seen the number of people blaming interest rates decline. However, there have been slight increases since April 2023 in Great Britain and Indonesia (both +3pp).

Canada and Spain are the only two countries to have seen those who cite interest rates rise across all five waves.



## Rising worries

### Immigrants and pay rises increasingly seen at fault

Fifty-four per cent across 31 countries blame both immigration and workers demanding pay rises as contributing to the cost-of-living crisis.

Those choosing workers' pay as a factor has increase 14pp since April 2022. While over the same period, those saying immigration has risen 6pp.

The COVID-19 pandemic and the Russian invasion of Ukraine and its consequences are being seen as a less of a factor.



# SHRINKFLATION



## Have you seen it?

### **Almost one in two say they have noticed “shrinkflation”**

Across 33 countries, 46% of consumers say they have noticed product sizes becoming smaller, but the price remaining the same.

This has been seen most in Europe with Great Britain having the highest proportion of people stopping this practice (64%).

Where shoppers have seen it least is in LATAM and Asia. Only 28% of Colombians and 30% in India and China have seen sizes reducing while the price stays the same.



## Is it right?

### **Forty-eight per cent say this practice is unacceptable**

People in 33 countries are more likely to say it is unacceptable than acceptable. However, there are big differences in whether it is right or wrong between Asia and the rest of the world.

Asia has the lowest proportion of those who describe it is unacceptable.

France and Türkiye are the two countries most against with 67% and 66% saying it is unacceptable for businesses and retailers to do this.



## Products most noticeable

### **Chips and chocolate seen as the worst offenders**

Of those who have noticed shrinkflation, savory snacks, such as chips/crisps and pretzels, are products most noted for undergoing this practice with 45% saying they have seen it.

This is followed by chocolate and sweets with 44% saying they have seen products getting smaller with the price remaining unchanged.

More than one in three (35%) have noticed the size of bread shrinking.





# EXPECTATIONS FOR THE FUTURE



## Past the peak?

### Fewer people think inflation will continue in the next year

Sixty-two per cent think the rate of inflation will rise in their country over the next year, the lowest figure we've recorded. This may indicate people feel the worst of the cost-of-living crisis is over and matches what we have seen in our What Worries the World survey.

Fewer people expect interest rates to continue to rise, but expectations for unemployment to rise has remained high. Fifty-nine per cent expect there to be fewer jobs and Great Britain, which has been in all five waves, records its highest figure.



## More money to spend

### More people think their disposable income will rise

Consumers are more likely to think their disposable income, as well as their standard of living, will rise in the next year than fall. This is the first time this has been the case in the *Ipsos Global Inflation Monitor*.

Thirty-one per cent think their disposable income will rise in the next 12 months and 29% believe it will fall. This sentiment is highest in Asia and LATAM, while those in Europe are slightly more nervous about what lies ahead in 2024.



## Going out to cost more

### More think socialising and driving will cost more in 2024

The number of people who think petrol and diesel is going to cost more is on the rise. While fewer think food shopping and their utility bills will go up, more people think driving costs will be more expensive than did in April 2023.

This is the same for going out and subscriptions, such as Netflix. Forty-eight per cent, up from 44% in April, think the cost of their subscriptions will rise. While 56%, up from 54%, believe the cost of eating out and going to the cinema is getting more expensive in the new year.

# SECTOR IMPACT

## What this means for brands



# WHAT THIS MEANS FOR:



## CPG

The number of people who expect the cost of their food and other household items to rise is the lowest it has been since we began this survey. However, there are reputational risks for brands in the methods used for maintaining margins in the face of rising costs. Almost one in two (46%) across 33 countries say it is unacceptable for brands to reduce the size of their products but keep their prices the same. In Europe and North America this sentiment is higher. Products most noticed for this include savory snacks and chocolate. Brands must be careful not to be seen as profiteering with 62% thinking businesses making excessive profits is driving the cost-of-living crisis.



## Hospitality

While fewer people are expecting food prices to rise, more consumers feel like it will be more expensive to go out and socialise in the next year than they did in April 2023. Türkiye, Canada, South Africa and Mexico have all seen notable increases in those thinking going out to restaurants, bars and cinemas will rise.

With expectations that the cost of socialising is going to increase, the importance of experience grows.



## Retail

The number of consumers expecting to have more disposable income in the next year is growing. This tends to be in countries in Asia and LATAM where people expect to have extra money to spend in 2024. While more than two-thirds across 33 countries believe they will be paying more for their food and other household shopping in the next year, expectation of price increases is the lowest it has been across all five waves of the *Ipsos Global Inflation Monitor*. In supermarkets people have noticed product sizes getting smaller and many in Europe and North America find this unacceptable. This is an emotional matter for many consumers, so retailers may need to decide who they side with on this issue. In some countries [retailers are already shaming manufacturers](#).



# WHAT THIS MEANS FOR:



## Financial Services

Interest rates are seen a major contributor to the cost-of-living crisis and only the global economy is perceived as a bigger factor in higher prices. However, less people think interest rates in their country are going to rise, while the number who expect to be paying more for their mortgage/rent has changed little across all five editions of the *Ipsos Global Inflation Monitor*. In those countries where fixed-rate mortgages are prevalent, we may see less locking in on a new term hoping for rates to fall further. More people expect to have more money to spend in the next year. While people may have a bit more disposable income, but some economic worries lingering, they may make sure they are putting more in their saving accounts, preparing for a rainy day.



## Utilities

Sixty-eight per cent across 33 countries expect the cost of their utilities to rise over the next year. This is unchanged from April earlier this year but is down 9pp since this time in 2022.

However, many countries who are entering winter have seen the number of people who expect to be paying more for energy rise compared to April. Italy, the Netherlands, Belgium and Spain have all seen notable increases since the previous wave.



## Media/Entertainment

Forty-four per cent across 33 countries expect to be paying more for their subscriptions in the next year. This is a 4pp increase since April and is highest figure we've recorded for subscriptions across the five waves of this survey. Great Britain, Hungary, India, Canada and Germany have all seen a double-digit increase in the number of people expecting to pay more for their subscriptions.

With streaming subscriber numbers declining in many markets across the world, delivering value for money will become more important in the new year.

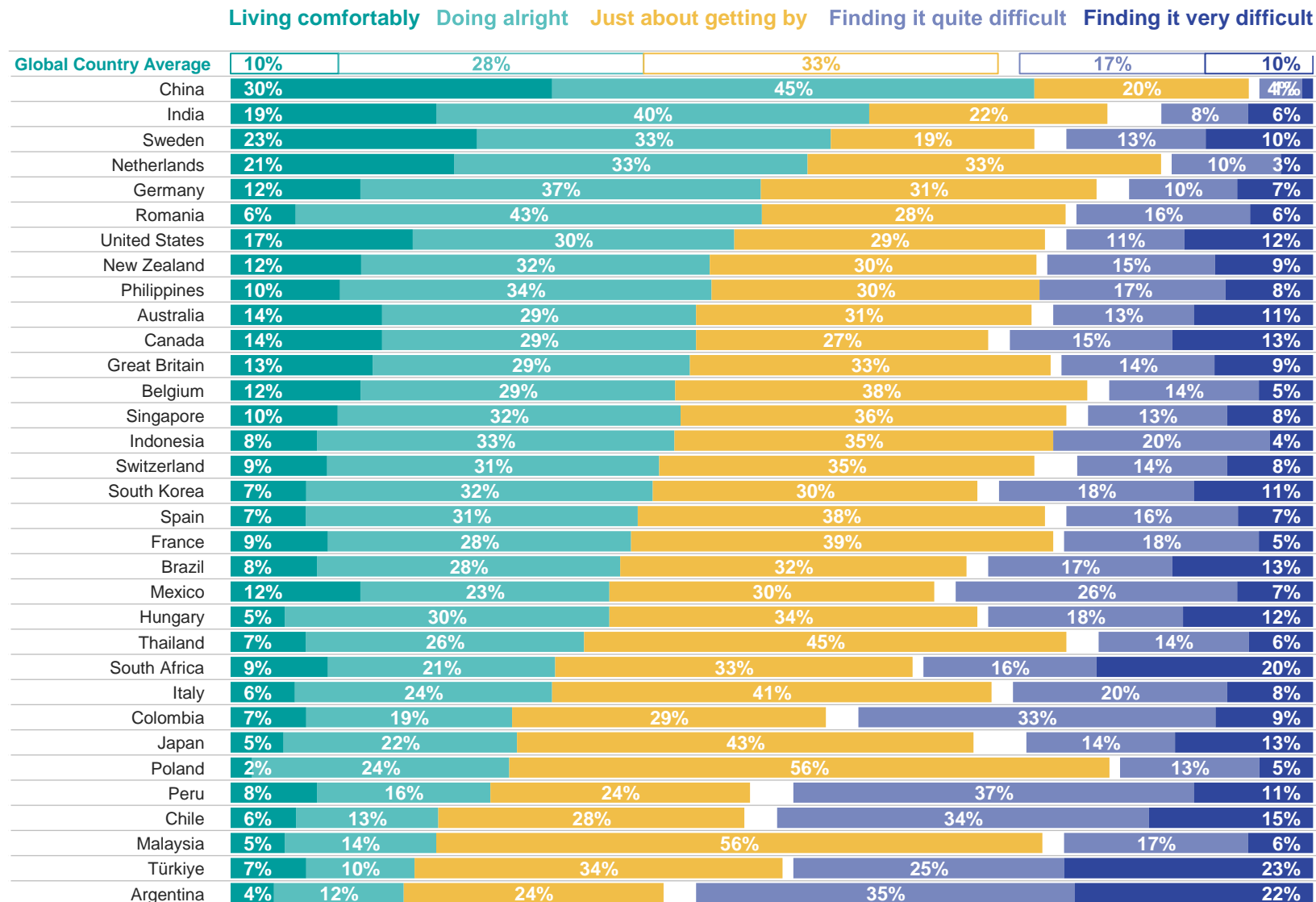


# CONSUMER PERCEPTIONS AND UNDERSTANDING



Q

How well would you say  
you are managing  
financially these days?  
Would you say you are...?



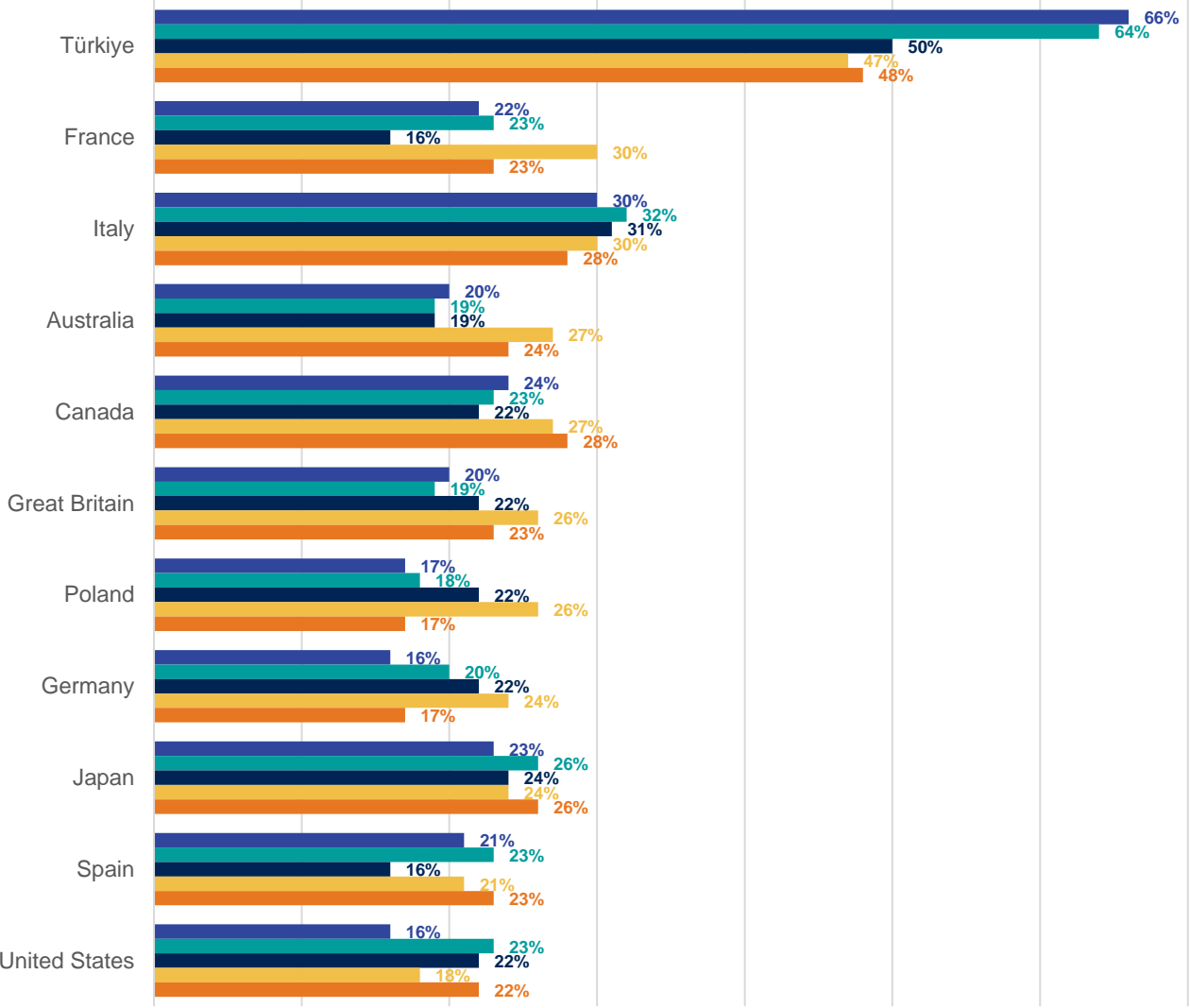
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Q

How well would you say  
you are managing  
financially these days?  
Would you say you are...?

% finding it difficult/very difficult



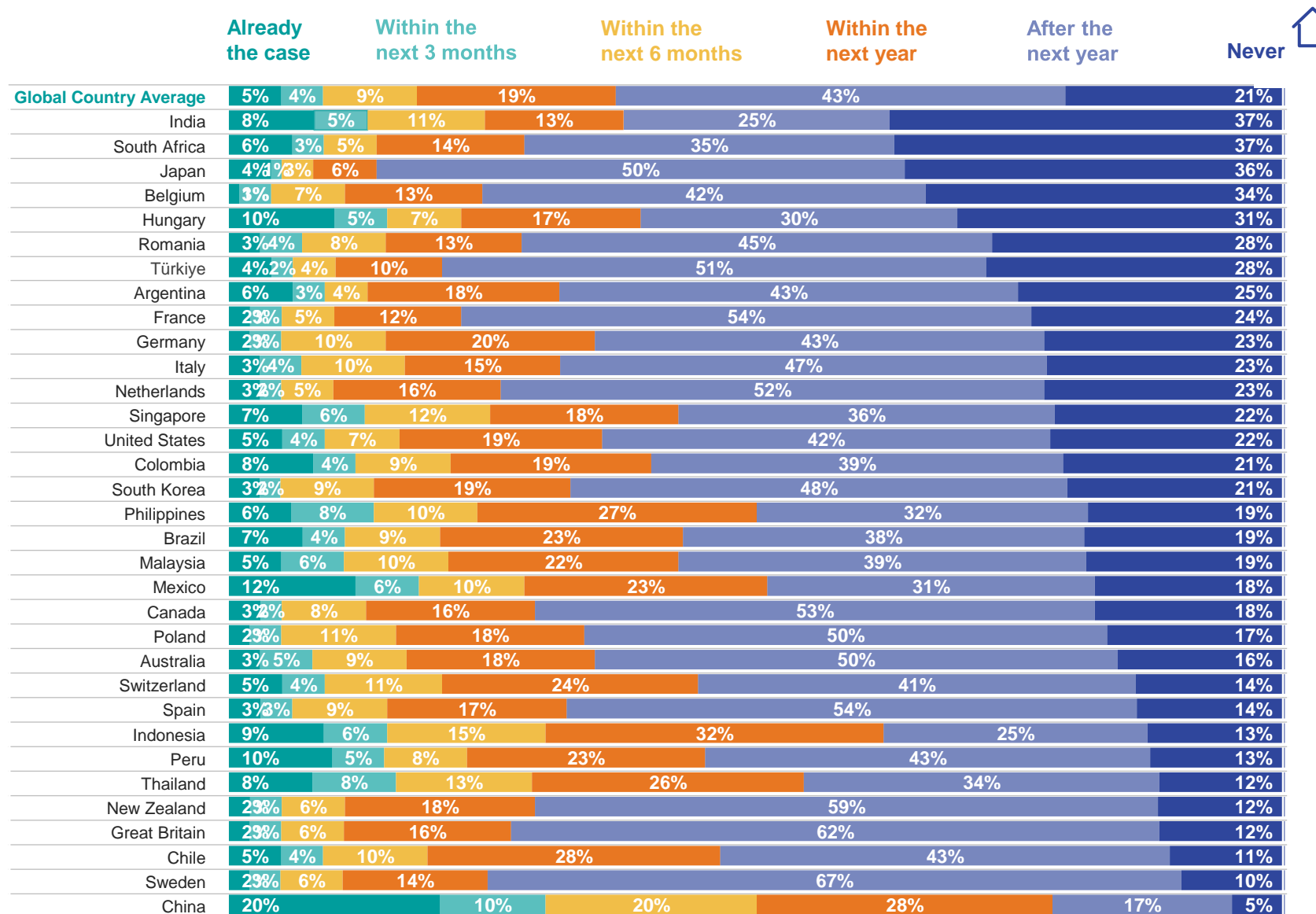
April '22  
June '22  
November '22  
April '23  
November '23

**Base:** 23,039 online adults under age 75 across 29 countries, interviewed March 24-April 7, 2023  
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Q

How long do you think it will take before inflation returns to normal in your country?



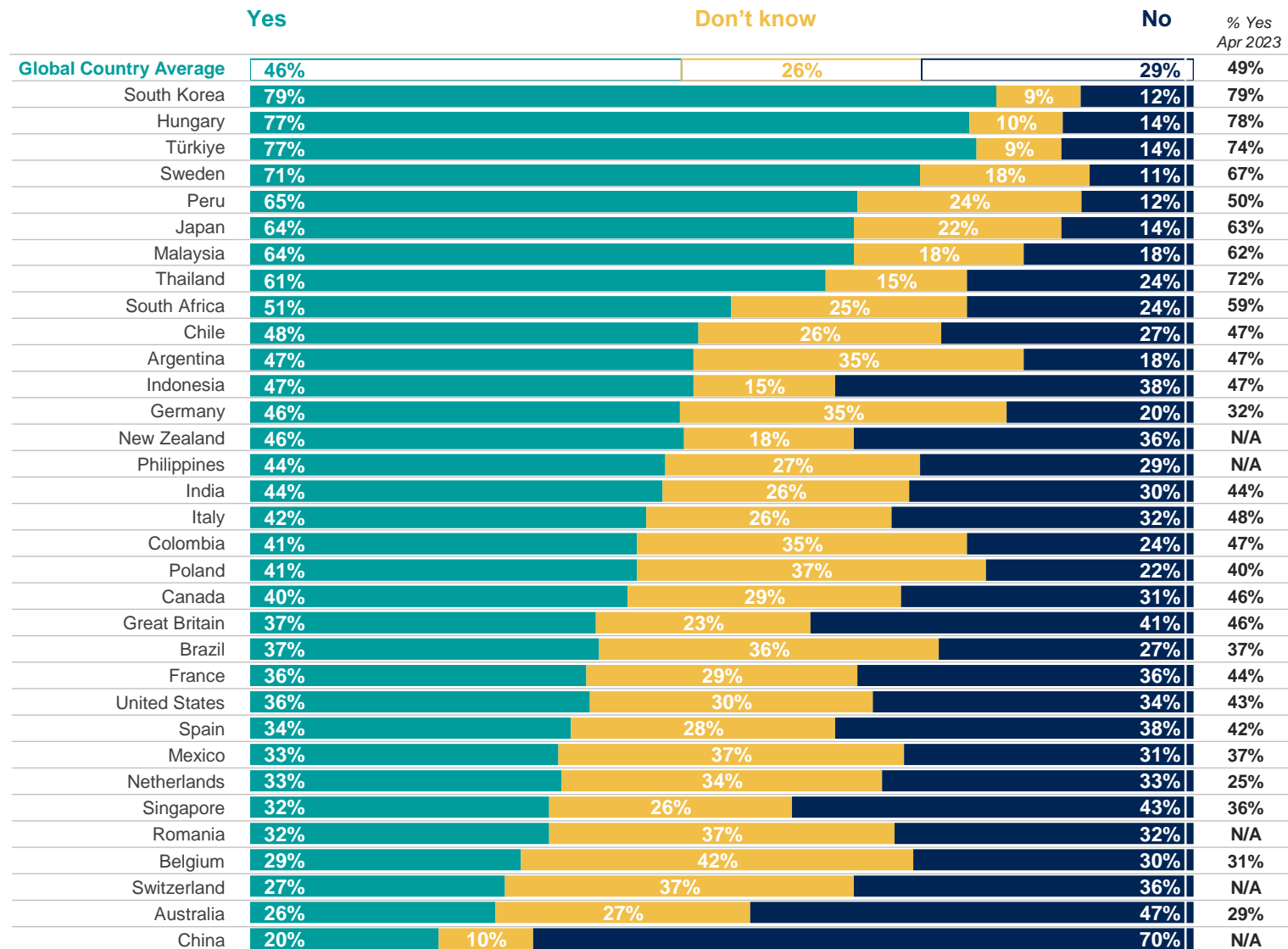
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Q

As far as you are aware, is the economy in your country currently in a recession?

