Ipsos Public Affairs

Global Advisor

The Economic Pulse of the World

Citizens in 28 Countries Assess the Current State of their Country’s Economy for a Total Global Perspective

A Global @dvisory – November 2018 – G@116
The Economic Pulse

GAME CHANGERS

These are the findings of the *Global Advisor* Wave 116 (G@116), an Ipsos survey conducted between October 26th and November 9th, 2018.

- The survey instrument is conducted monthly in 28 countries around the world via the Ipsos Online Panel system. The countries reporting herein are Argentina, Australia, Belgium, Brazil, Canada, China, Chile, France, Great Britain, Germany, Hungary, India, Israel, Italy, Japan, Malaysia, Mexico, Peru, Poland, Russia, Saudi Arabia, Serbia, South Africa, South Korea, Spain, Sweden, Turkey and the United States of America.

- For the results of the survey presented herein, an international sample of 19,8210, adults aged 18-64 in the US, Israel and Canada, and age 16-64 in all other countries, were interviewed. Approximately 1000+ individuals participated on a country by country basis via the Ipsos Online Panel with the exception of Argentina, Belgium, Chile, Hungary, Israel, Malaysia, Mexico, Peru, Poland, Russia, Saudi Arabia, Serbia, South Africa, South Korea, Sweden and Turkey, where each have a sample approximately 500+. The precision of Ipsos online polls are calculated using a credibility interval with a poll of 1,000 accurate to +/- 3.1 percentage points and of 500 accurate to +/- 4.5 percentage points. For more information on the Ipsos use of credibility intervals, please visit the Ipsos website.

- 15 of the 28 countries surveyed online generate nationally representative samples in their countries (Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, Italy, Japan, Poland, South Korea, Spain, Sweden, and United States).

- Brazil, China, Chile, India, Israel, Malaysia, Mexico, Peru, Russia, Saudi Arabia, Serbia, South Africa and Turkey produce a national sample that is more urban & educated, and with higher incomes than their fellow citizens. We refer to these respondents as “Upper Deck Consumer Citizens”. They are not nationally representative of their country.

There are three analytic components that make up the findings of this monthly Economic Pulse report. Each question is tracked and analyzed from questions dealing with:

① The currently perceived macroeconomic state of the respondent's country:

- **Thinking about our economic situation, how would you describe the current economic situation in [insert country]?** Is it very good, somewhat good, somewhat bad or very bad?

② The currently perceived state of the local economy:

- **Rate the current state of the economy in your local area** using a scale from 1 to 7, where 7 means a very strong economy today and 1 means a very weak economy.

③ A six month outlook for the local economy:

- **Looking ahead six months from now, do you expect the economy in your local area to be** much stronger, somewhat stronger, about the same, somewhat weaker, or much weaker than it is now?


THE
WORLD at
a GLANCE

Global Average of National Economic Assessment Unchanged: 46%

- The average **global economic assessment of national economies surveyed in 28 countries remains unchanged this wave with 46% of global citizens rating their national economies as ‘good’.**

- China (91%) remains at the top spot in the national economic assessment category this month, followed by Saudi Arabia (87%), Germany (81%), India (71%), Sweden (70%), the United States (67%), Canada (62%), Australia (60%), Peru (60%), Israel (59%), Poland (58%) and Chile (56%). Argentina (12%) remains at the lowest spot in this assessment, followed by South Africa (15%), South Korea (17%), Spain (18%), Brazil (19%), France (21%), Italy (24%), Turkey (25%), Russia (29%), Hungary (31%), Japan (33%) and Mexico (33%).

- *Countries with the greatest improvements in this wave*: Sweden (70%, +6 pts.), Serbia (44%, +6 pts.), India (71%, +5 pts.), Italy (24%, +4 pts.), Brazil (19%, +4 pts.), Belgium (53%, +4 pts.) , Turkey (25%, +3 pts.), Canada (62%, +3 pts.), Saudi Arabia (87%, +2 pts.) and Mexico (33%, +2 pts.).

- *Countries with the greatest declines*: Australia (60%, -5 pts.), Spain (18%, -4 pts.), Israel (59%, -3 pts.), South Korea (17%, -3 pts.), France (21%, -2 pts.), Great Britain (43%, -2 pts.), Japan (33%, -2 pts.) and Russia (29%, -2 pts.).

Global Average of Local Economic Assessment (36%) Unchanged

- When asked to assess their local economy, **over one third (36%) of those surveyed in 28 countries agree that the state of the current economy in their local area is 'good'. The local economic assessment remains unchanged since last sounding.**

- China (81%) is the top country in the local assessment category again, followed by Saudi Arabia (67%), Germany (60%), Sweden (60%), Israel (59%), the United States (57%), India (54%), Chile (49%), Canada (48%) and Australia (44%). South Africa (11%) is the lowest ranked country this month, followed by Argentina (14%), Spain (15%), South Korea (17%), Serbia (17%), Japan (17%), France (18%), Russia (21%), Hungary (22%), Brazil (22%), Turkey (23%), Italy (24%) and Mexico (24%).

- *Countries with the greatest improvements in this wave*: Sweden (60%, +7 pts.), Peru (38%, +5 pts.), India (54%, +4 pts.), Poland (38%, +3 pts.), Italy (24%, +3 pts.), Brazil (22%, +3 pts.), Canada (48%, +3 pts.), Great Britain (34%, +2 pts.), Argentina (14%, +2 pts.) and the United States (57%, +2 pts.).

- *Countries with the greatest declines in this wave*: Russia (21%, -6 pts.), Malaysia (36%, -3 pts.), Chile (49%, -3 pts.), South Korea (17%, -3 pts.), Spain (15%, -2 pts.), France (18%, -2 pts.), Mexico (24%, -2 pts.), Israel (59%, -2 pts.), South Africa (11%, -2 pts.), Serbia (17%, -2 pts.) and Turkey (23%, -2 pts.).

Global Average of Future Outlook for Local Economy (28%) Unchanged

- **The future outlook remain unchanged since last sounding, with over one quarter (27%) of global citizens surveyed in 28 countries expecting their local economy to be stronger six months from now.**

- China (74%) remains at the top of this assessment category this month, followed by Saudi Arabia (68%), Brazil (67%), India (54%), Peru (49%), Chile (49%), Mexico (39%), Argentina (35%), Malaysia (35%), the United States (32%) and Poland (27%). France (7%) has the lowest future outlook score this month again, followed by Belgium (8%), Sweden (10%), Japan (11%), Serbia (12%), Hungary (13%), Great Britain (14%), Russia (15%), Spain (15%) and Australia (16%).

- *Countries with the greatest improvements in this wave*: Brazil (67%, +9 pts.), the United States (32%, +5 pts.), India (54%, +4 pts.), Russia (15%, +3 pts.), Poland (27%, +3 pts.), Israel (18%, +3 pts.), Germany (18%, +3 pts.), Saudi Arabia (68%, +2 pts.), Malaysia (35%, +2 pts.), Great Britain (14%, +2 pts.) and Canada (20%, +2 pts.).

- *Countries with the greatest declines in this wave*: Mexico (39%, -10 pts.), Peru (49%, -6 pts.), Sweden (10%, -4 pts.), Belgium (8%, -3 pts.), South Korea (17%, -3 pts.), Argentina (35%, -2 pts.), Australia (16%, -2 pts.), China (74%, -2 pts.), Serbia (12%, -2 pts.) and Spain (15%, -2 pts.).

1. National Economic Assessments: Countries at a Glance Compared to the Last Wave…

Those Countries Where the Local National Economic Assessment…							
is HIGHEST this month		has experienced an IMPROVEMENT since last sounding		has experienced a DECLINE since last sounding		is LOWEST this month	
China	91%	Sweden	6%	Australia	-5%	Serbia	44%
Saudi Arabia	87%	Serbia	6%	Spain	-4%	Great Britain	43%
Germany	81%	India	5%	Israel	-3%	Japan	33%
India	71%	Italy	4%	South Korea	-3%	Mexico	33%
Sweden	70%	Brazil	4%	France	-2%	Hungary	31%
US	67%	Belgium	4%	Great Britain	-2%	Russia	29%
Canada	62%	Turkey	3%	Japan	-2%	Turkey	25%
Australia	60%	Canada	3%	Russia	-2%	Italy	24%
Peru	60%	Saudi Arabia	2%	Chile	-1%	France	21%
Israel	59%	Mexico	2%	China	-1%	Brazil	19%
Poland	58%	South Africa	1%	Malaysia	-1%	Spain	18%
Chile	56%	Poland	1%	Peru	-1%	South Korea	17%
Malaysia	55%	Germany	1%			South Africa	15%
Belgium	53%					Argentina	12%

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Thinking about our economic situation, how would you describe the current economic situation in [insert country]? Is it very good, somewhat good, somewhat bad or very bad?

1. National Economic Assessment: Regions at a Glance Compared to the Last Wave…

REGION (in descending order by NET)	NET 'Good'	CHANGE (since last sounding)
North America	65%	2%
BRIC	53%	2%
APAC	50%	-2%
Middle East/Africa	46%	0%
G-8 Countries	45%	0%
Europe	44%	1%
LATAM	36%	1%

Rate the current state of the economy in your local area using a scale from 1 to 7, where 7 means a very strong economy today and 1 means a very weak economy

2. Local Economic Assessment: Countries at a Glance Compared to the Last Wave…

Those Countries Where the Local Area Economic Assessment…							
is HIGHEST this month		has experienced an IMPROVEMENT since last sounding		has experienced a DECLINE since last sounding		is LOWEST this month	
China	81%	Sweden	7%	Russia	-6%	Great Britain	34%
Saudi Arabia	67%	Peru	5%	Malaysia	-3%	Italy	24%
Germany	60%	India	4%	Chile	-3%	Mexico	24%
Sweden	60%	Poland	3%	South Korea	-3%	Turkey	23%
Israel	59%	Italy	3%	Spain	-2%	Brazil	22%
US	57%	Brazil	3%	France	-2%	Hungary	22%
India	54%	Canada	3%	Mexico	-2%	Russia	21%
Chile	49%	Great Britain	2%	Israel	-2%	France	18%
Canada	48%	Argentina	2%	South Africa	-2%	Japan	17%
Australia	44%	US	2%	Serbia	-2%	Serbia	17%
Peru	38%	China	1%	Turkey	-2%	South Korea	17%
Poland	38%	Belgium	1%	Australia	-1%	Spain	15%
Malaysia	36%			Saudi Arabia	-1%	Argentina	14%
Belgium	34%					South Africa	11%

2. Local Economic Assessment: Regions at a Glance Compared to the Last Wave…

REGION (in descending order by NET)	NET 'Strong' Top 3 Box (5-6-7)	CHANGE (since last sounding)
North America	53%	3%
BRIC	45%	1%
Middle East/Africa	40%	-2%
APAC	39%	-1%
G-8 Countries	35%	0%
Europe	32%	1%
LATAM	29%	1%

Looking ahead six months from now, do you expect the economy in your local area to be much stronger, somewhat stronger, about the same, somewhat weaker, or much weaker than it is now?

3. Six Month Outlook on the Local Economy: Countries at a Glance Compared to the Last Wave…

Countries where the Assessment of the Local Economic Strengthening …							
is HIGHEST this month		has experienced an IMPROVEMENT since last sounding		has experienced a DECLINE since last sounding		is LOWEST this month	
China	74%	Brazil	9%	Mexico	-10%	South Africa	19%
Saudi Arabia	68%	US	5%	Peru	-6%	Germany	18%
Brazil	67%	India	4%	Sweden	-4%	Israel	18%
India	54%	Russia	3%	Belgium	-3%	South Korea	17%
Peru	49%	Poland	3%	South Korea	-3%	Australia	16%
Chile	49%	Israel	3%	Argentina	-2%	Spain	15%
Mexico	39%	Germany	3%	Australia	-2%	Russia	15%
Argentina	35%	Saudi Arabia	2%	China	-2%	Great Britain	14%
Malaysia	35%	Malaysia	2%	Serbia	-2%	Hungary	13%
US	32%	Great Britain	2%	Spain	-2%	Serbia	12%
Poland	27%	Canada	2%	France	-1%	Japan	11%
Turkey	25%			Hungary	-1%	Sweden	10%
Italy	20%			Italy	-1%	Belgium	8%
Canada	20%			Turkey	-1%	France	7%

Looking ahead six months from now, do you expect the economy in your local area to be much stronger, somewhat stronger, about the same, somewhat weaker, or much weaker than it is now?

3. Six Month Outlook on Local Economy: Regions at a Glance Compared to Last Wave…

REGION (in descending order by NET)	NET 'Stronger'	CHANGE (since last sounding)
BRIC	53%	4%
LATAM	48%	-2%
Middle East/Africa	32%	0%
APAC	31%	0%
North America	26%	3%
G-8 Countries	17%	2%
Europe	14%	-1%

DETAILED FINDINGS

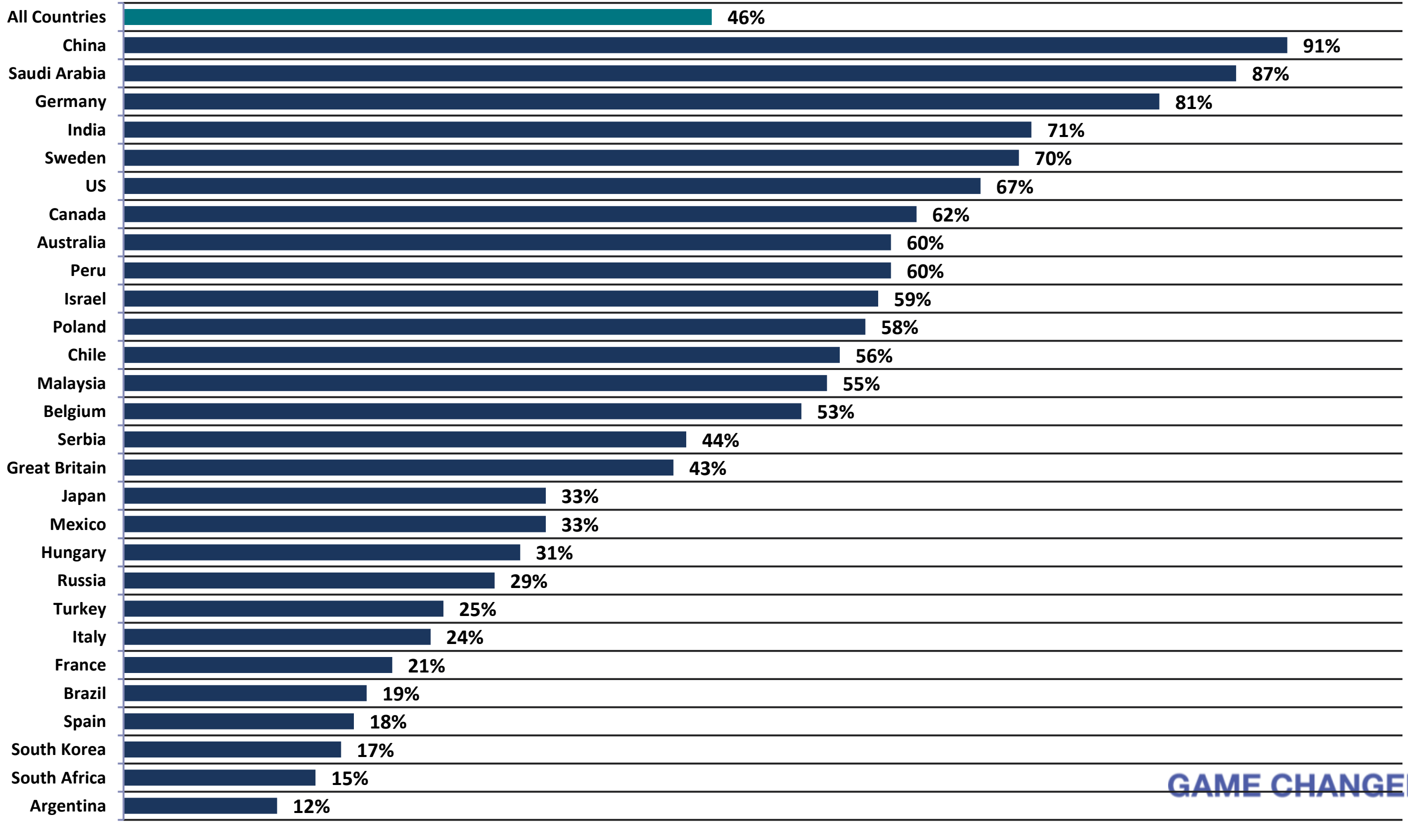
➊ Assessing The Current Economic Situation ……

in Their Country

Now thinking about our economic situation, how would you describe the current economic situation in [insert country]? Is it very good, somewhat good, somewhat bad or very bad?

Global Citizens Assess the Current Economic Situation in their Country as “Good”

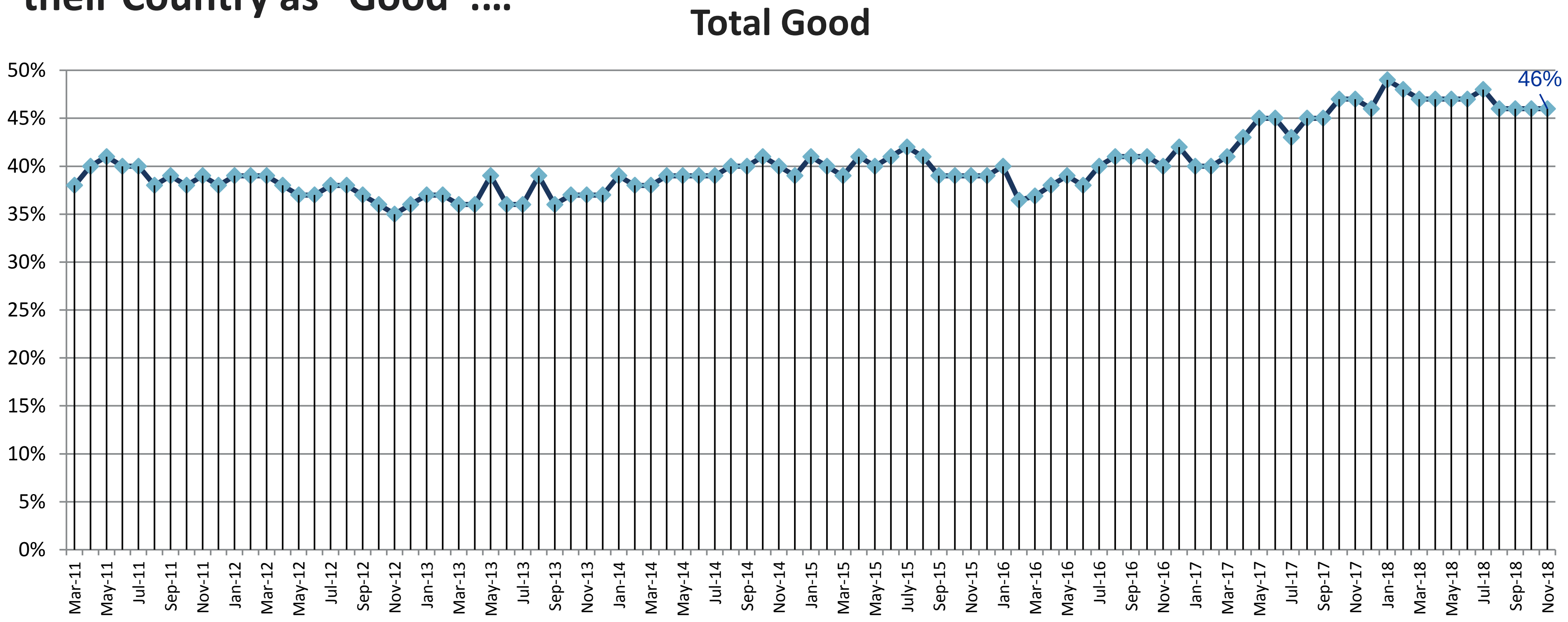
‘Very Good / Somewhat Good’



Now thinking about our economic situation, how would you describe the current economic situation in [insert country]? Is it very good, somewhat good, somewhat bad or very bad?

N/C

Global Average Tracked - Global Citizens Assess the Current Economic Situation in their Country as “Good”:…



Now thinking about our economic situation, how would you describe the current economic situation in [insert country]? Is it very good, somewhat good, somewhat bad or very bad?

