



Storm Clouds on the Horizon?

Global Consumer Confidence Waning

Cliff Young
President, Ipsos Public Affairs
USA



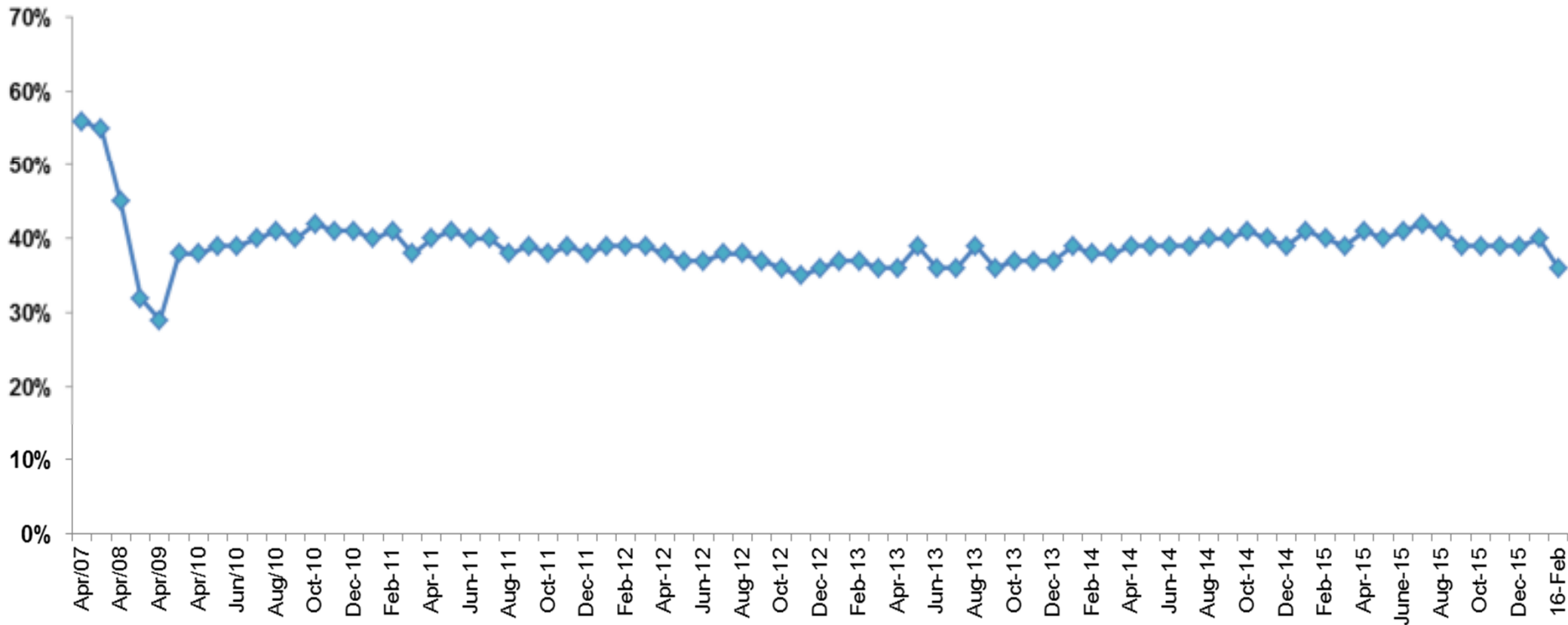
Talking Points

- Economic storm clouds on the horizon as global consumer confidence wanes.
- Consumer confidence dips across all regions but is especially sharp in China and other emerging markets.
- Such confidence metrics important leading indicators of household expenditures four to six months out.
- The US, however, is holding its own. For the now, the global crisis of consumer confidence has not bled over to American consumers.
- That said, the following months will be essential in understanding the relative degree of US insulation from the global slowdown.



Global consumer confidence shows decline over the last month—a 4 point dip.

