Ipsos Global @dvisory

GLOBAL WORRIES, DIRECTION, SATISFACTION

CITIZENS IN 24 COUNTRIES ASSESS
THE MOST WORRYING ISSUES,
DIRECTION AND SATISFACTION IN
THEIR COUNTRY TODAY



ANALYTIC COMPONENTS

There are three analytic components that make up the findings of this monthly report. Each analysis comes from tracked questions dealing with:

- 1. The currently perceived most worrying issues in their country today: Which three of the following topics do you find the most worrying in your country? Unemployment and jobs; Poverty and social inequality; Corruption and financial or political scandals; Crime and violence; Health care; Education; Taxes; Moral decline; Immigration control; Maintaining social programs or the Welfare state; Terrorism; Threats against the environment; Climate change; Rise of extremism; Access to credit; Childhood obesity
- 2. The country being on the right track or wrong direction: Generally speaking, would you say things in this country are heading in the right direction, or are they off on the wrong track?
- 3. Satisfaction with the way things are going in their country: Now, thinking about your country, overall, are you satisfied or dissatisfied with the way things are going in your country today?

SUMMARY

- 1. Unemployment and Poverty/Social Inequality Remain Top Global Worry Issues
- 2. Majority Say Country on 'Wrong Track'
- 3. Only One Third 'Satisfied' with Way Things are Going in their Country Today

KEY FINDINGS

1. Unemployment and Poverty/Social Inequality are the Top Global Worrying Issues...

Even though "unemployment and jobs" (48% -1) is the aggregate number one issue around the world it's only the number one issue in 11 of the 24 countries surveyed: France, Great Britain, Hungary, Italy, Japan, Poland, Saudi Arabia, Spain, Sweden, Turkey and the United States. In fact, "poverty and social inequality" is the pick of 23 countries out of the top four issues while "unemployment and jobs" is picked in only 22 countries.

The second most worrying issue is "poverty and social inequality" (39% +1) and is the number one issue in Belgium, China, Germany and Russia.

The third most worrying issue is "corruption and financial or political scandals" (33% N/C) and is the number one issue in India, Indonesia and South Korea. It is followed closely by "crime and violence" (32% -1), the number one issue in Argentina, Australia, Mexico and South Africa.

The fifth most worrying issue is "health care" (24% +1) and is the number one issue in Brazil and Canada.

Finding Common Ground: Of The Top 4 Most Worrying Issues in Each Country...

- Poverty and social inequality is mentioned by residents of 23 countries of the 24 countries surveyed it is mentioned in each except for the United States.
- Unemployment and jobs is mentioned by residents in 22 countries of the 24 countries surveyed it is mentioned in each except for Brazil and India
- **Crime and violence is mentioned by residents of 14 countries** which include Argentina, Australia, Belgium, Brazil, France, Germany, Great Britain, India, Italy, Mexico, Russia, South Africa, Spain and Sweden.
- Corruption and financial or political scandal is mentioned by the residents of 13 countries— which
 include Brazil, Hungary, India, Indonesia, Italy, Poland, Russia, Saudi Arabia, South Africa, South Korea, Spain,
 Sweden, and the United States.
- Healthcare is mentioned by residents of 9 countries which include Argentina, Brazil, Canada, China, Germany, Hungary, Poland, Russia, and the United States.
- Taxes is mentioned by the residents of 4 countries which include Belgium, Canada, France and the United States
- Moral decline is mentioned by residents in 3 countries which include Indonesia, Japan and Saudi Arabia
- **Education is mentioned by the residents of 3 countries** which include Australia, Mexico and Turkey.
- Terrorism is mentioned by respondents in 2 countries which include India and Turkey
- Immigration control is mentioned by residents of 1 country Great Britain

2. Majority (62%) Say Country is on the Wrong Track...

- Only four in ten (38%) of global citizens say things in their country are heading in the right direction, down two points since November 2010—a majority (62%) believe things are on the wrong track.
- Regionally, BRIC sits at the top with six in ten (58%) believing things are going well. Europe is at the bottom with only 27% feeling this way.
- Seven in ten of those in China (71%) and Saudi Arabia (70%) say their country is heading in the right direction. These global leaders are juxtaposed by the global pessimists: Italy (15%), France (16%) and Japan (16%) who believe things are on the Wrong Track.
- A handful of countries have shown noteworthy change since the last sounding. In particular, India (56% -16), Russia (46% -7), Mexico (22% -6) and Australia (51% -6). Only South Africa (35% +6) rose notably.

BRIC Down Most From Last Regional Sounding—But Still Leads All... REGIONS

| REGION (in descending order by NET) | NET 'Right Direction' | CHANGE (since last sounding) |
|-------------------------------------|-----------------------|---------------------------------|
| BRIC | 58% | ▼7% |
| APAC | 48% | ▼5% |
| Middle East/Africa | 46% | ▲3% |
| North America | 42% | N/C |
| LATAM | 37% | ▼4% |
| G-8 Countries | 31% | ▼1% |
| Europe | 27% | ▼1% |

All Countries at a Glance Compared to the Last Wave: Right Direction or Wrong Track?

| 2. Citizen Co | nsumer | s Who Say Things | In Th | eir Co | ountry Are Heading Ir | n The | Righ | t Directior | ١ |
|-----------------------------|--------|--|-------|--------|---|-------|------|----------------------------|-----|
| is HIGHEST this month | | has experienced an IMPROVEMENT since last sounding | | | has experienced a DECLINE since last sounding | | | is LOWEST this month | |
| China | 75% | South Africa | | 6 | India | • | 16 | Italy | 12% |
| India | 72% | Italy | | 3 | Russia | • | 7 | | |
| Saudi Arabia | 67% | Saudi Arabia | | 3 | Mexico | • | 6 | | |
| Indonesia | 61% | Poland | | 2 | Australia | • | 6 | | |
| Brazil | 60% | | | | Indonesia | • | 4 | | |
| Australia | 57% | | | | China | • | 4 | | |
| Russia | 53% | | | | Hungary | • | 4 | | |
| Canada | 52% | | | | Brazil | • | 3 | | |
| Sweden | 52% | | | | Belgium | • | 2 | | |
| | | | | | Turkey | • | 1 | | |
| | | | | | Japan | • | 1 | | |
| | | | | | Great Britain | • | 1 | | |
| | | | | | Germany | • | 1 | | |
| | | | | | France | • | 1 | | |
| | | | | | Canada | • | 1 | | |
| | | | | | Argentina | • | 1 | | |

3. Only One Third are Satisfied with Things are Going in their Country Today...

- Only one third (33%) of global citizens say they are satisfied with the way things are going in their country today, down one point since November 2010.
- BRIC sits at the top with five in ten (48%) believing things are going well, Europe at the bottom with only 26% feeling this way.
- Nationally, China leads the pack (62%), followed up India (61%) and Australia (61%). Those in Spain (9%), Hungary (9%) and Mexico (11%) are the least satisfied.
- The two countries that showed the most noteworthy change on this measure since November are: India (61% 10) and South Africa (28% +7).

Citizen Consumers Who Are Satisfied With The Way Things Are Going In Their Country Today - REGIONS

| REGION (in descending order by NET) | NET 'Satisfied' | CHANGE (since last sounding) | | | |
|-------------------------------------|--------------------|---------------------------------|--|--|--|
| BRIC | 48% | ▼4% | | | |
| North America | 41% | ▼1% | | | |
| APAC | 41% | ▼1% | | | |
| Middle East/Africa | 36% | N/C | | | |
| G-8 Countries | 30% | N/C | | | |
| LATAM | 27% | N/C | | | |
| Europe | 26% | ▼1% | | | |

Citizen Consumers Who Are Satisfied With The Way Things Are Going In Their Country Today - All COUNTRIES:

| Those Countries Where… | | | | | | | | | |
|-----------------------------|--|--------------|------------|---|---------------|---|----------------------------|-------|----|
| is HIGHEST this month | has experienced an IMPROVEMENT since last sounding | | | has experienced a DECLINE since last sounding | | | is LOWEST this month | | |
| China | 62% | South Africa | ▲ 7 | | India | • | 10 | Spain | 9% |
| Australia | 61% | Australia | | 3 | China | • | 5 | | |
| India | 61% | France | | 3 | Saudi Arabia | • | 5 | | |
| Canada | 59% | Mexico | | 3 | Belgium | • | 4 | | |
| Sweden | 58% | Indonesia | A 2 | | South Korea | • | 4 | | |
| Saudi Arabia | 53% | Italy | | 2 | United States | ▼ | 3 | | |
| Brazil | 51% | Japan | | 2 | Spain | • | 3 | | |
| Germany | 50% | Brazil | | 1 | Hungary | • | 3 | | |
| | | Canada | | 1 | Great Britain | • | 3 | | |
| | | | | | Germany | • | 2 | | |
| | | | | | Argentina | • | 2 | | |