For All Countries Tracked: Citizens Assess the Current Economic Situation in their Country as “Good”

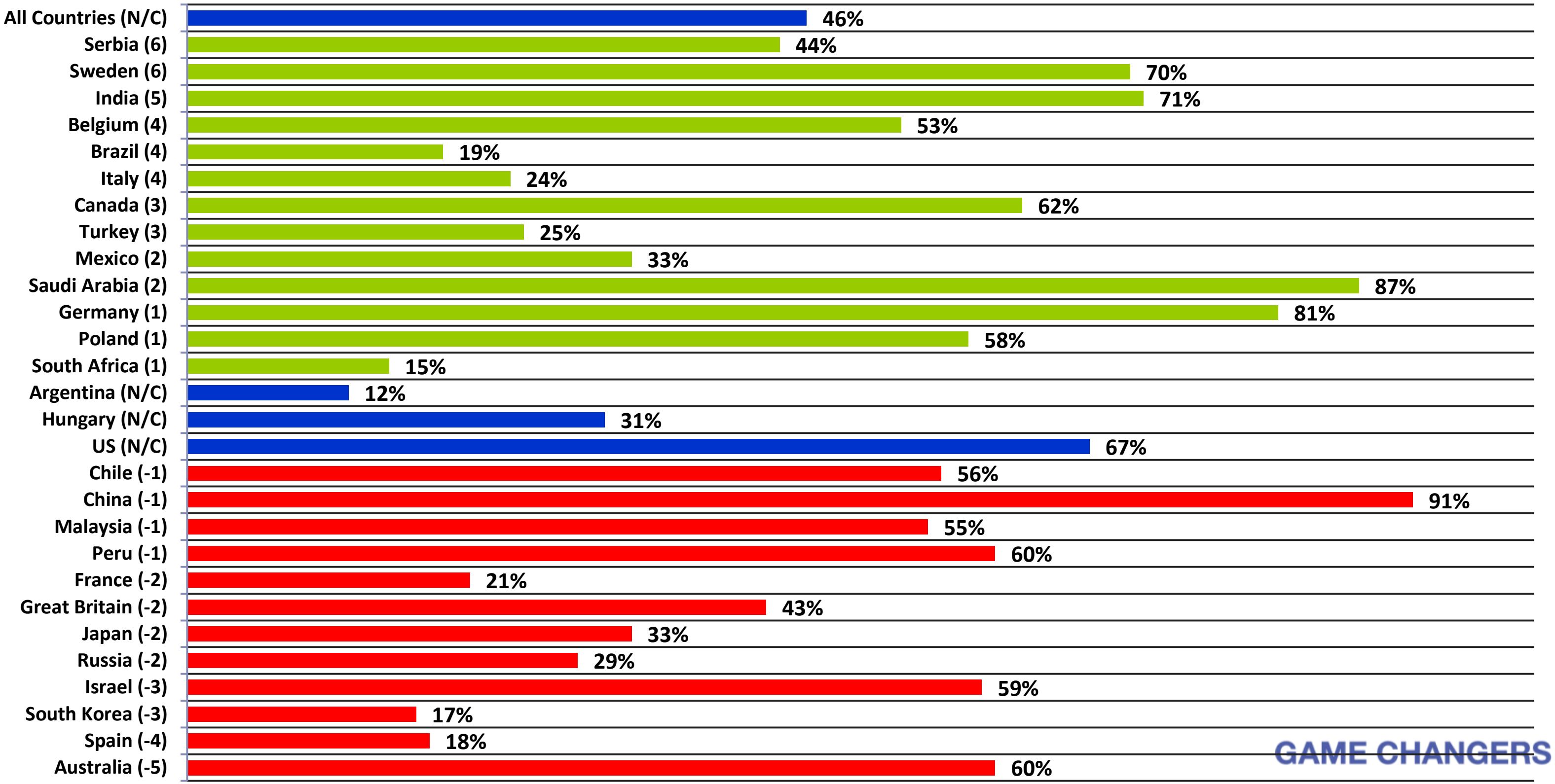
	Nov ‘15	Dec ‘15	Jan ‘16	Feb `16	Mar `16	Apr `16	May `16	Jun `16	Jul `16	Aug `16	Sep `16	Oct `16	Nov `16	Dec `16	Jan `17	Feb `17	Mar `17	Apr `17	May `17	Jun `17	Jul `17	Aug `17	Sep `17	Oct `17	Nov `17	Dec `17	Jan `18	Feb `18	Mar `18	Apr `18	May `18	Jun `18	Jul `18	Aug `18	Sep `18	Oct `18	Nov `18
Total	39%	39%	40%	36%	37%	38%	39%	38%	40%	41%	41%	41%	40%	42%	40%	40%	41%	43%	45%	45%	43%	45%	45%	47%	47%	46%	49%	48%	47%	47%	47%	47%	48%	46%	46%	46%	46%
Argentina	29%	27%	28%	24%	15%	15%	17%	21%	19%	19%	18%	20%	21%	23%	20%	23%	21%	21%	27%	22%	19%	20%	33%	34%	38%	28%	32%	28%	26%	30%	21%	21%	20%	13%	12%	12%	12%
Australia	55%	57%	59%	56%	52%	52%	59%	51%	56%	55%	55%	58%	60%	62%	60%	57%	58%	60%	59%	58%	56%	60%	60%	69%	60%	61%	67%	69%	64%	63%	62%	66%	66%	63%	61%	65%	60%
Belgium	43%	35%	40%	38%	39%	33%	36%	27%	33%	39%	37%	28%	33%	36%	37%	41%	34%	45%	47%	49%	48%	46%	45%	51%	53%	58%	56%	52%	54%	50%	58%	55%	54%	58%	50%	49%	53%
Brazil	8%	4%	8%	8%	7%	8%	7%	6%	8%	12%	7%	9%	9%	13%	9%	10%	11%	9%	10%	9%	12%	9%	17%	13%	11%	11%	17%	10%	11%	14%	15%	10%	15%	15%	15%	15%	19%
Chile																											57%	66%	61%	62%	52%	63%	61%	51%	52%	57%	56%
Canada	52%	51%	44%	34%	36%	49%	52%	53%	57%	59%	56%	54%	53%	61%	52%	55%	56%	59%	56%	59%	62%	69%	67%	67%	68%	61%	65%	55%	56%	56%	55%	61%	64%	57%	60%	59%	62%
China	72%	74%	66%	61%	67%	67%	65%	69%	71%	72%	72%	76%	76%	79%	74%	76%	78%	80%	81%	82%	78%	84%	86%	84%	87%	86%	90%	88%	88%	89%	84%	86%	82%	90%	85%	92%	91%
France	12%	13%	18%	9%	12%	12%	13%	11%	13%	16%	13%	11%	14%	21%	16%	14%	17%	15%	17%	25%	24%	22%	23%	25%	25%	27%	34%	35%	32%	29%	28%	29%	28%	25%	24%	23%	21%
Germany	71%	74%	79%	72%	67%	74%	73%	74%	78%	76%	75%	75%	77%	76%	77%	74%	81%	79%	81%	82%	79%	80%	80%	80%	80%	80%	81%	79%	79%	80%	83%	81%	82%	78%	80%	80%	81%
Great Britain	45%	45%	48%	49%	49%	39%	44%	48%	37%	42%	45%	50%	41%	38%	43%	44%	44%	48%	47%	42%	39%	40%	36%	41%	40%	35%	43%	41%	45%	45%	51%	40%	46%	41%	42%	45%	43%
Hungary	19%	23%	16%	19%	20%	22%	16%	18%	18%	19%	21%	21%	17%	24%	25%	23%	22%	22%	25%	27%	19%	26%	29%	27%	27%	23%	26%	32%	26%	28%	31%	32%	36%	27%	30%	31%	31%
India	76%	79%	84%	76%	82%	81%	80%	81%	81%	83%	84%	82%	86%	79%	78%	80%	77%	82%	83%	82%	80%	82%	80%	74%	76%	81%	81%	77%	79%	76%	74%	77%	76%	76%	78%	66%	71%
Israel	42%	46%	42%	47%	43%	52%	42%	48%	50%	48%	52%	53%	49%	46%	46%	48%	54%	57%	60%	59%	52%	57%	50%	58%	57%	57%	60%	65%	58%	62%	66%	66%	63%	61%	59%	62%	59%
Italy	13%	16%	13%	14%	13%	14%	14%	14%	13%	15%	13%	15%	14%	18%	15%	15%	16%	12%	14%	17%	17%	14%	16%	17%	17%	17%	17%	18%	18%	20%	18%	18%	23%	25%	21%	20%	24%
Japan	26%	27%	29%	26%	23%	21%	19%	19%	21%	23%	26%	29%	28%	38%	29%	32%	30%	34%	34%	38%	37%	34%	34%	39%	40%	37%	42%	39%	41%	38%	37%	36%	36%	35%	41%	35%	33%
Malaysia																											45%	47%	41%	40%	45%	56%	66%	57%	60%	56%	55%
Mexico	27%	24%	24%	17%	23%	24%	20%	19%	14%	23%	20%	17%	20%	21%	14%	14%	17%	20%	27%	25%	22%	31%	31%	28%	27%	27%	31%	27%	22%	24%	26%	27%	32%	28%	32%	31%	33%
Peru		52%	52%	46%	45%	52%	54%	54%	61%	62%	69%	65%	65%	72%	67%	61%	60%	62%	77%	69%	52%	60%	58%	63%	61%	59%	63%	55%	60%	55%	54%	50%	54%	55%	62%	61%	60%
Poland	30%	36%	35%	33%	29%	36%	31%	31%	38%	41%	42%	37%	36%	39%	36%	35%	40%	41%	44%	46%	48%	49%	52%	60%	49%	53%	59%	55%	54%	50%	57%	55%	56%	51%	52%	57%	58%
Russia	29%	36%	32%	21%	28%	25%	28%	26%	27%	29%	28%	28%	29%	29%	33%	32%	33%	34%	35%	32%	36%	37%	34%	36%	44%	34%	42%	36%	36%	33%	35%	35%	34%	32%	32%	31%	29%
Saudi Arabia	91%	90%	86%	88%	89%	86%	91%	88%	91%	87%	78%	80%	82%	79%	80%	78%	74%	79%	87%	84%	80%	76%	81%	83%	80%	81%	73%	78%	77%	80%	81%	83%	81%	83%	80%	85%	87%
Serbia																21%	27%	32%	31%	32%	33%	32%	27%	25%	33%	37%	38%	40%	34%	39%	38%	38%	37%	35%	34%	38%	44%
South Africa	18%	12%	12%	13%	9%	11%	17%	13%	12%	12%	17%	18%	15%	15%	16%	18%	18%	17%	13%	14%	9%	13%	14%	10%	15%	12%	19%	25%	30%	29%	22%	19%	17%	17%	15%	14%	15%
South Korea	12%	13%	11%	13%	13%	13%	13%	10%	13%	14%	13%	15%	10%	15%	7%	7%	7%	10%	13%	23%	24%	24%	20%	25%	27%	30%	29%	26%	25%	28%	33%	23%	25%	20%	17%	20%	17%
Spain	17%	17%	18%	14%	15%	15%	14%	13%	14%	16%	16%	15%	13%	17%	17%	16%	18%	21%	22%	22%	24%	25%	25%	28%	26%	21%	24%	17%	20%	23%	22%	23%	25%	27%	21%	22%	18%
Sweden	63%	58%	65%	56%	63%	69%	68%	65%	74%	68%	70%	65%	66%	66%	69%	69%	70%	69%	77%	69%	72%	75%	72%	78%	75%	77%	71%	78%	77%	69%	65%	68%	63%	71%	70%	64%	70%
Turkey	42%	40%	45%	36%	38%	40%	42%	39%	41%	40%	43%	50%	45%	37%	37%	29%	38%	39%	42%	37%	40%	41%	47%	40%	36%	37%	35%	37%	39%	37%	32%	32%	41%	39%	31%	22%	25%
United States	44%	45%	45%	44%	45%	46%	48%	48%	49%	53%	50%	48%	45%	55%	52%	55%	57%	59%	57%	62%	57%	61%	61%	63%	60%	61%	66%	64%	66%	66%	63%	61%	63%	64%	65%	67%	67%

Thinking about our economic situation, how would you describe the current economic situation in [insert country]? Is it very good, somewhat good, somewhat bad or very bad?

Countries Ranked and Marked By Change In Assessment From Last Month (Left Column)

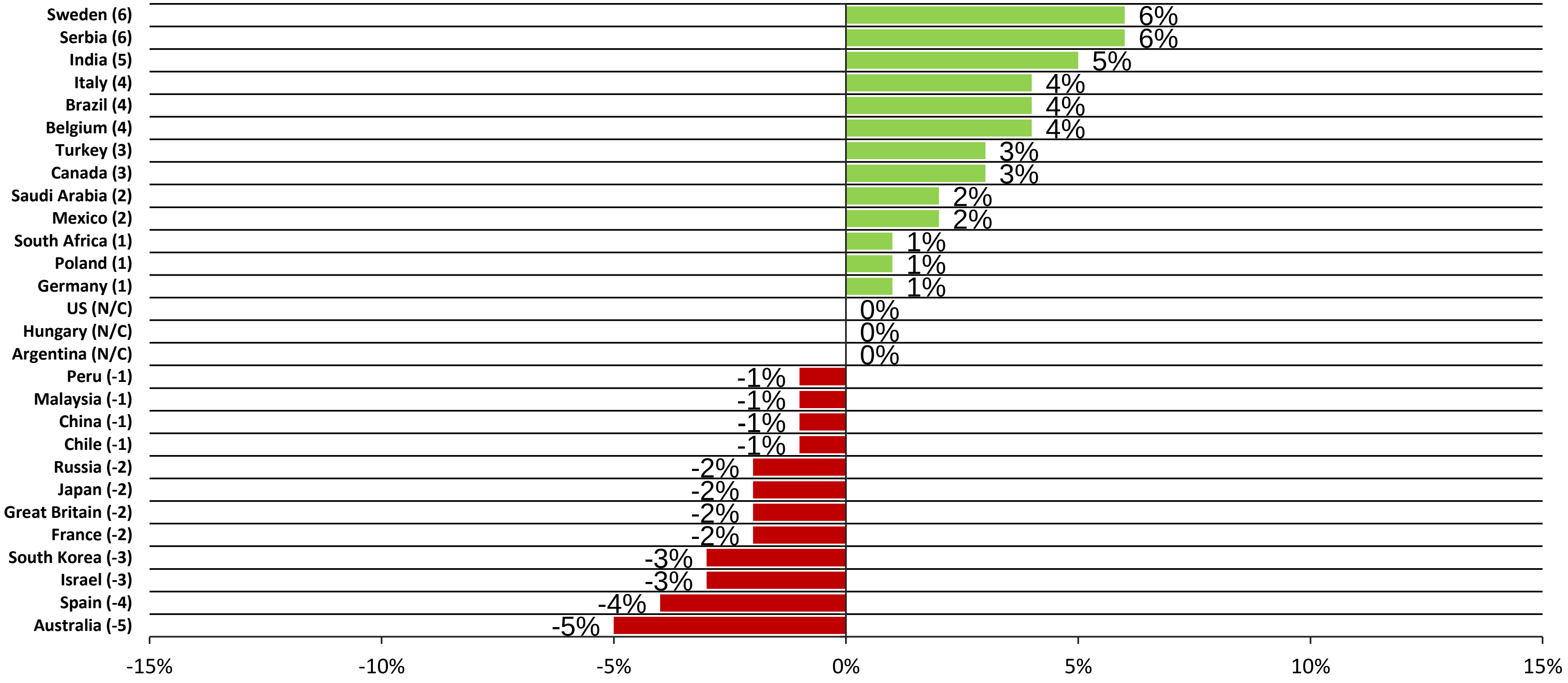
Green marks countries experiencing improvement;
Blue marks countries with no change from last month;
Red marks countries experiencing a decline;

% Very Good / Somewhat Good



Thinking about our economic situation, how would you describe the current economic situation in [insert country]? Is it very good, somewhat good, somewhat bad or very bad?

Countries Ranked by Net Improvement, Decline or No Change Compared to Last Month:



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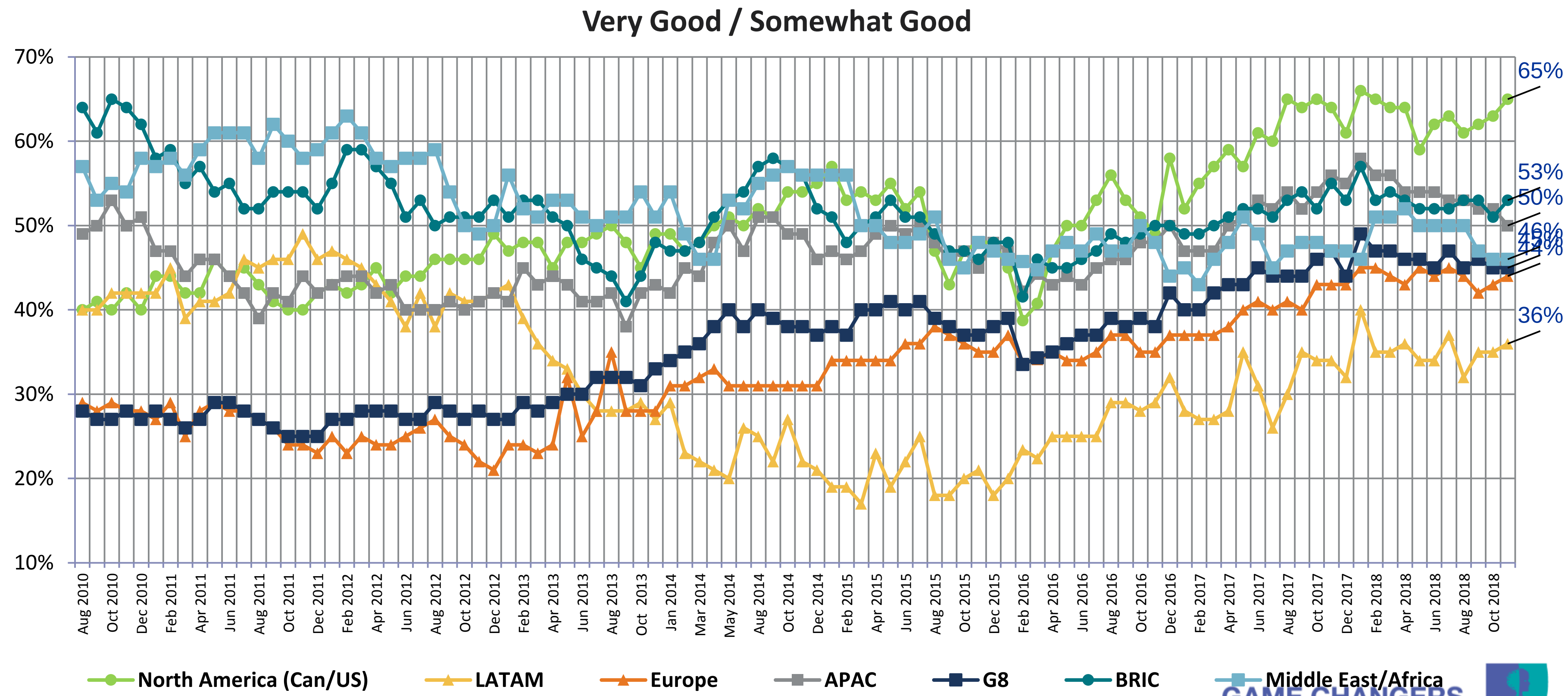
Now thinking about our economic situation, how would you describe the current economic situation in [insert country]? Is it very good, somewhat good, somewhat bad or very bad?

Assessing the Current Economic Situation by All Regions:



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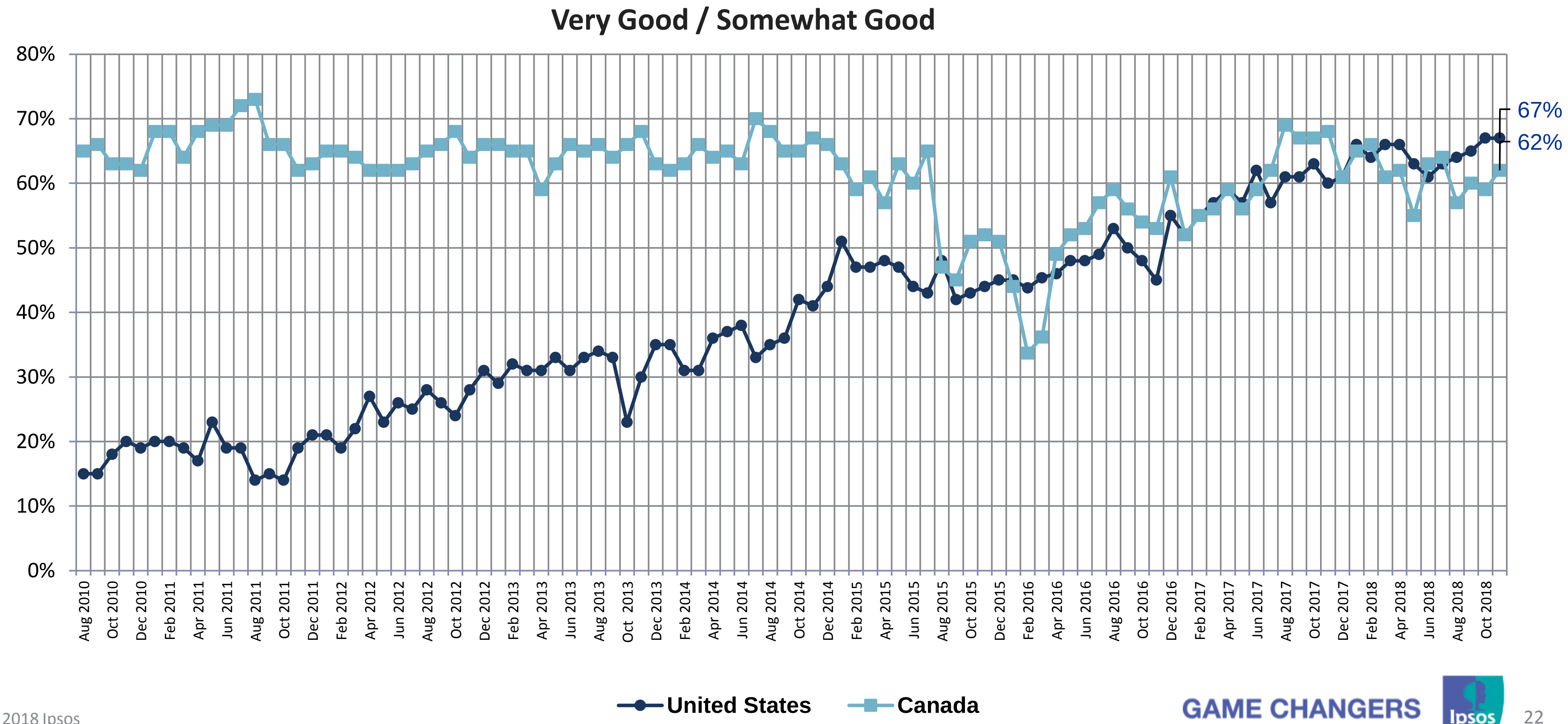
Now thinking about our economic situation, how would you describe the current economic situation in [insert country]? Is it very good, somewhat good, somewhat bad or very bad?