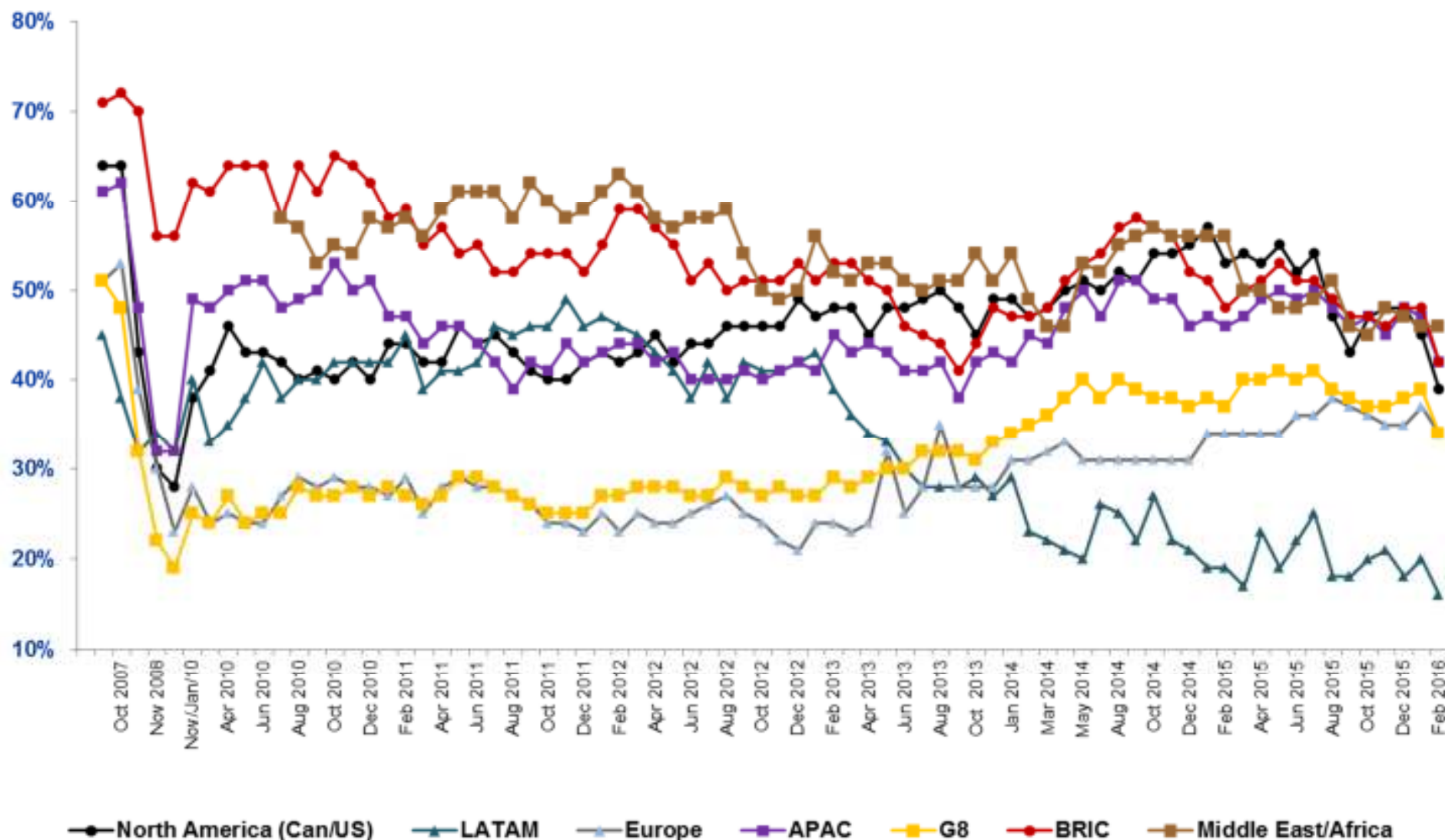
Total Good



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?