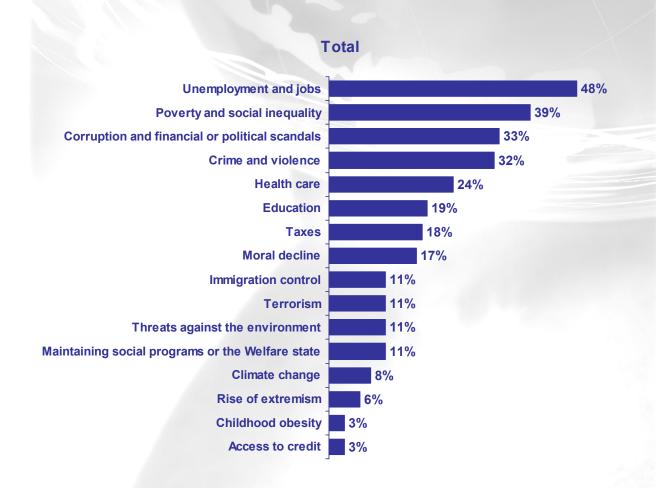
DETAILED FINDINGS

TOP MOST WORRYING ISSUES

GLOBAL SUMMARY

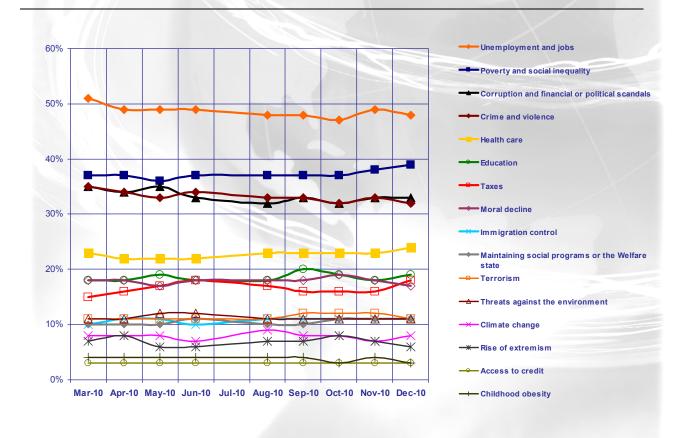
Most Worrying Issues:

unemployment and job; poverty and social inequality; corruption and financial/political scandals; crime and violence.



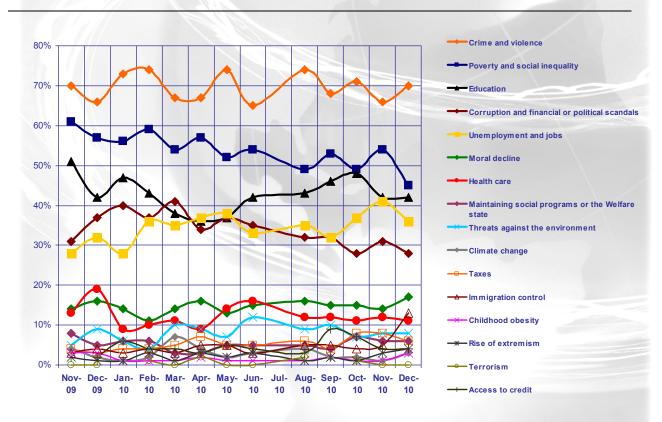
GLOBAL - TOTAL TOP 4 WORRIES:

unemployment and jobs; poverty and social any quality, corruption and financial or political scandals; crime and violence.



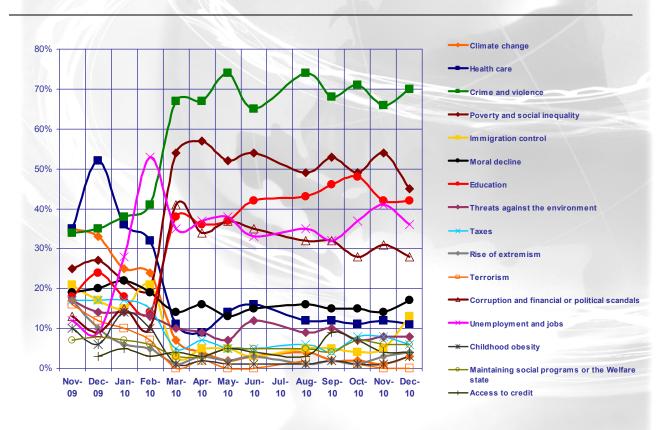
ARGENTINA - TOP 4 WORRIES:

crime and violence; poverty and social inequality; healthcare; unemployment and jobs



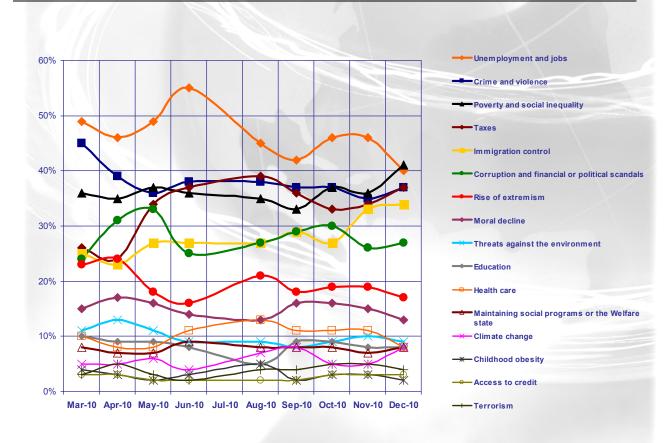
AUSTRALIA - TOP 4 WORRIES:

crime and violence; poverty and social inequality; education; unemployment and jobs



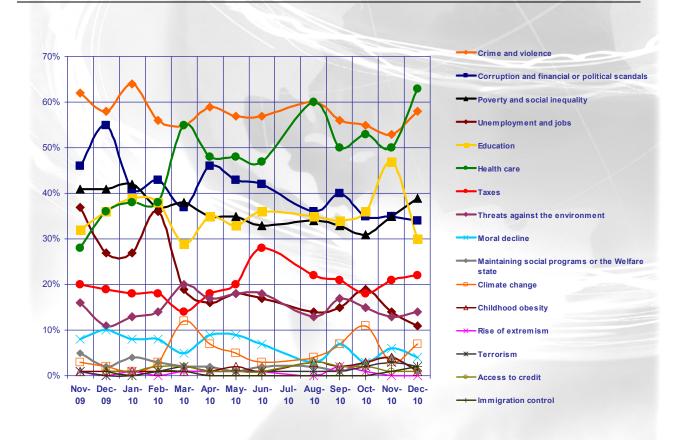
BELGIUM - TOP 4 WORRIES:

poverty and social inequality; unemployment and jobs; crime and violence; taxes.



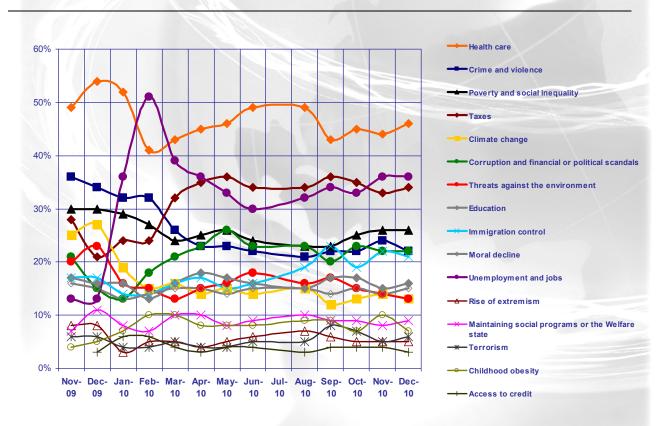
BRAZIL - TOP 4 WORRIES:

healthcare, crime and violence, poverty and social inequality; corruption and financial or political scandals.