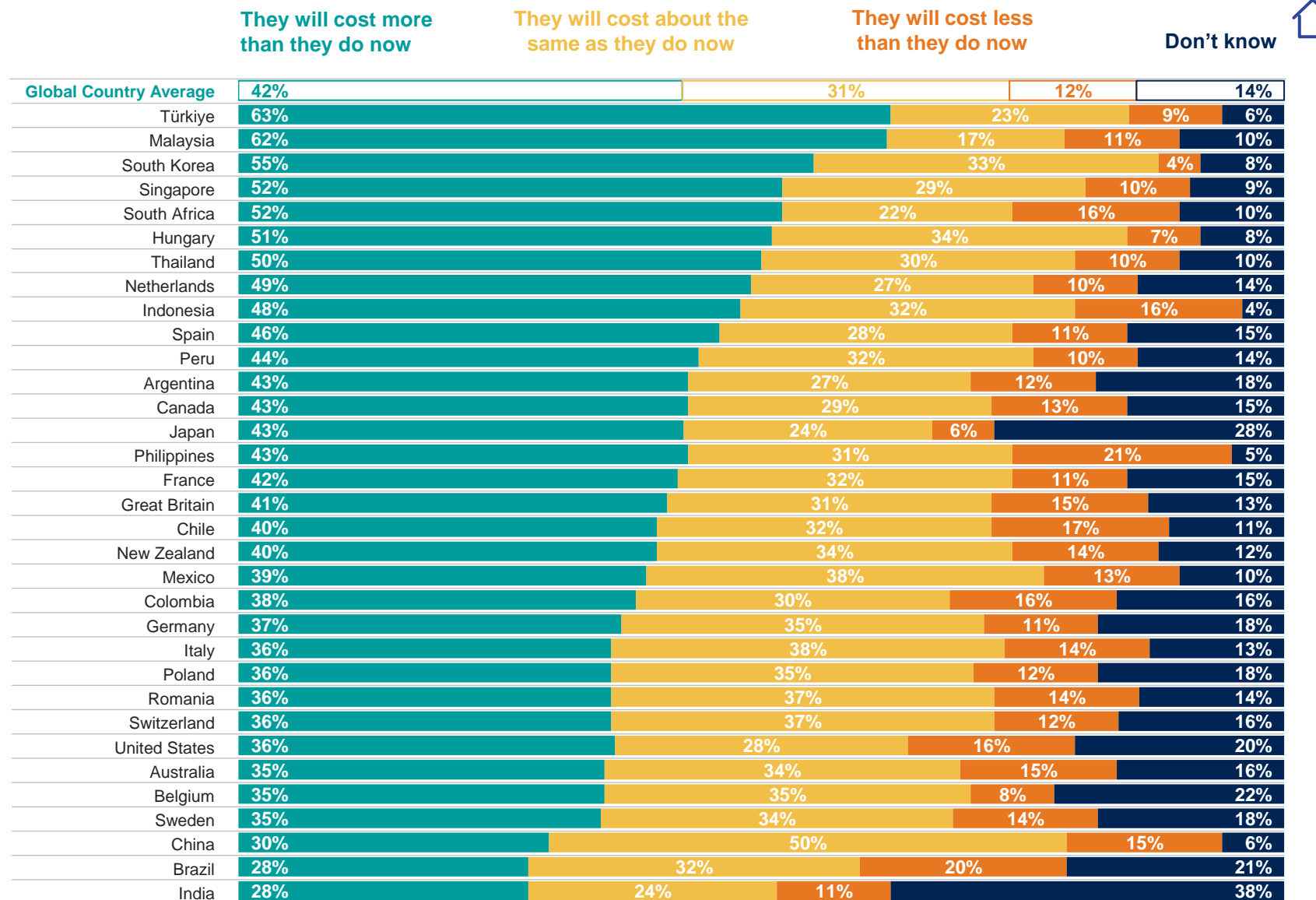


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Q

You may have heard recently about the rate of inflation falling in countries around the world. Assuming the annual rate of inflation halves in your country over the next year but remains above zero, which of the following will be true about the cost of goods and services in general this time next year?



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# SHRINKFLATION



# CONSUMER ATTITUDES AND UNDERSTANDING



Shrinkflation has dominated headlines this year and its controversy has led to many brands being named and shamed. The practice involves a product's size reducing while its price stays the same.

It has caused controversy among consumers, highlighting when it comes to the cost-of-living crisis we may not all be in it together. The European Commission went as far to call it a "[deceptive marketing technique](#)", while in France the [government has said it will introduce a law](#) ensuring that consumers will be notified if there is any reduction in size.

Looking at shrinkflation, 46% of consumers across 33 countries say they have noticed it. However, this is higher in English-speaking countries and Western Europe who are more likely to have seen this in their supermarkets.

## Shrinkflation in the news

What is shrinkflation and is it costing me money in my weekly shopping?

France's Carrefour puts up 'shrinkflation' warning signs

**Less is more: Why shrinkflation is sparking anger among French shoppers**

**The curse of shrinkflation: how food is being sneakily downsized - but prices aren't**

Feel like you're paying more for less? These are the latest items to be hit by 'shrinkflation'

**Smaller boxes in the cereal aisle? Say hello to shrinkflation.**

BuzzFeed

**"Shrinkflation" Has Gone Too Far — Here Are 19 Items That Are No Longer A Bang For Your Buck**





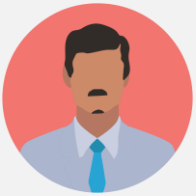
## What are consumers saying?



**“I first started noticing toilet paper was getting smaller & smaller, to the point of glaringly obvious. But now, more corporations are doing it in a manner that isn’t as noticeable. It isn’t enough to shop price but also net weight.”**



**“Shrinkflation isn’t just limited to non-perishables and packaged foods anymore! Even fresh products are feeling the squeeze. Smaller containers for fruits, veggies, are becoming the new norm.”**



**“Sell you less for the same price. Avoids sticker shock of increasing prices but you get less product in return. It's happening with virtually all products. Soft drinks get smaller, cereal bars get lighter etc... check out r/shrinkflation for more.”**

It’s in these countries where shoppers are most against shrinkflation. Two-thirds in France and Türkiye believe it is unacceptable for brands and retailers to do this. This is echoed globally with one in two (48%) saying it is the case.

However, this masks big differences by country. Consumers in Asia have a very different attitude. While they are the least likely to have seen shrinkflation in their supermarkets, they are the least likely to find it unacceptable and, in some countries, more likely to say they find it acceptable than unacceptable.

One thing that has been clear is brands have to be careful how they navigate through the cost-of-living crisis if they want to avoid being accused of profiteering. Businesses making excessive profits is seen by consumers as one of the biggest drivers of rising prices. As can be seen by the verbatims from social media (see left), this is a very emotional issue and could affect their long-term brand health.

Source: Ipsos Synthesio

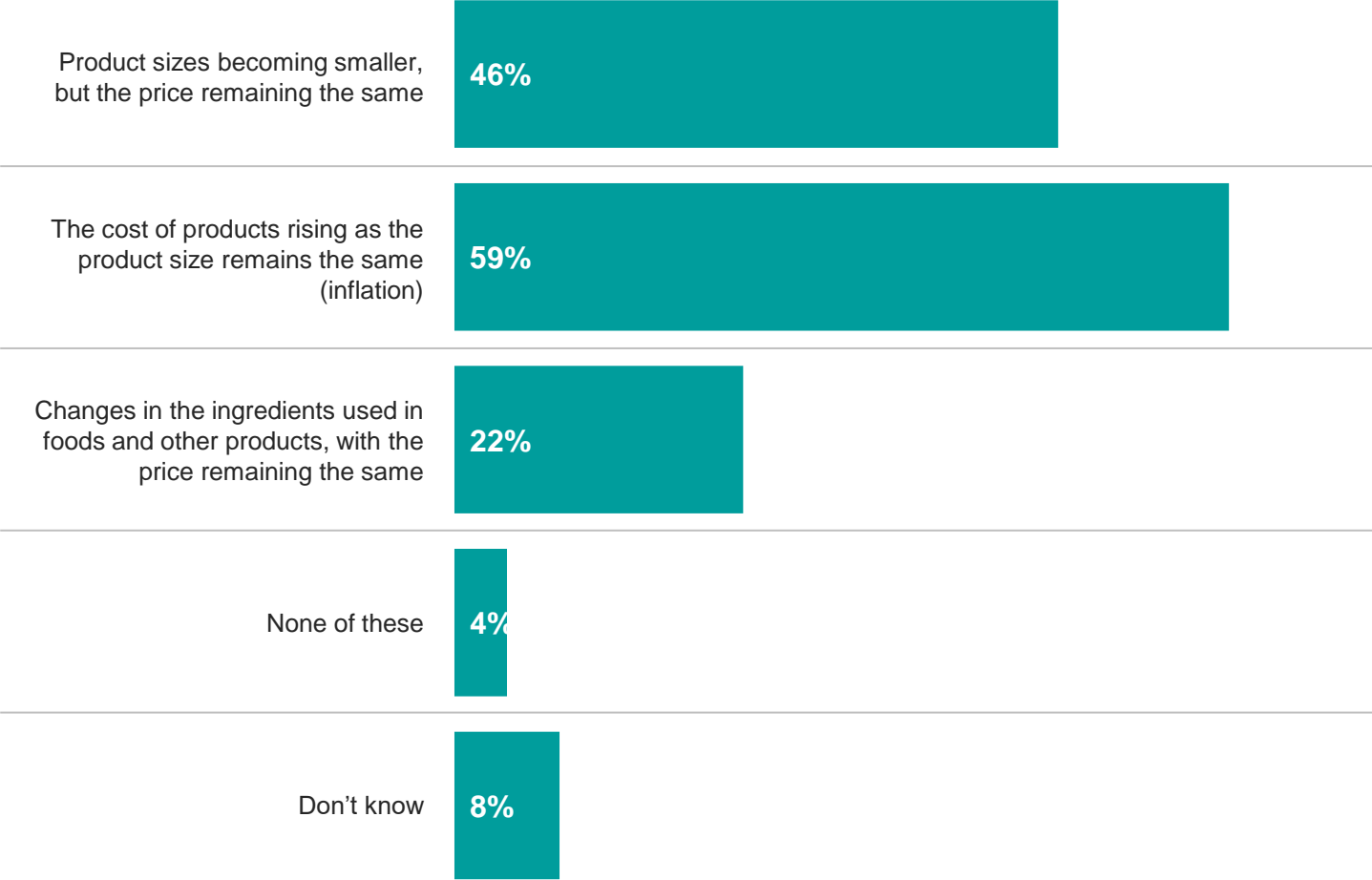


Q

Which of the following, if any, have you noticed in the past six months when buying food and other products in your country?

Global Country Average

% noticed



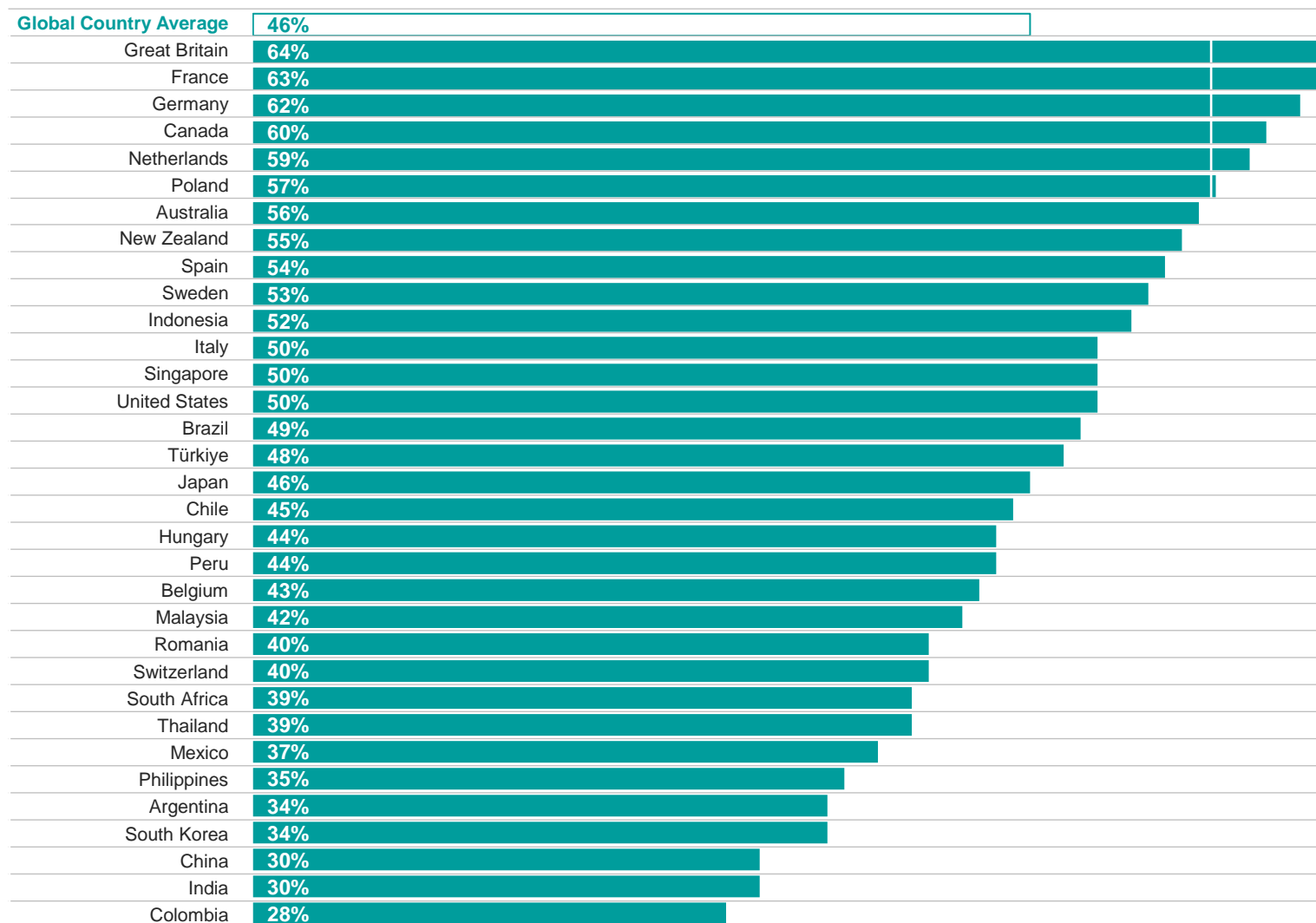
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Q

Which of the following, if any, have you noticed in the past six months when buying food and other products in your country?

Product sizes becoming smaller, but the price remaining the same

% noticed



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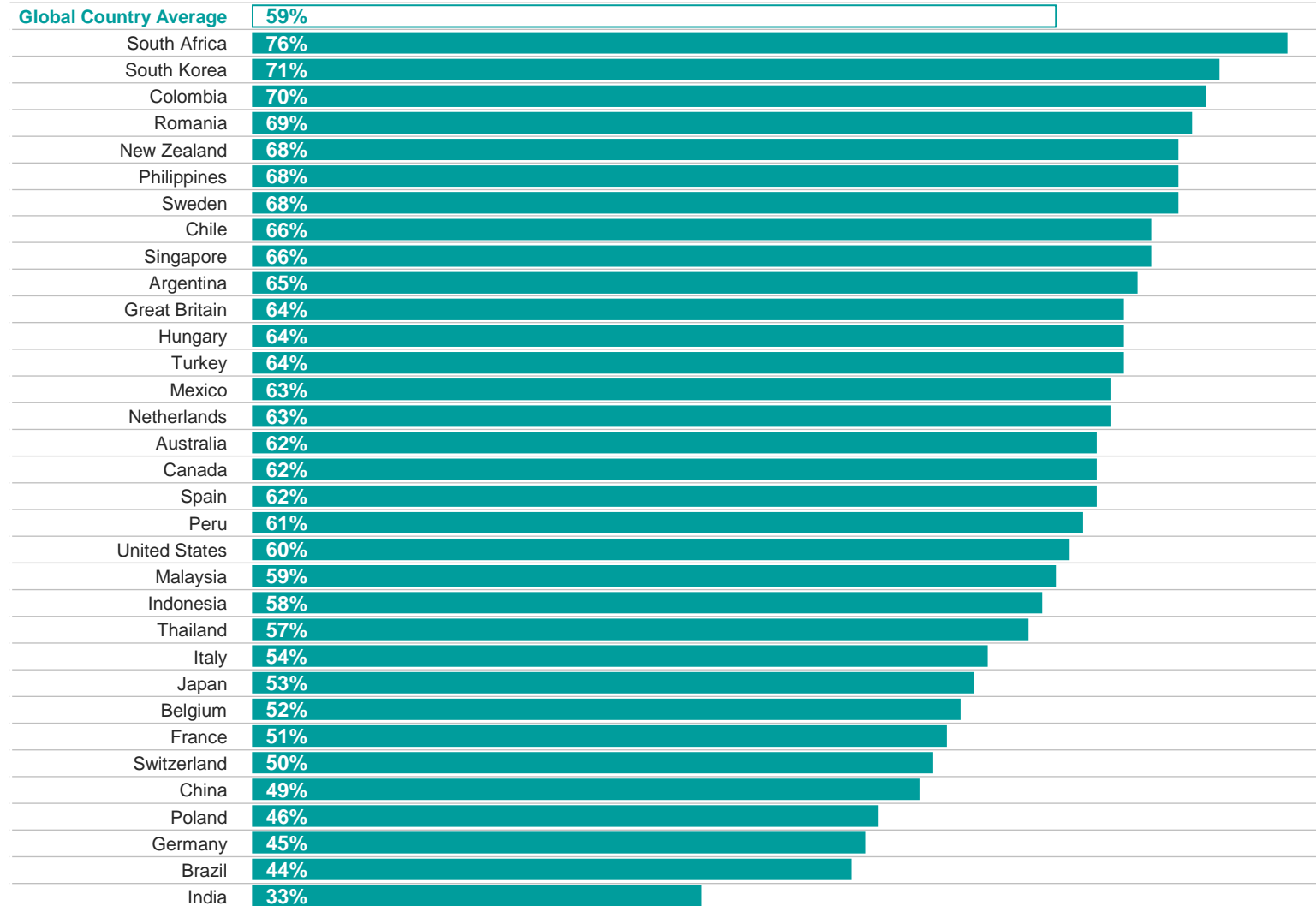


Q

Which of the following, if any, have you noticed in the past six months when buying food and other products in your country?