2

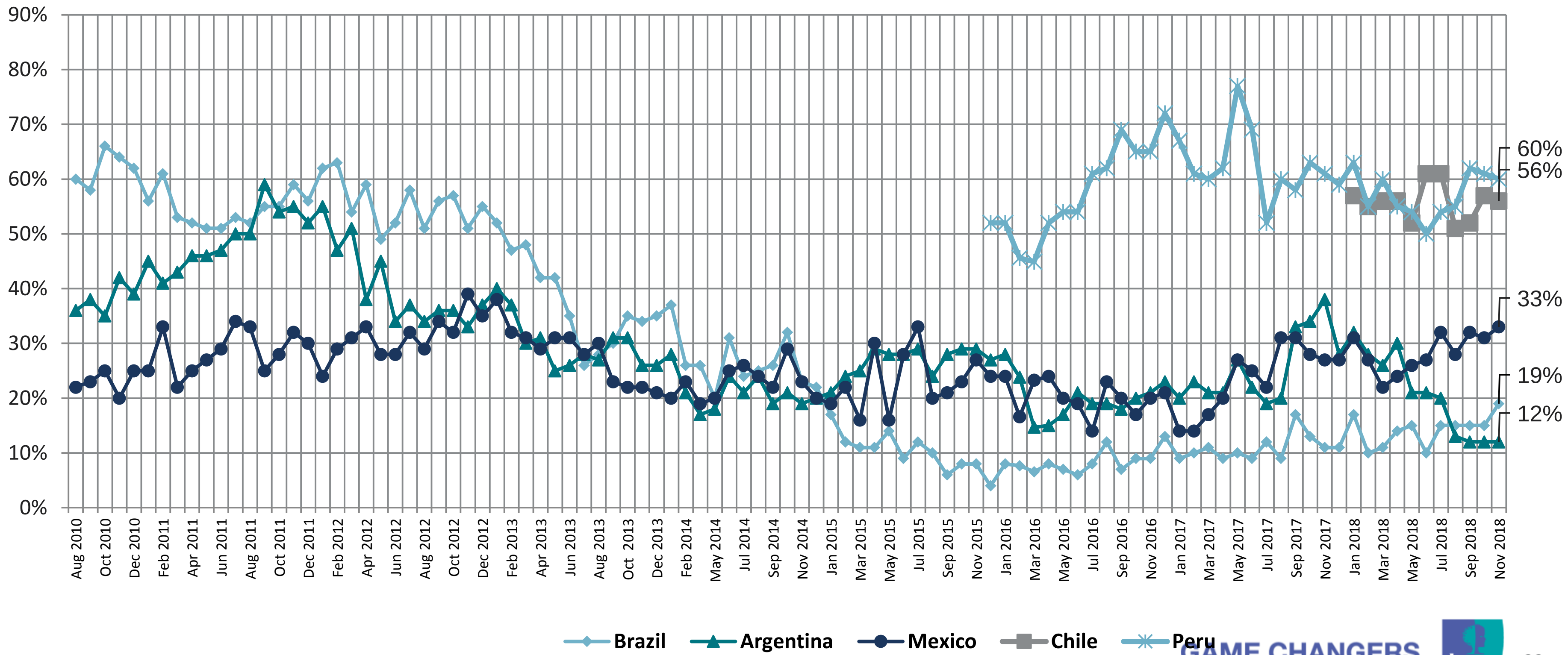
North American (Canada/US) Countries - Assessing the Current Economic Situation



Now thinking about our economic situation, how would you describe the current economic situation in [insert country]? Is it very good, somewhat good, somewhat bad or very bad?

LATAM Countries - Assessing the Current Economic Situation

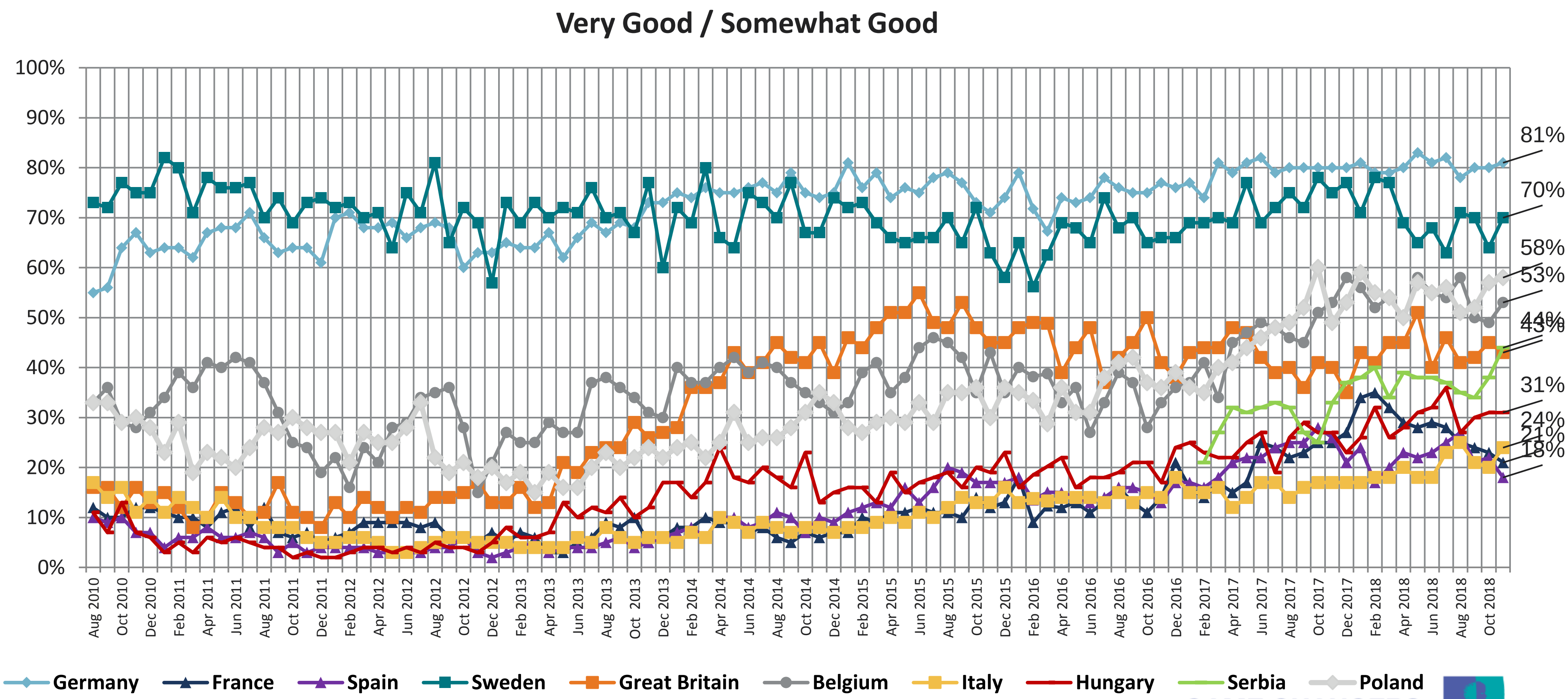
Very Good / Somewhat Good



GAME CHANGERS

Now thinking about our economic situation, how would you describe the current economic situation in [insert country]? Is it very good, somewhat good, somewhat bad or very bad?

European Countries - Assessing the Current Economic Situation



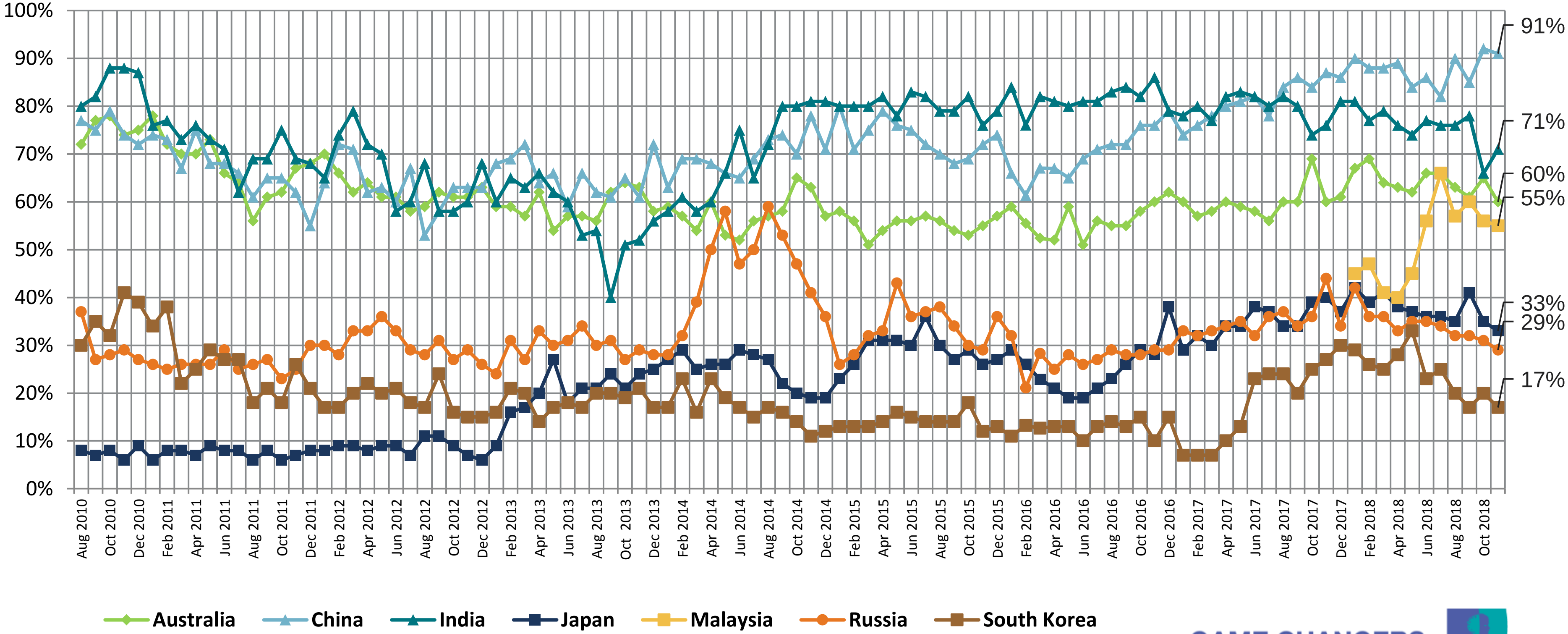
GAME CHANGERS

Now thinking about our economic situation, how would you describe the current economic situation in [insert country]? Is it very good, somewhat good, somewhat bad or very bad?

2

APAC Countries - Assessing the Current Economic Situation

Very Good / Somewhat Good

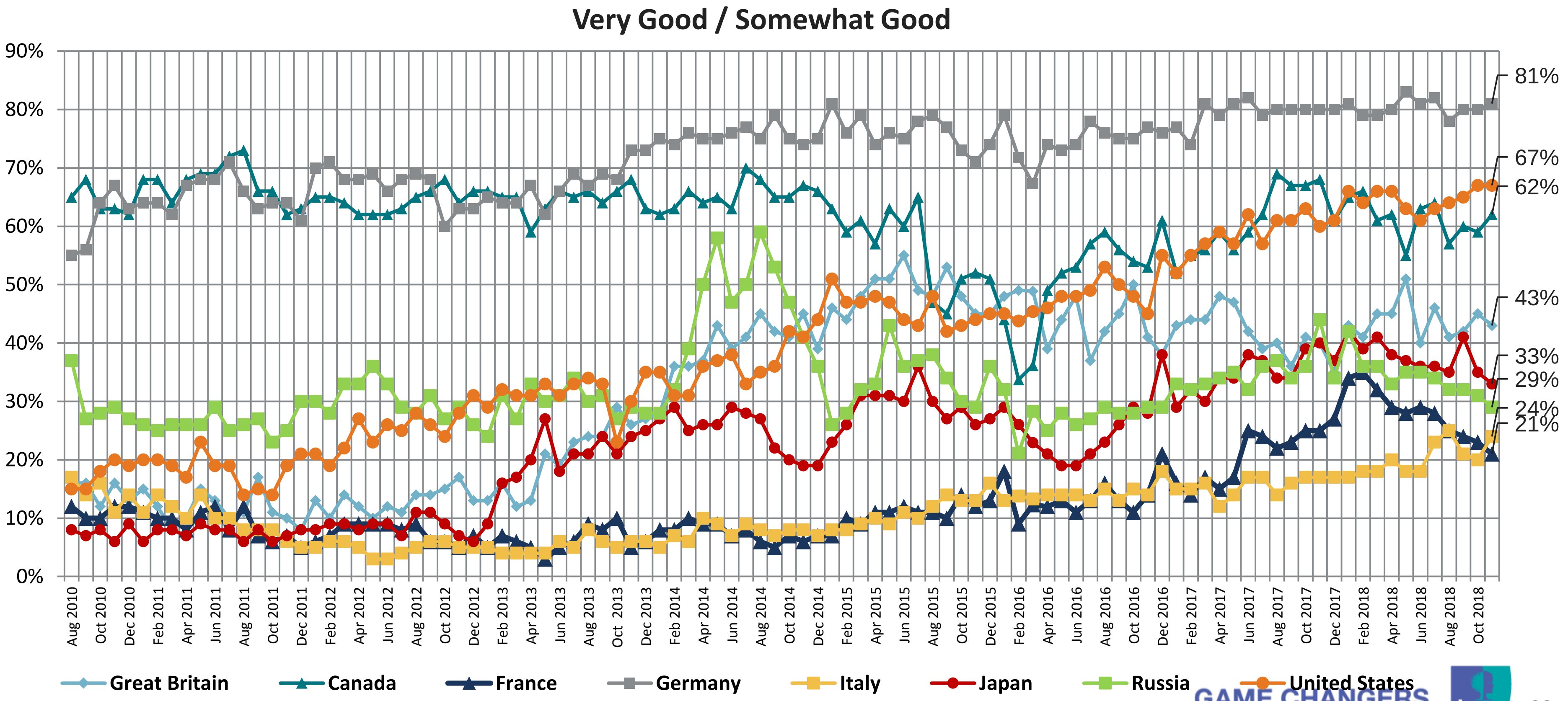


GAME CHANGERS

Now thinking about our economic situation, how would you describe the current economic situation in [insert country]? Is it very good, somewhat good, somewhat bad or very bad?

N/C

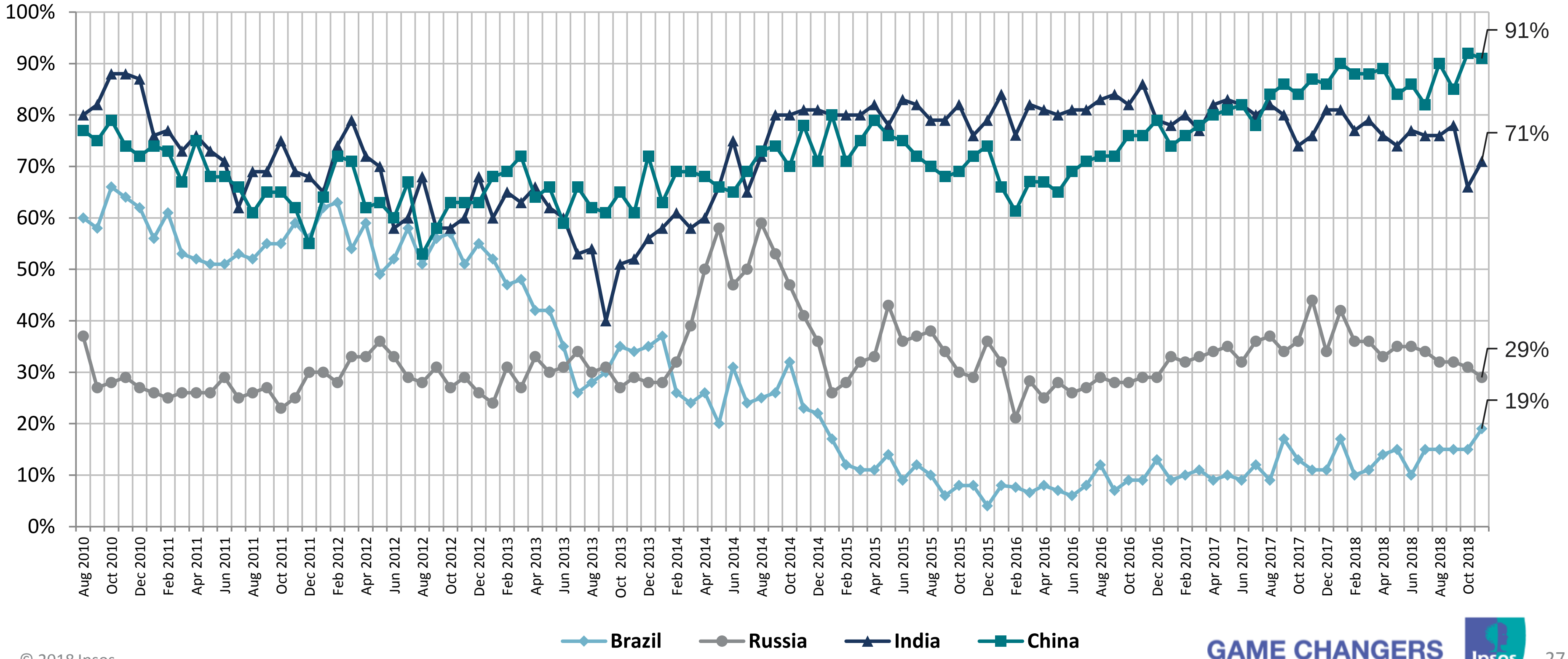
G8 Countries - Assessing the Current Economic Situation



GAME CHANGERS Ipsos

BRIC Countries - Assessing the Current Economic Situation

Very Good / Somewhat Good



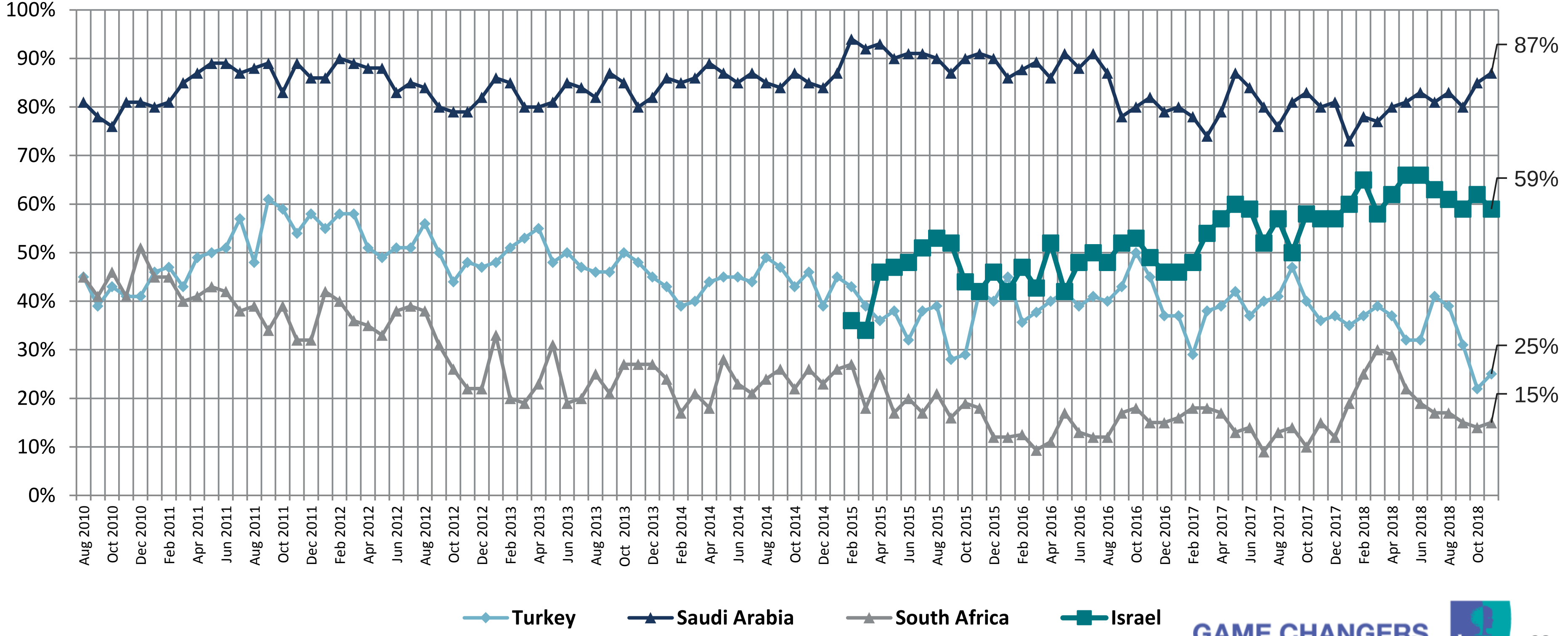
GAME CHANGERS

Now thinking about our economic situation, how would you describe the current economic situation in [insert country]? Is it very good, somewhat good, somewhat bad or very bad?