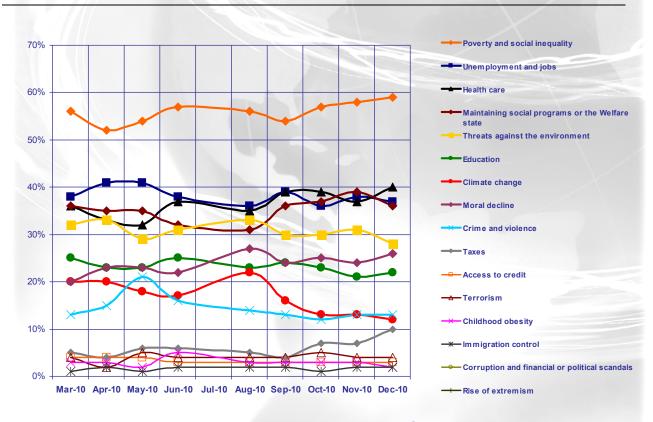
CANADA - TOP 4 WORRIES:

healthcare; unemployment and jobs; taxes; poverty and social inequality.



CHINA - TOP 4 WORRIES:

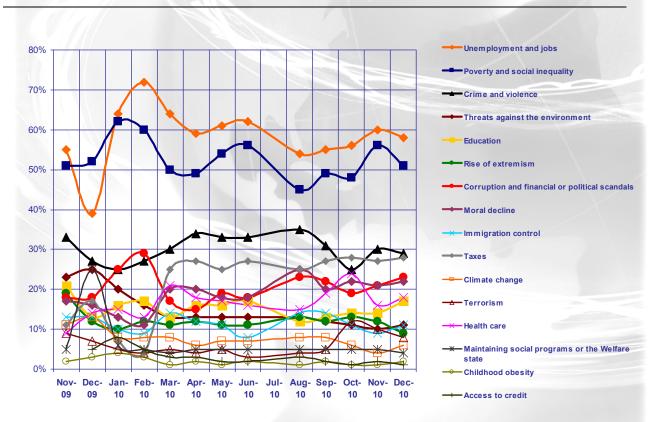
poverty and social inequality; healthcare; unemployment and jobs; maintaining social programs or the welfare state



Which three of the following topics do you find the most worrying in your country?

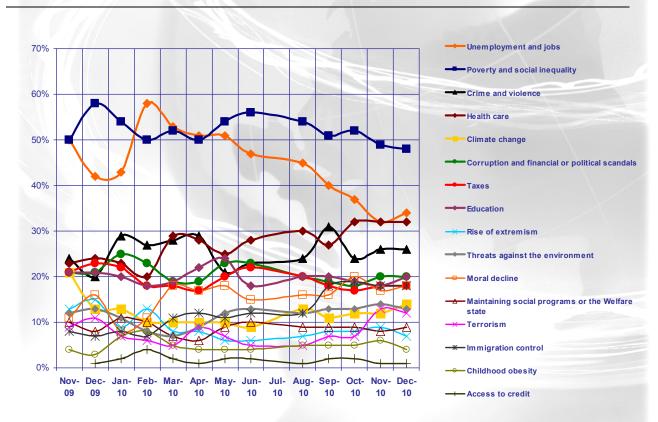
FRANCE - TOP 4 WORRIES:

unemployment and jobs; poverty and social inequality; crime and violence; taxes.



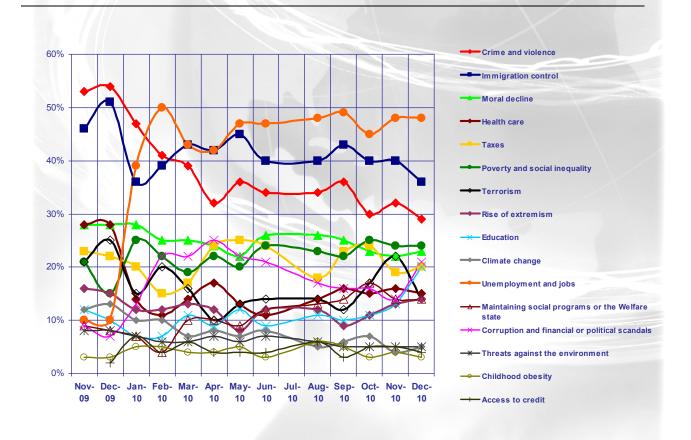
GERMANY - TOP 4 WORRIES:

poverty and social inequality; unemployment and jobs; healthcare; crime and violence.



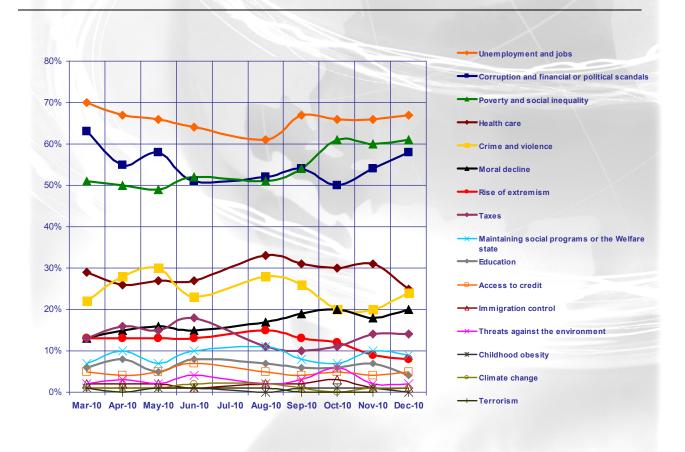
GREAT BRITAIN - TOP 4 WORRIES:

unemployment and jobs; immigration control; crime and violence; poverty and social inequality.



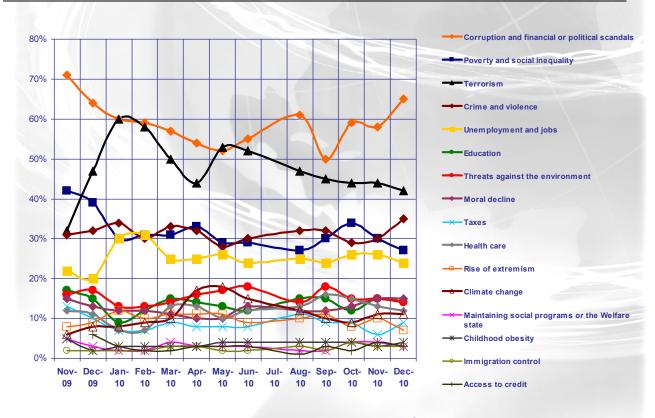
HUNGARY - TOP 4 WORRIES:

unemployment and jobs; poverty and social inequality; corruption and financial/political scandals; healthcare.



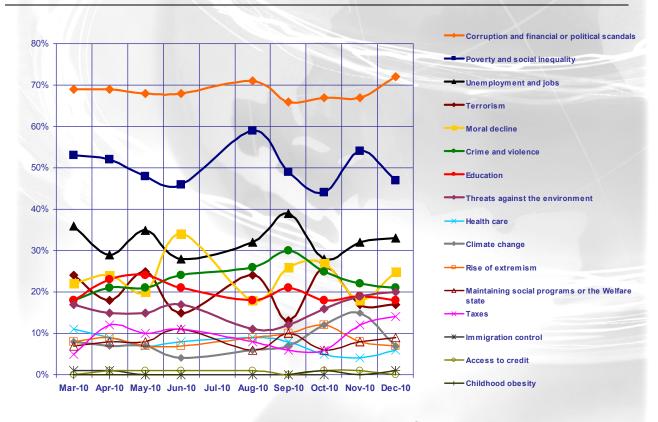
INDIA - TOP 4 WORRIES:

corruption and financial/political scandals; terrorism; crime and violence; poverty and social inequality.



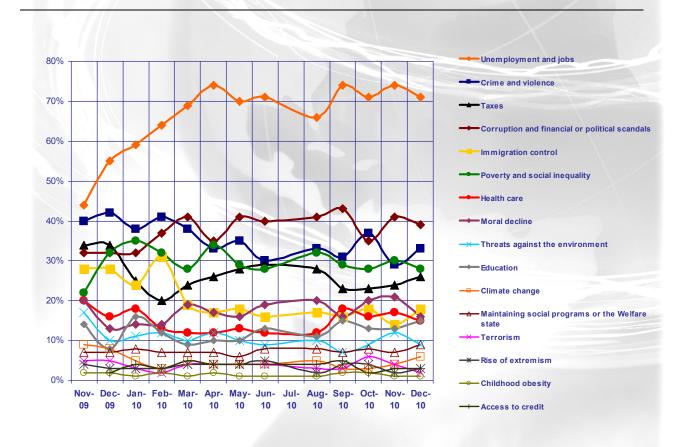
INDONESIA - TOP 4 WORRIES:

corruption and financial/political scandals; poverty and social inequality; unemployment and jobs; moral decline.