The cost of products rising as the product size remains the same (inflation)

% noticed



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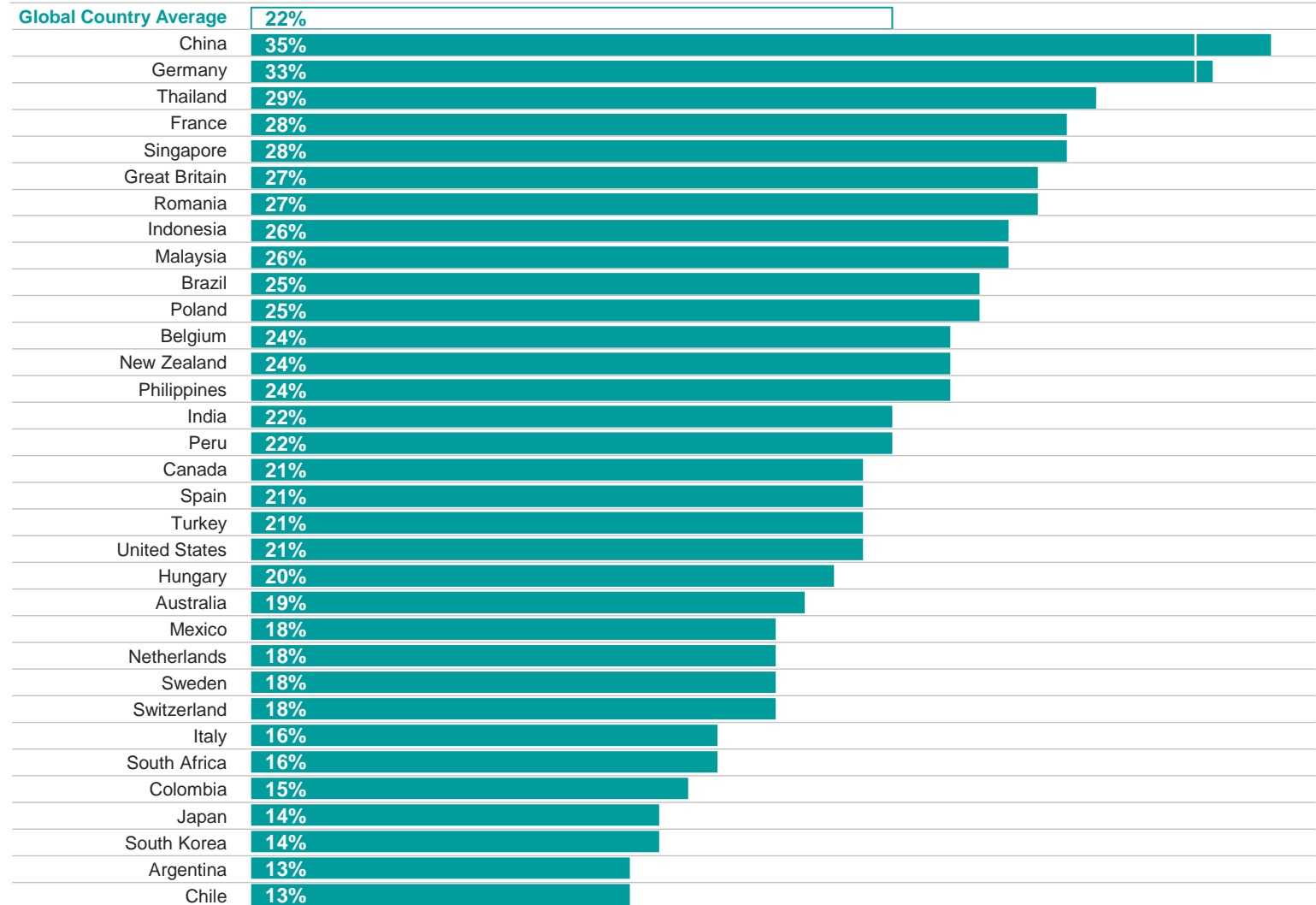


Q

Which of the following, if any, have you noticed in the past six months when buying food and other products in your country?

Changes in the ingredients used in foods and other products, with the price remaining the same

% noticed



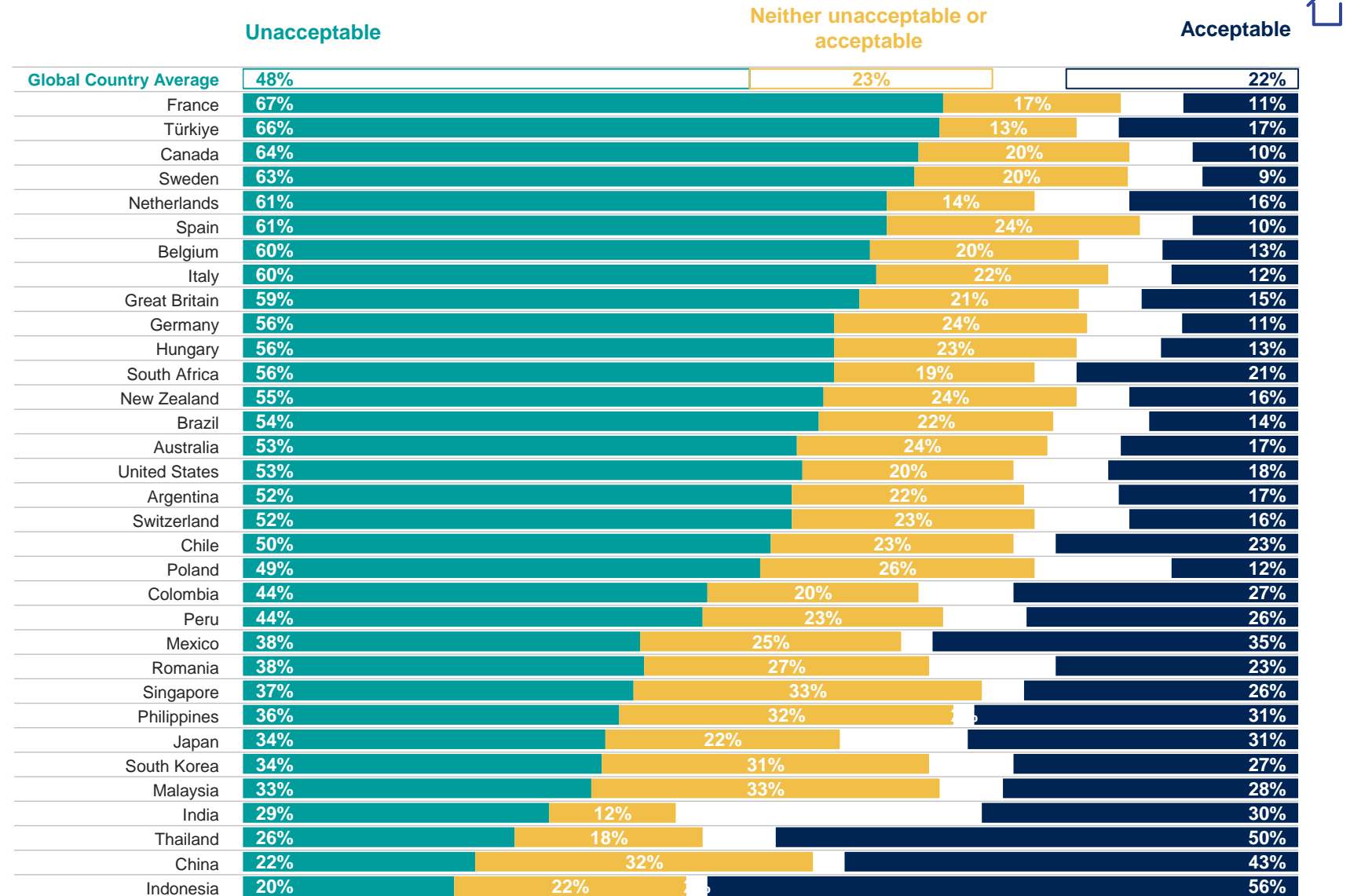
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Q

And how acceptable, if at all, do you think it is for businesses and retailers to reduce the size of their products while keeping prices the same, as a way of responding to rising costs?



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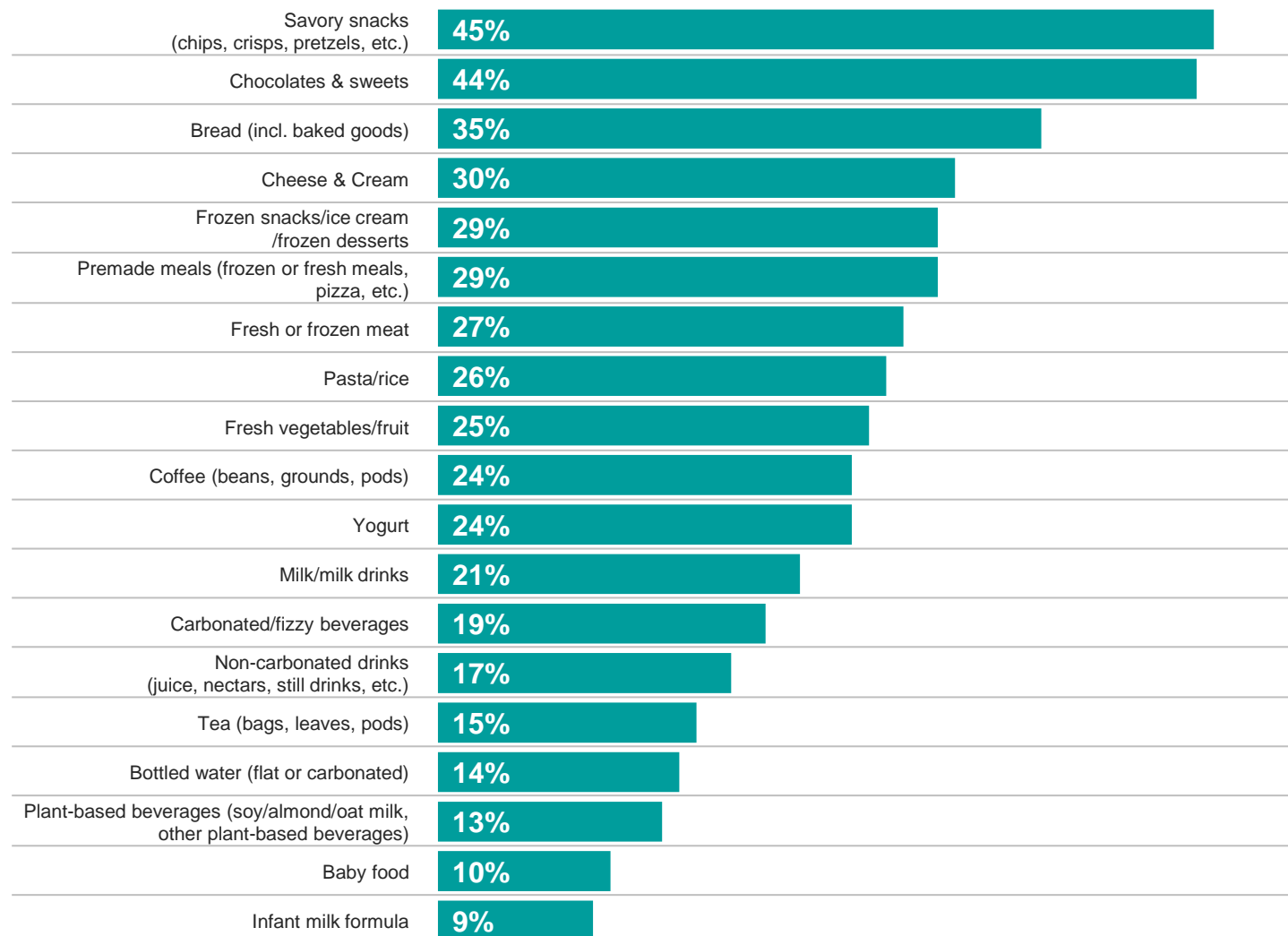
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Q

In which of the following types of food and products have you noticed pack sizes becoming smaller, while the price has stayed the same?

### Global Country Average

From those than answered noticed to the product sizes becoming smaller, but the price remaining the same



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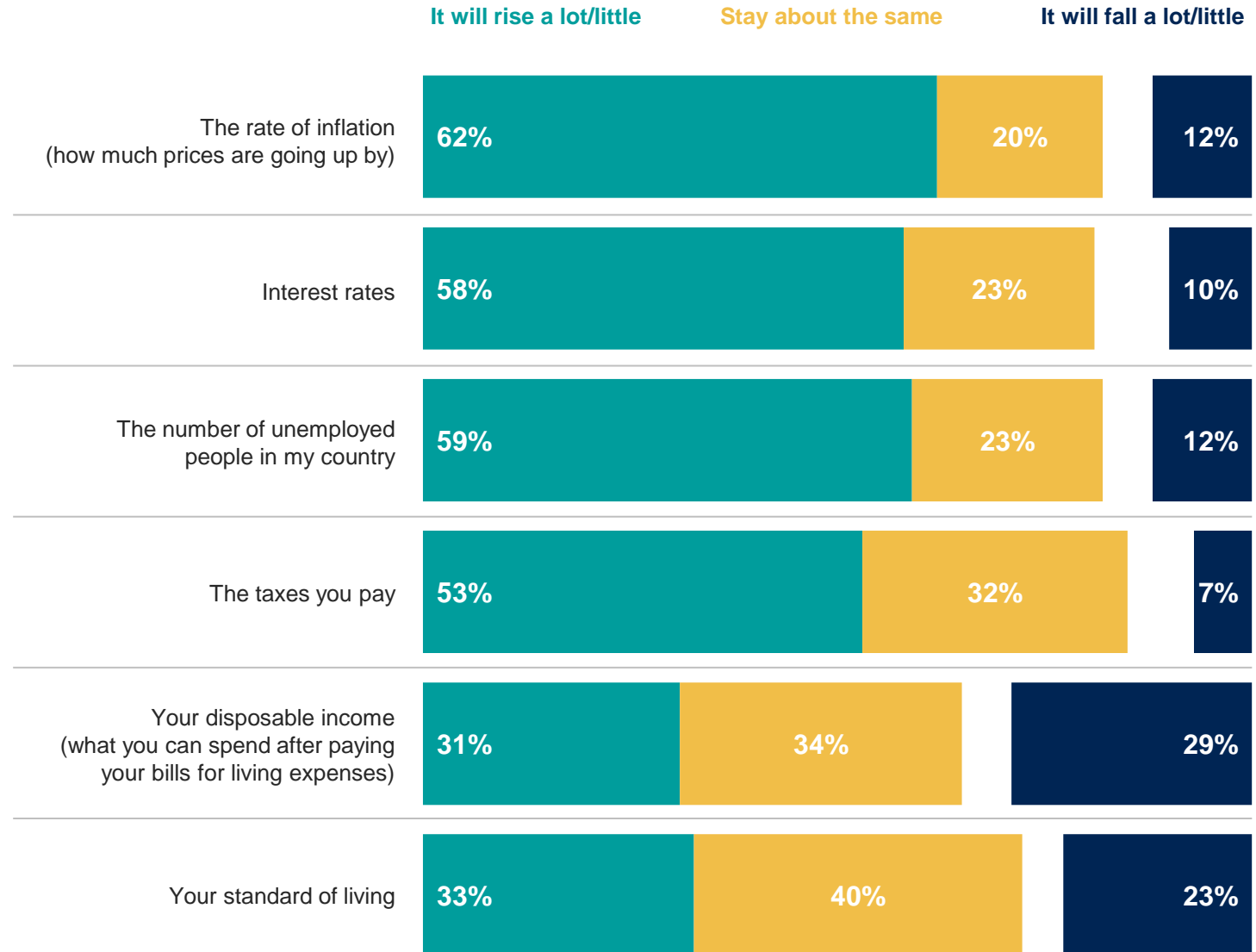
# EXPECTATIONS FOR THE FUTURE



Q

Over the next year, do you think each of the following will rise, decline, or stay at about the same level?

Global Country Average %



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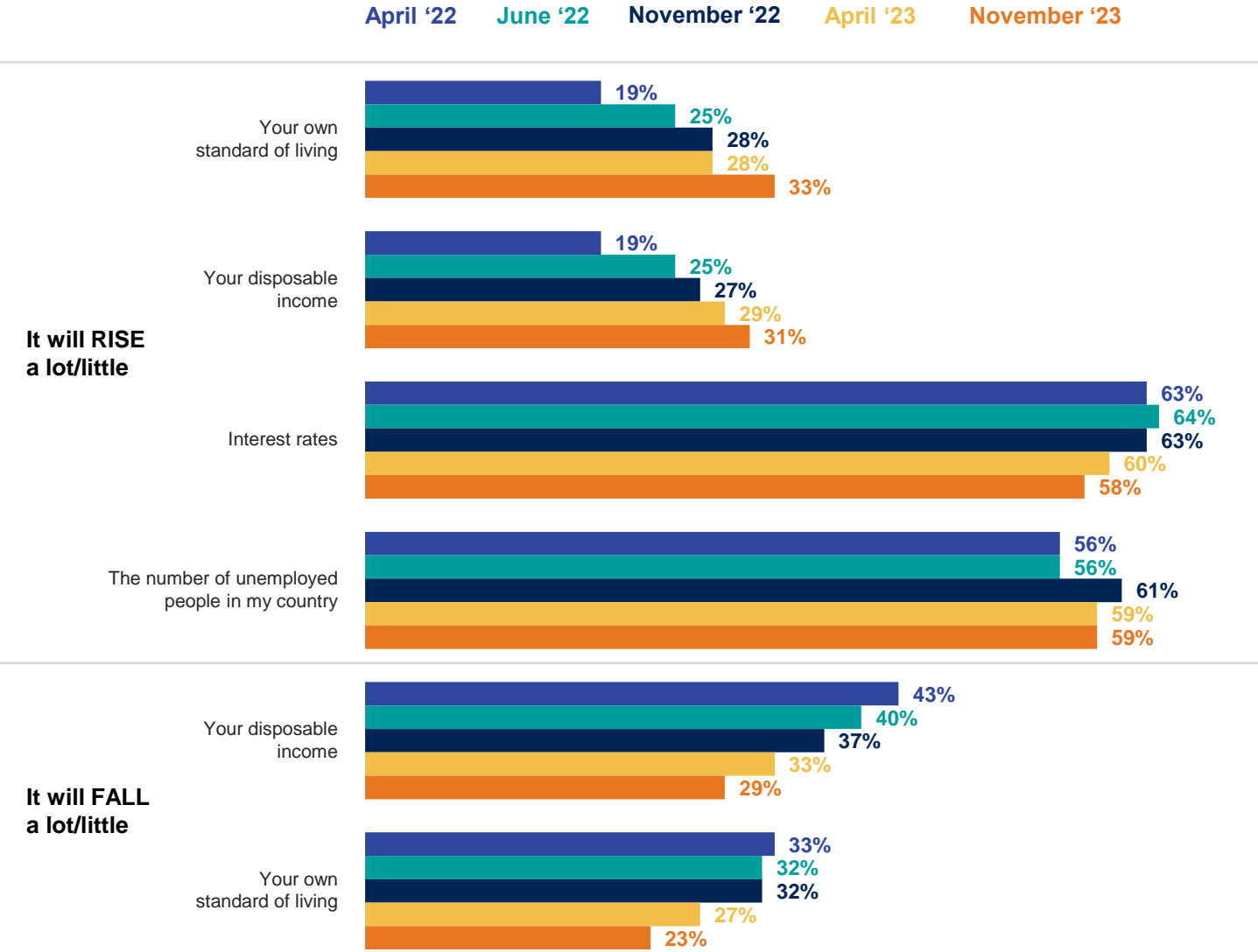