N/C

Middle East/African Countries - Assessing the Current Economic Situation

Very Good / Somewhat Good



GAME CHANGERS

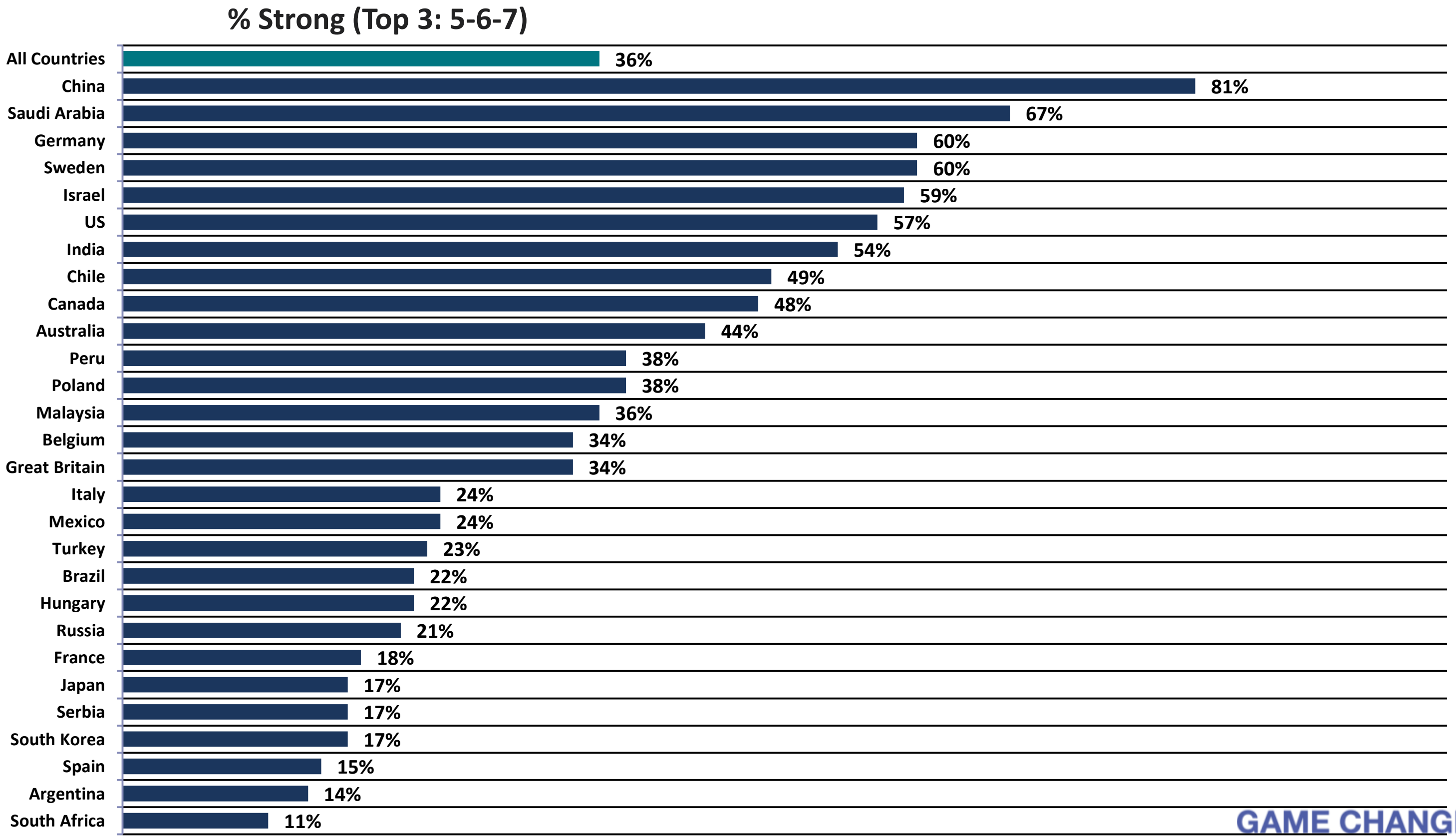
Ipsos

❷ Assessing The Economy...

...in Their Local Area

Rate the current state of the economy in your local area using a scale from 1 to 7, where 7 means a very strong economy today and 1 means a very weak economy

Citizen Consumers Who Say The Economy In Their Local Area is Strong…

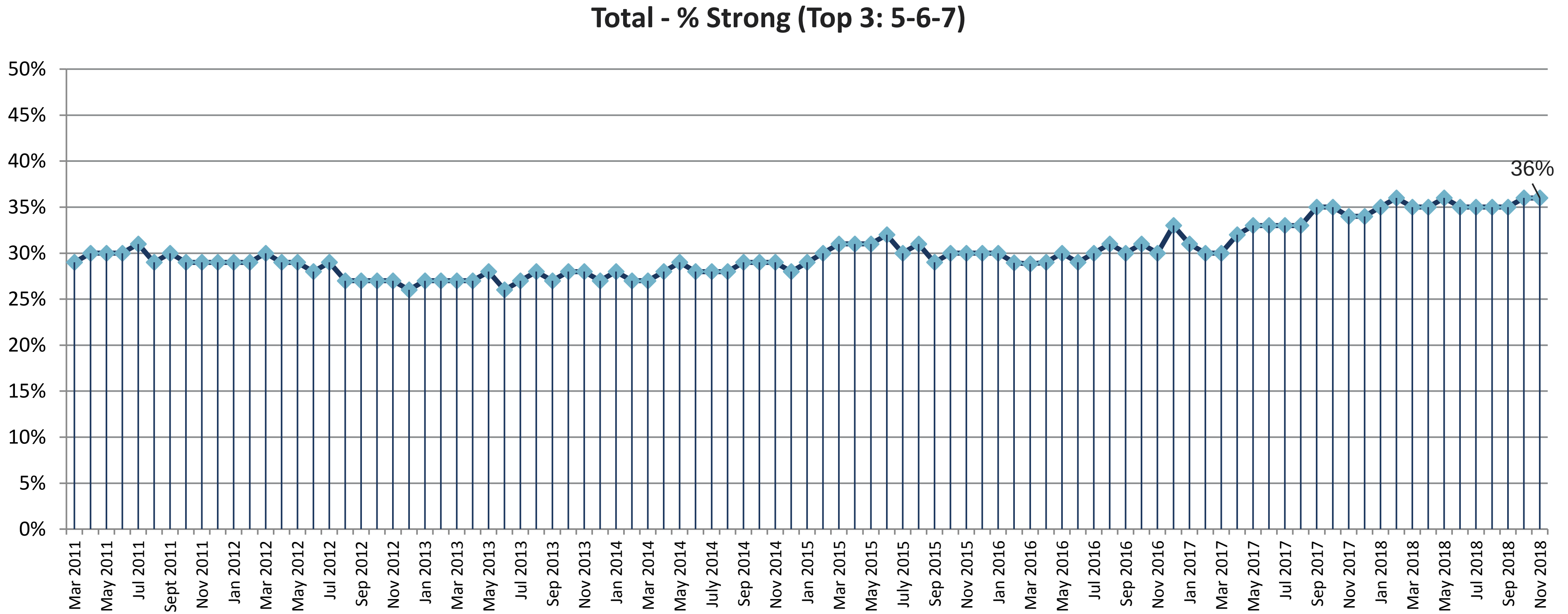


GAME CHANGERS

Rate the current state of the economy in your local area using a scale from 1 to 7, where 7 means a very strong economy today and 1 means a very weak economy.

N/C

Citizen Consumers Who Say The Economy In Their Local Area is Strong



GAME CHANGERS Ipsos

Rate the current state of the economy in your local area using a scale from 1 to 7, where 7 means a very strong economy today and 1 means a very weak economy.
% Strong (Top 3 5-6-7)

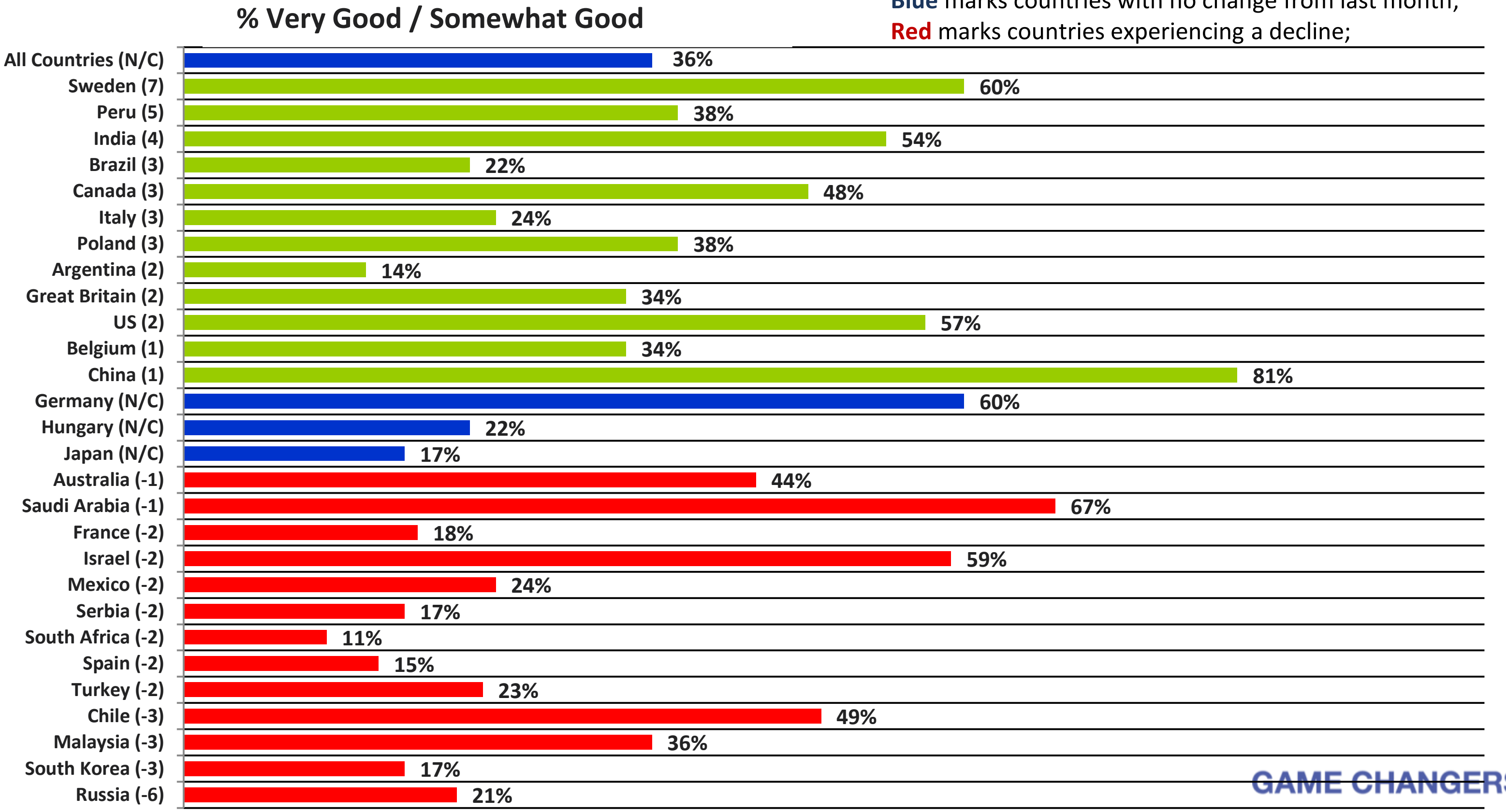
Citizen Consumers Who Say The Economy In Their Local Area is Strong

	Nov ‘15	Dec ‘15	Jan ‘16	Feb `16	Mar `16	Apr `16	May `16	Jun `16	Jul `16	Aug `16	Sep `16	Oct `16	Nov `16	Dec `16	Jan `17	Feb `17	Mar `17	Apr `17	May `17	Jun `17	Jul `17	Aug `17	Sep `17	Oct `17	Nov `17	Dec `17	Jan `18	Feb `18	Mar `18	Apr `18	May `18	Jun `18	Jul `18	Aug `18	Sep `18	Oct `18	Nov `18
Total	30%	30%	30%	29%	29%	29%	30%	29%	30%	31%	30%	31%	30%	33%	31%	30%	30%	32%	33%	33%	33%	33%	35%	35%	34%	34%	35%	36%	35%	35%	36%	35%	35%	35%	35%	36%	36%
Argentina	22%	18%	20%	20%	14%	16%	18%	17%	18%	15%	14%	16%	15%	21%	17%	19%	18%	19%	19%	19%	16%	18%	29%	29%	30%	23%	26%	20%	20%	23%	20%	19%	15%	18%	12%	12%	14%
Australia	36%	42%	32%	38%	34%	33%	39%	32%	37%	36%	34%	38%	38%	39%	38%	38%	37%	40%	40%	38%	39%	41%	41%	50%	40%	37%	43%	49%	45%	42%	41%	45%	44%	42%	41%	45%	44%
Belgium	26%	19%	19%	24%	26%	19%	21%	16%	20%	24%	22%	20%	20%	23%	20%	25%	23%	28%	31%	28%	30%	28%	30%	34%	32%	35%	37%	35%	33%	33%	36%	34%	33%	37%	30%	33%	34%
Brazil	18%	14%	16%	13%	10%	13%	14%	12%	14%	16%	13%	15%	14%	17%	14%	16%	17%	15%	16%	16%	16%	15%	19%	18%	16%	13%	19%	19%	18%	18%	21%	15%	19%	19%	16%	19%	22%
Canada	34%	33%	32%	21%	24%	33%	33%	34%	37%	36%	39%	34%	36%	42%	36%	34%	38%	39%	38%	41%	44%	46%	48%	44%	44%	41%	44%	46%	44%	45%	42%	46%	46%	46%	44%	45%	48%
Chile																											50%	49%	50%	53%	46%	50%	55%	45%	51%	52%	49%
China	57%	58%	54%	50%	54%	55%	54%	55%	57%	58%	58%	59%	61%	62%	58%	57%	60%	60%	67%	62%	65%	66%	71%	69%	73%	73%	73%	73%	74%	75%	72%	72%	68%	82%	76%	80%	81%
France	15%	17%	20%	16%	15%	13%	16%	15%	14%	14%	15%	13%	17%	18%	16%	16%	19%	16%	19%	21%	23%	22%	23%	21%	20%	23%	26%	28%	23%	25%	24%	23%	22%	22%	21%	20%	18%
Germany	51%	49%	56%	53%	52%	54%	51%	51%	55%	51%	55%	53%	56%	59%	54%	53%	59%	55%	58%	61%	62%	61%	59%	61%	58%	60%	58%	63%	58%	56%	58%	62%	62%	60%	59%	60%	60%
Great Britain	29%	29%	33%	32%	33%	24%	30%	27%	27%	28%	30%	32%	32%	30%	30%	31%	31%	34%	35%	34%	31%	29%	27%	29%	29%	26%	31%	31%	30%	32%	35%	28%	31%	29%	32%	32%	34%
Hungary	15%	15%	16%	15%	17%	17%	15%	16%	14%	15%	17%	17%	15%	19%	18%	18%	17%	18%	18%	22%	18%	26%	18%	24%	20%	18%	21%	21%	24%	22%	21%	24%	24%	21%	19%	22%	22%
India	55%	50%	61%	52%	55%	57%	57%	54%	55%	55%	53%	62%	60%	62%	60%	61%	56%	65%	61%	61%	62%	62%	62%	57%	54%	57%	60%	57%	59%	58%	55%	59%	58%	55%	59%	50%	54%
Israel	53%	59%	50%	58%	53%	59%	55%	56%	50%	58%	53%	55%	62%	53%	56%	55%	56%	60%	59%	56%	54%	56%	57%	56%	51%	56%	57%	60%	58%	66%	66%	55%	58%	59%	60%	61%	59%
Italy	13%	14%	13%	13%	13%	13%	14%	16%	12%	12%	13%	12%	14%	15%	15%	14%	15%	14%	16%	17%	16%	16%	17%	14%	16%	16%	15%	17%	16%	19%	15%	18%	21%	21%	20%	21%	24%
Japan	12%	13%	11%	15%	12%	12%	11%	13%	11%	11%	12%	13%	12%	17%	13%	14%	15%	13%	16%	18%	16%	16%	18%	17%	20%	18%	19%	18%	22%	17%	18%	18%	15%	18%	19%	17%	17%
Malaysia																											33%	32%	30%	28%	35%	43%	47%	37%	43%	39%	36%
Mexico	24%	16%	20%	9%	18%	16%	24%	12%	10%	19%	17%	13%	11%	17%	10%	10%	16%	17%	20%	16%	17%	22%	22%	22%	23%	22%	23%	22%	17%	20%	20%	22%	24%	23%	26%	26%	24%
Peru		25%	24%	20%	17%	22%	25%	28%	30%	32%	36%	35%	35%	42%	39%	29%	34%	35%	48%	36%	25%	37%	31%	35%	36%	33%	34%	30%	35%	28%	30%	28%	32%	33%	33%	33%	38%
Poland	20%	27%	26%	28%	19%	22%	25%	27%	26%	28%	28%	28%	23%	22%	26%	24%	27%	28%	31%	31%	35%	33%	34%	39%	36%	37%	38%	37%	37%	30%	38%	35%	35%	35%	37%	35%	38%
Russia	23%	24%	18%	24%	23%	20%	21%	17%	23%	20%	17%	19%	18%	24%	22%	23%	20%	22%	21%	22%	24%	18%	25%	25%	29%	20%	14%	23%	24%	15%	23%	22%	21%	20%	20%	27%	21%
Saudi Arabia	62%	66%	59%	61%	68%	59%	68%	64%	70%	62%	51%	57%	58%	56%	58%	56%	53%	57%	65%	63%	64%	50%	58%	58%	57%	63%	56%	61%	54%	62%	62%	63%	63%	57%	64%	68%	67%
Serbia																8%	9%	9%	12%	13%	11%	10%	10%	10%	11%	13%	14%	13%	11%	13%	14%	13%	10%	15%	16%	19%	17%
South Africa	13%	12%	10%	10%	8%	9%	17%	11%	11%	11%	15%	16%	16%	13%	12%	14%	15%	14%	14%	14%	10%	13%	13%	11%	14%	12%	17%	22%	20%	23%	20%	16%	18%	17%	13%	13%	11%
South Korea	12%	11%	10%	13%	14%	12%	12%	10%	13%	15%	13%	14%	5%	15%	6%	7%	6%	10%	10%	19%	23%	20%	22%	20%	21%	24%	24%	24%	24%	24%	28%	20%	20%	17%	19%	20%	17%
Spain	15%	14%	15%	11%	13%	13%	12%	11%	14%	16%	12%	14%	14%	19%	15%	15%	15%	18%	16%	17%	21%	20%	21%	21%	22%	17%	18%	17%	19%	19%	18%	21%	18%	17%	19%	17%	15%
Sweden	50%	53%	59%	58%	57%	55%	57%	57%	51%	58%	48%	59%	54%	51%	56%	52%	55%	60%	60%	55%	56%	60%	60%	63%	63%	60%	62%	65%	60%	55%	57%	54%	47%	56%	53%	53%	60%
Turkey	33%	27%	39%	29%	33%	30%	31%	29%	29%	29%	36%	42%	33%	29%	30%	21%	28%	36%	27%	31%	31%	30%	33%	26%	31%	30%	28%	31%	32%	27%	28%	29%	34%	32%	29%	25%	23%
United States	36%	36%	36%	40%	40%	38%	40%	39%	39%	48%	43%	46%	39%	46%	43%	47%	46%	50%	49%	53%	46%	49%	53%	54%	49%	47%	53%	55%	54%	56%	58%	50%	53%	54%	56%	55%	57%

Rate the current state of the economy in your local area using a scale from 1 to 7, where 7 means a very strong economy today and 1 means a very weak economy…

Countries Ranked and Marked By Change In Assessment From Last Month (Left Column):