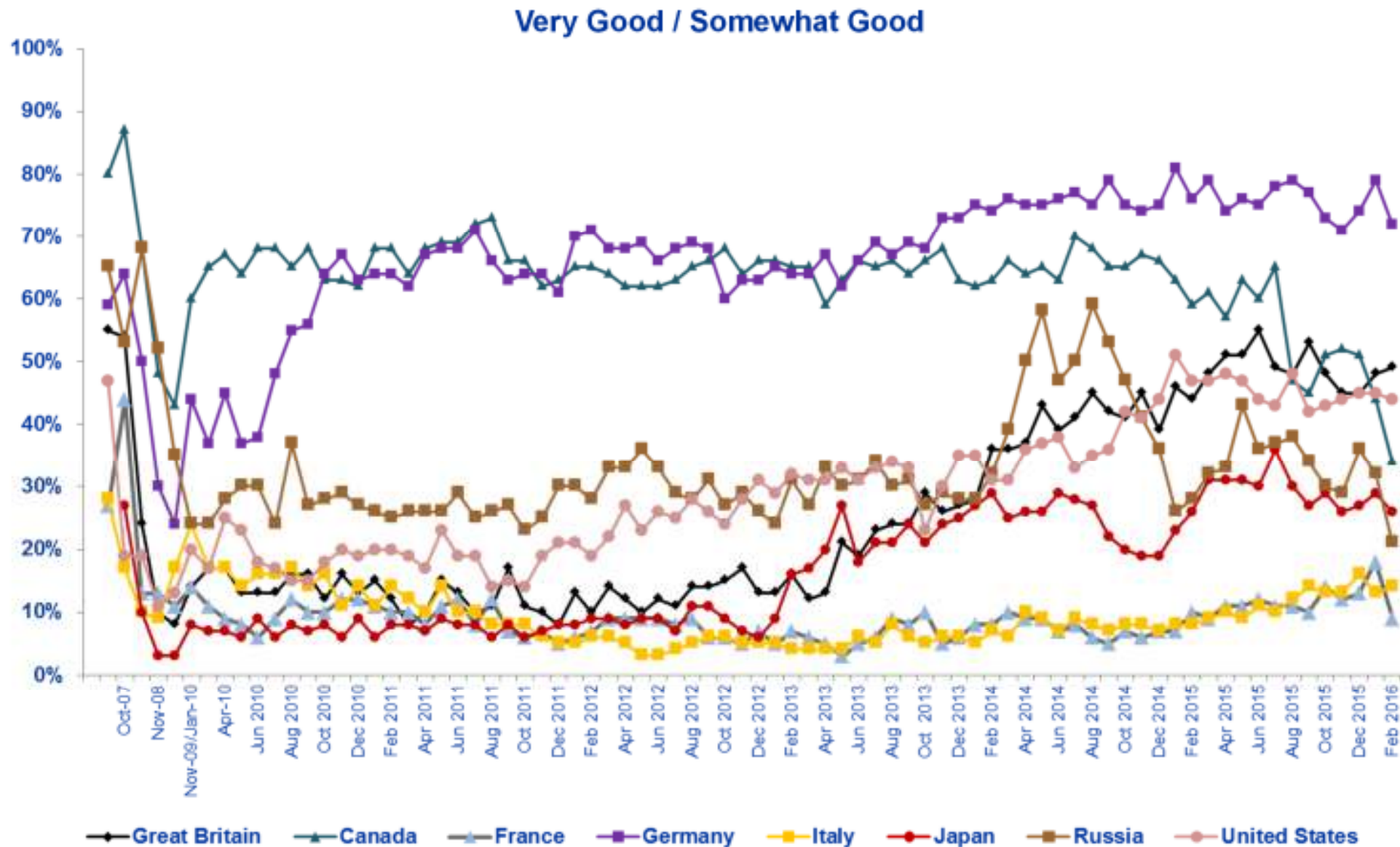
Confidence declines across all regions except the Middle East/Africa

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?