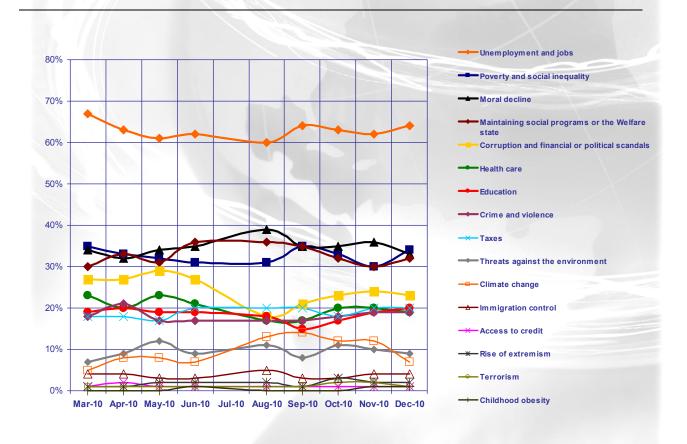
ITALY - TOP 4 WORRIES:

unemployment and jobs; corruption and financial/political scandals; crime and violence; poverty and social inequality.



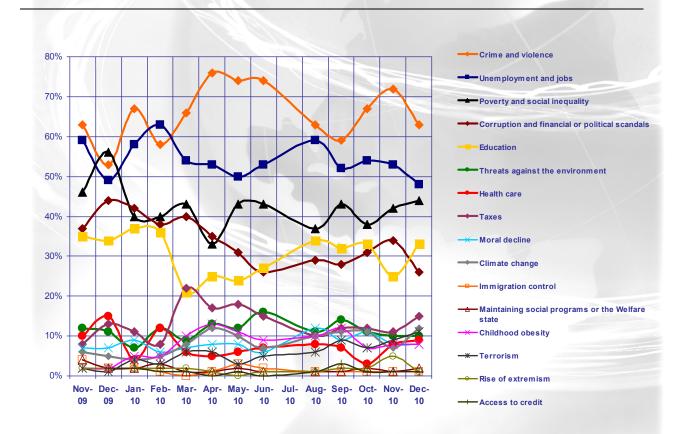
JAPAN - TOP 4 WORRIES:

unemployment and jobs; poverty and social inequality; moral decline; maintaining social programs.



MEXICO - TOP 4 WORRIES:

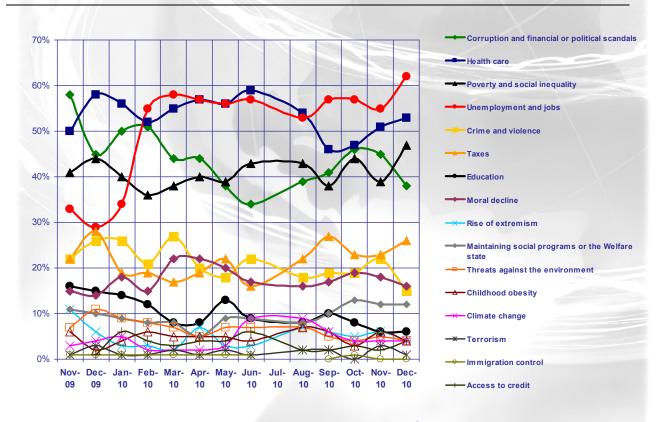
crime and violence; unemployment and jobs; poverty and social inequality; education.



Which three of the following topics do you find the most worrying in your country?

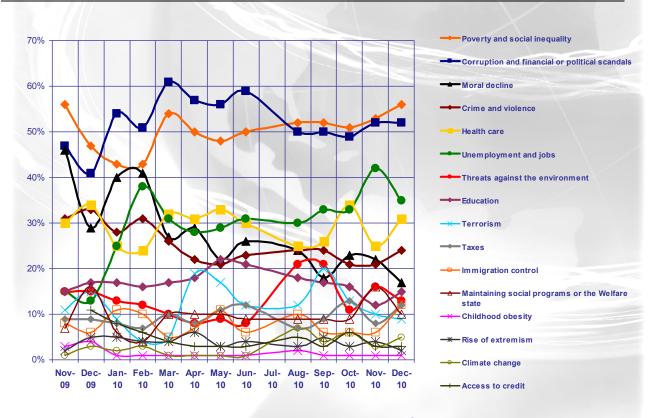
POLAND - TOP 4 WORRIES:

unemployment and jobs; healthcare; poverty and social inequality; corruption and financial/political scandals.



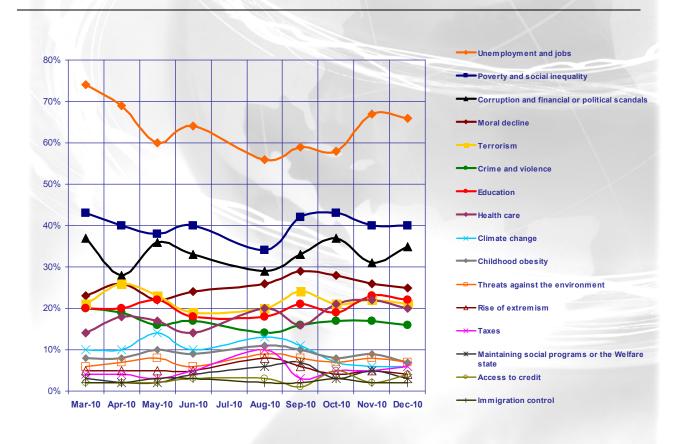
RUSSIA - TOP 4 WORRIES:

poverty and social inequality; corruption and financial or political scandals; unemployment and jobs; healthcare.



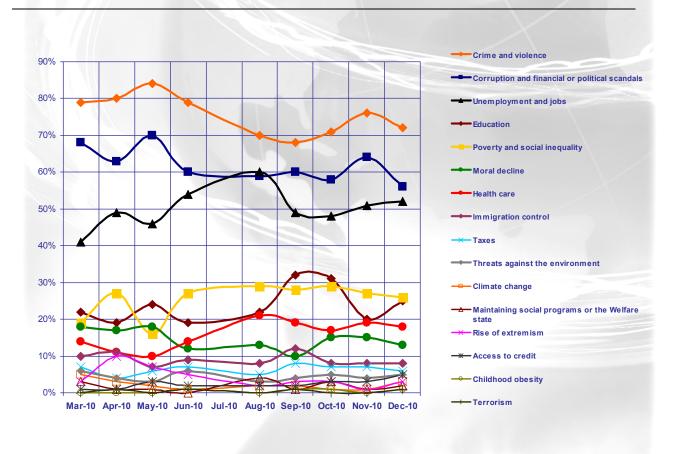
SAUDI ARABIA - TOP 4 WORRIES:

unemployment and jobs; poverty and social inequality; corruption and financial/political scandals; moral decline.



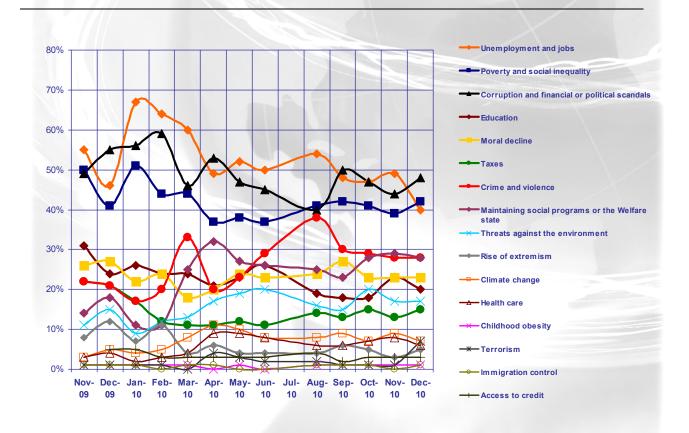
SOUTH AFRICA - TOP 4 WORRIES:

crime and violence; corruption and financial/political scandals; unemployment and jobs; poverty and social inequality.