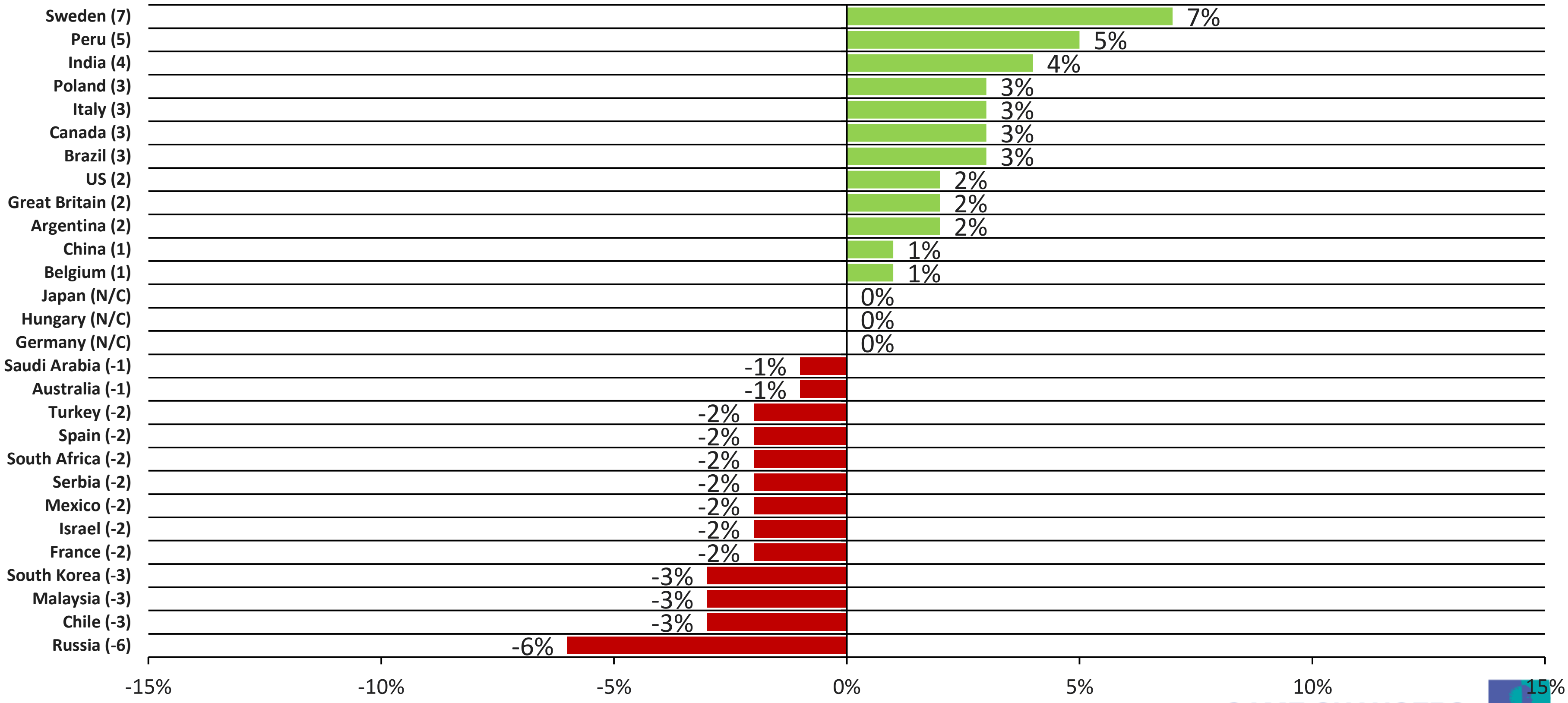
Green marks countries experiencing improvement;
Blue marks countries with no change from last month;
Red marks countries experiencing a decline;



GAME CHANGERS Ipsos

Rate the current state of the economy in your local area using a scale from 1 to 7, where 7 means a very strong economy today and 1 means a very weak economy…

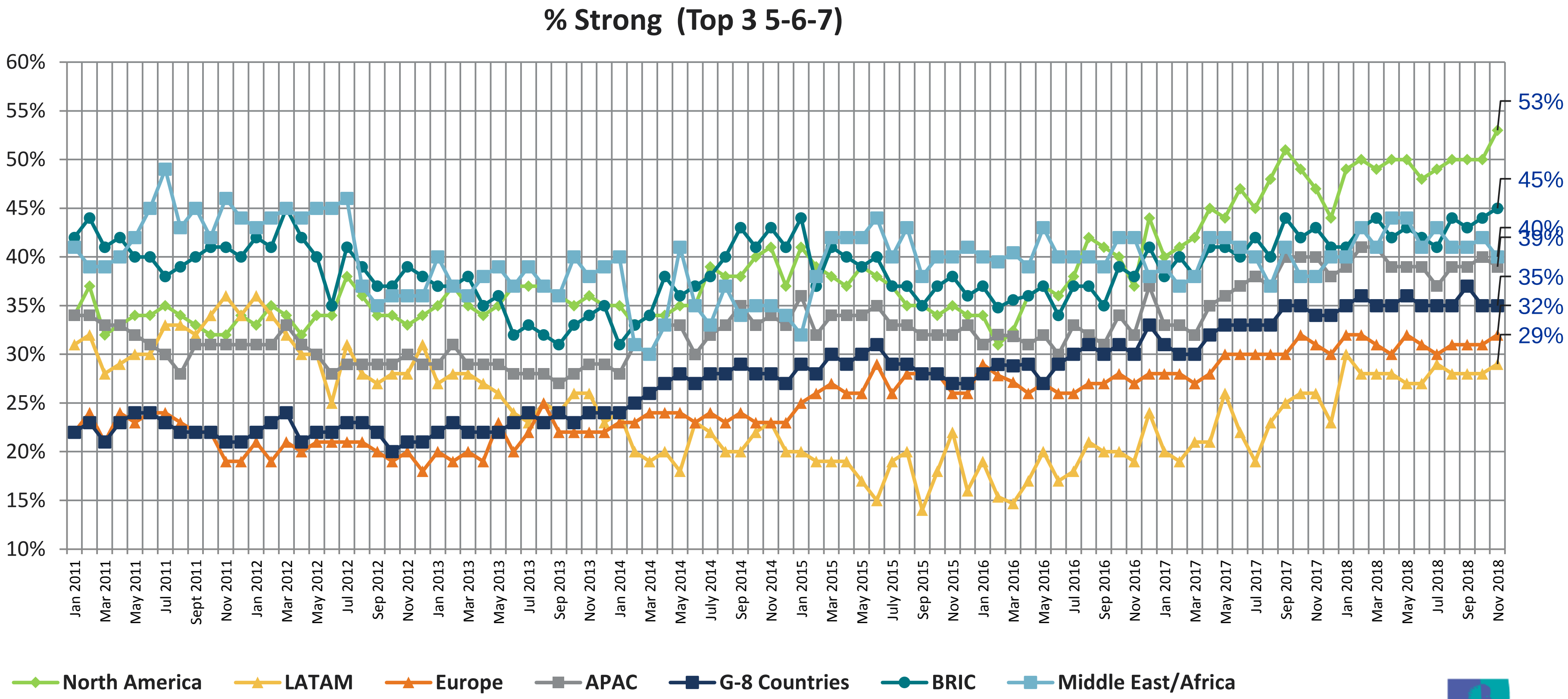
Countries Ranked by Net Improvement, Decline or No Change Compared to Last Month:



GAME CHANGERS Ipsos

Rate the current state of the economy in your local area using a scale from 1 to 7, where 7 means a very strong economy today and 1 means a very weak economy.

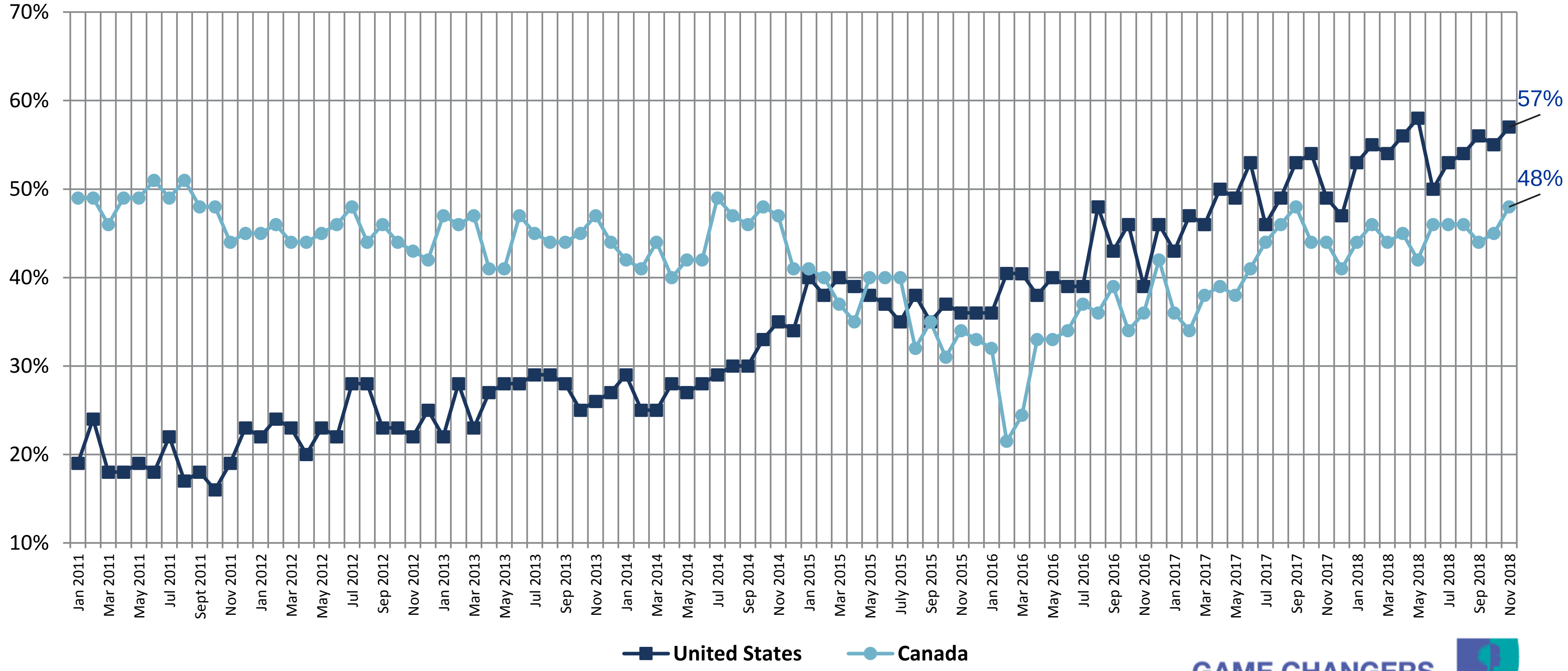
All Regions - Assess the Strength of Their Local Economy



GAME CHANGERS

North American Countries - Assess the Strength of Their Local Economy

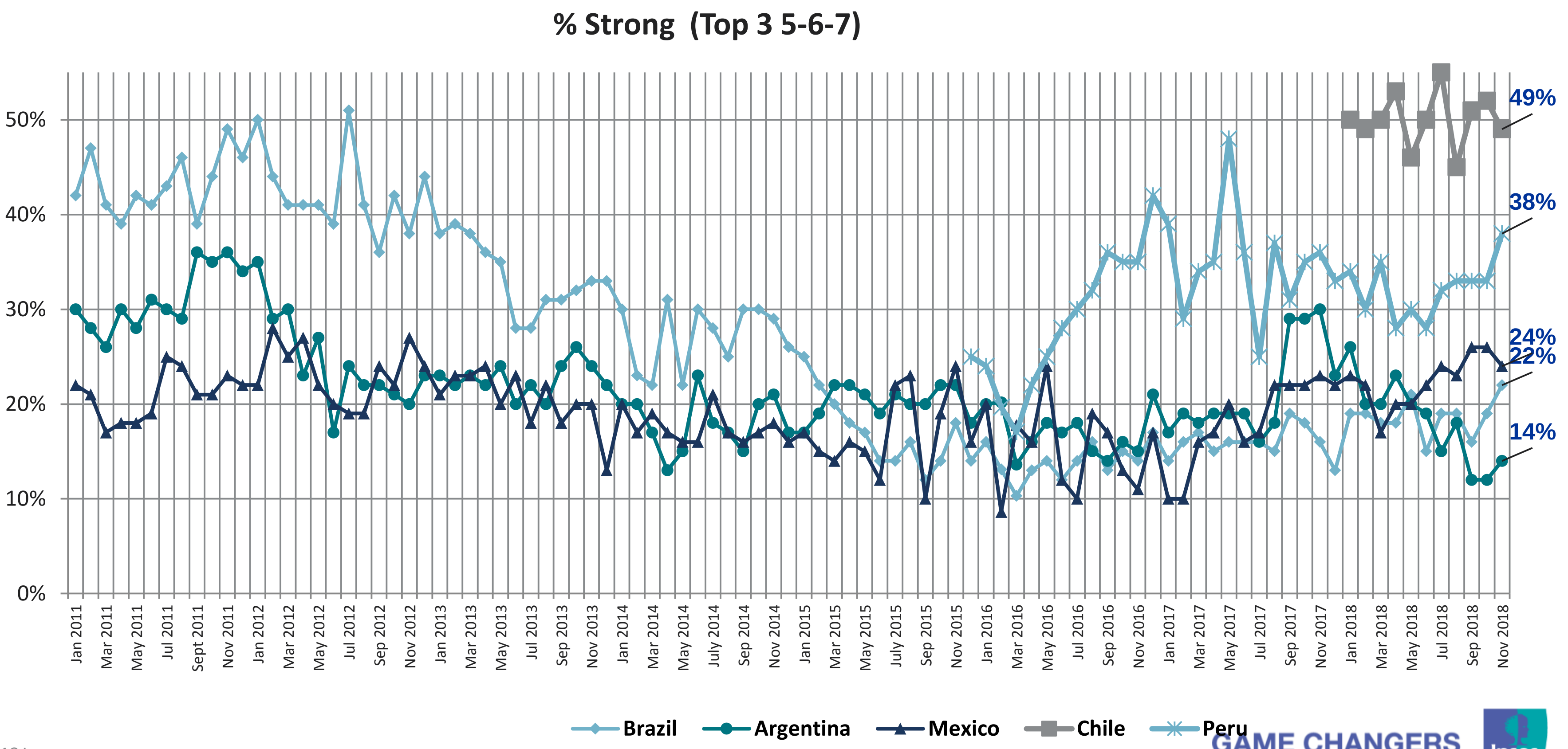
% Strong (Top 3 5-6-7)



GAME CHANGERS

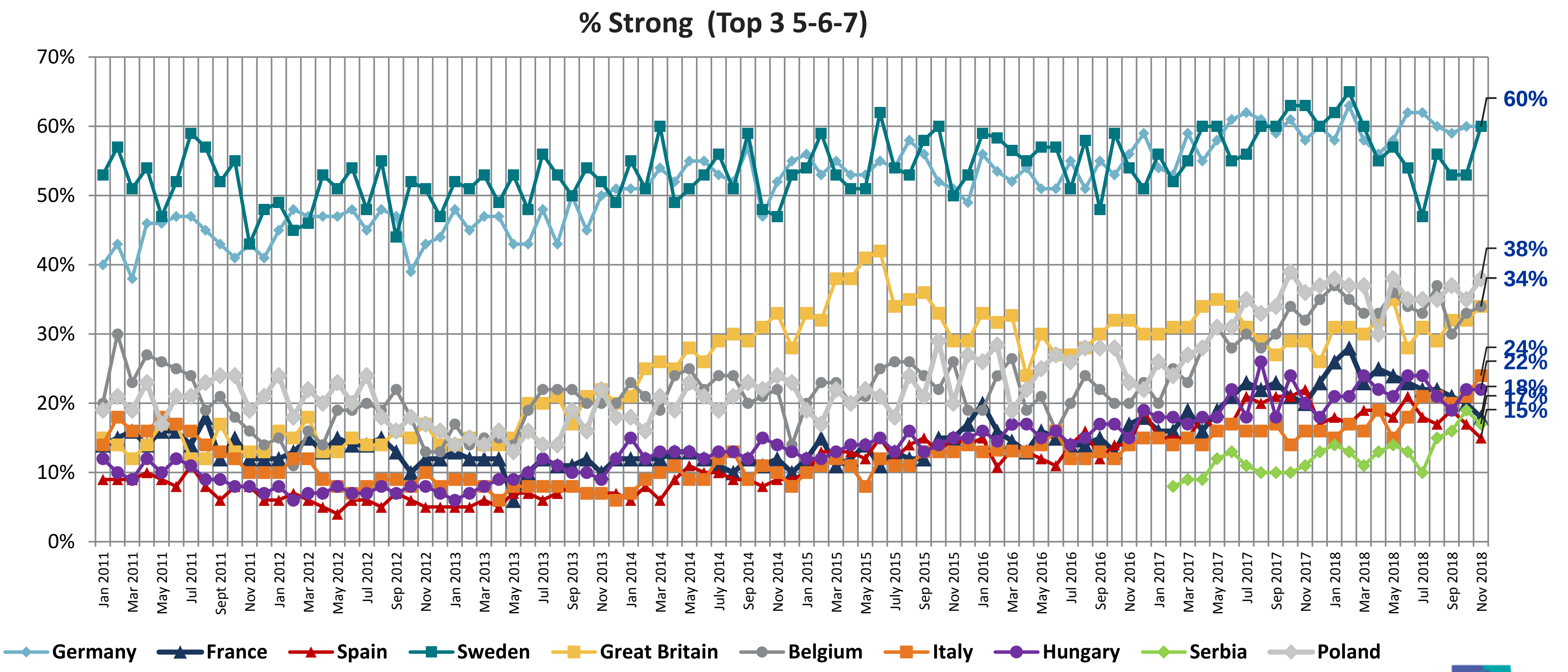
Rate the current state of the economy in your local area using a scale from 1 to 7, where 7 means a very strong economy today and 1 means a very weak economy.

LATAM Countries - Assess the Strength of Their Local Economy



Rate the current state of the economy in your local area using a scale from 1 to 7, where 7 means a very strong economy today and 1 means a very weak economy.

European Countries - Assess the Strength of Their Local Economy

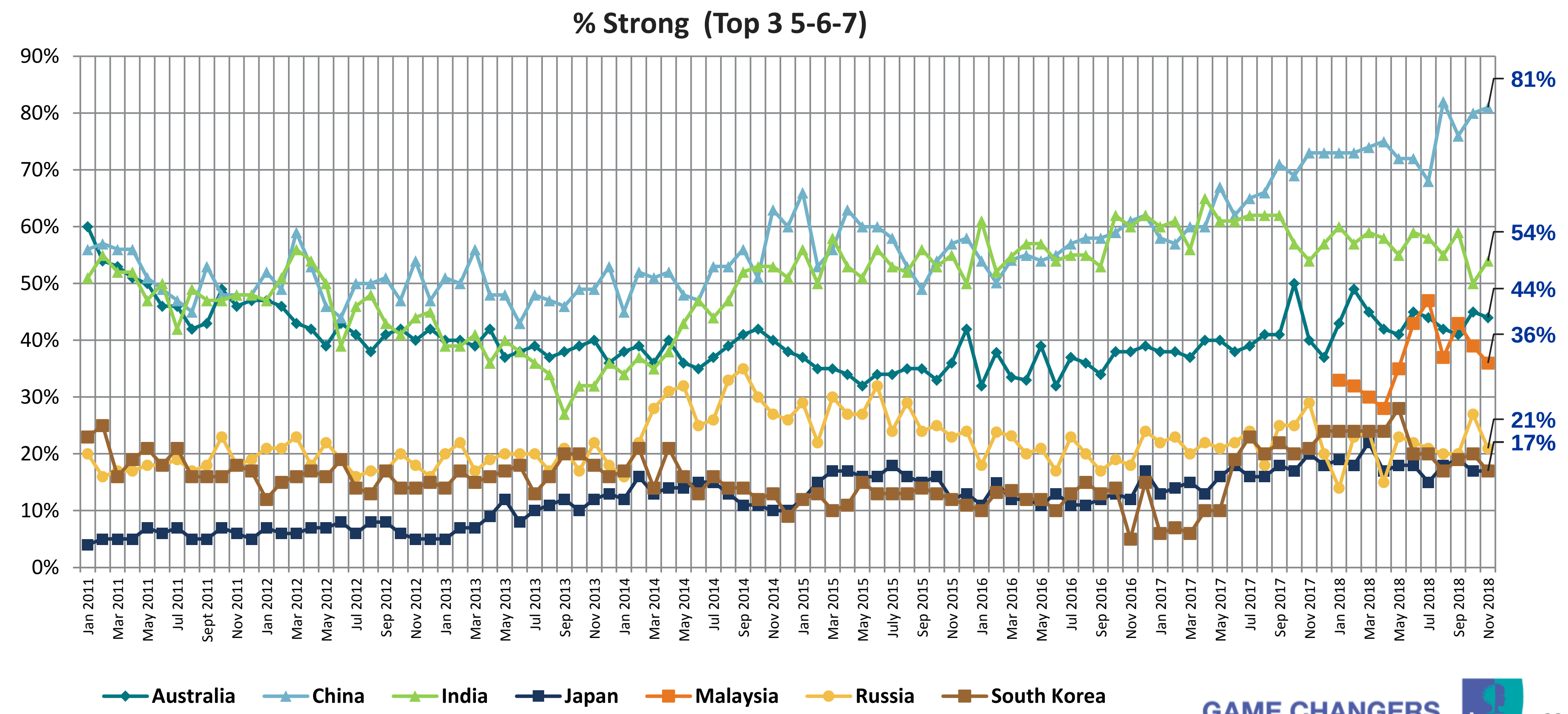


GAME CHANGERS

Rate the current state of the economy in your local area using a scale from 1 to 7, where 7 means a very strong economy today and 1 means a very weak economy.