General consumer angst in the G8

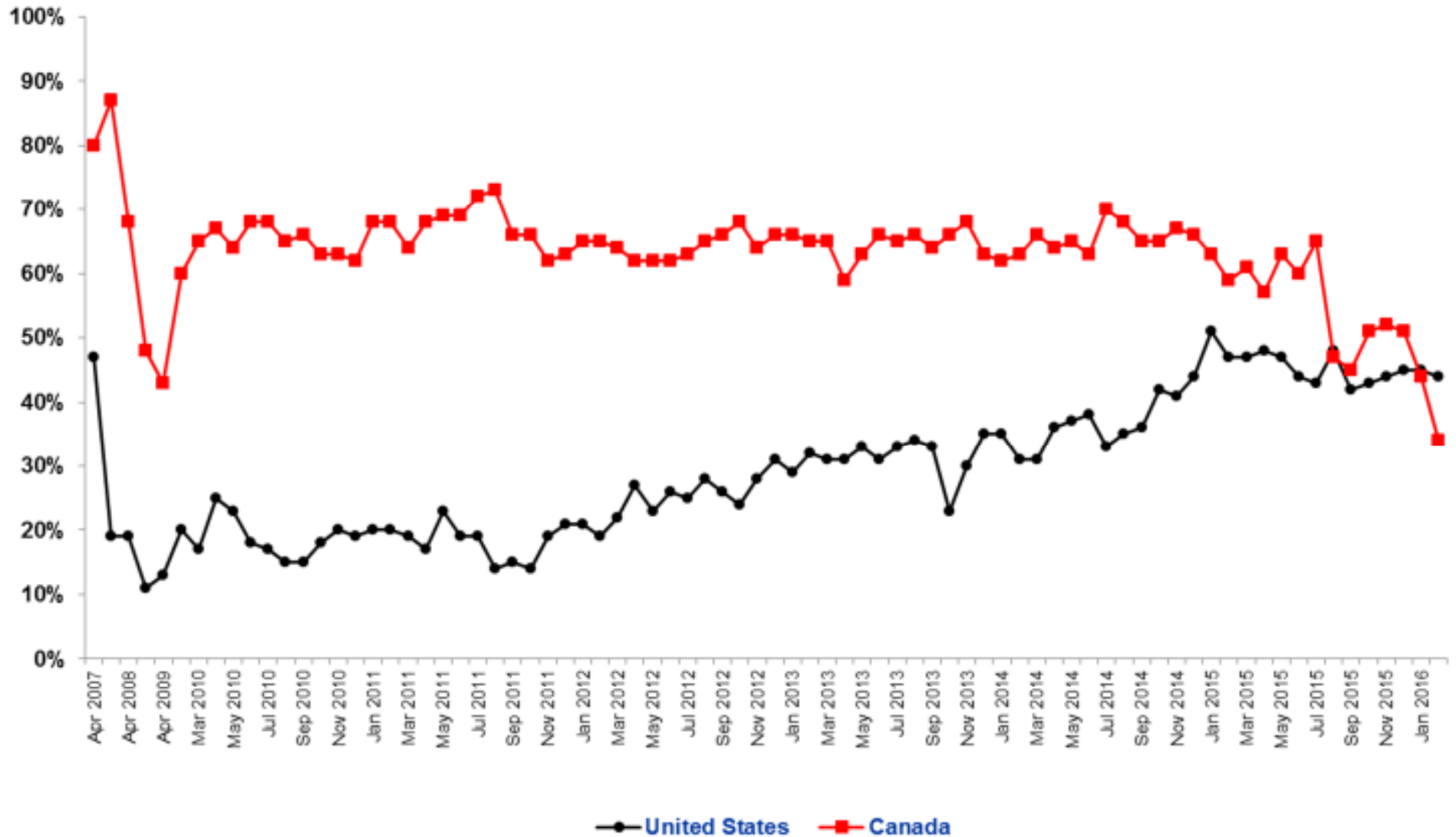


Now thinking about our economic situation, how would you describe the current economic situation in [insert country]?