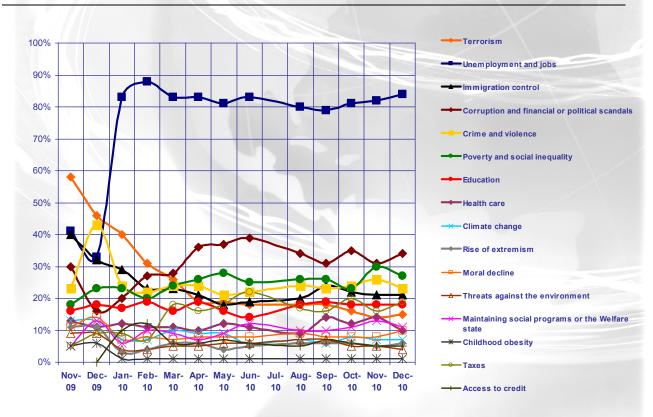
SOUTH KOREA - TOP 4 WORRIES:

corruption and financial/political scandals; poverty and social inequality; unemployment and jobs; maintaining social programs



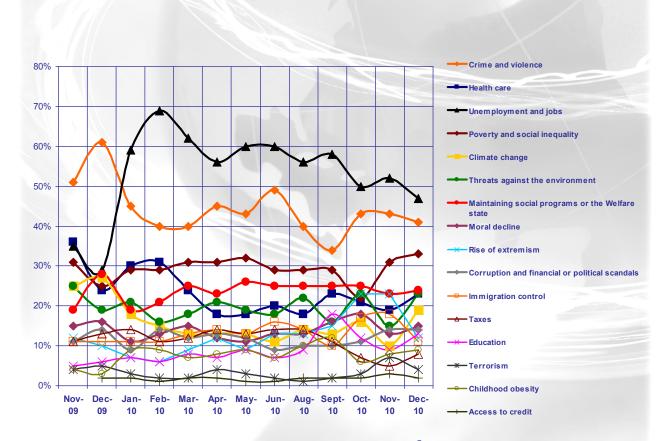
SPAIN - TOP 4 WORRIES:

unemployment and jobs; corruption and financial/political scandals; poverty and social inequality; crime and violence



SWEDEN - TOP 4 WORRIES:

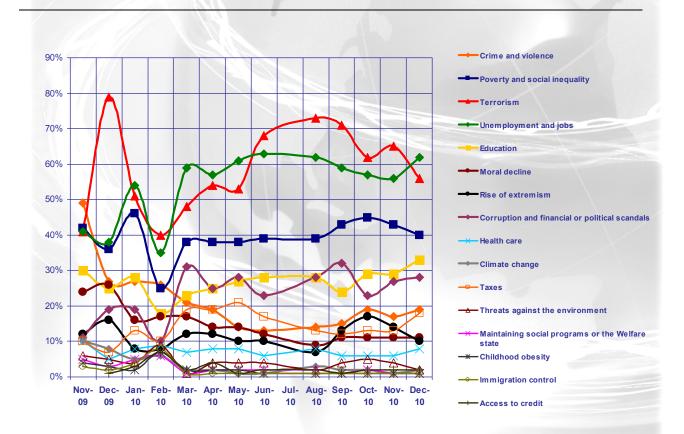
crime and violence; healthcare; unemployment and jobs; poverty and social inequity



Which three of the following topics do you find the most worrying in your country?

TURKEY - TOP 4 WORRIES:

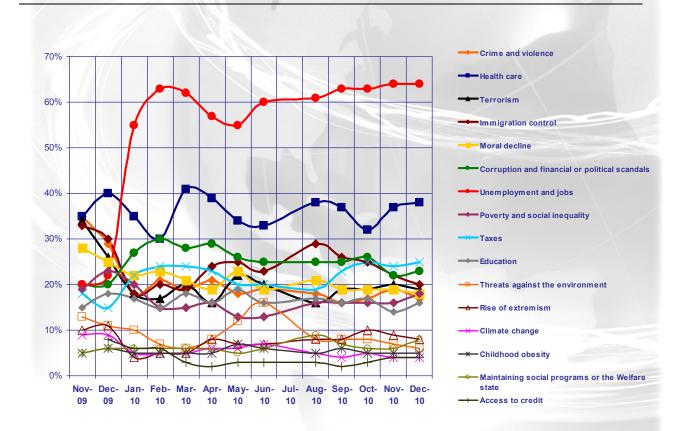
unemployment and jobs; terrorism; poverty and social inequality; education



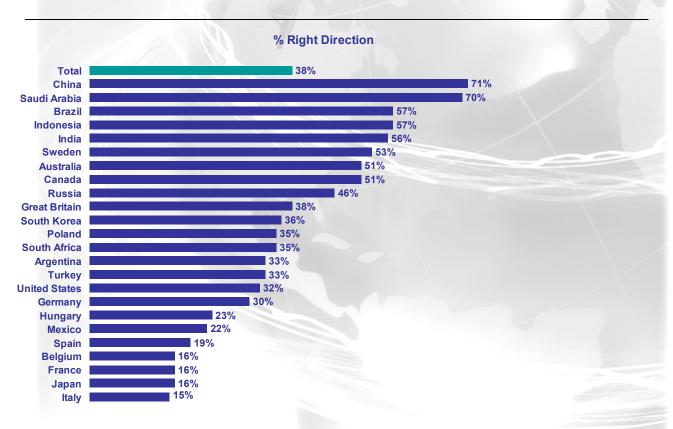
Which three of the following topics do you find the most worrying in your country?

UNITED STATES - TOP 4 WORRIES:

unemployment and jobs; healthcare; taxes; corruption and financial/political scandals



Heading in Right Direction, or Wrong Track



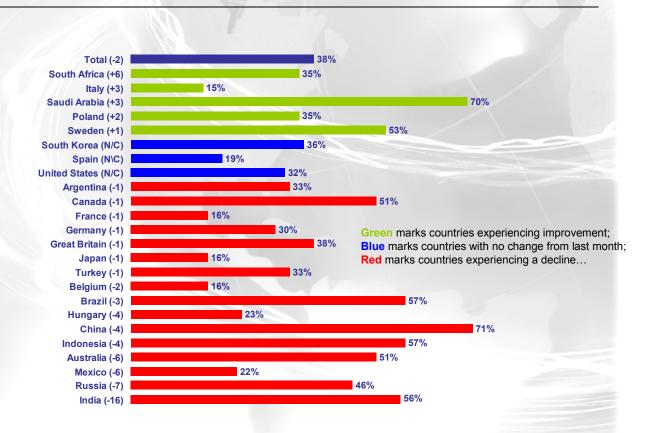
GENERALLY SPEAKING, WOULD YOU SAY THINGS IN THIS COUNTRY ARE HEADING IN THE RIGHT DIRECTION, OR ARE THEY OFF ON THE WRONG TRACK?