1

APAC Countries - Assess the Strength of Their Local Economy

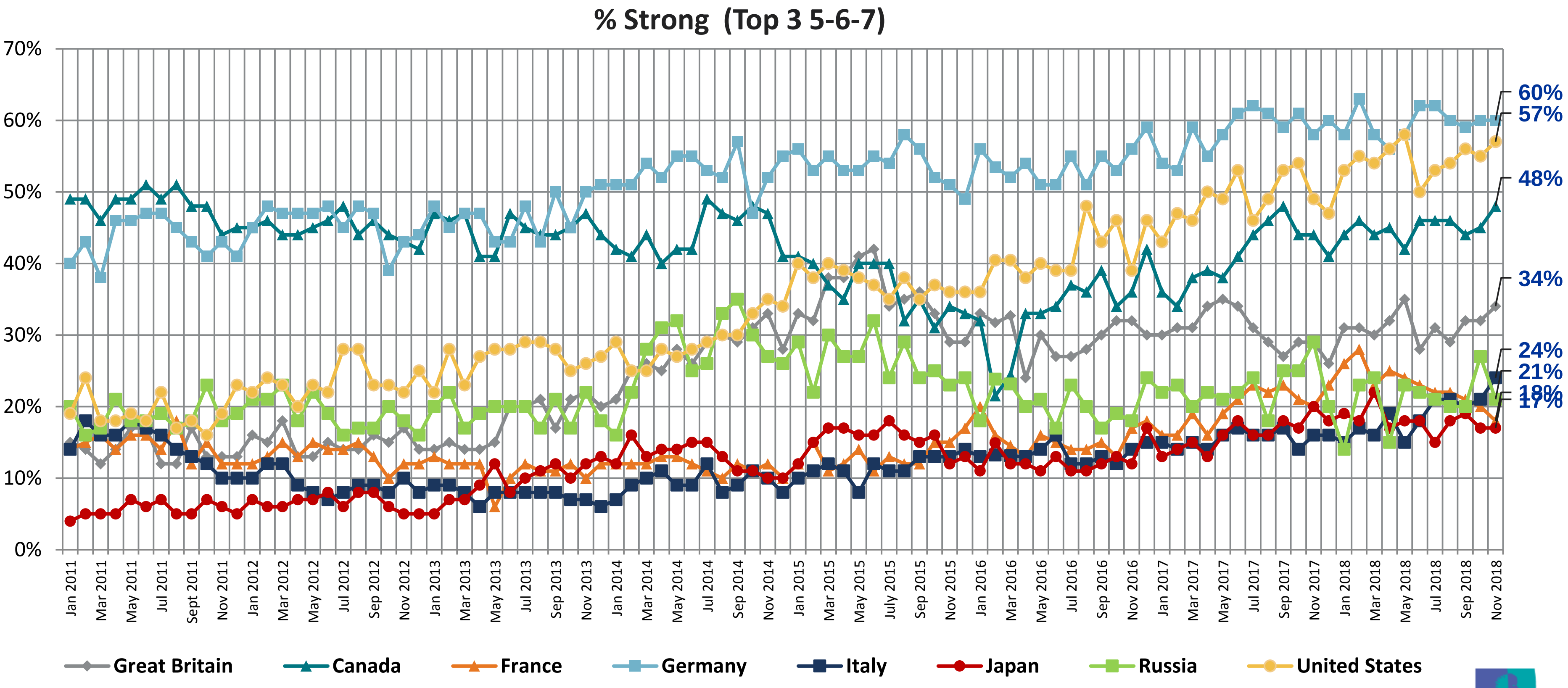


GAME CHANGERS Ipsos

Rate the current state of the economy in your local area using a scale from 1 to 7, where 7 means a very strong economy today and 1 means a very weak economy.

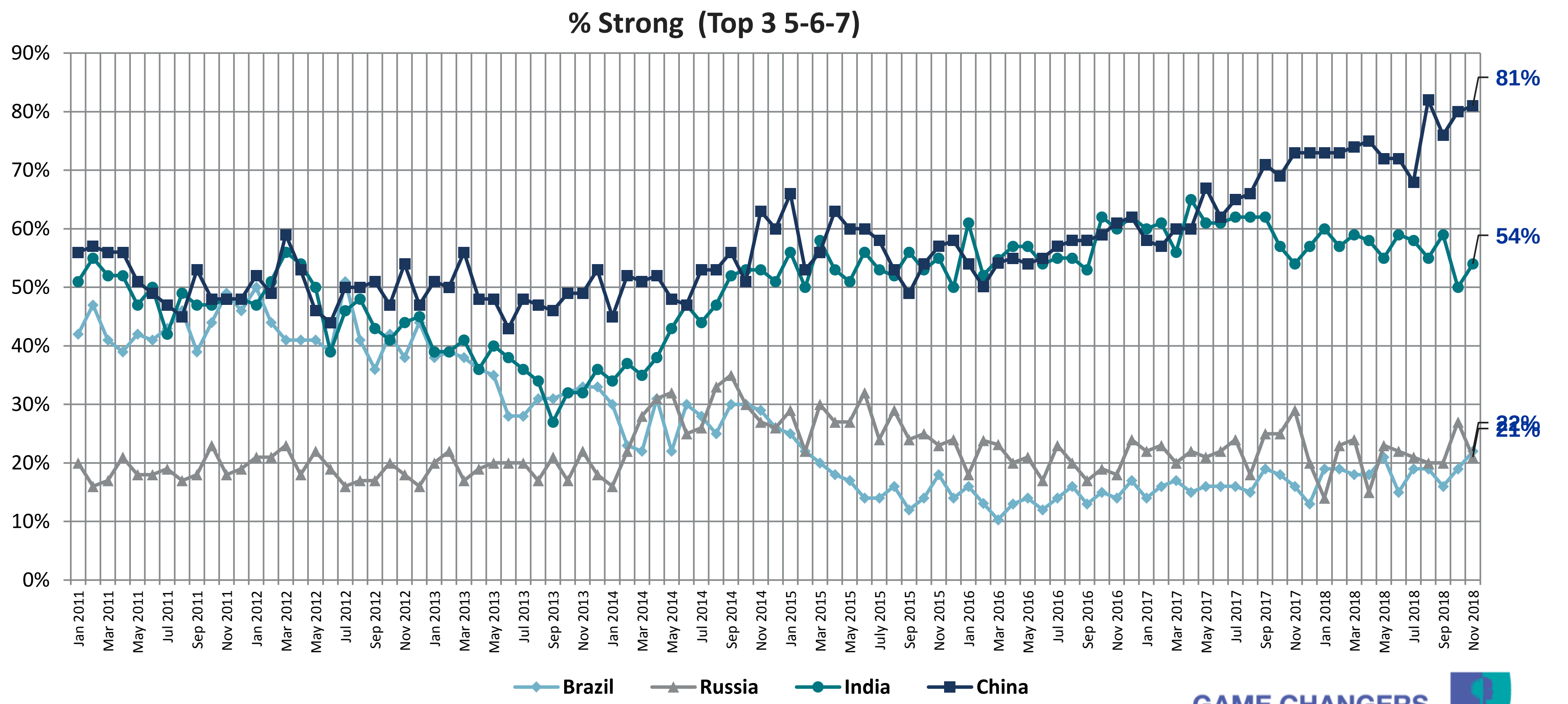
N/C

G8 Countries - Assess the Strength of Their Local Economy



Rate the current state of the economy in your local area using a scale from 1 to 7, where 7 means a very strong economy today and 1 means a very weak economy.

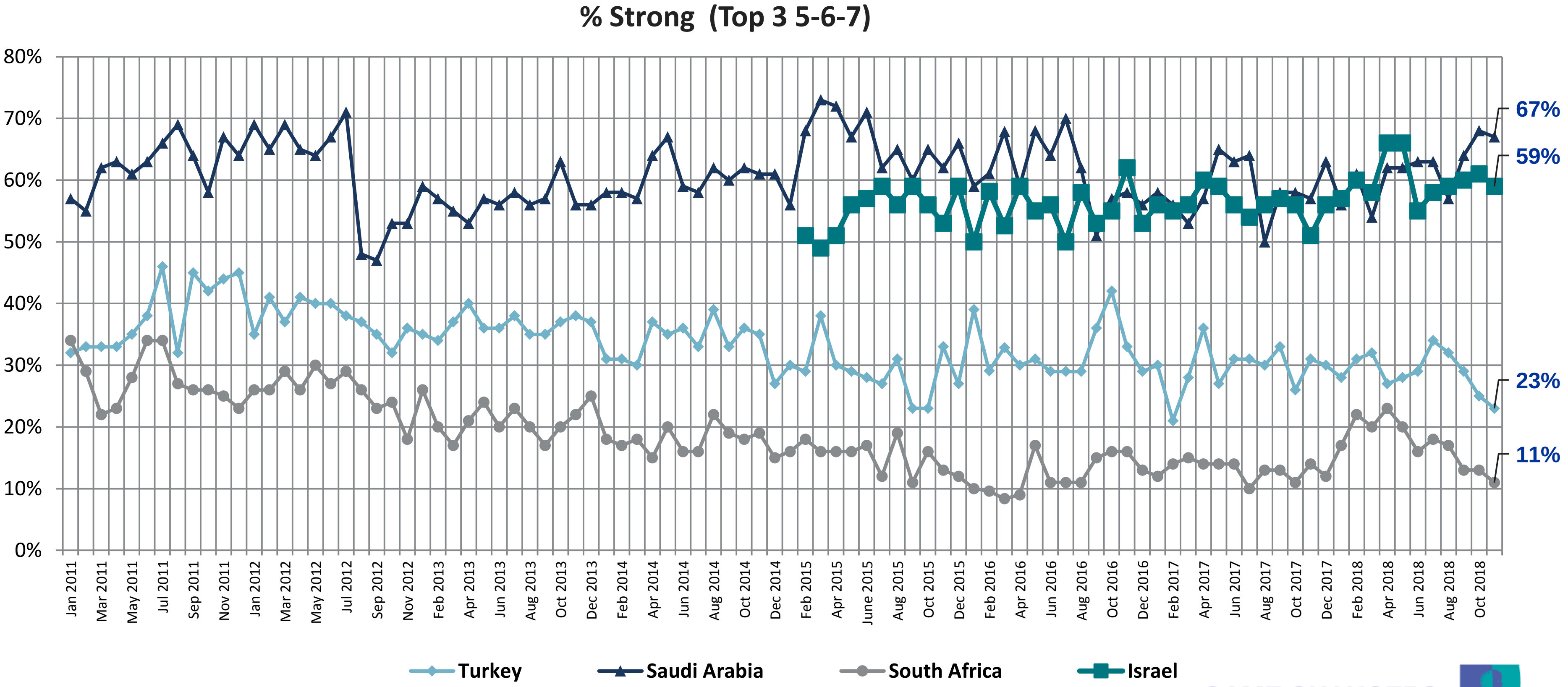
BRIC Countries - Assess the Strength of Their Local Economy



Rate the current state of the economy in your local area using a scale from 1 to 7, where 7 means a very strong economy today and 1 means a very weak economy.

2

Middle East/African Countries - Assess the Strength of Their Local Economy



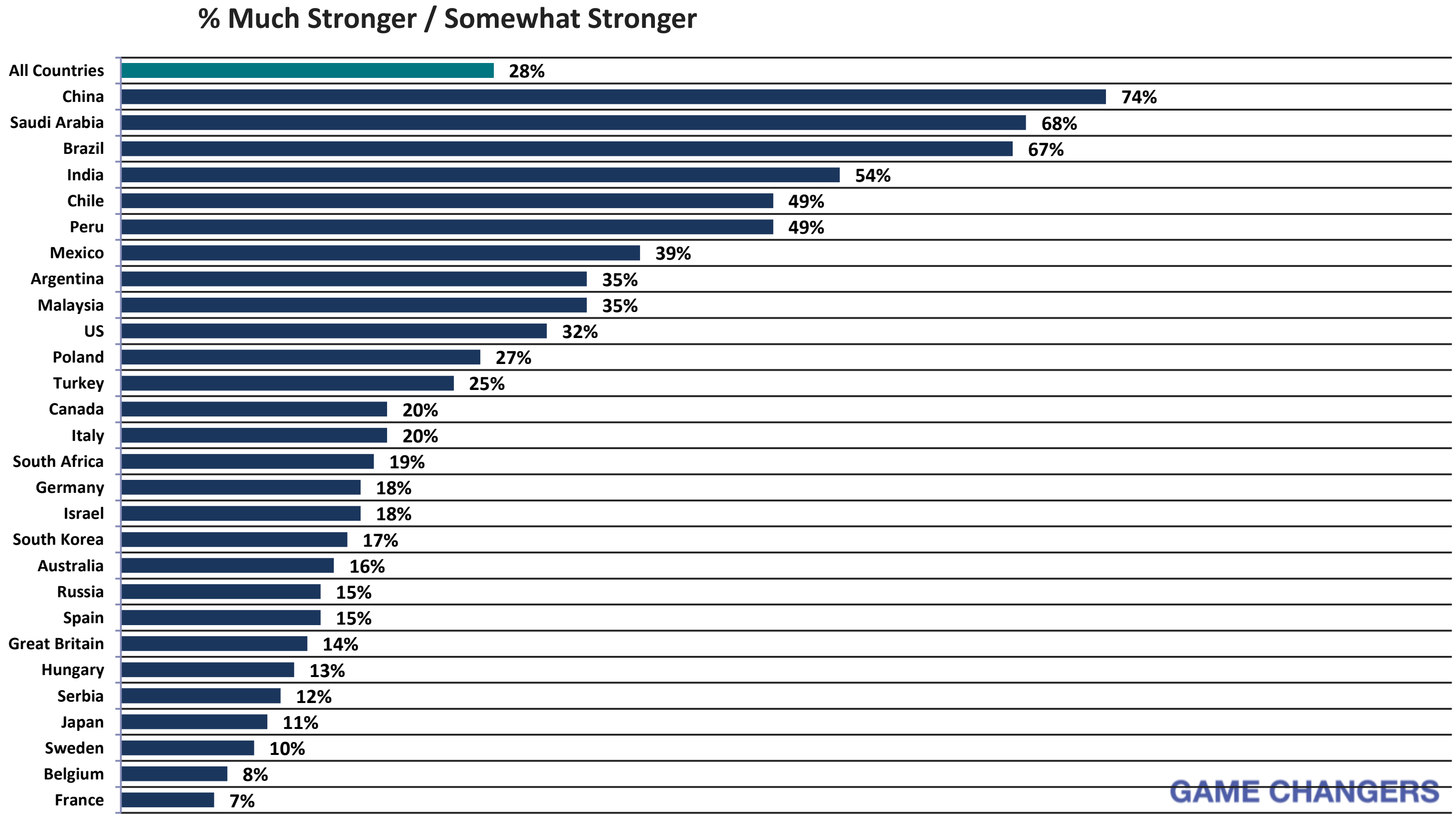
GAME CHANGERS Ipsos

❸ Assessing the Strength of The Local Economy…

…Six Months From Now

Looking ahead 6 months from now, do you expect the economy in your local area to be much stronger, somewhat stronger, about the same, somewhat weaker, or much weaker than it is now?

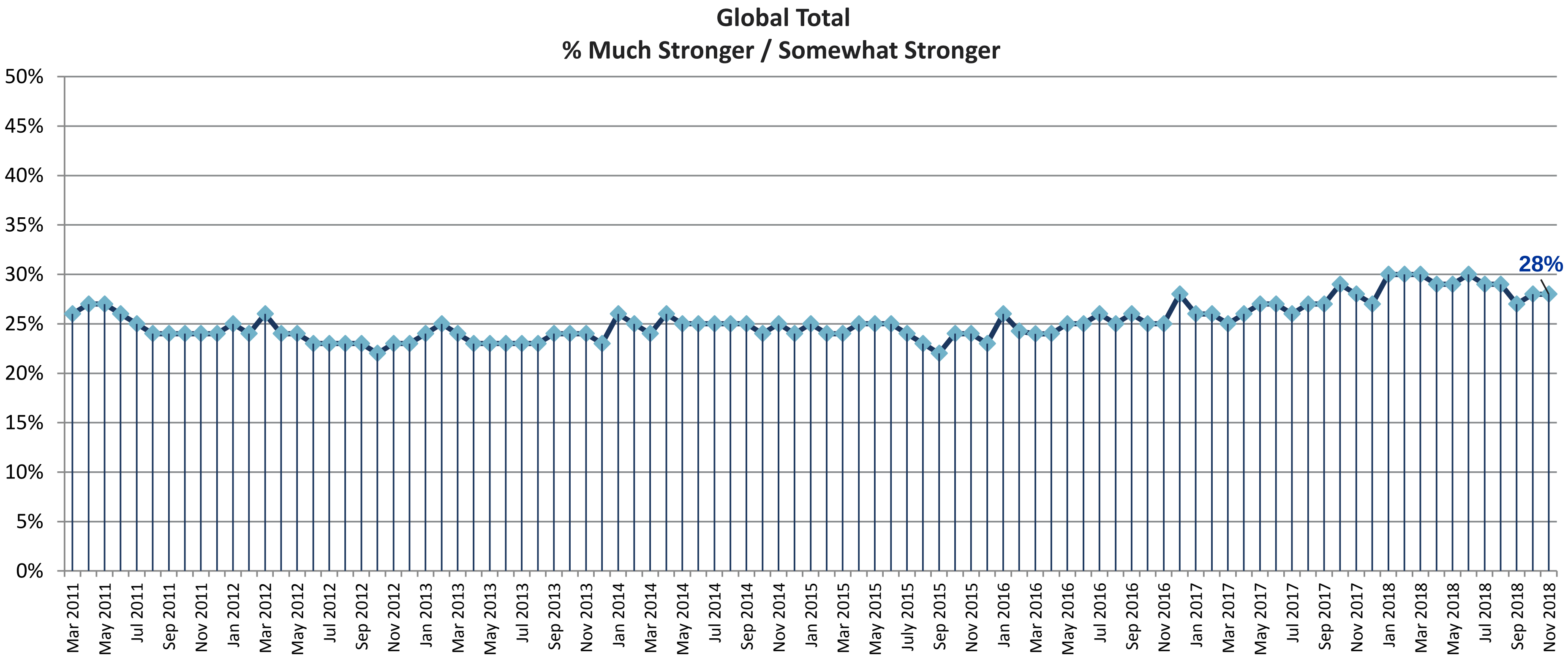
Citizen Consumers Who Say The Economy in the Local Area to be Stronger in The Next Six Months…



Looking ahead 6 months from now, do you expect the economy in your local area to be much stronger, somewhat stronger, about the same, somewhat weaker, or much weaker than it is now?

N/C

Citizen Consumers Who Say The Economy in the Local Area to be Stronger in The Next Six Months…



GAME CHANGERS

Looking ahead six months from now, do you expect the economy in your local area to be much stronger, somewhat stronger, about the same, somewhat weaker, or much weaker than it is now?
% Much Stronger / Somewhat Stronger

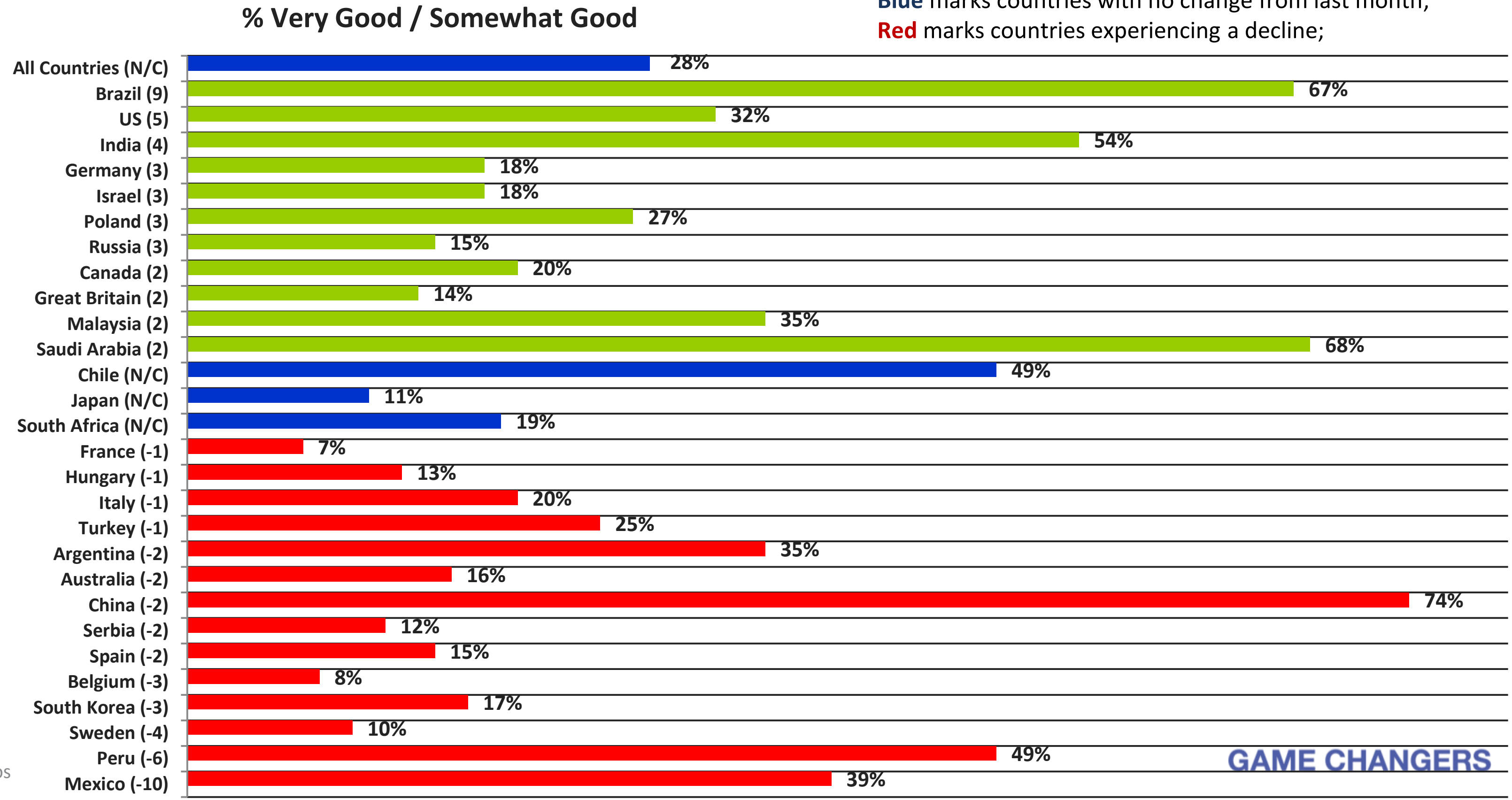
Citizen Consumers Who Say The Economy in the Local Area to be Stronger in The Next Six Months…