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Canada shows precipitous decline over the last few months, while the US is holding its own

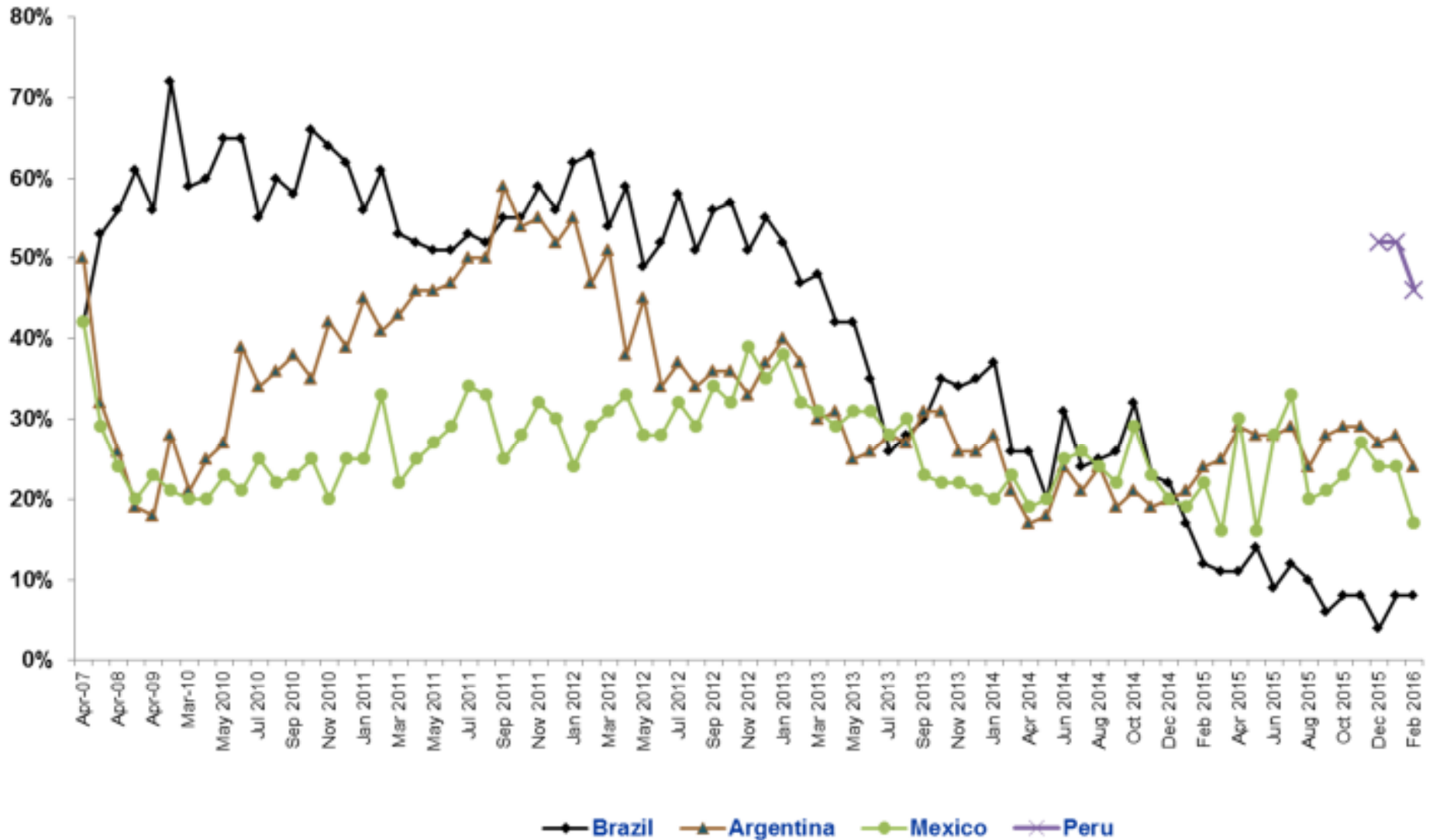
Very Good / Somewhat Good



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?