Q

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Global Country Average %



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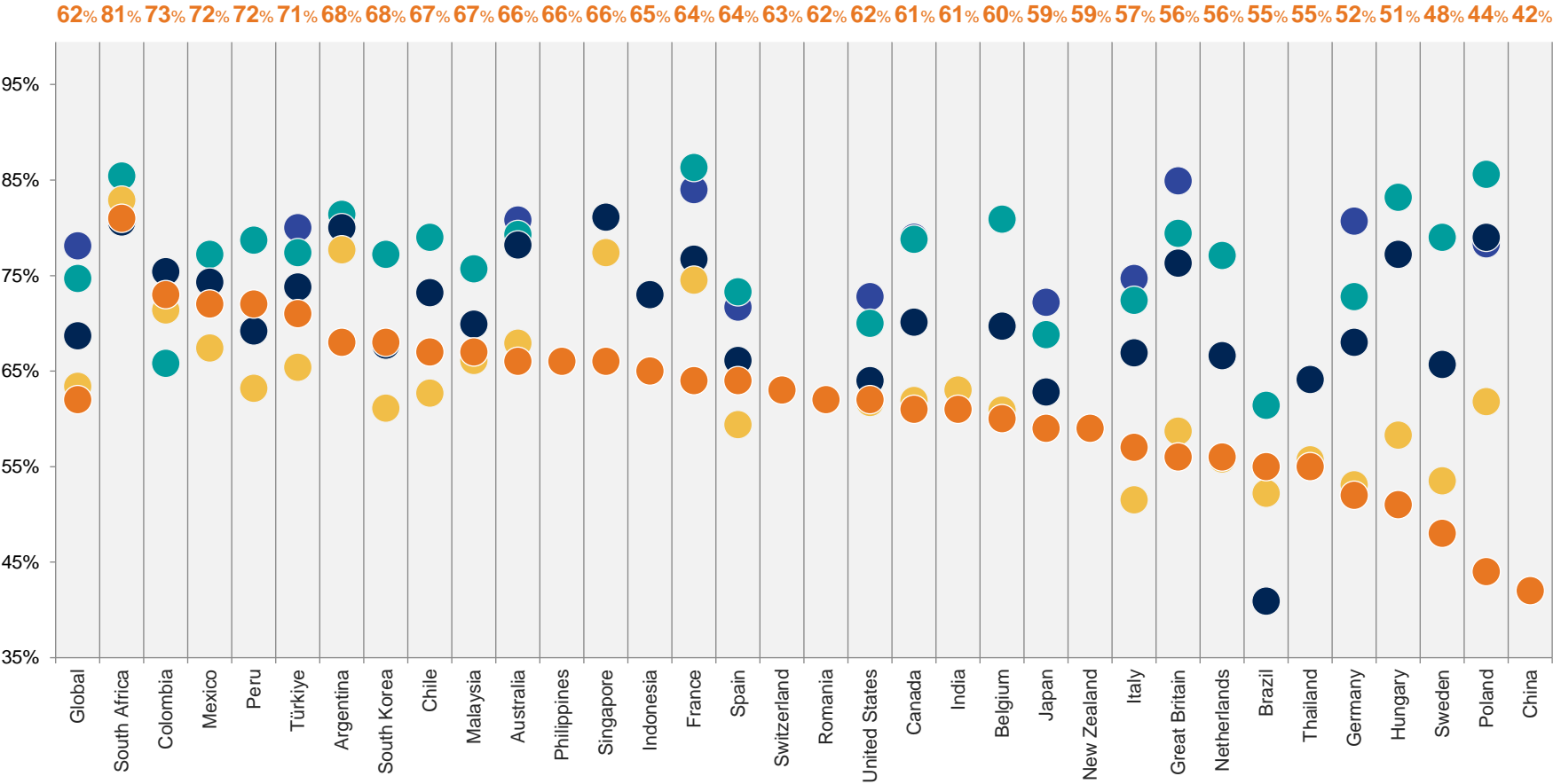


Over the next year, do you think each of the following will rise, decline, or stay at about the same level?

The rate of inflation (how much prices are going up by)

% it will rise a lot/little

April '22   June '22   November '22   April '23   November '23



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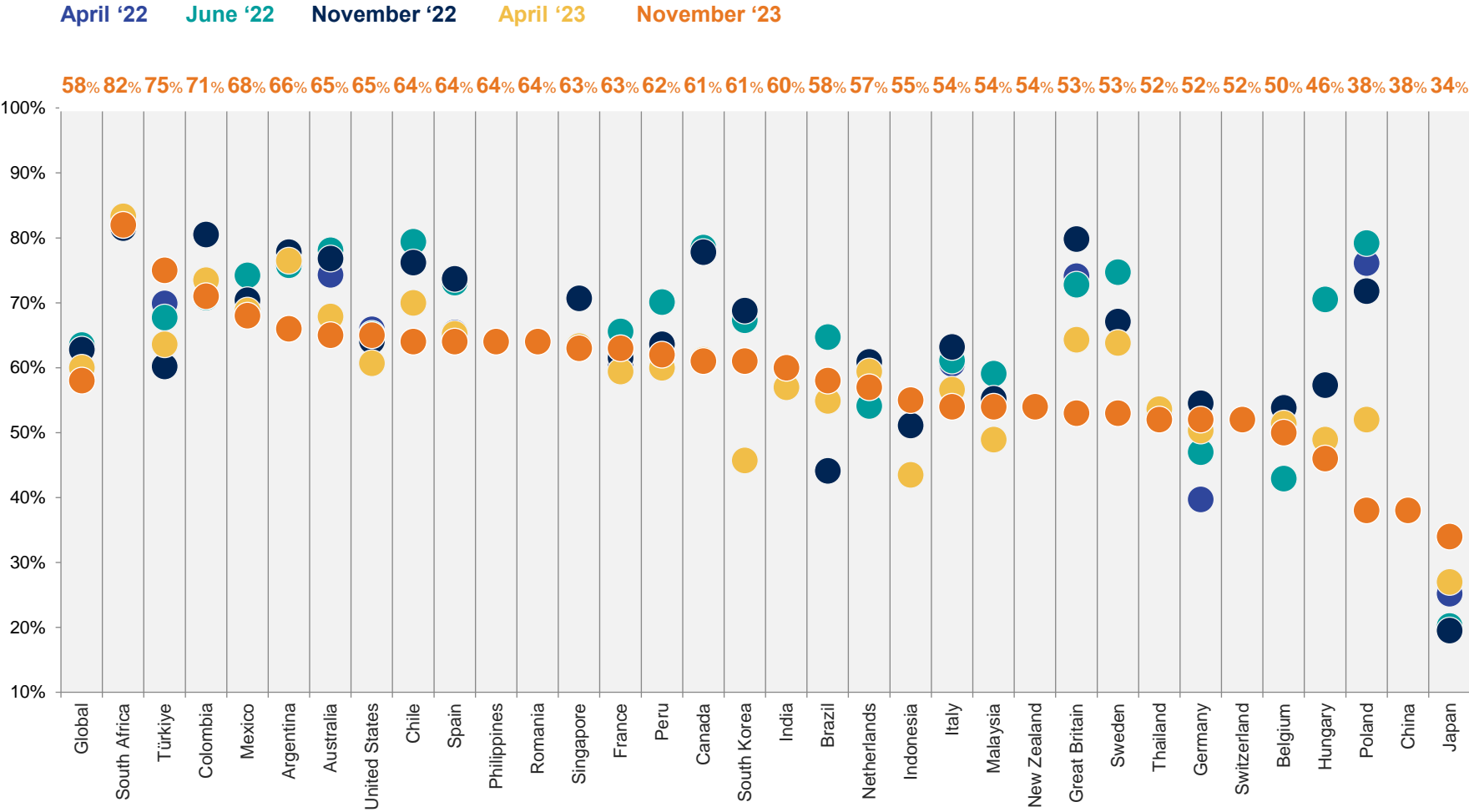




Over the next year, do you think each of the following will rise, decline, or stay at about the same level?

Interest rates

% it will rise a lot/little



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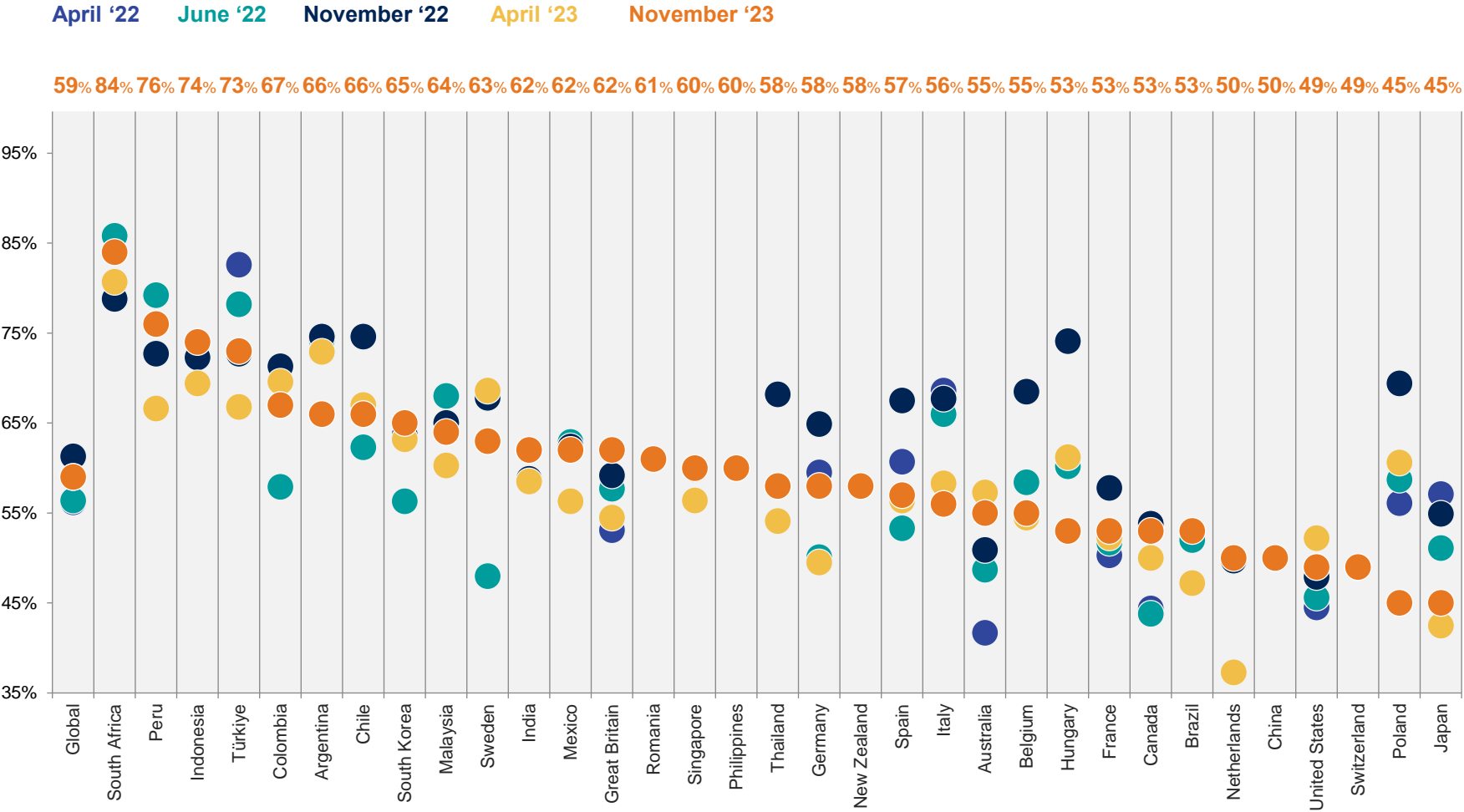




Over the next year, do you think each of the following will rise, decline, or stay at about the same level?

The number of unemployed people in my country

% it will rise a lot/little

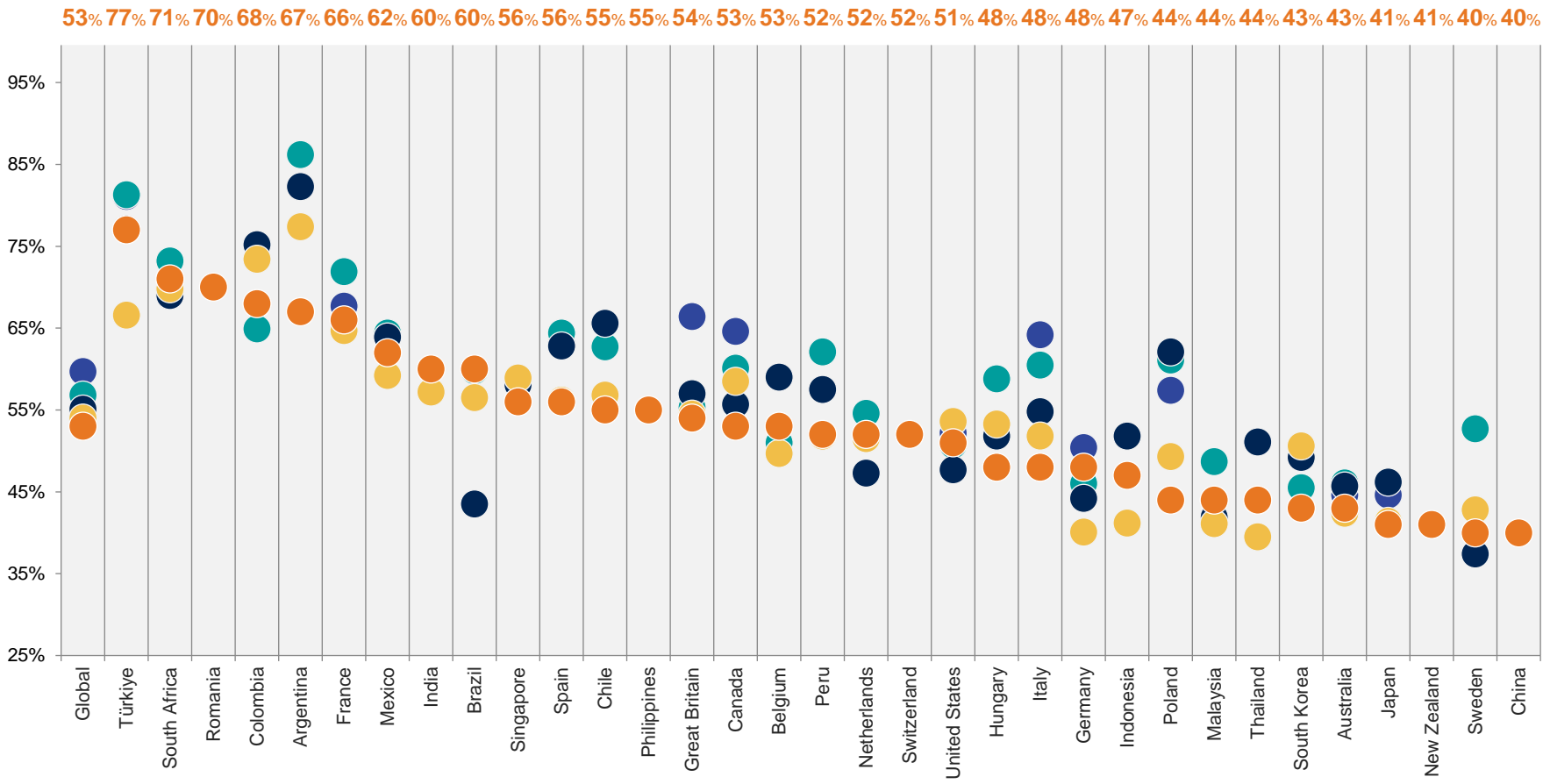


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The "Global Country Average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result. The samples in Brazil, Chile, mainland China, Colombia, Indonesia, Malaysia, Mexico, New Zealand, Peru, Philippines, Singapore, South Africa, Thailand and Türkiye are more urban, more educated, and/or more affluent than the general population.

Over the next year, do you think each of the following will rise, decline, or stay at about the same level?

The taxes you pay  
% it will rise a lot/little

April '22   June '22   November '22   April '23   November '23



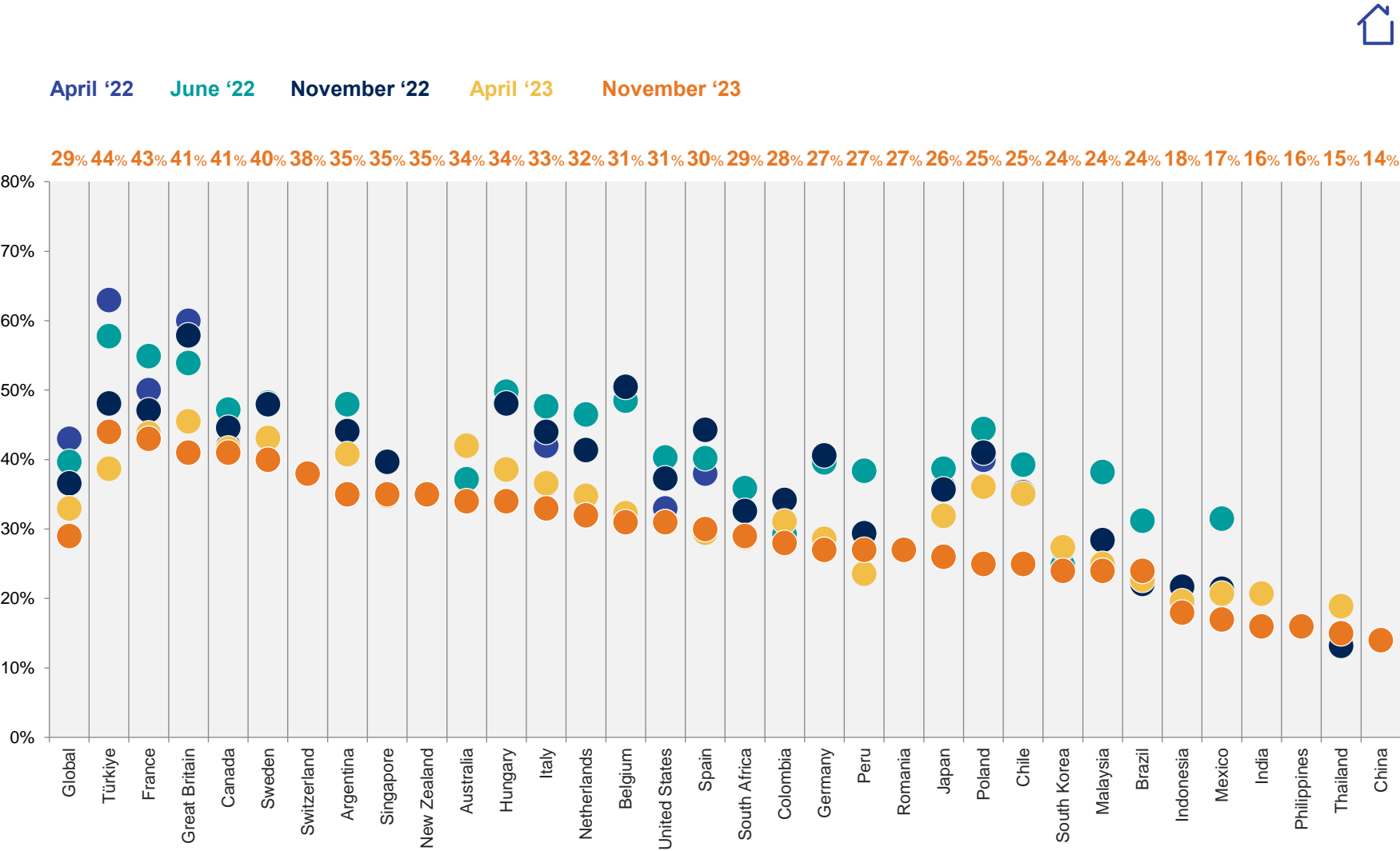
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Over the next year, do you think each of the following will rise, decline, or stay at about the same level?