% Right Direction

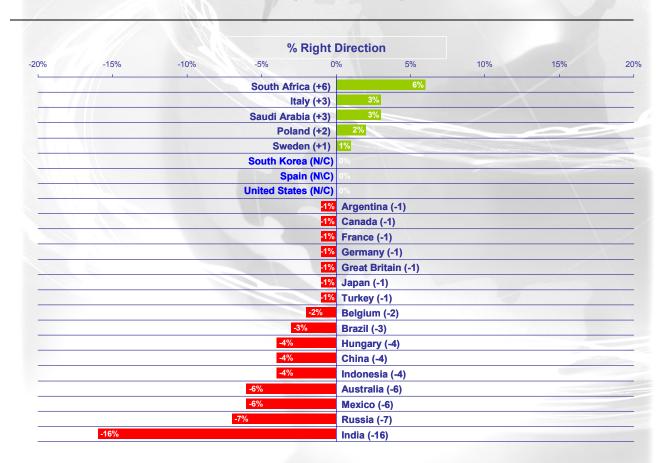
| | Mar 2010 | April 2010 | May 2010 | June 2010 | July 2010 | Aug 2010 | Sep 2010 | Oct 2010 | Nov 2010 | Dec 2010 |
|----------------------|-------------|---------------|----------|--------------|-----------|-------------|-------------|----------|-------------|-------------|
| Total | 38% | 39% | 39% | 39% | 40% | 39% | 38% | 39% | 40% | 38% |
| Argentina | 16% | 18% | 19% | 29% | 22% | 29% | 27% | 29% | 34% | 33% |
| Australia | 63% | 57% | 58% | 50% | 57% | 55% | 59% | 59% | 57% | 51% |
| Belgium | 30% | 14% | 14% | 20% | 23% | 28% | 20% | 15% | 18% | 16% |
| Brazil | 49% | 49% | 52% | 56% | 49% | 51% | 48% | 56% | 60% | 57% |
| Canada | 56% | 53% | 49% | 51% | 55% | 48% | 54% | 50% | 52% | 51% |
| China | 81% | 77% | 77% | 77% | 75% | 74% | 74% | 75% | 75% | 71% |
| France | 17% | 17% | 15% | 16% | 16% | 19% | 17% | 16% | 17% | 16% |
| Germany | 23% | 28% | 24% | 20% | 22% | 29% | 26% | 26% | 31% | 30% |
| Great Britain | 26% | 31% | 40% | 45% | 43% | 43% | 40% | 39% | 39% | 38% |
| Hungary | 16% | 34% | 38% | 38% | 32% | 36% | 34% | 42% | 27% | 23% |
| India | 67% | 64% | 62% | 66% | 57% | 63% | 63% | 67% | 72% | 56% |
| Indonesia | 67% | 64% | 65% | 59% | 68% | 58% | 61% | 54% | 61% | 57% |
| Italy | 24% | 24% | 19% | 22% | 21% | 18% | 20% | 20% | 12% | 15% |
| Japan | 22% | 19% | 18% | 27% | 20% | 23% | 21% | 24% | 17% | 16% |
| Mexico | 22% | 21% | 26% | 30% | 21% | 20% | 26% | 22% | 28% | 22% |
| Poland | 43% | 45% | 47% | 47% | 51% | 36% | 34% | 30% | 33% | 35% |
| Russia | 48% | 54% | 49% | 49% | 48% | 54% | 48% | 48% | 53% | 46% |
| Saudi Arabia | 62% | 64% | 63% | 60% | 68% | 61% | 63% | 60% | 67% | 70% |
| South Africa | 24% | 27% | 26% | 37% | 51% | 37% | 25% | 33% | 29% | 35% |
| South Korea | 31% | 31% | 33% | 30% | 29% | 31% | 32% | 37% | 36% | 36% |
| Spain | 20% | 17% | 23% | 18% | 26% | 24% | 21% | 23% | 19% | 19% |
| Sweden | 40% | 45% | 44% | 42% | 47% | 45% | 49% | 45% | 52% | 53% |
| Turkey | 30% | 37% | 32% | 31% | 29% | 27% | 28% | 37% | 34% | 33% |
| United States | 32% | 39% | 38% | 36% | 28% | 30% | 30% | 30% | 32% | 32% |

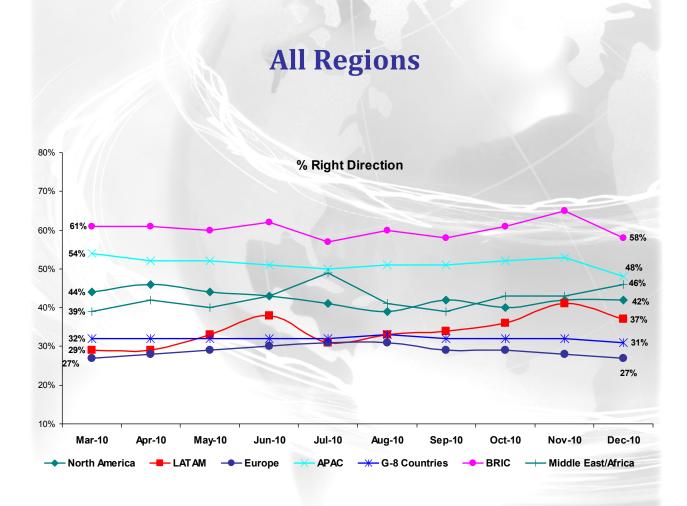
GENERALLY SPEAKING, WOULD YOU SAY THINGS IN THIS COUNTRY ARE HEADING IN THE RIGHT DIRECTION, OR ARE THEY OFF ON THE WRONG TRACK?

Countries Ranked and Marked By Change In Assessment From Last

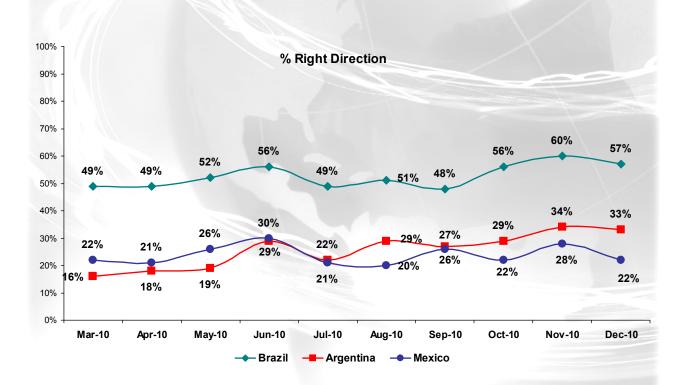


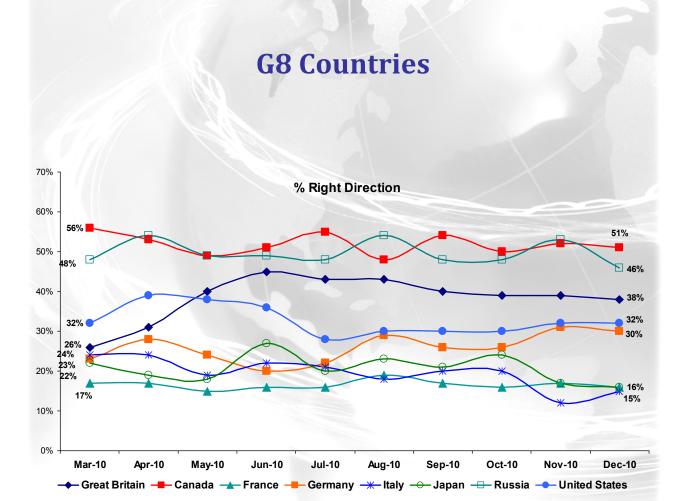
Countries Ranked and Marked By Change In Assessment From Last Month (Left Column):