Crisis of Consumer Confidence in Latin America

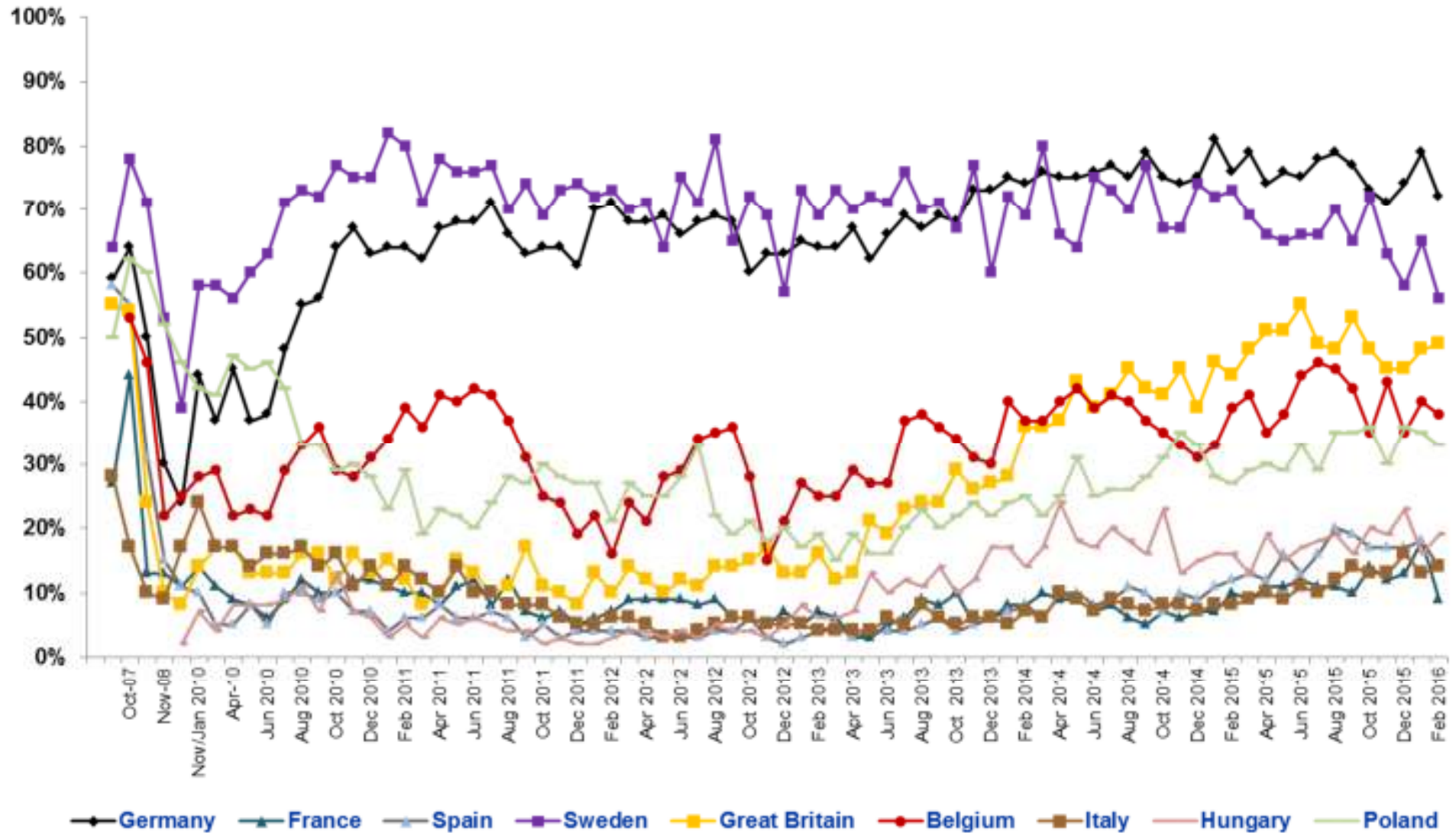
Very Good / Somewhat Good



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Europe's consumer confidence anchors (Germany and Sweden) also showing signs of weakness