Your disposable income (what you can spend after paying your bills for living expenses)

% it will **fall** a lot/little



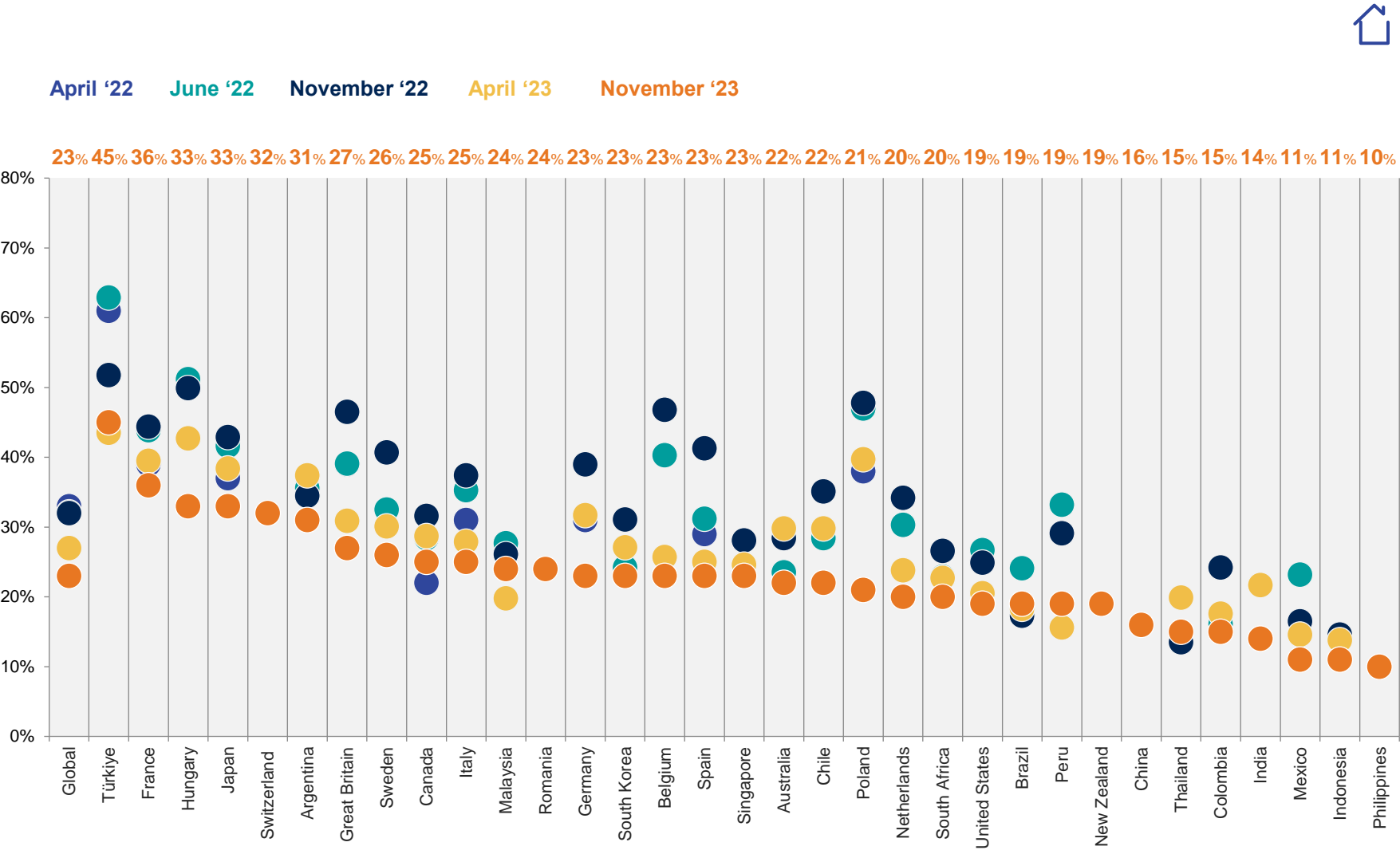
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Over the next year, do you think each of the following will rise, decline, or stay at about the same level?

Your own standard of living  
% it will **fall** a lot/little



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Q

Thinking now about your household spend in the next six months, for each of the following types of spend, please say whether you expect it to increase, decrease, or stay the same as it is now.

Global Country Average %



**Base:** 24,792 online adults under age 75 across 33 countries, interviewed October 20-November 3, 2023

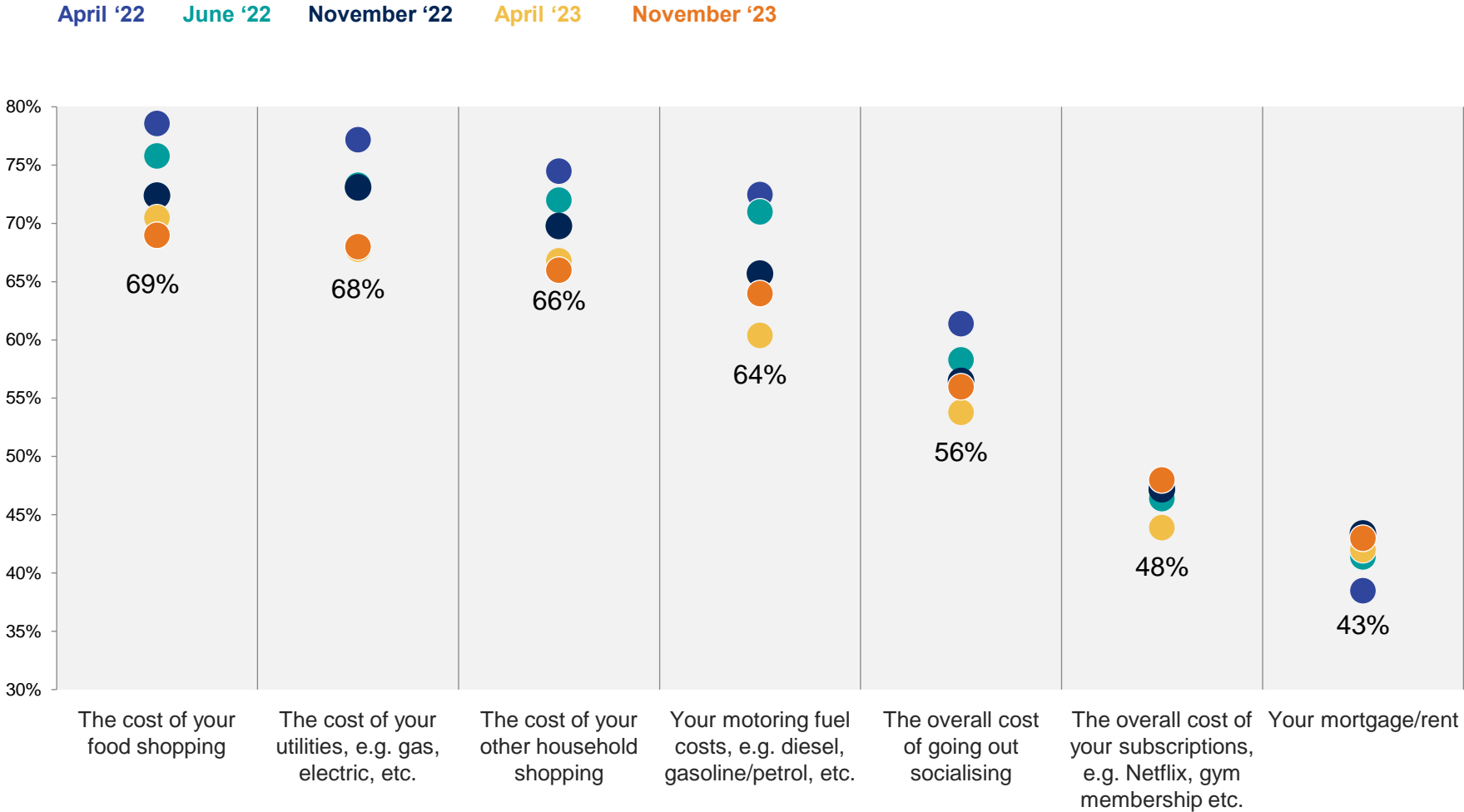
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Thinking now about your household spend in the next six months, for each of the following types of spend, please say whether you expect it to increase, decrease, or stay the same as it is now.

Increase a lot/little

Global Country Average %



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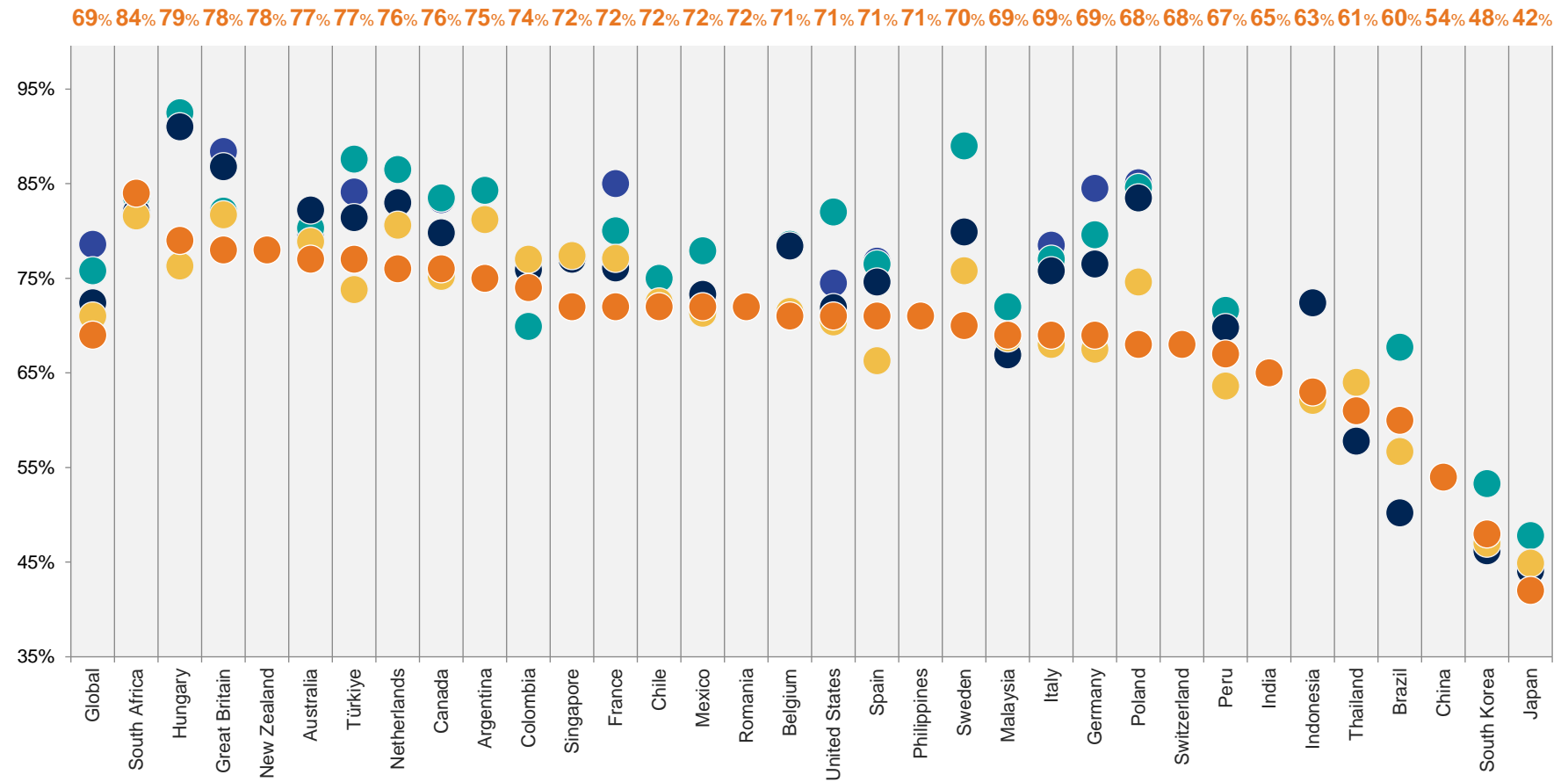


April '22   June '22   November '22   April '23   November '23

## The cost of your food shopping

Thinking now about your household spend in the next six months, for each of the following types of spend, please say whether you expect it to increase, decrease, or stay the same as it is now?

% it will rise a lot/little



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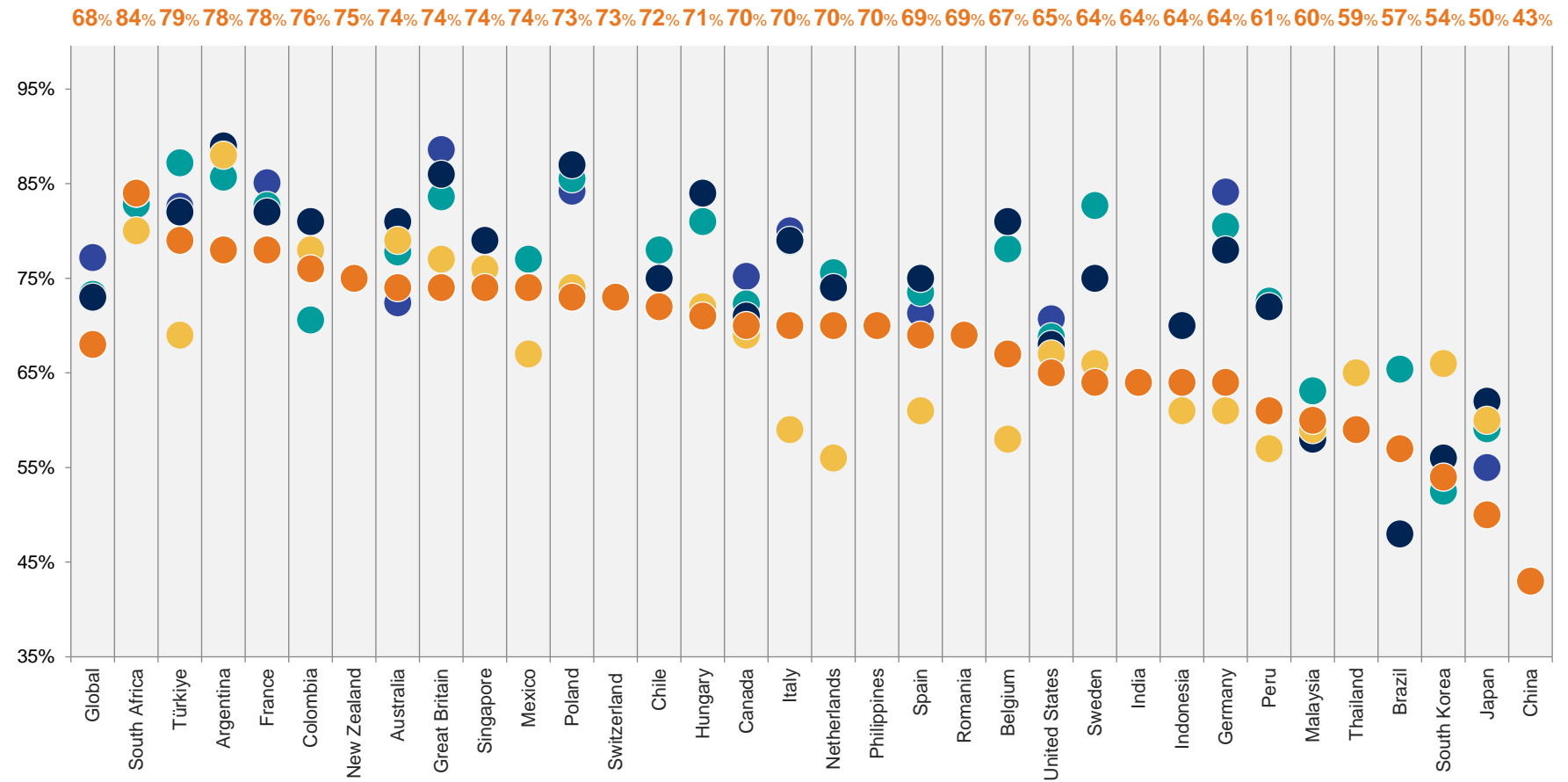


April '22   June '22   November '22   April '23   November '23

The cost of your utilities,  
e.g. gas, electric, etc.

Thinking now about your  
household spend in the next  
six months, for each of the  
following types of spend, please  
say whether you expect it to  
increase, decrease, or stay the  
same as it is now?

% it will rise a lot/little



Base: 24,792 online adults under age 75 across 33 countries, interviewed October 20-November 3, 2023

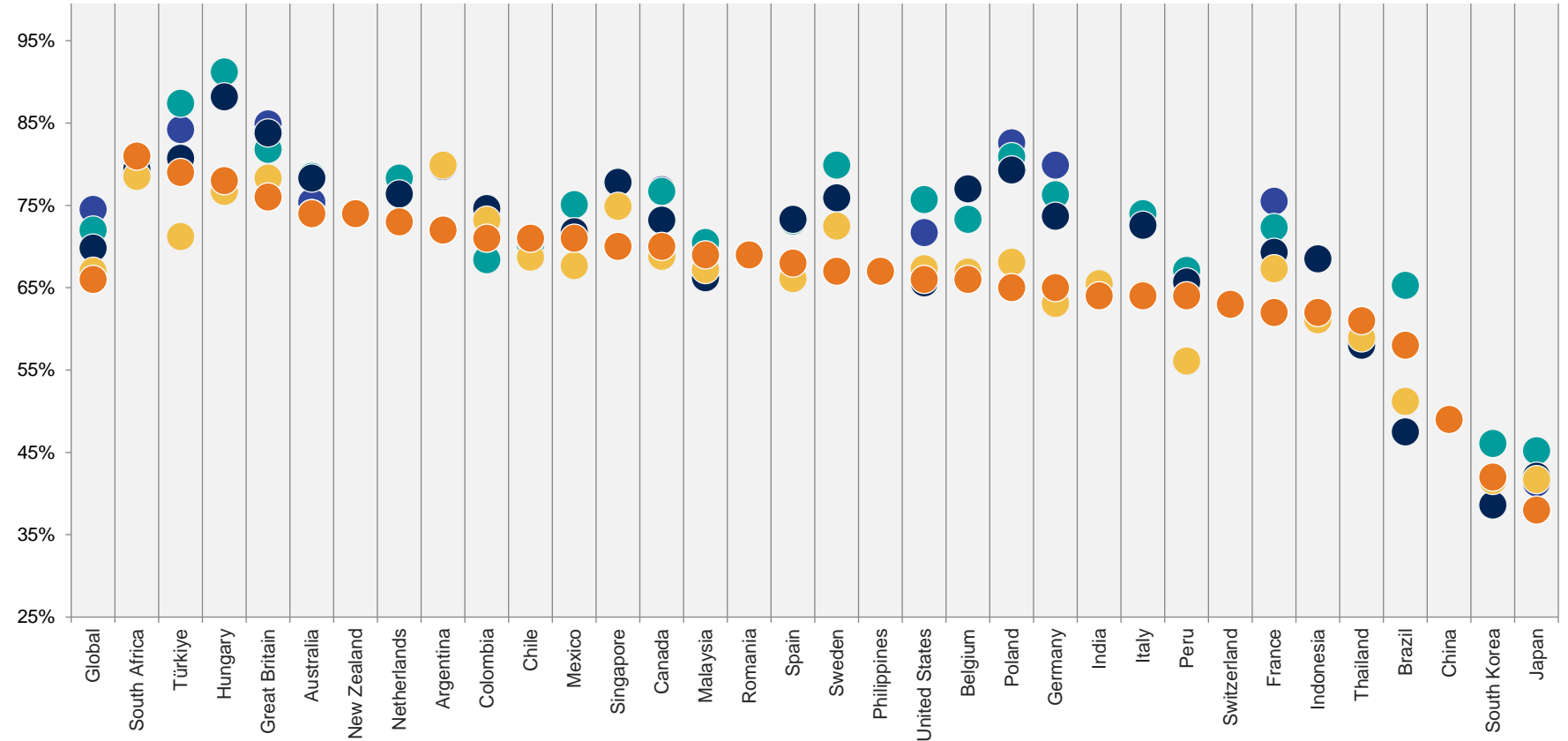
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April '22   June '22   November '22   April '23   November '23

66% 81% 79% 78% 76% 74% 74% 73% 72% 71% 71% 71% 70% 70% 69% 69% 68% 67% 67% 66% 66% 65% 65% 64% 64% 64% 63% 62% 62% 61% 58% 49% 42% 38%



## The cost of your other household shopping

Thinking now about your household spend in the next six months, for each of the following types of spend, please say whether you expect it to increase, decrease, or stay the same as it is now?