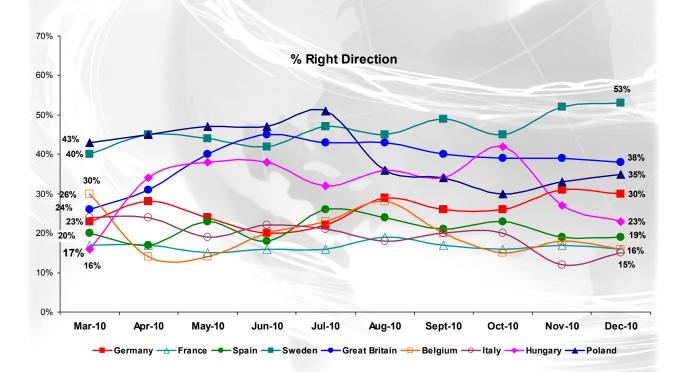


LATAM Countries

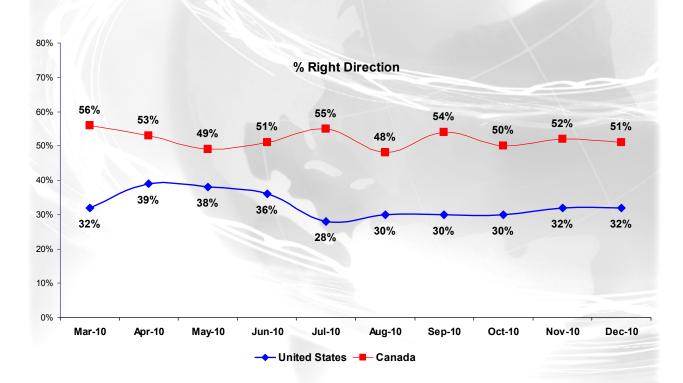




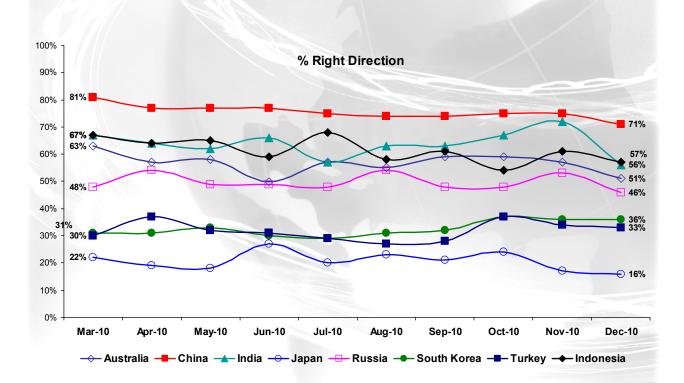
European Countries

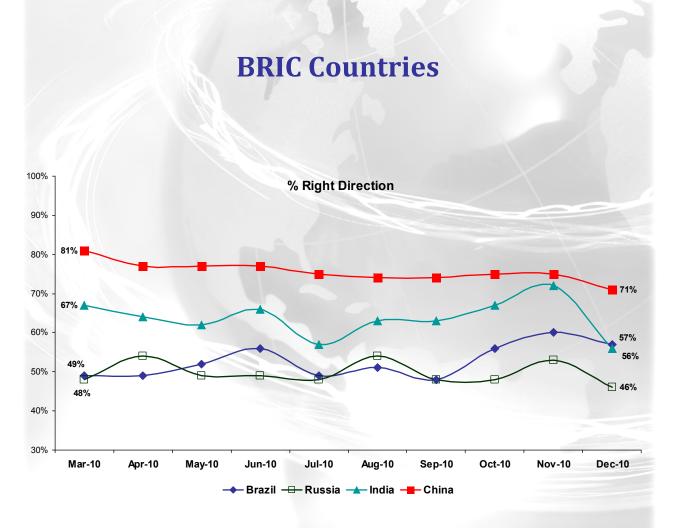


North American Countries

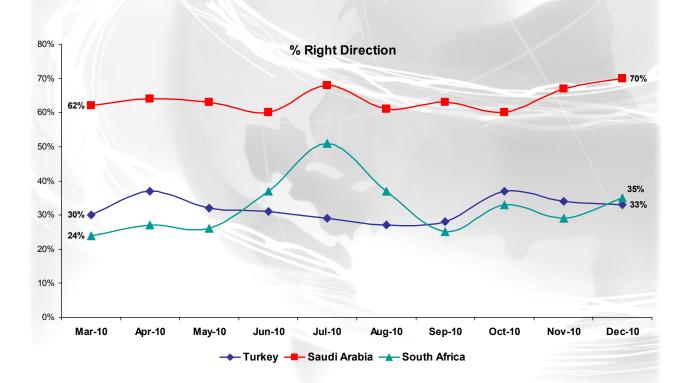


APAC Countries





Middle East/African Countries



Satisfaction With the Way Things Are Going in their Country Today



68%

26%

20%

21%

12%

34%

22%

45%

17%

31%

13%

53%

27%

24%

India

Italy

Japan

Mexico

Poland

Russia

Spain

Sweden

Turkey

Saudi Arabia

South Africa

South Korea

United States

Indonesia

| | Mar 2010 | April 2010 | May 2010 | June 2010 | July 2010 | Aug 2010 | Sep 2010 | Oct 2010 | Nov 2010 | Dec 2010 |
|----------------------|-------------|---------------|----------|--------------|--------------|-------------|-------------|----------|-------------|-------------|
| Total | 33% | 35% | 33% | 34% | 36% | 34% | 33% | 34% | 34% | 33% |
| Argentina | 11% | 15% | 13% | 23% | 18% | 17% | 16% | 16% | 22% | 20% |
| Australia | 72% | 63% | 60% | 58% | 61% | 55% | 63% | 65% | 58% | 61% |
| Belgium | 35% | 16% | 16% | 20% | 28% | 29% | 25% | 18% | 22% | 18% |
| Brazil | 38% | 44% | 48% | 46% | 45% | 48% | 40% | 49% | 50% | 51% |
| Canada | 62% | 61% | 55% | 60% | 61% | 58% | 60% | 55% | 58% | 59% |
| China | 68% | 70% | 67% | 66% | 66% | 67% | 66% | 67% | 67% | 62% |
| France | 19% | 21% | 15% | 16% | 17% | 19% | 17% | 18% | 17% | 20% |
| Germany | 45% | 52% | 41% | 40% | 48% | 53% | 51% | 50% | 52% | 50% |
| Great Britain | 32% | 33% | 32% | 30% | 32% | 34% | 31% | 30% | 30% | 27% |
| Hungary | 5% | 15% | 15% | 16% | 16% | 16% | 15% | 23% | 12% | 9% |

63%

34%

20%

20%

10%

33%

22%

54%

46%

31%

19%

63%

27%

25%

65%

21%

20%

23%

8%

26%

24%

50%

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62%

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35%

15%

57%

27%

22%

70%

27%

19%

26%

8%

23%

23%

48%

26%

33%

15%

57%

31%

25%

71%

21%

14%

22%

8%

27%

19%

58%

21%

38%

12%

58%

29%

27%

61%

23%

16%

24%

11%

27%

19%

53%

28% 34%

9%

58%

29%

24%

% Satisfied

Now, thinking about your country, overall, are you satisfied or dissatisfied with the way things are going in your country today?

67%

23%

17%

20%

11%

37%

25%

50%

23%

31%

11%

50%

32%

32%

71%

25%

20%

21%

11%

40%

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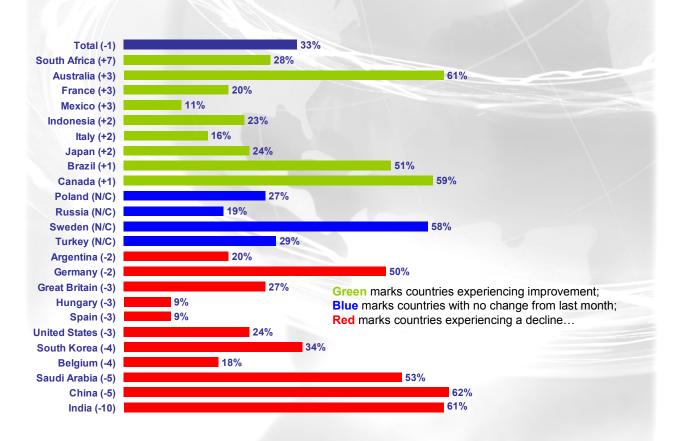
8%

59%

29%

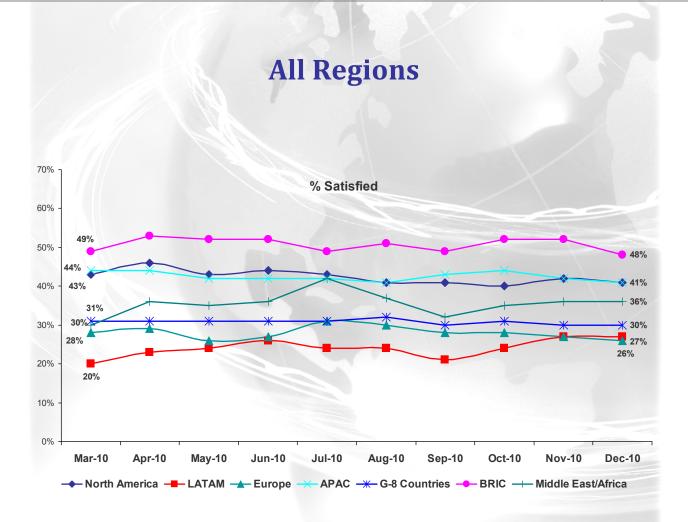
27%

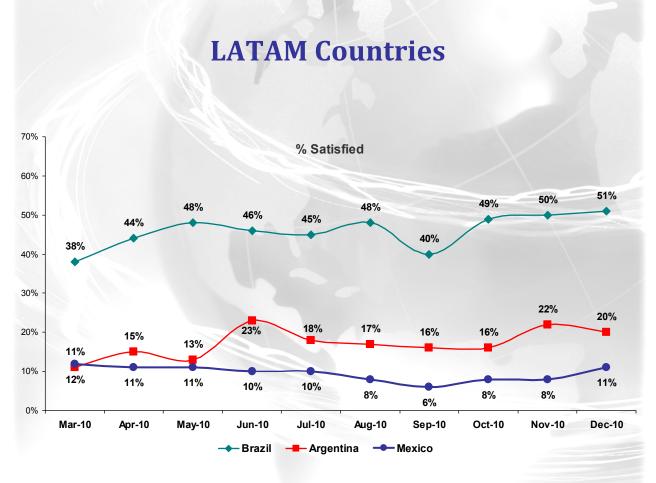
Countries Ranked and Marked By Change In Assessment From Last Month (Left Column):