	Nov '15	Dec '15	Jan '16	Feb '16	Mar '16	Apr '16	May '16	Jun '16	Jul '16	Aug '16	Sep '16	Oct '16	Nov '16	Dec '16	Jan '17	Feb '17	Mar '17	Apr '17	May '17	Jun '17	Jul '17	Aug '17	Sep '17	Oct '17	Nov '17	Dec '17	Jan '18	Feb '18	Mar '18	Apr '18	May '18	Jun '18	Jul '18	Aug '18	Sep '18	Oct '18	Nov '18
Total	24%	23%	26%	24%	24%	24%	25%	25%	26%	25%	26%	25%	25%	28%	26%	26%	25%	26%	27%	27%	26%	27%	27%	29%	28%	27%	30%	30%	30%	29%	29%	30%	29%	29%	27%	28%	28%
Argentina	61%	58%	65%	56%	49%	53%	59%	57%	54%	52%	53%	50%	50%	52%	45%	46%	42%	49%	51%	44%	39%	43%	51%	54%	51%	44%	44%	42%	39%	42%	37%	38%	32%	35%	33%	37%	35%
Australia	17%	19%	15%	14%	12%	14%	18%	17%	18%	16%	14%	14%	15%	15%	17%	16%	17%	17%	16%	16%	14%	19%	16%	27%	21%	17%	17%	20%	22%	16%	19%	18%	18%	19%	16%	18%	16%
Belgium	12%	9%	10%	10%	12%	7%	11%	8%	8%	12%	8%	6%	8%	9%	12%	11%	10%	13%	12%	10%	15%	15%	14%	14%	18%	22%	21%	15%	12%	15%	12%	13%	11%	14%	8%	11%	8%
Brazil	51%	53%	53%	53%	53%	54%	54%	55%	57%	56%	59%	59%	59%	54%	59%	62%	58%	55%	48%	55%	52%	50%	49%	57%	51%	53%	53%	58%	54%	54%	54%	46%	49%	50%	49%	58%	67%
Canada	24%	18%	15%	17%	16%	19%	20%	17%	18%	16%	17%	15%	16%	27%	18%	16%	18%	18%	18%	17%	18%	21%	20%	22%	23%	18%	22%	24%	18%	18%	18%	20%	18%	20%	15%	18%	20%
Chile																											61%	60%	56%	59%	55%	55%	52%	45%	51%	49%	49%
China	52%	49%	48%	41%	47%	49%	44%	49%	52%	50%	52%	53%	49%	56%	53%	52%	57%	53%	56%	54%	48%	58%	60%	59%	64%	62%	61%	57%	59%	57%	59%	59%	54%	72%	65%	76%	74%
France	5%	6%	11%	5%	5%	6%	8%	5%	6%	5%	5%	5%	6%	11%	8%	8%	7%	6%	9%	12%	12%	13%	11%	14%	10%	13%	16%	16%	13%	11%	11%	9%	9%	9%	7%	8%	7%
Germany	15%	16%	17%	15%	12%	15%	13%	16%	18%	13%	15%	13%	15%	26%	19%	17%	17%	19%	19%	19%	17%	17%	21%	26%	24%	20%	25%	24%	16%	19%	18%	16%	16%	18%	17%	15%	18%
Great Britain	14%	15%	16%	14%	12%	10%	12%	10%	12%	14%	12%	12%	12%	12%	13%	15%	11%	12%	14%	12%	11%	11%	10%	13%	10%	13%	12%	12%	14%	12%	19%	12%	13%	12%	10%	12%	14%
Hungary	12%	12%	11%	11%	11%	12%	9%	11%	12%	11%	13%	11%	9%	13%	15%	13%	11%	10%	15%	14%	12%	15%	14%	14%	12%	8%	14%	17%	18%	31%	15%	16%	16%	14%	19%	14%	13%
India	58%	56%	69%	57%	65%	63%	59%	61%	62%	60%	60%	62%	66%	67%	65%	67%	62%	69%	70%	66%	64%	65%	65%	62%	56%	63%	62%	60%	62%	58%	57%	56%	58%	58%	56%	50%	54%
Israel	11%	11%	15%	13%	13%	9%	14%	17%	12%	14%	18%	13%	13%	10%	9%	17%	16%	12%	16%	15%	15%	16%	12%	10%	15%	14%	18%	17%	18%	19%	17%	19%	15%	17%	13%	15%	18%
Italy	13%	14%	14%	12%	11%	11%	9%	12%	9%	8%	10%	9%	9%	10%	10%	8%	11%	8%	8%	12%	9%	9%	7%	11%	12%	8%	10%	13%	15%	15%	10%	21%	25%	21%	19%	21%	20%
Japan	11%	13%	11%	11%	9%	10%	7%	9%	9%	8%	10%	11%	9%	14%	9%	11%	11%	9%	11%	12%	11%	10%	11%	13%	15%	14%	16%	12%	14%	13%	12%	12%	11%	11%	15%	11%	11%
Malaysia																											25%	23%	26%	23%	26%	57%	51%	38%	39%	33%	35%
Mexico	32%	24%	32%	31%	31%	26%	27%	30%	27%	28%	32%	27%	22%	25%	20%	20%	27%	26%	28%	27%	23%	29%	29%	31%	30%	26%	31%	35%	28%	33%	35%	37%	47%	53%	47%	49%	39%
Peru		47%	49%	53%	48%	47%	58%	58%	67%	69%	65%	60%	64%	58%	52%	46%	54%	48%	53%	54%	53%	57%	51%	52%	49%	49%	49%	50%	46%	53%	52%	47%	42%	53%	51%	55%	49%
Poland	14%	17%	13%	16%	14%	18%	16%	18%	18%	18%	15%	17%	14%	13%	18%	16%	21%	20%	23%	23%	21%	24%	29%	24%	27%	23%	31%	24%	25%	22%	27%	26%	24%	26%	25%	24%	27%
Russia	24%	21%	19%	31%	24%	21%	22%	20%	18%	16%	18%	17%	19%	21%	22%	22%	19%	18%	19%	19%	18%	19%	19%	30%	25%	17%	16%	19%	20%	24%	19%	20%	16%	16%	13%	12%	15%
Saudi Arabia	49%	53%	51%	51%	52%	51%	62%	58%	64%	52%	47%	48%	55%	55%	55%	51%	49%	52%	64%	55%	52%	45%	52%	55%	56%	57%	53%	55%	53%	57%	61%	61%	56%	58%	59%	66%	68%
Serbia																11%	15%	20%	18%	15%	19%	16%	15%	15%	16%	16%	17%	18%	19%	19%	20%	22%	22%	20%	15%	14%	12%
South Africa	15%	11%	13%	13%	13%	15%	18%	16%	16%	16%	20%	22%	13%	16%	13%	19%	16%	16%	13%	14%	14%	16%	12%	14%	11%	13%	32%	38%	47%	30%	25%	22%	20%	20%	17%	19%	19%
South Korea	12%	10%	8%	10%	10%	10%	12%	10%	9%	10%	9%	9%	5%	17%	8%	10%	10%	13%	13%	37%	32%	30%	24%	22%	24%	33%	25%	24%	24%	24%	33%	27%	22%	14%	16%	20%	17%
Spain	21%	22%	23%	19%	19%	19%	14%	17%	16%	18%	15%	15%	18%	26%	20%	19%	18%	20%	23%	21%	18%	21%	18%	22%	20%	19%	17%	19%	17%	21%	17%	27%	22%	18%	17%	17%	15%
Sweden	8%	9%	9%	5%	10%	11%	14%	12%	16%	11%	15%	12%	11%	18%	20%	10%	16%	22%	27%	17%	14%	27%	24%	27%	31%	16%	24%	25%	28%	14%	16%	20%	13%	16%	23%	14%	10%
Turkey	32%	22%	35%	26%	24%	27%	24%	25%	26%	31%	32%	38%	32%	31%	31%	25%	27%	34%	31%	26%	30%	32%	31%	25%	27%	28%	27%	30%	33%	25%	29%	33%	33%	36%	25%	26%	25%
United States	25%	26%	23%	25%	26%	27%	29%	29%	31%	33%	31%	31%	25%	38%	38%	42%	40%	39%	37%	39%	34%	31%	36%	34%	33%	33%	35%	39%	34%	34%	37%	28%	31%	32%	29%	27%	32%

Looking ahead six months from now, do you expect the economy in your local area to be much stronger, somewhat stronger, about the same, somewhat weaker, or much weaker than it is now?

Countries Ranked and Marked By Change In Assessment From Last Month (Left Column):

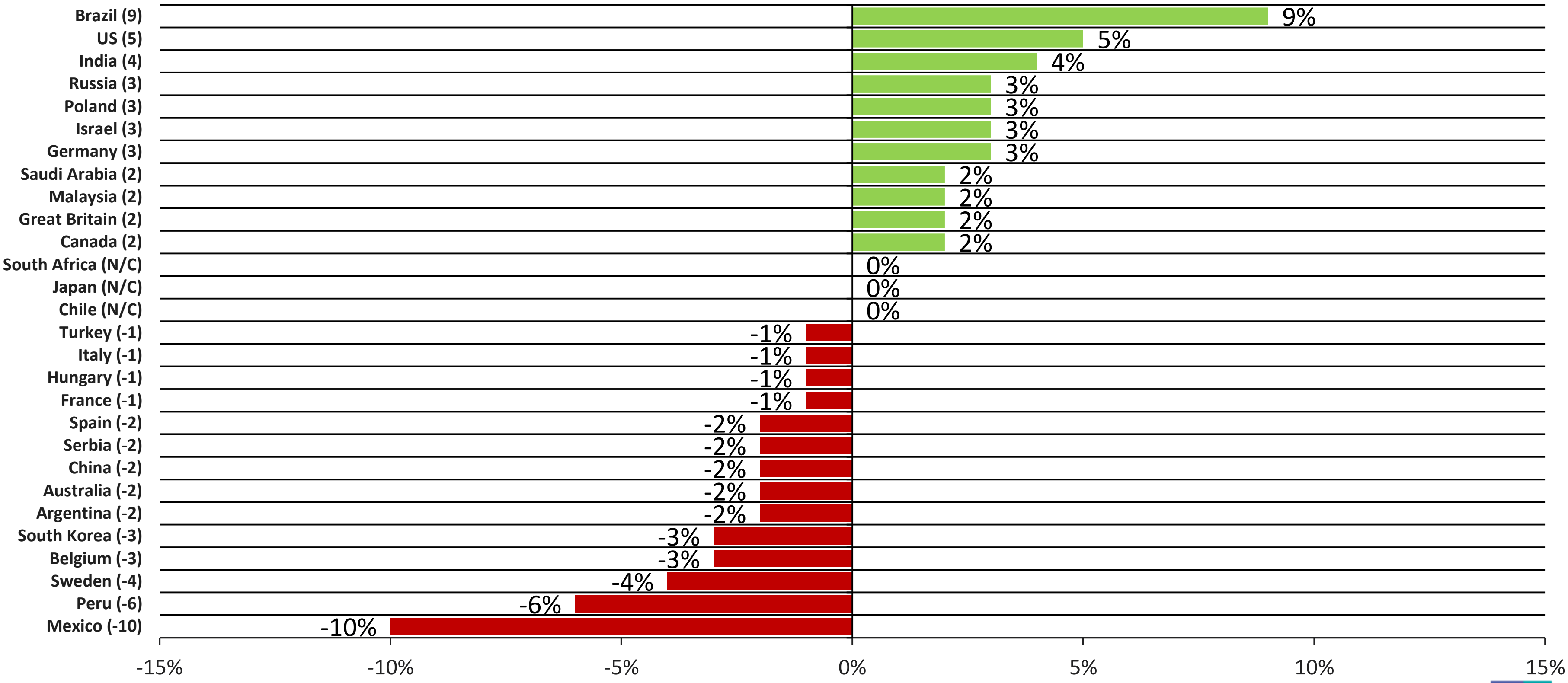
Green marks countries experiencing improvement;
Blue marks countries with no change from last month;
Red marks countries experiencing a decline;



GAME CHANGERS

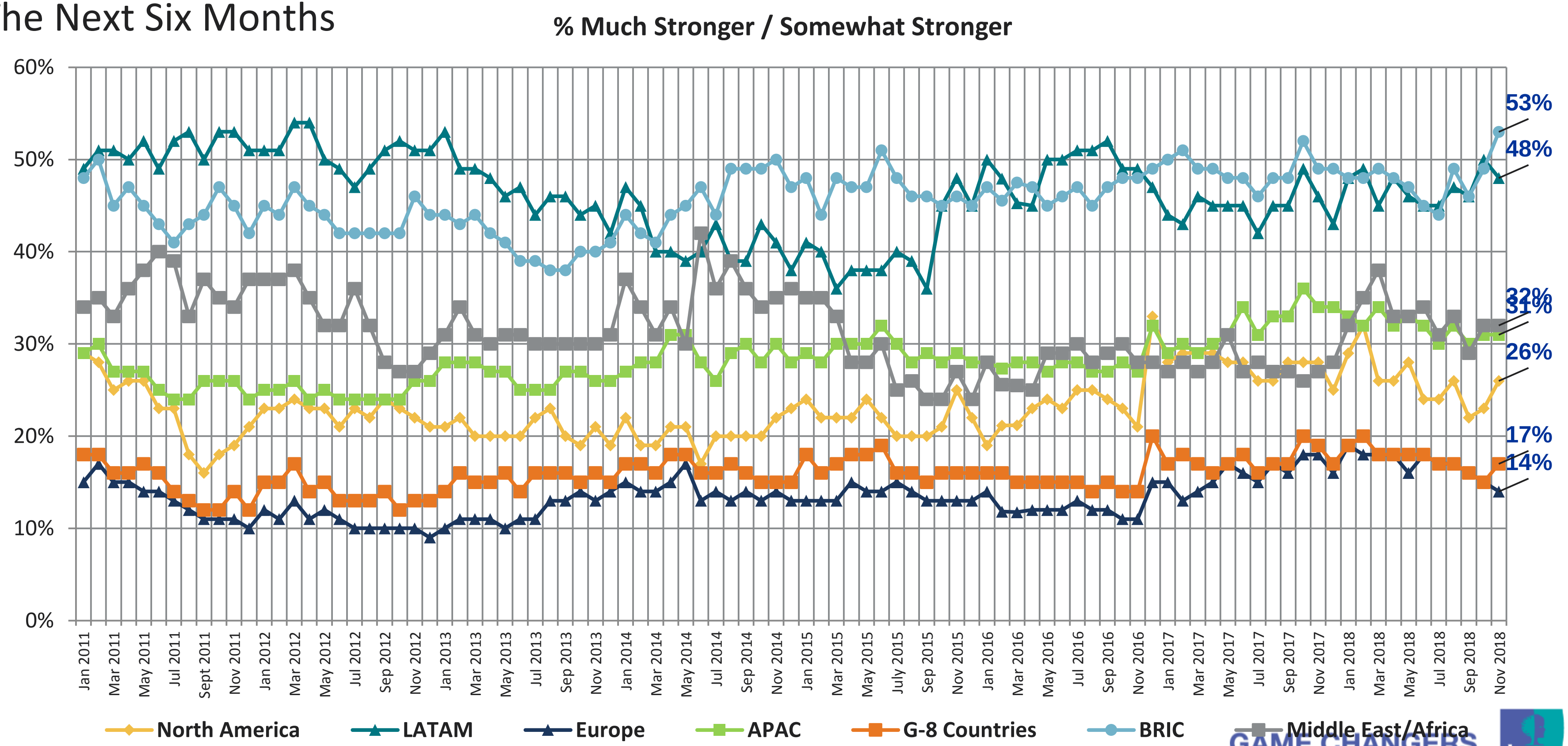
Looking ahead six months from now, do you expect the economy in your local area to be much stronger, somewhat stronger, about the same, somewhat weaker, or much weaker than it is now?

Countries Ranked by Net Improvement, Decline or No Change Compared to Last Month:



Looking ahead 6 months from now, do you expect the economy in your local area to be much stronger, somewhat stronger, about the same, somewhat weaker, or much weaker than it is now?

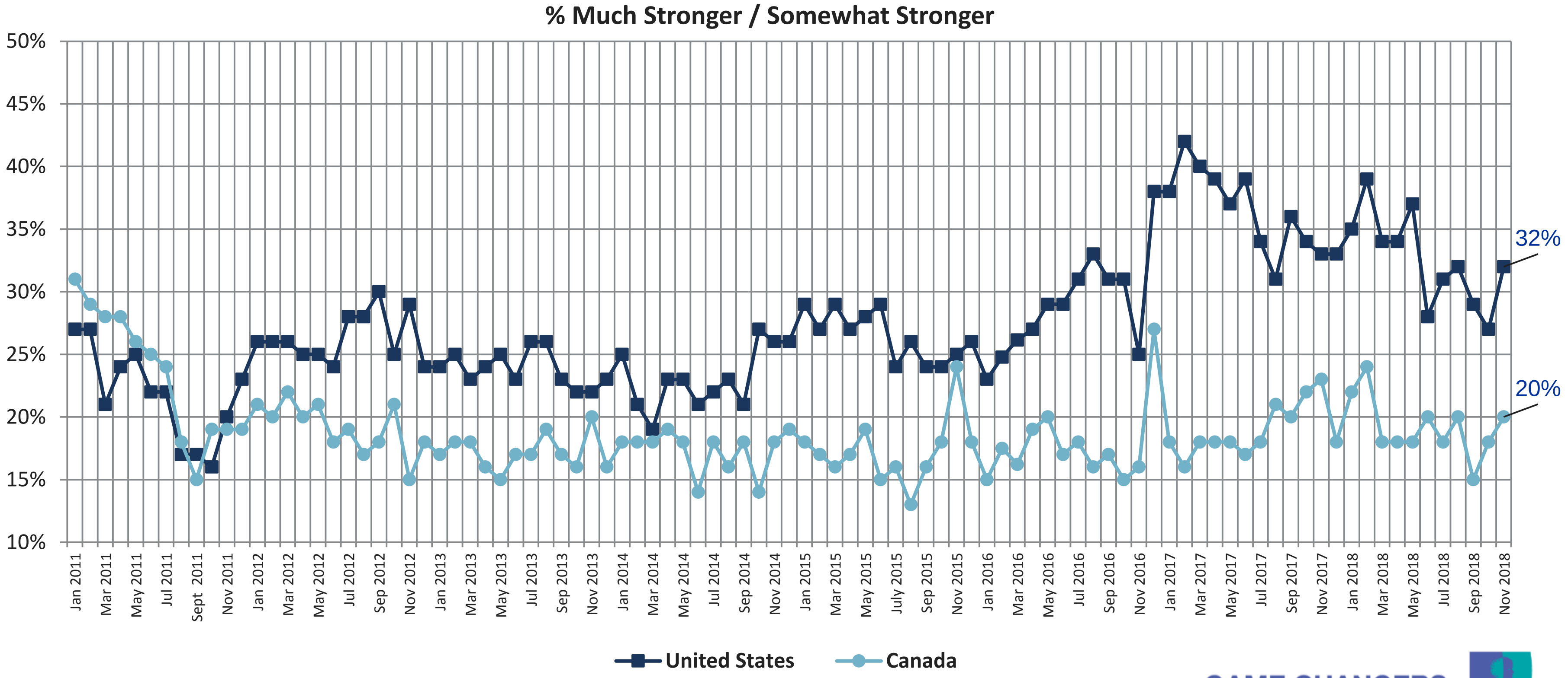
All Regions - Citizen Consumers Who Say The Economy in the Local Area to be Stronger in The Next Six Months



GAME CHANGERS Ipsos

Looking ahead 6 months from now, do you expect the economy in your local area to be much stronger, somewhat stronger, about the same, somewhat weaker, or much weaker than it is now?