% it will rise a lot/little

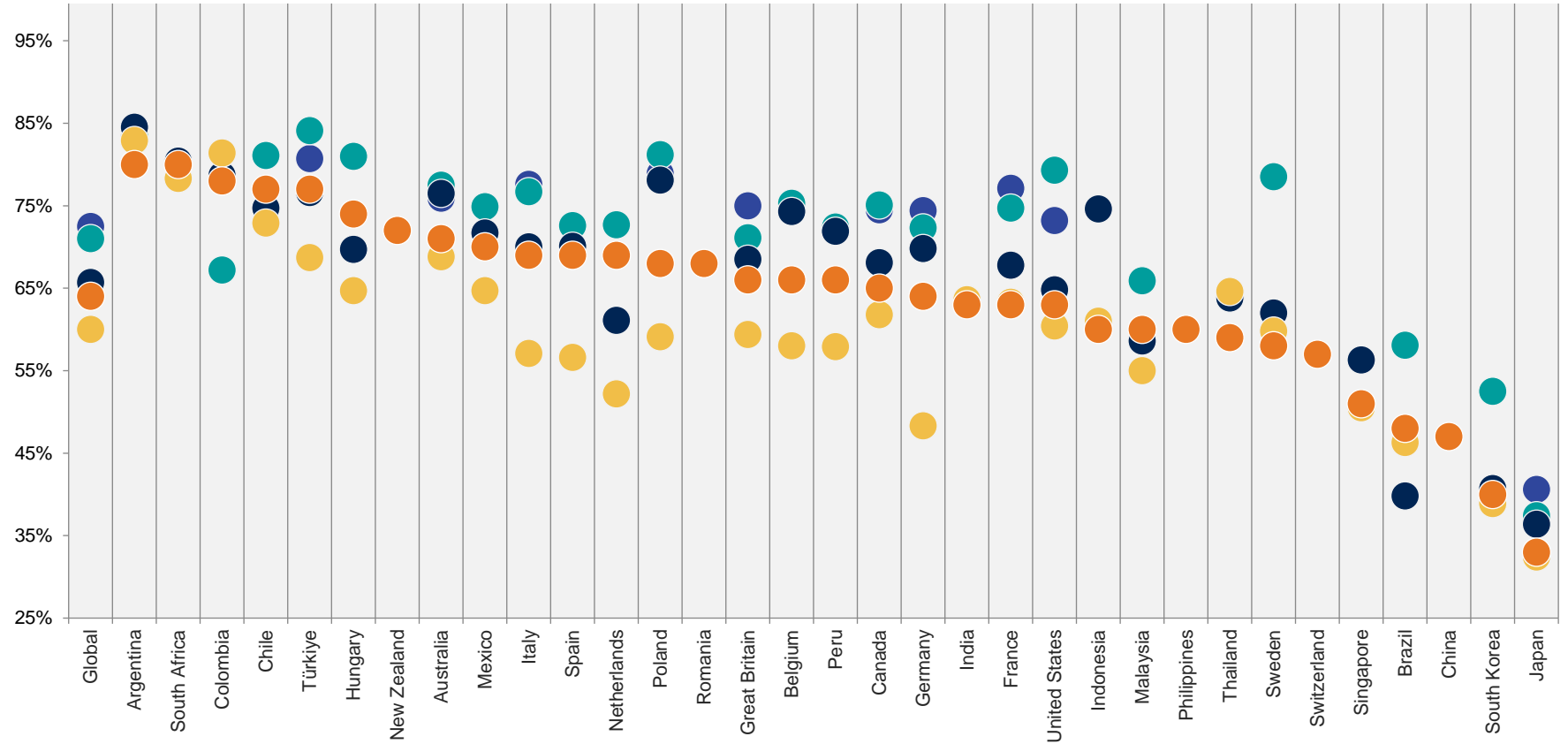
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April '22   June '22   November '22   April '23   November '23

64% 80% 80% 78% 77% 77% 74% 72% 71% 70% 69% 69% 69% 68% 68% 66% 66% 66% 65% 64% 63% 63% 63% 60% 60% 60% 59% 58% 57% 51% 48% 47% 40% 33%



Your motoring fuel costs, e.g. diesel, gasoline/petrol, etc.

Thinking now about your household spend in the next six months, for each of the following types of spend, please say whether you expect it to increase, decrease, or stay the same as it is now?

% it will rise a lot/little

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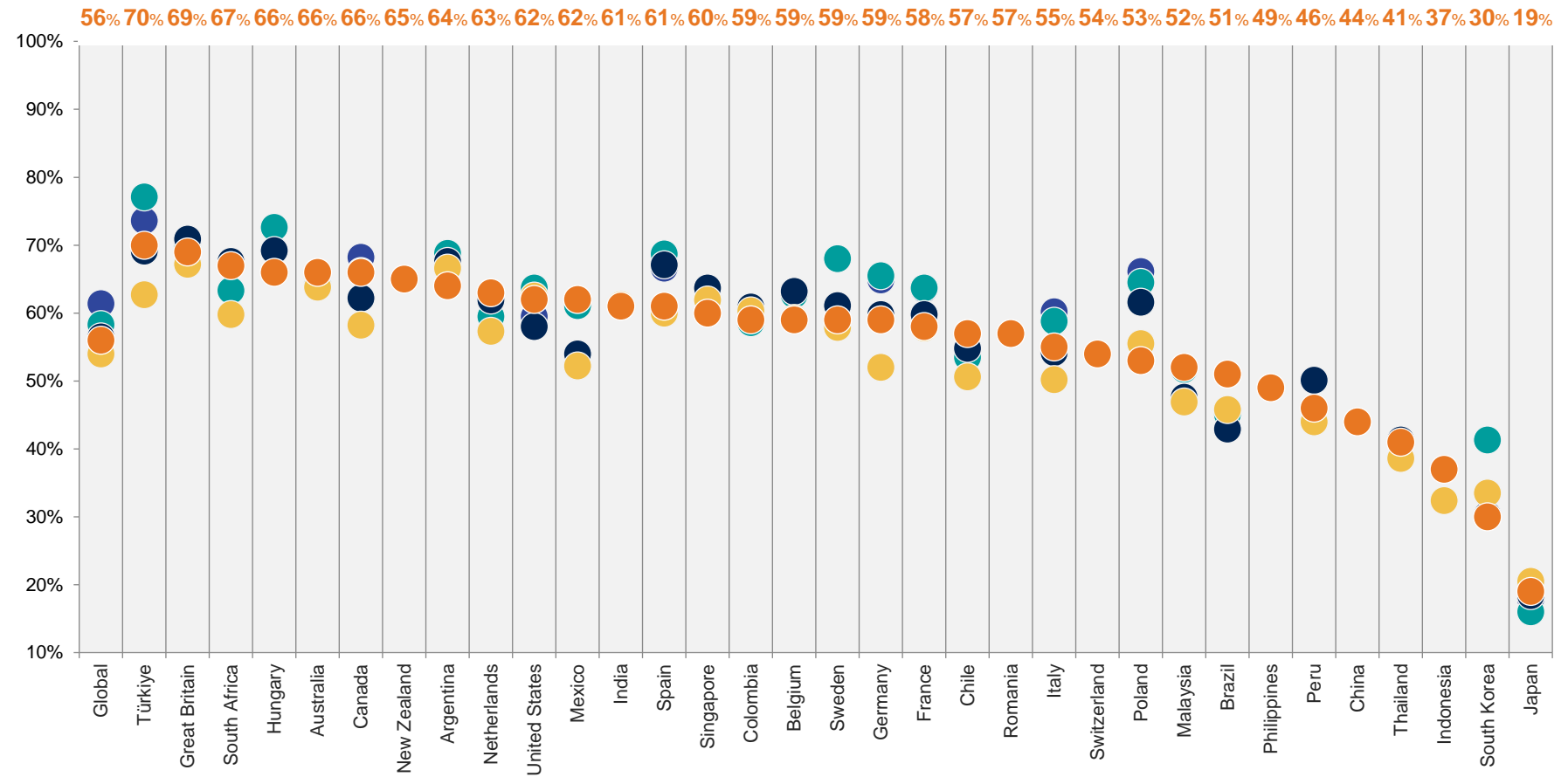


April '22   June '22   November '22   April '23   November '23

The overall cost of going out socialising e.g. cinema, cafés, restaurants, pubs, clubs, etc.

Thinking now about your household spend in the next six months, for each of the following types of spend, please say whether you expect it to increase, decrease, or stay the same as it is now?

% it will rise a lot/little



Base: 24,792 online adults under age 75 across 33 countries, interviewed October 20-November 3, 2023

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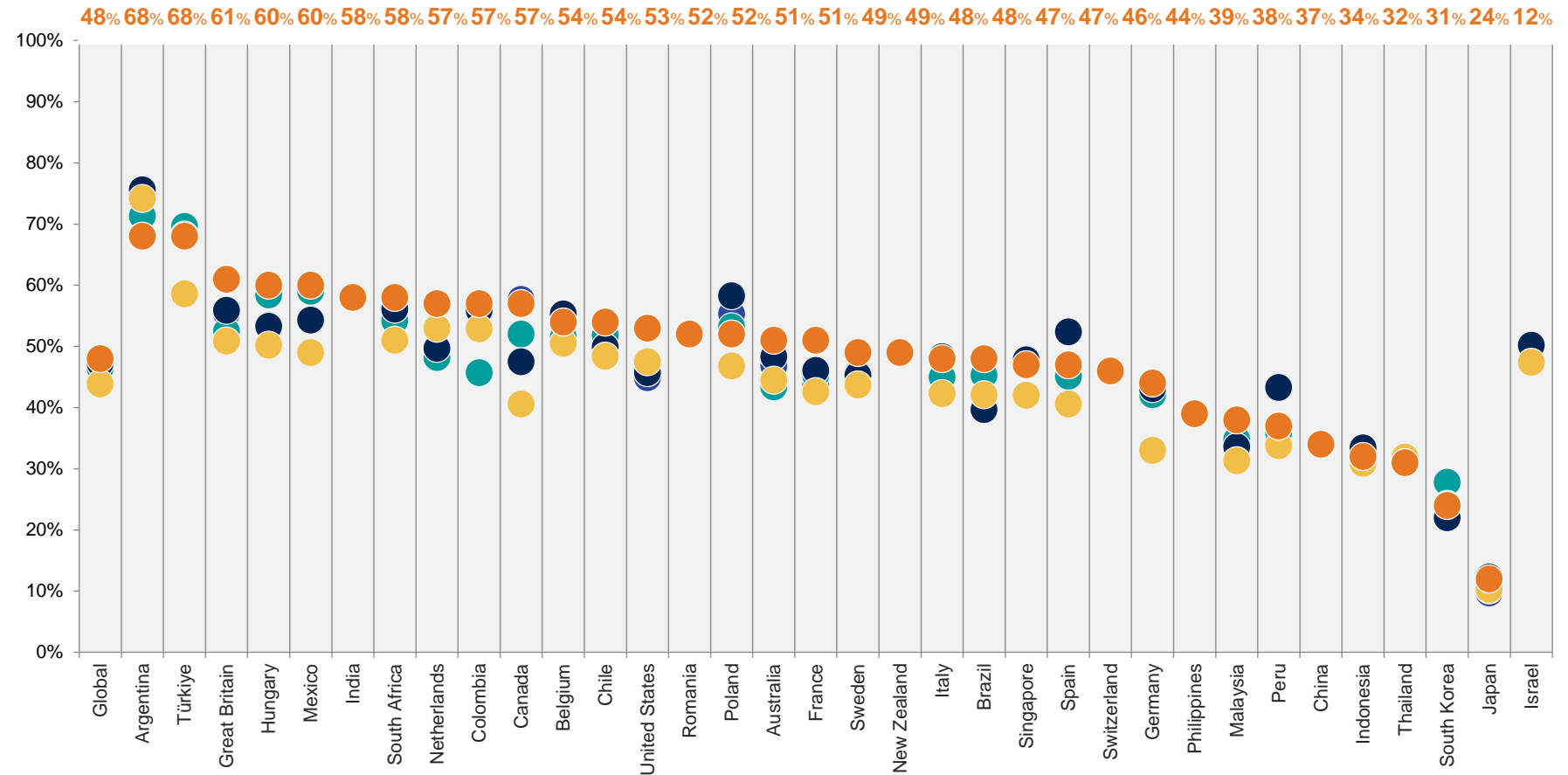


April '22   June '22   November '22   April '23   November '23

The overall cost of your subscriptions, e.g. Netflix, gym membership etc.

Thinking now about your household spend in the next six months, for each of the following types of spend, please say whether you expect it to increase, decrease, or stay the same as it is now?

% it will rise a lot/little



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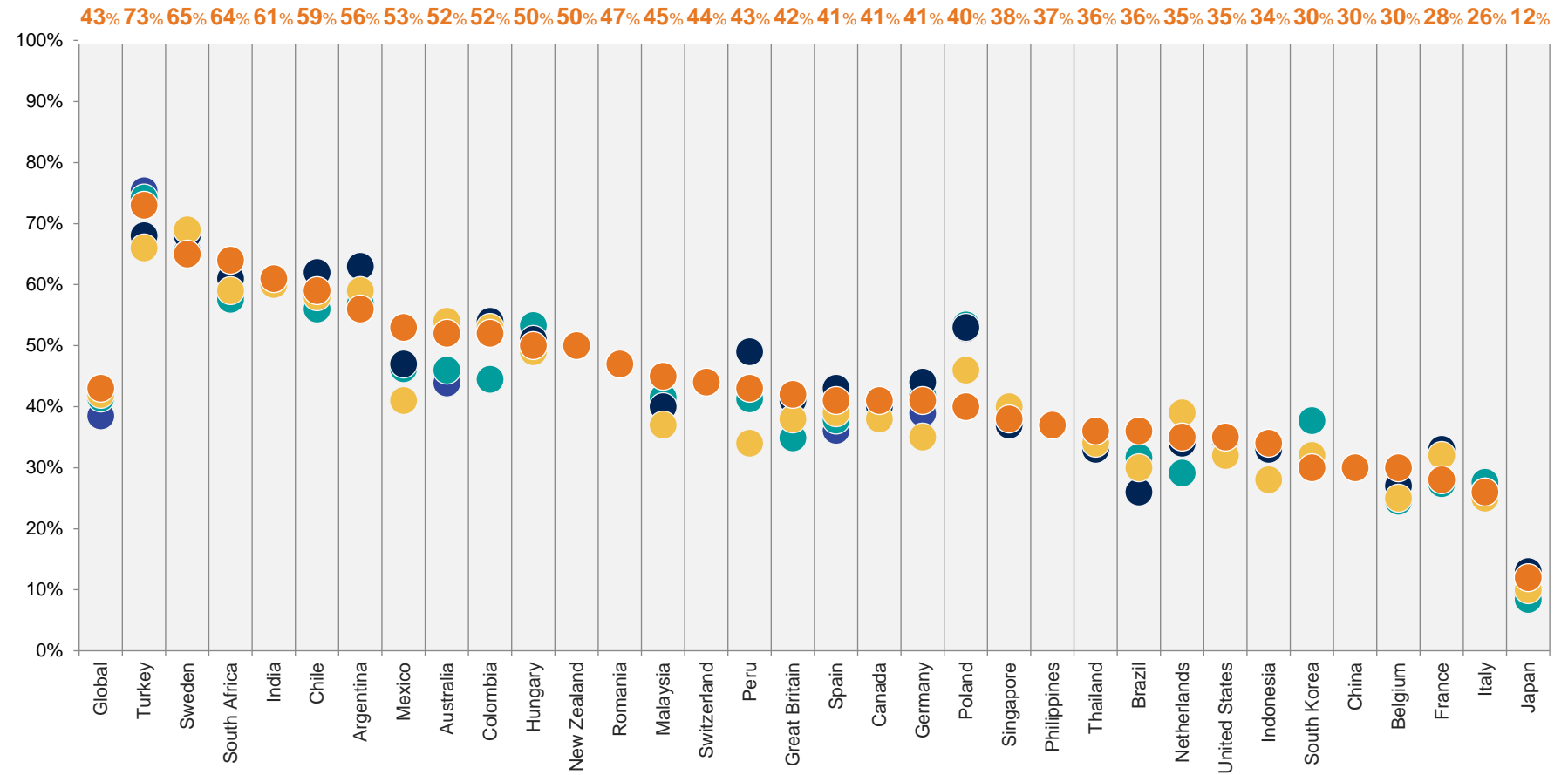


April '22   June '22   November '22   April '23   November '23

## Your mortgage/rent

Thinking now about your household spend in the next six months, for each of the following types of spend, please say whether you expect it to increase, decrease, or stay the same as it is now?

% it will rise a lot/little



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# WHY ARE PRICES RISING?

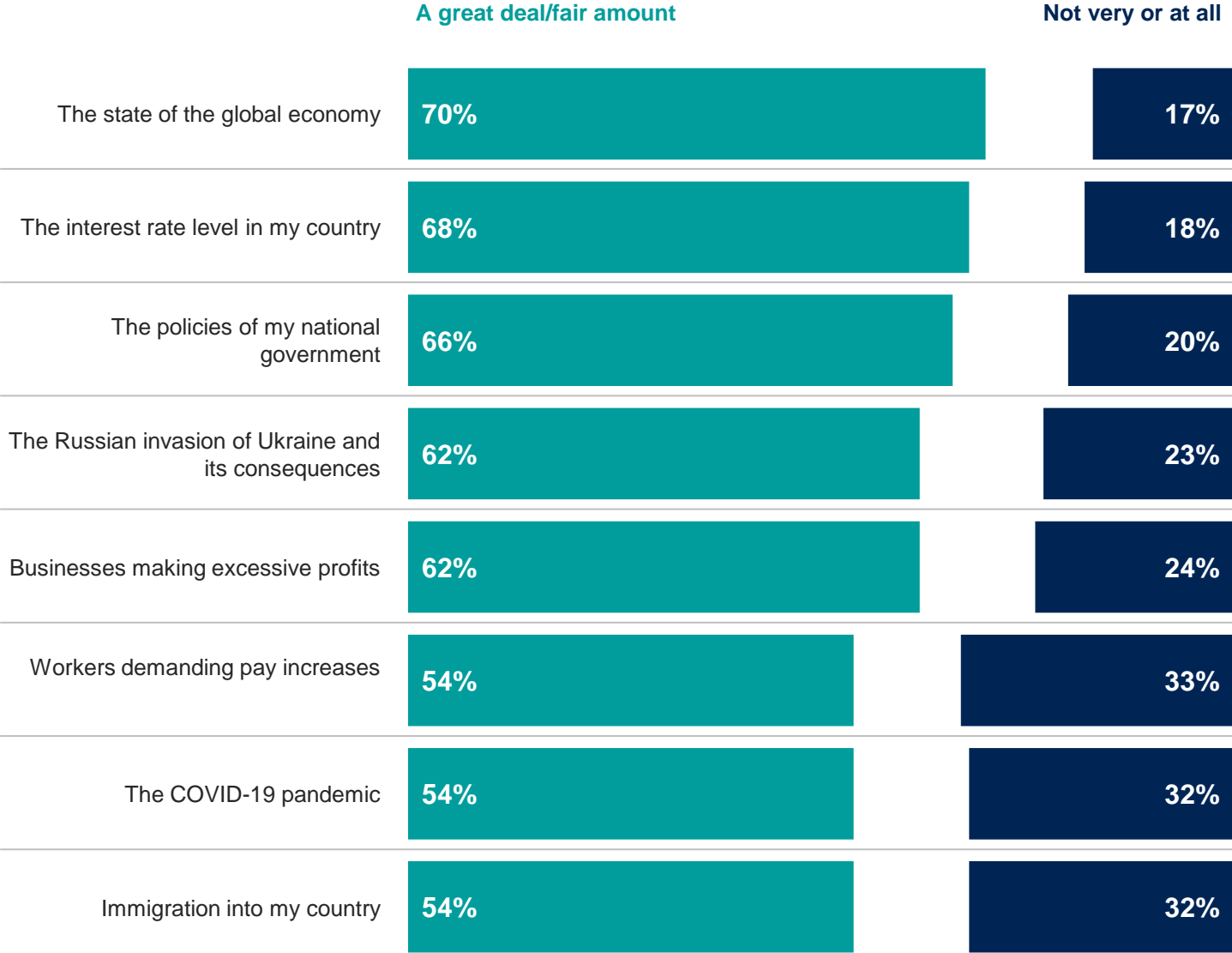






How much, if at all, do you think each of the following are contributing to the rising cost of living in ... today?