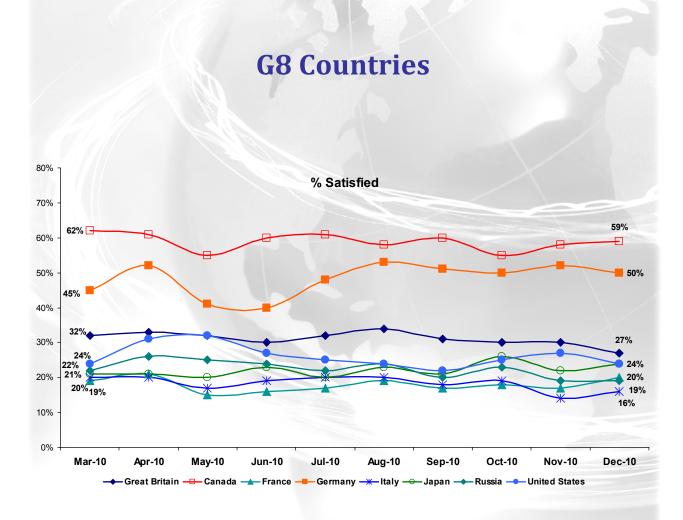


Countries Ranked by Net Improvement, Decline or No Change Compared to Last Month

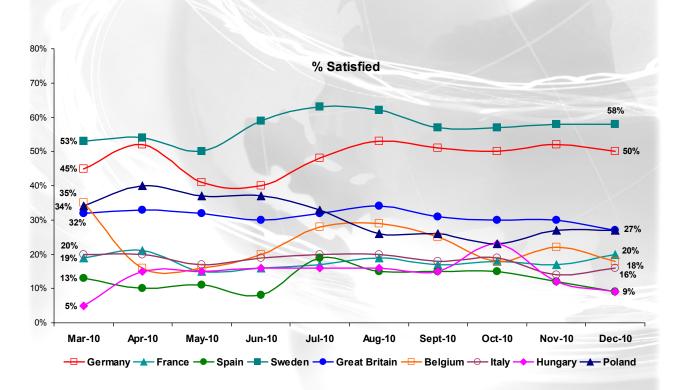
| South Africa (+7) | 7% |
|-------------------|--------------------|
| Australia (+3) | 3% |
| France (+3) | 3% |
| Mexico (+3) | 3% |
| Indonesia (+2) | 2% |
| Italy (+2) | 2% |
| Japan (+2) | 2% |
| Brazil (+1) | 1% |
| Canada (+1) | 1% |
| Poland (N/C) | |
| Russia (N/C) | |
| Sweden (N/C) | |
| Turkey (N/C) | |
| -2% | Argentina (-2) |
| -2% | Germany (-2) |
| -3% | Great Britain (-3) |
| -3% | Hungary (-3) |
| -3% | Spain (-3) |
| -3% | United States (-3) |
| -4% | South Korea (-4) |
| -4% | Belgium (-4) |
| -5% | Saudi Arabia (-5) |
| -5% | China (-5) |
| -10% | India (-10) |
| | |



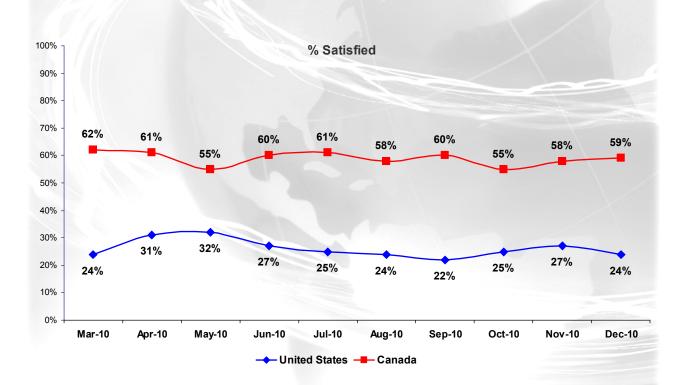


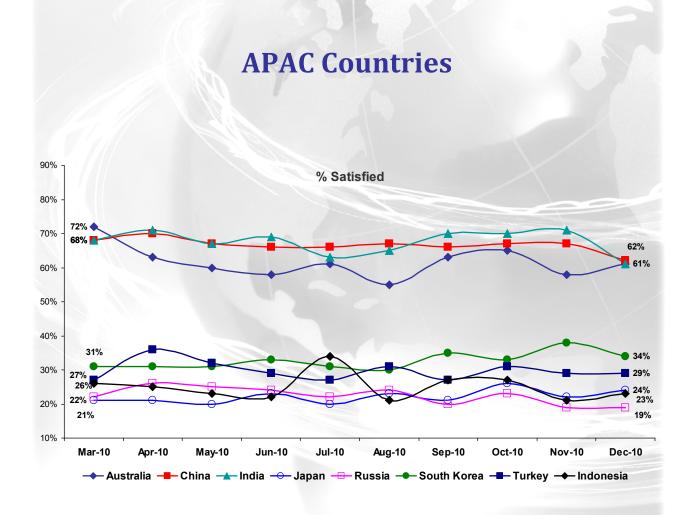


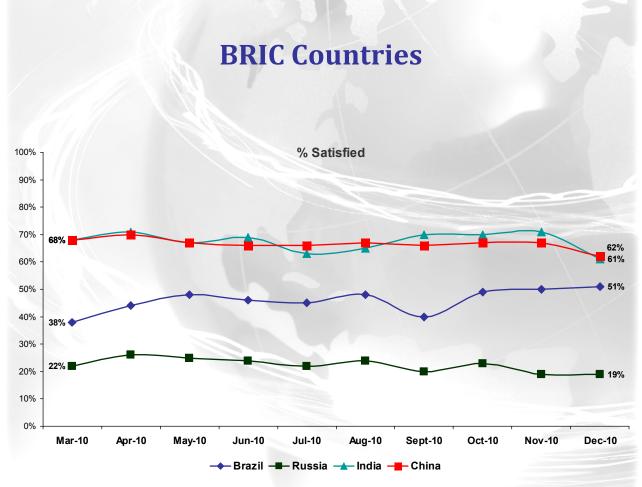
European Countries



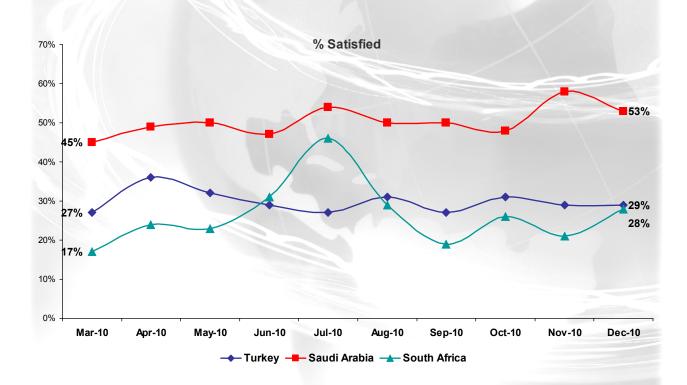
North American Countries







Middle East/African Countries



METHODOLOGY

These are the findings of the *Global @dvisor* Wave 16 (G@16), an Ipsos survey conducted between December 10th and December 20th, 2010.

The survey instrument is conducted monthly in 24 countries around the world via the Ipsos Online Panel system. The countries reporting herein are Argentina, Australia, Belgium, Brazil, Canada, China, France, Great Britain, Germany, Hungary, India, Indonesia, Italy, Japan, Mexico, Poland, Russia, Saudi Arabia, South Africa, South Korea, Spain, Sweden, Turkey and the United States of America.

A total sample of 18,676 adults were interviewed for this survey: aged 18-64 in the US and Canada, and age 16-64 in all other countries, with approximately 1000+ individuals on a country by country basis with the exception of Argentina, Belgium, Indonesia, Mexico, Poland, Saudi Arabia, South Africa, South Korea, Sweden and Turkey, where each have a sample approximately 500+.

Weighting was employed to balance demographics and ensure the sample's composition reflects that of the adult population according to the most recent country Census data available and to provide results intended to approximate the sample universe. A survey with an unweighted probability sample of this size and a 100% response rate would have an estimated margin of error of +/- 3.1 percentage points for a sample of 1,000 and an estimated margin of error of +/- 4.5 percentage points 19 times out of 20 per country of what the results would have been had the entire population of adults in that country had been polled.

FURTHER INFORMATION

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The Ipsos *Global @dvisor* Omnibus is a monthly, online survey of consumer citizens in 24 countries and produces syndicated reports and studies specifically tailored to the needs of corporations, advertising and PR agencies, and governments. For information contact:

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With over 9,100 employees working in wholly owned operations in 64 countries, Ipsos conducts advertising, customer loyalty, marketing, media, and public affairs research, as well as forecasting, modeling, and consulting and a full line of custom, syndicated, omnibus, panel, and online research products and services in over 100 countries.

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by NYSE - Euronext Paris, Ipsos is
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