North American Countries - Citizen Consumers Who Say The Economy in the Local Area to be Stronger in The Next Six Months

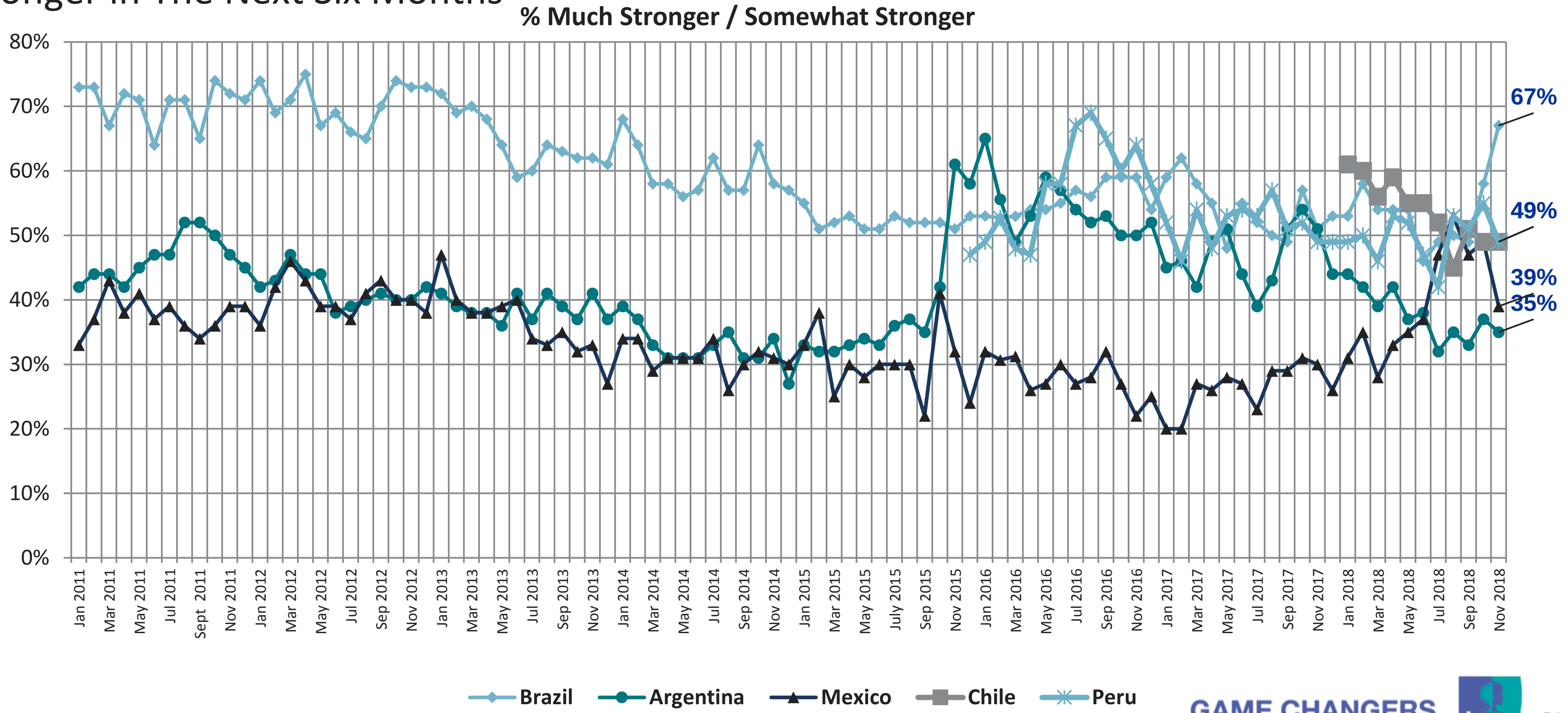


GAME CHANGERS

Looking ahead 6 months from now, do you expect the economy in your local area to be much stronger, somewhat stronger, about the same, somewhat weaker, or much weaker than it is now?

2

LATAM Countries - Citizen Consumers Who Say The Economy in the Local Area to be Stronger in The Next Six Months

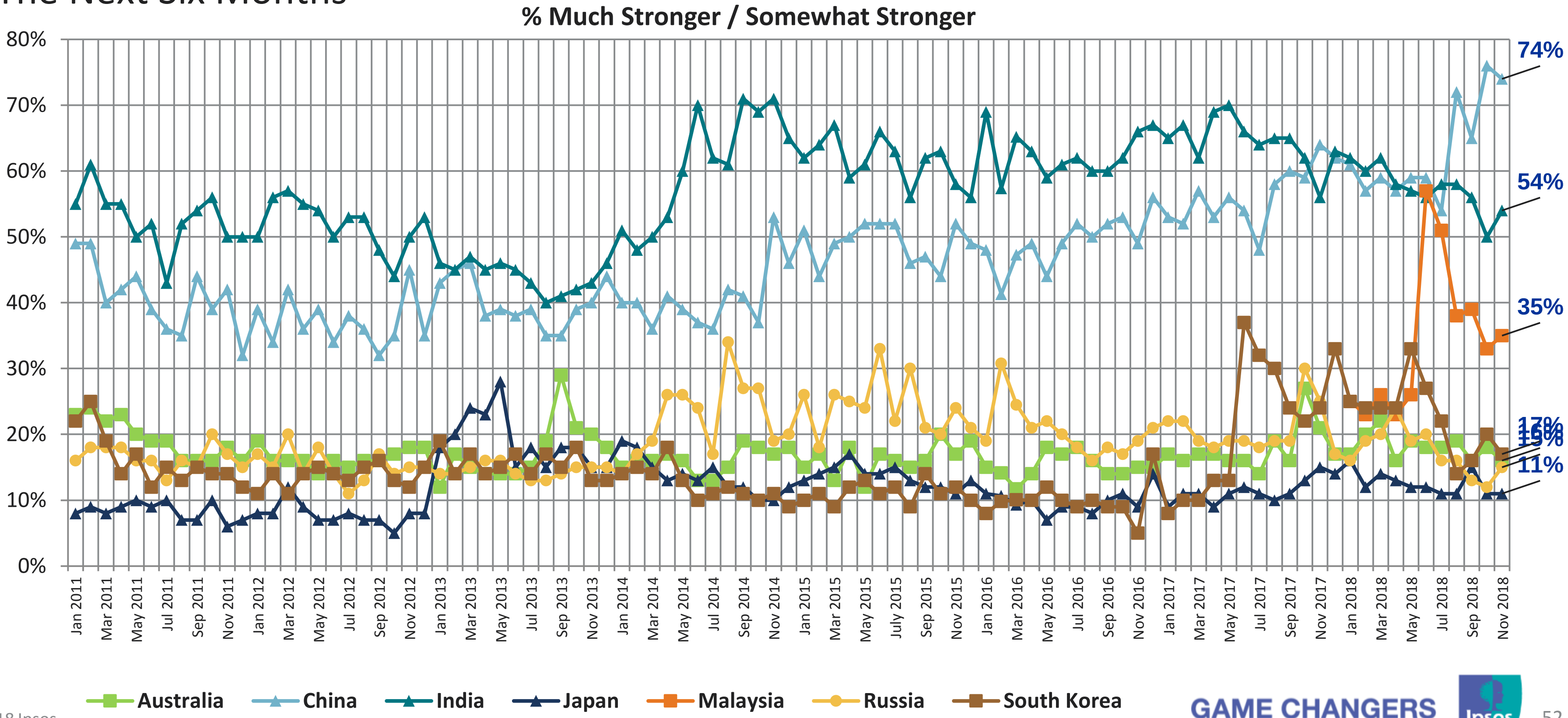


GAME CHANGERS

Looking ahead 6 months from now, do you expect the economy in your local area to be much stronger, somewhat stronger, about the same, somewhat weaker, or much weaker than it is now?

N/C

APAC Countries - Citizen Consumers Who Say The Economy in the Local Area to be Stronger in The Next Six Months

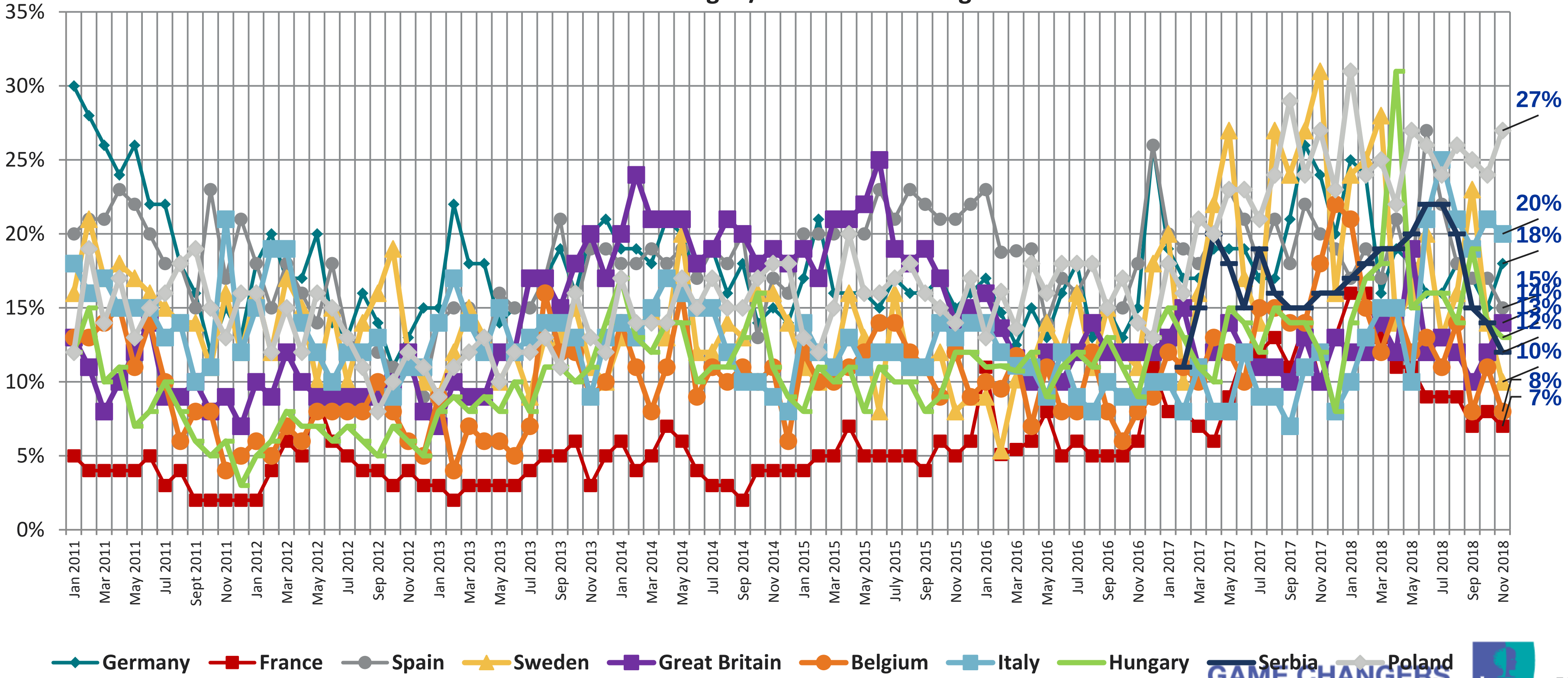


GAME CHANGERS Ipsos

Looking ahead 6 months from now, do you expect the economy in your local area to be much stronger, somewhat stronger, about the same, somewhat weaker, or much weaker than it is now?

1

European Countries - Citizen Consumers Who Say The Economy in the Local Area to be Stronger in The Next Six Months



GAME CHANGERS

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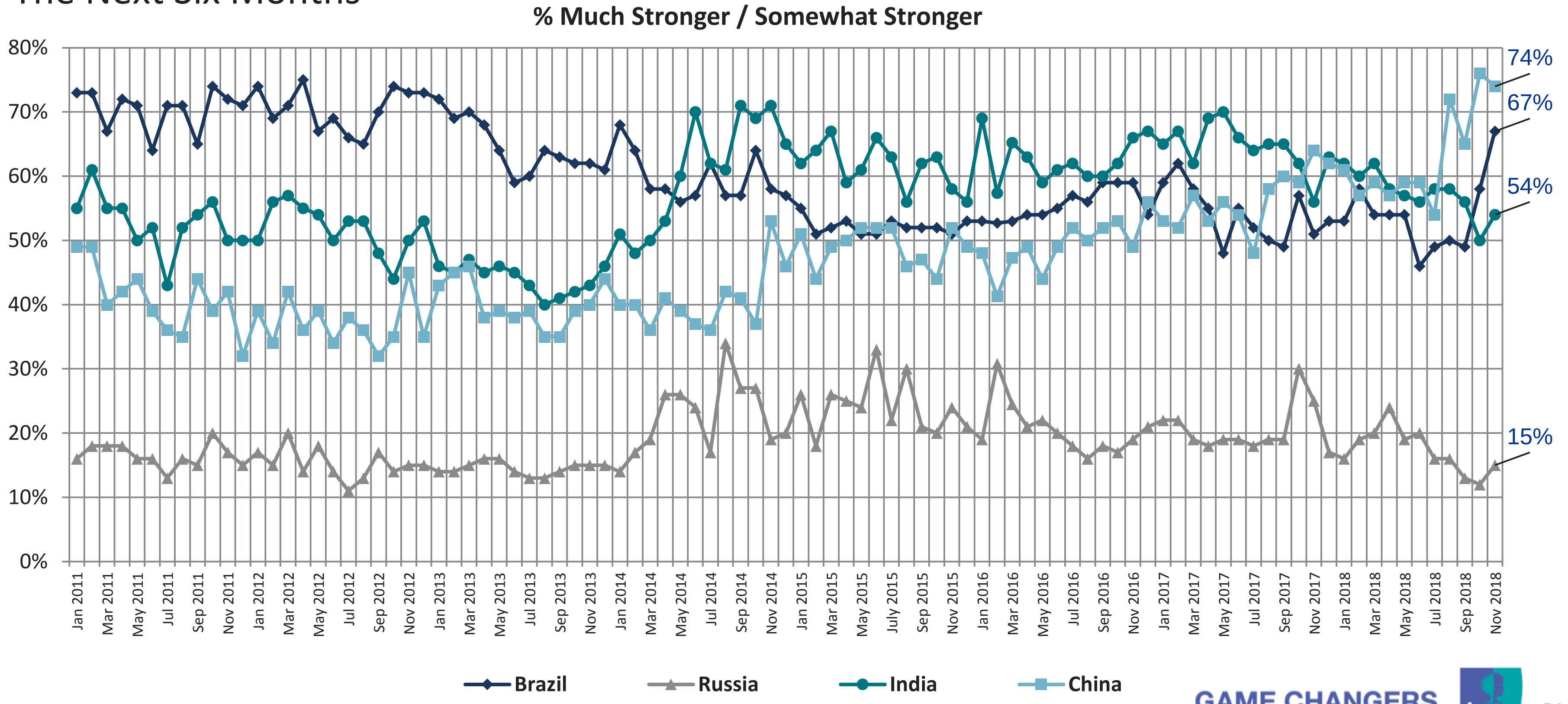
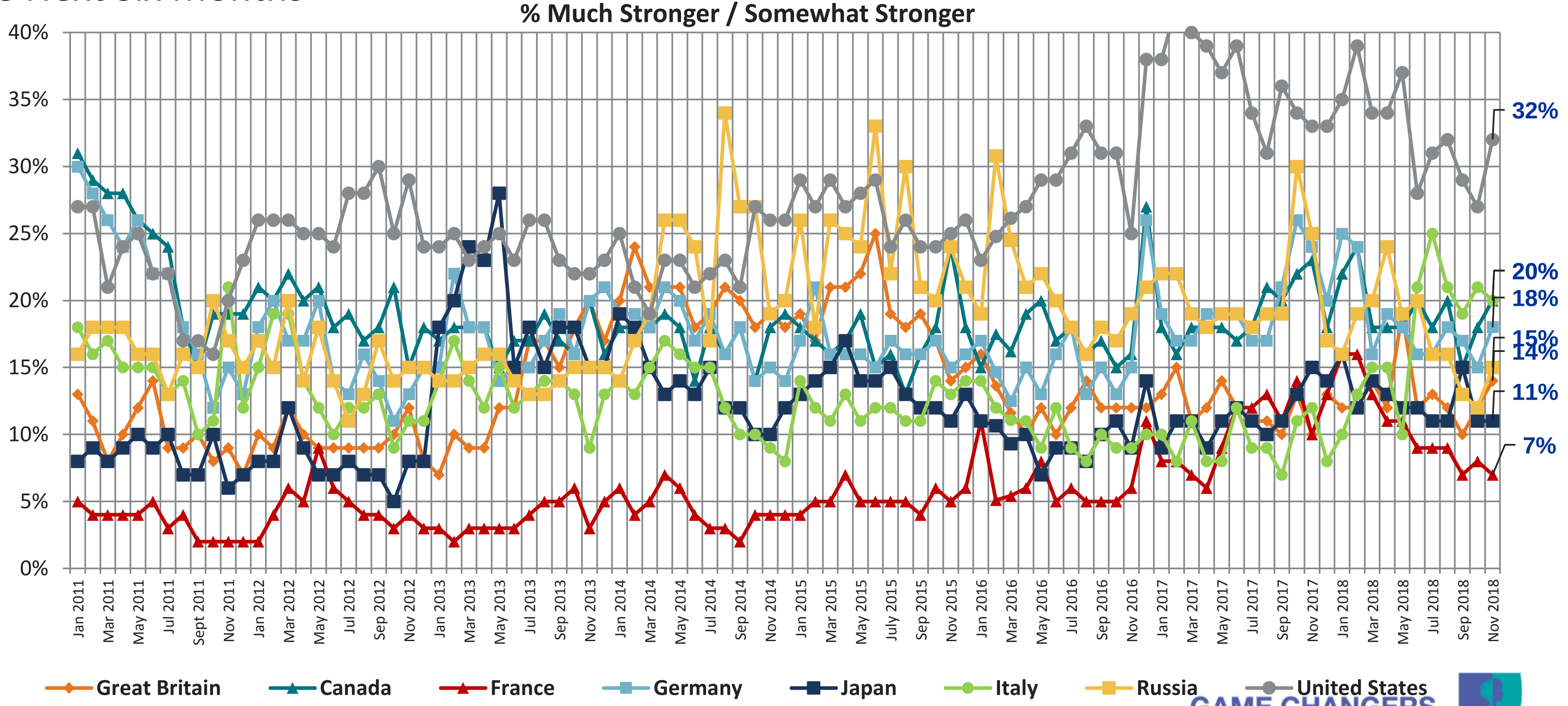
BRIC Countries - Citizen Consumers Who Say The Economy in the Local Area to be Stronger in The Next Six Months



GAME CHANGERS

Looking ahead 6 months from now, do you expect the economy in your local area to be much stronger, somewhat stronger, about the same, somewhat weaker, or much weaker than it is now?

G8 Countries - Citizen Consumers Who Say The Economy in the Local Area to be Stronger in The Next Six Months

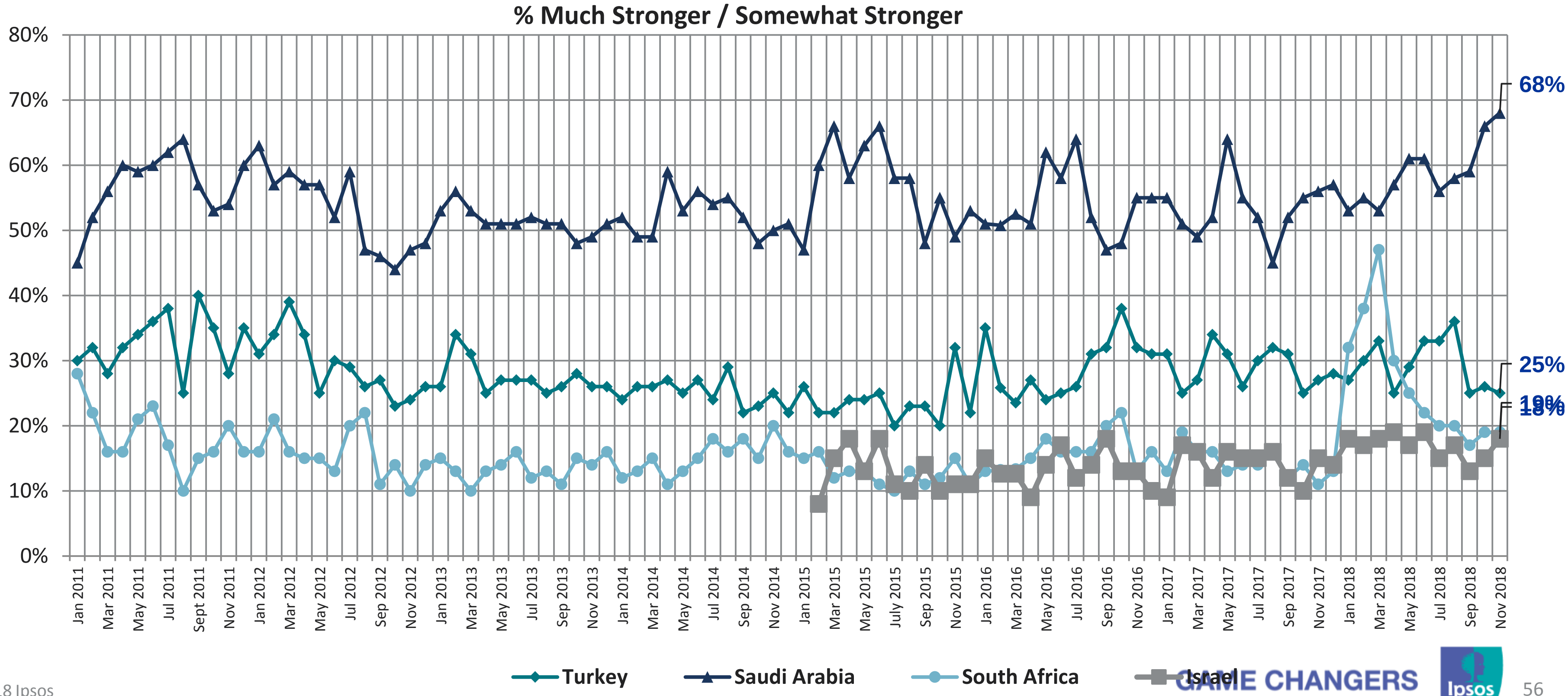


GAME CHANGERS

Looking ahead 6 months from now, do you expect the economy in your local area to be much stronger, somewhat stronger, about the same, somewhat weaker, or much weaker than it is now?

N/C

Middle East/African Countries - Citizen Consumers Who Say The Economy in the Local Area to be Stronger in The Next Six Months



GAME CHANGERS

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- Ipsos has been listed on the Paris Stock Exchange since 1999 and generated global revenues €1,669.5 ($2,218.4 million) in 2014.
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