Global Country Average %



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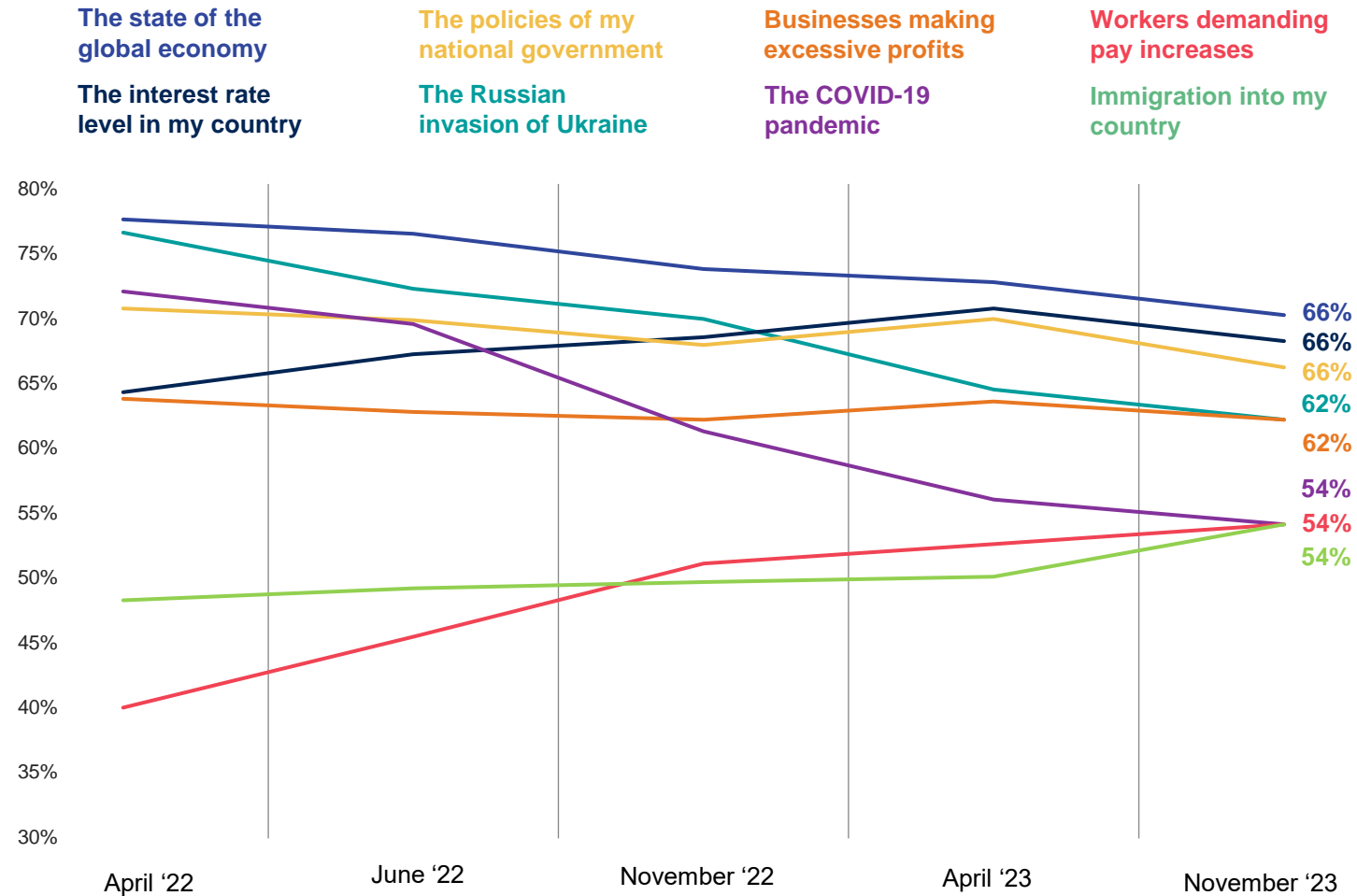


Q

How much, if at all, do you think each of the following are contributing to the rising cost of living in ... today?

A great deal/fair amount

Global Country Average %



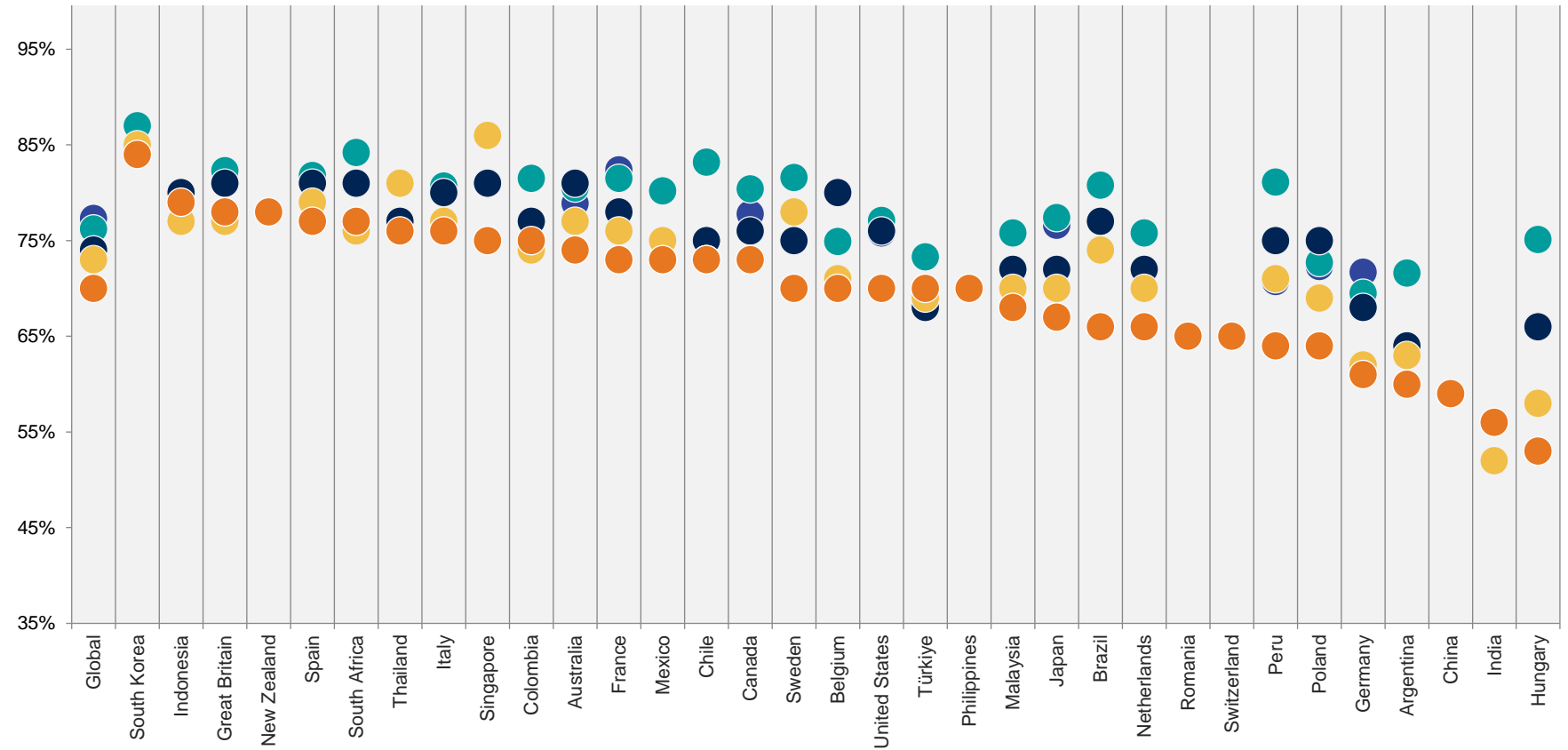
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April '22   June '22   November '22   April '23   November '23

70% 84% 79% 78% 78% 77% 77% 76% 76% 75% 75% 74% 73% 73% 73% 73% 70% 70% 70% 70% 70% 68% 67% 66% 66% 65% 65% 64% 64% 61% 60% 59% 56% 53%



## The state of the global economy

How much, if at all, do you think each of the following are contributing to the rising cost of living in ... today?

% a great deal/fair amount

Base: 24,792 online adults under age 75 across 33 countries, interviewed October 20-November 3, 2023

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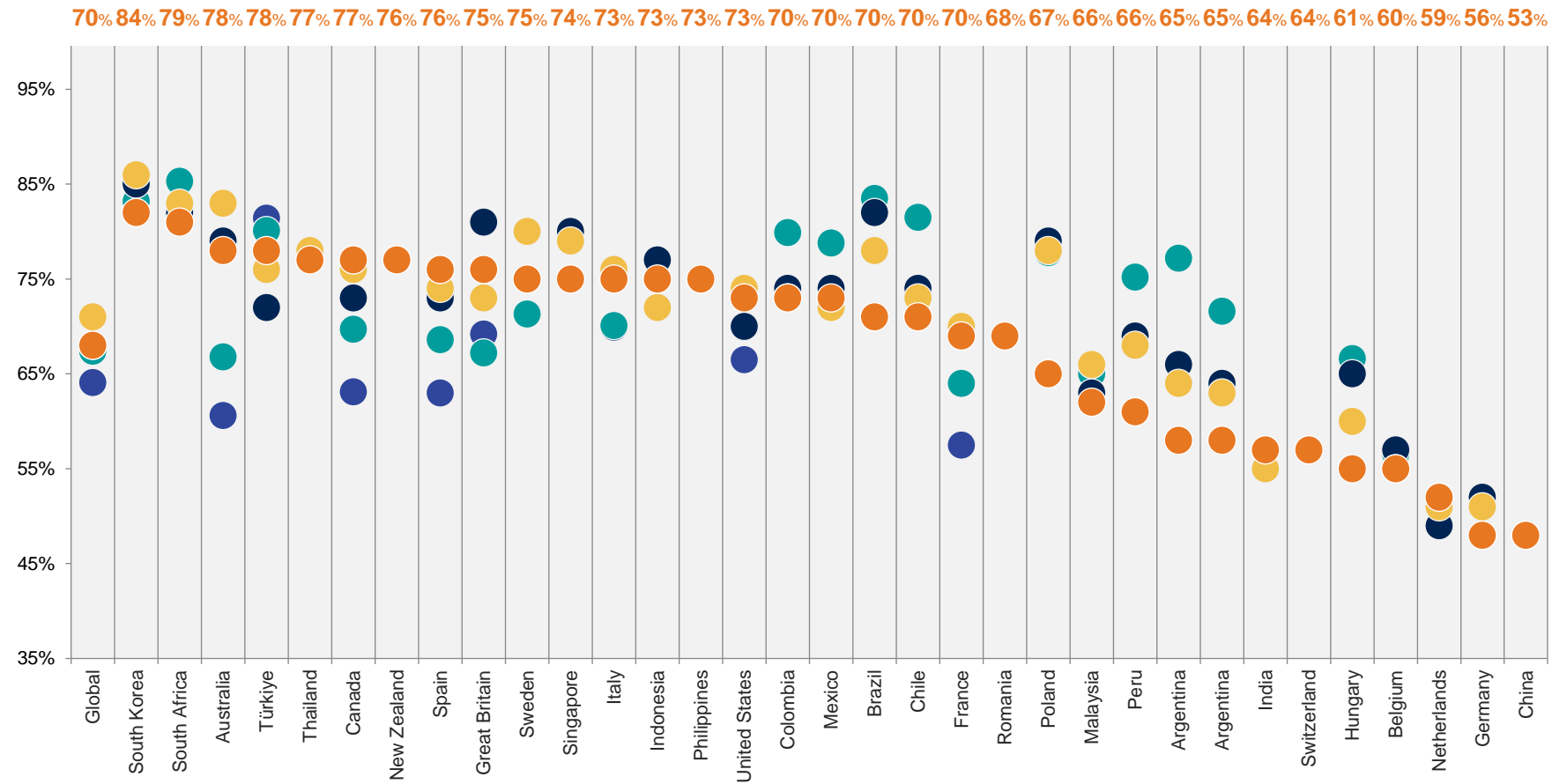


April '22   June '22   November '22   April '23   November '23

## The interest level in my country

How much, if at all, do you think each of the following are contributing to the rising cost of living in ... today?

% a great deal/fair amount



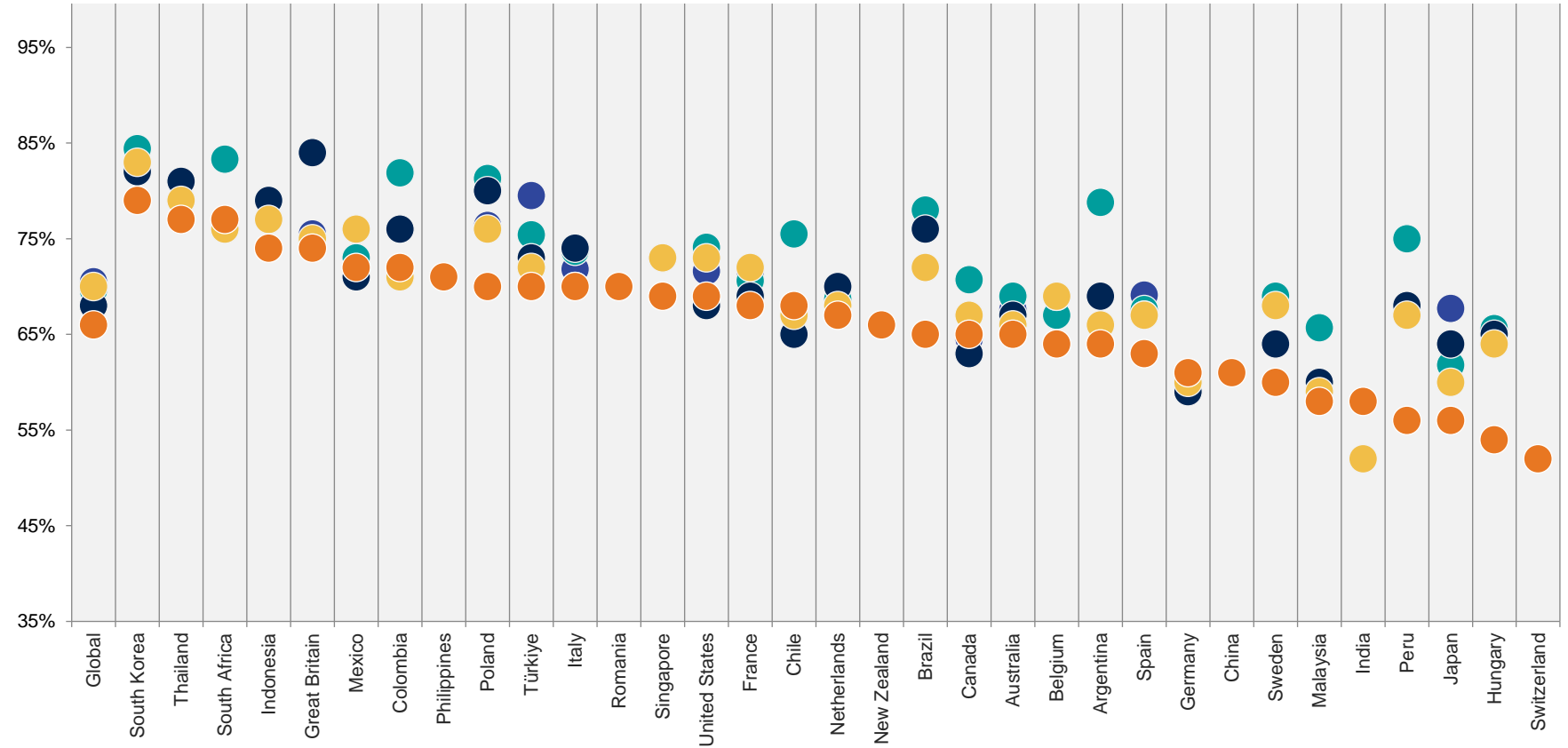
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April '22   June '22   November '22   April '23   November '23

66% 79% 77% 77% 74% 74% 72% 72% 71% 70% 70% 70% 70% 69% 69% 68% 68% 67% 66% 65% 65% 65% 64% 64% 63% 61% 61% 60% 58% 58% 56% 56% 54% 52%



## The policies of my national government

How much, if at all, do you think each of the following are contributing to the rising cost of living in ... today?

% a great deal/fair amount

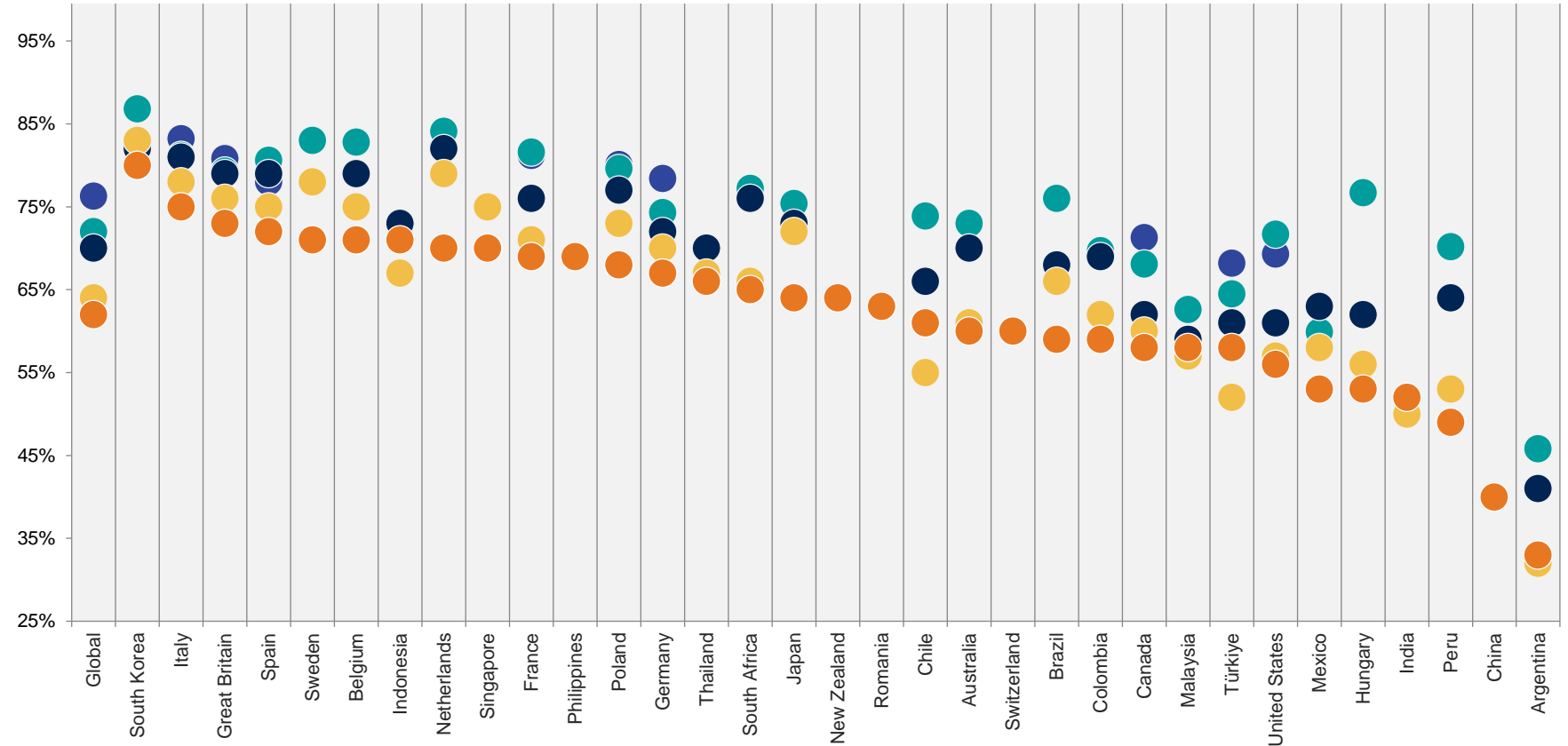
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April '22   June '22   November '22   April '23   November '23

62% 84% 75% 73% 72% 71% 71% 71% 70% 70% 69% 69% 68% 67% 66% 65% 64% 64% 63% 61% 60% 60% 59% 59% 58% 58% 58% 56% 53% 53% 52% 49% 40% 33%



## The Russian invasion of Ukraine and its consequences

How much, if at all, do you think each of the following are contributing to the rising cost of living in ... today?

% a great deal/fair amount

Base: 24,792 online adults under age 75 across 33 countries, interviewed October 20-November 3, 2023

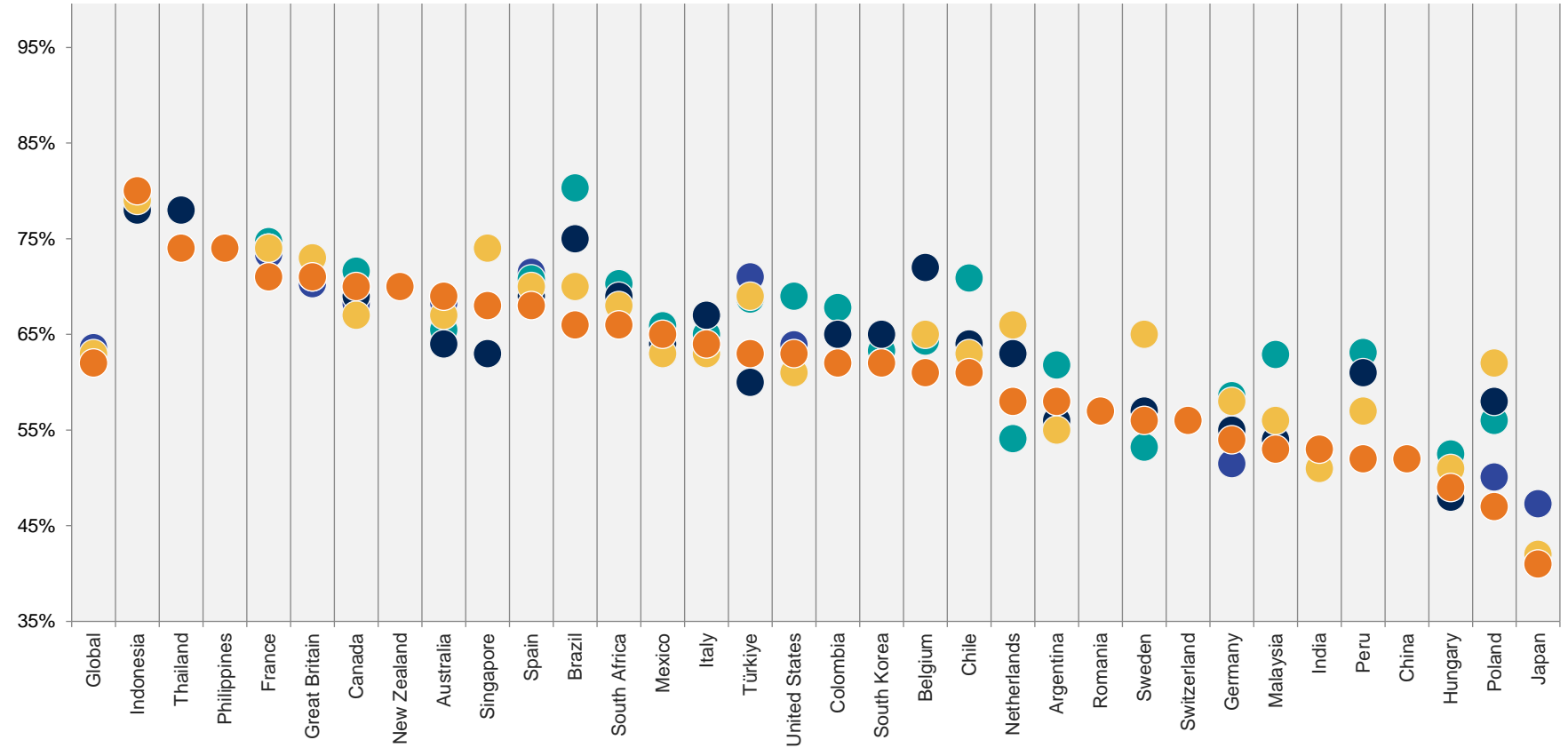
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April '22   June '22   November '22   April '23   November '23

62% 80% 74% 74% 71% 71% 70% 70% 69% 68% 68% 66% 66% 65% 64% 63% 63% 62% 62% 61% 61% 58% 58% 57% 56% 56% 54% 53% 53% 52% 52% 49% 47% 41%



## Businesses making excessive profits

How much, if at all, do you think each of the following are contributing to the rising cost of living in ... today?

% a great deal/fair amount

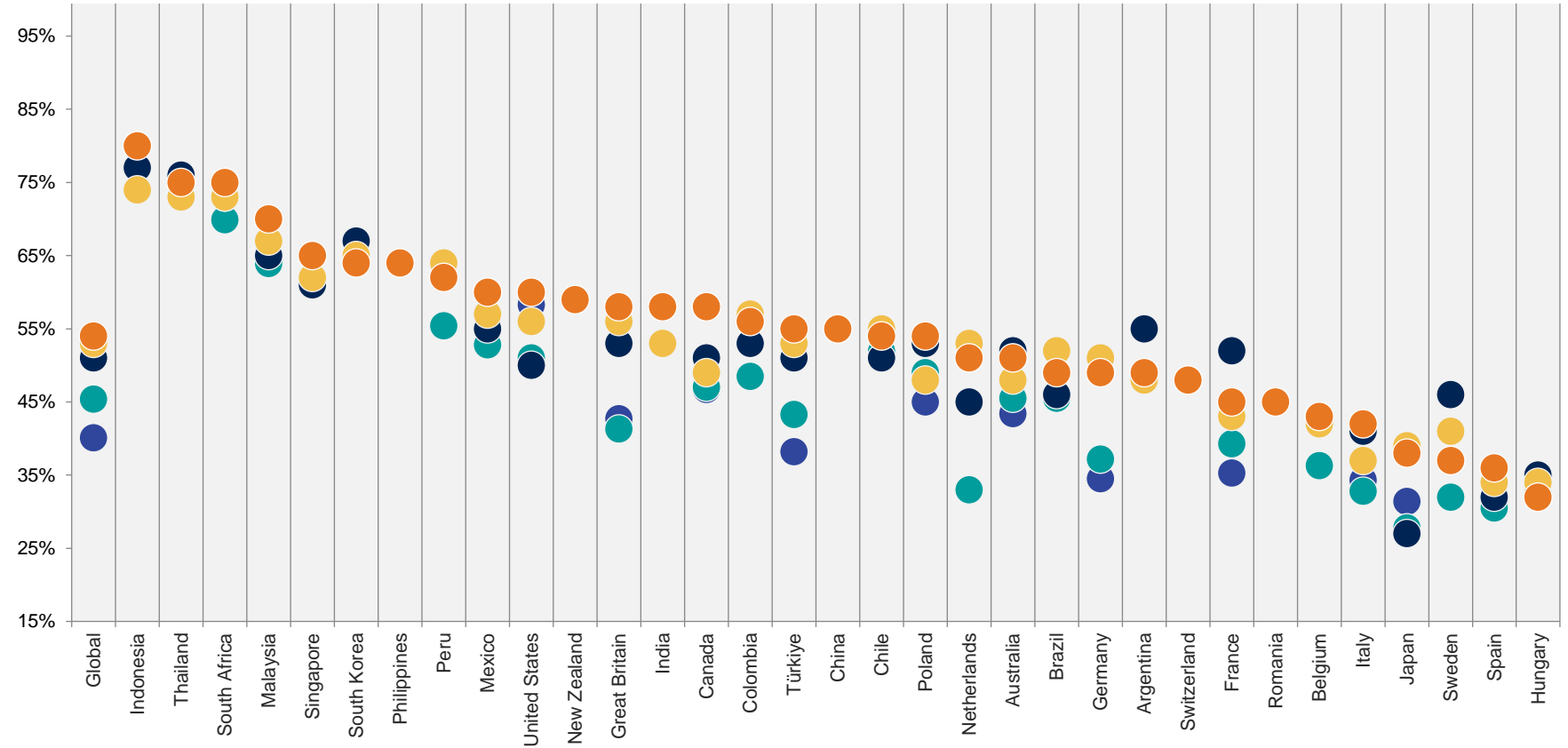
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April '22   June '22   November '22   April '23   November '23

54% 80% 75% 75% 70% 65% 64% 64% 62% 60% 60% 59% 58% 58% 58% 56% 55% 55% 54% 54% 51% 51% 49% 49% 49% 48% 45% 45% 43% 42% 38% 37% 36% 32%



## Workers demanding pay increases

How much, if at all, do you think each of the following are contributing to the rising cost of living in ... today?

% a great deal/fair amount

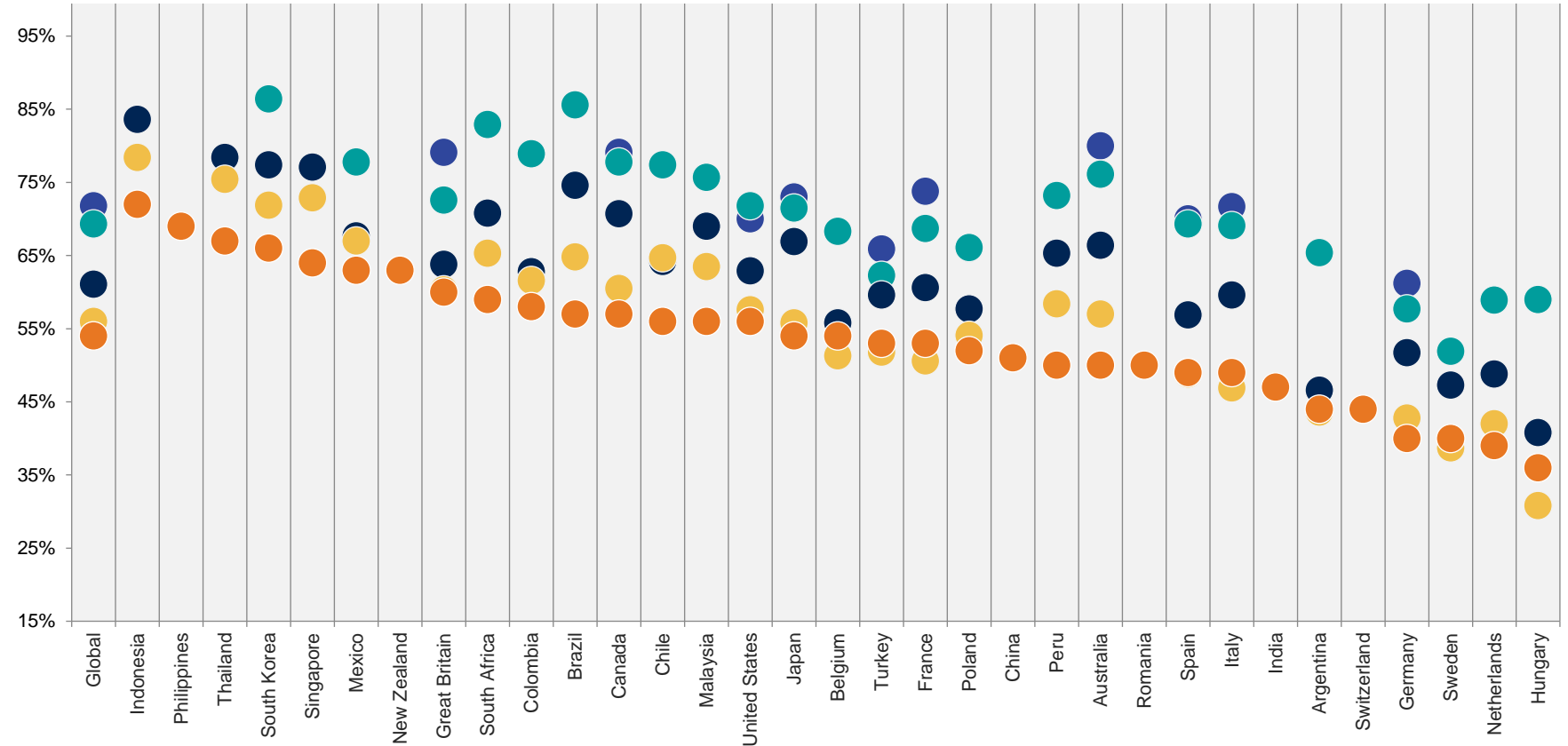
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April '22   June '22   November '22   April '23   November '23

54% 72% 69% 67% 66% 64% 63% 63% 60% 59% 58% 57% 57% 56% 56% 54% 54% 53% 53% 52% 51% 50% 50% 50% 49% 49% 47% 44% 44% 40% 40% 39% 36%



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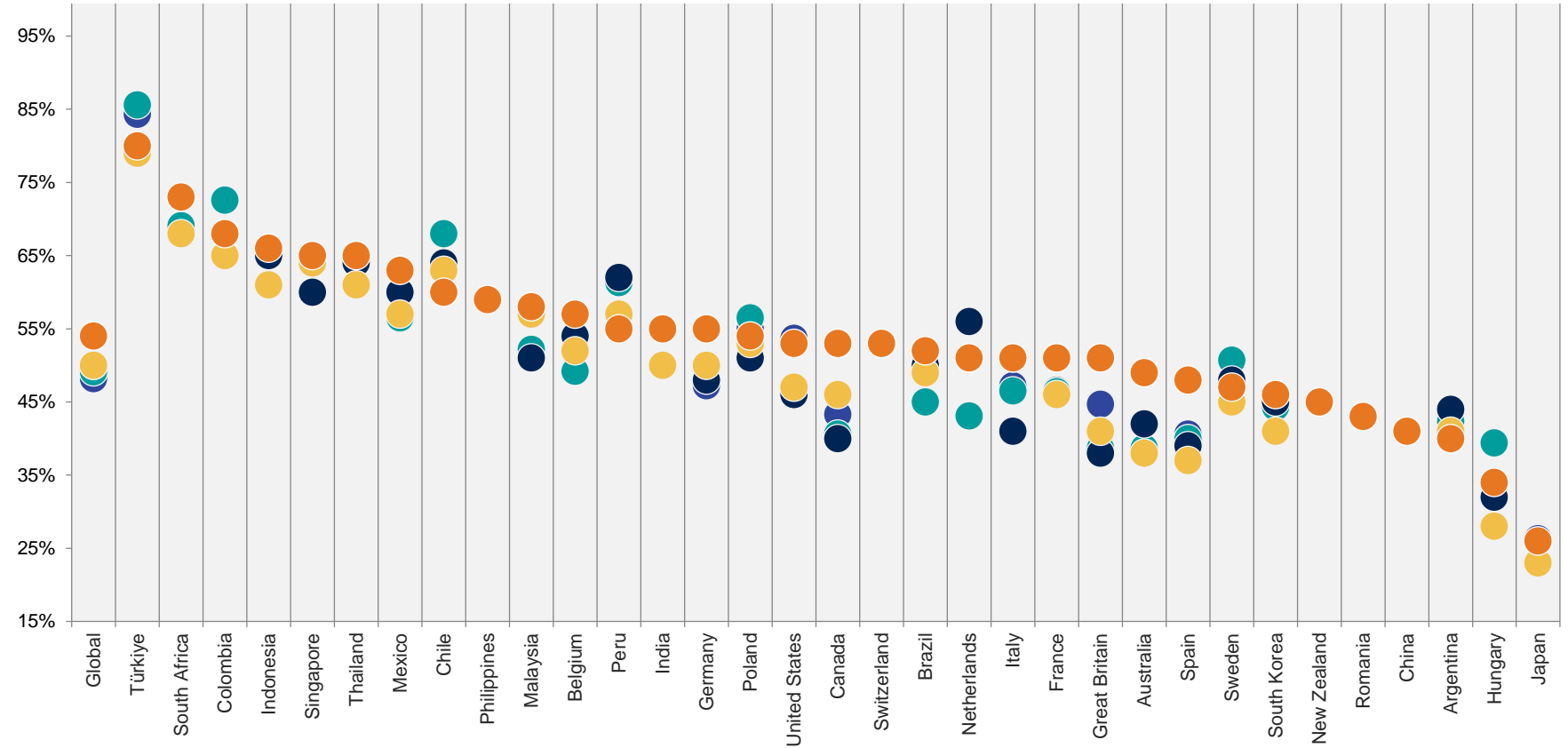
April '22   June '22   November '22   April '23   November '23

54% 80% 73% 68% 66% 65% 65% 63% 60% 59% 58% 57% 55% 55% 55% 54% 53% 53% 53% 52% 52% 51% 50% 50% 50% 49% 49% 47% 44% 44% 40% 40% 39% 36%

## Immigration into my country

How much, if at all, do you think each of the following are contributing to the rising cost of living in ... today?

% a great deal/fair amount



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# METHODOLOGY





# Methodology

These are the results of a 33-country survey conducted by Ipsos on its Global Advisor online platform and, in India, on its IndiaBus platform, between Friday, October 20 and Friday, November 3, 2023.

For this survey, Ipsos interviewed a total of 24,792 adults aged 18 years and older in India, 18-74 in Canada, Malaysia, New Zealand, South Africa, Turkey, and the United States, 20-74 in Thailand, 21-74 in Indonesia and Singapore, and 16-74 in all other countries.

The sample consists of approximately 1,000 individuals each in Australia, Brazil, Canada, mainland China, France, Germany, Great Britain, Italy, Japan, New Zealand, Philippines, Spain, and the U.S., and 500 individuals each in Argentina, Belgium, Chile, Colombia, Hungary, Indonesia, Malaysia, Mexico, the Netherlands, Peru, Poland, Romania, Singapore, South Africa, South Korea, Sweden, Switzerland, Thailand, and Turkey. The sample in India consists of approximately 2,200 individuals, of whom approximately 1,800 were interviewed face-to-face and 400 were interviewed online.

Samples in Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, Italy, Japan, the Netherlands, Poland, Romania, South Korea, Spain, Sweden, Switzerland, and the U.S. can be considered representative of their general adult populations under the age of 75. Samples in Brazil, Chile, mainland China, Colombia, Indonesia, Malaysia, Mexico, New Zealand, Peru, Philippines, Singapore, South Africa, Thailand, 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.

India’s sample represents a large subset of its urban population — social economic classes A, B and C in metros and tier 1-3 town classes across all four zones. The data is weighted so that the composition of each country’s sample 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 in which 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.

When percentages do not sum up to 100 or the ‘difference’ appears to be +/-1 percentage point more/less than the actual result, 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 where N=1,000 being accurate to +/- 3.5 percentage points and of where N=500 being 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 countries 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. We serve more than 5000 clients across the world with 75 business solutions.

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](http://www.ipsos.com)



# GAME CHANGERS

In our world of rapid change, the need of 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, countries 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.**

\*\*\*

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



**BE  
SURE.  
ACT  
SMARTER.**

**GAME CHANGERS**