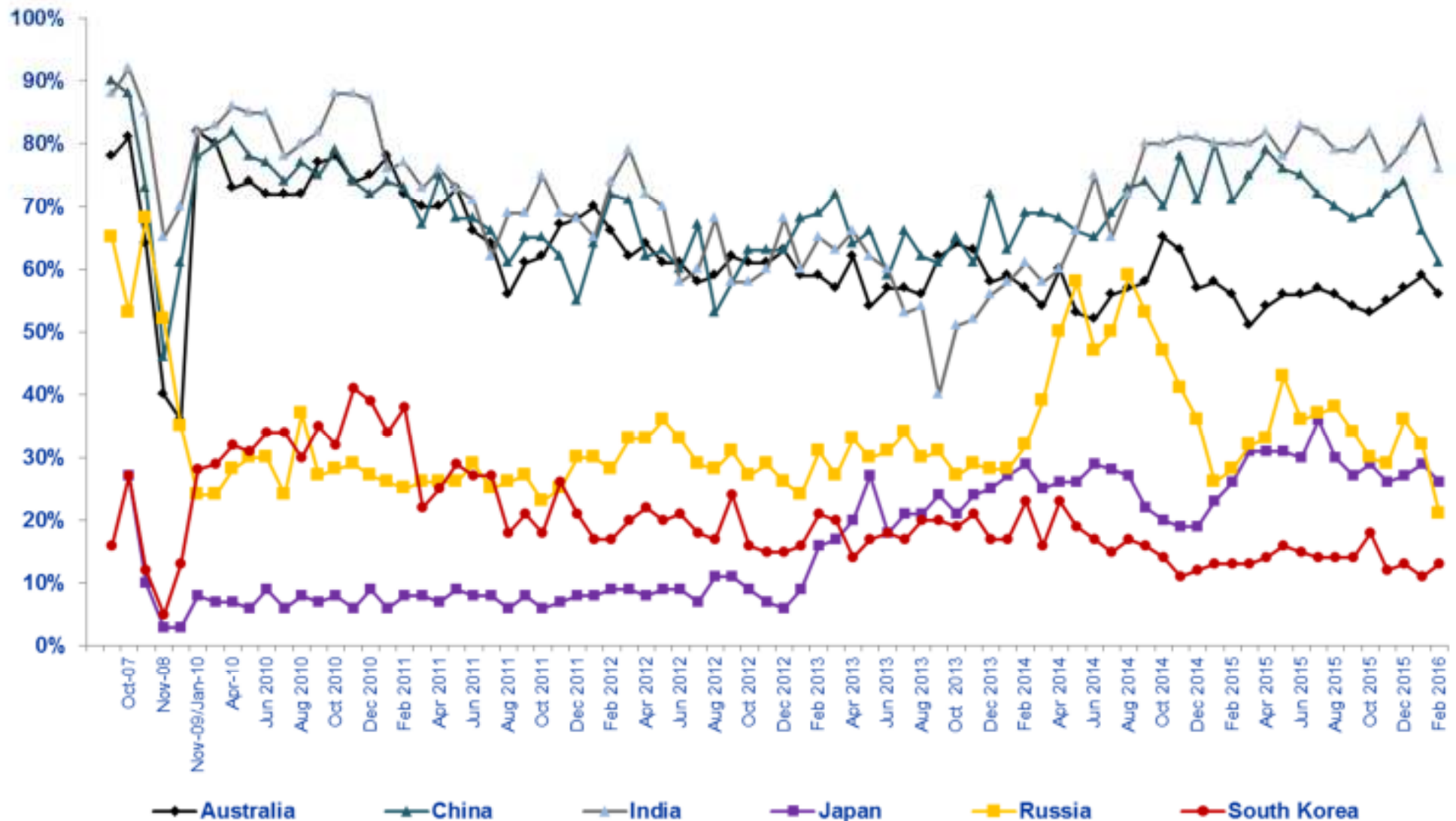
Very Good / Somewhat Good



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?

APAC slowdown being driven by China and Russia

Very Good / Somewhat Good

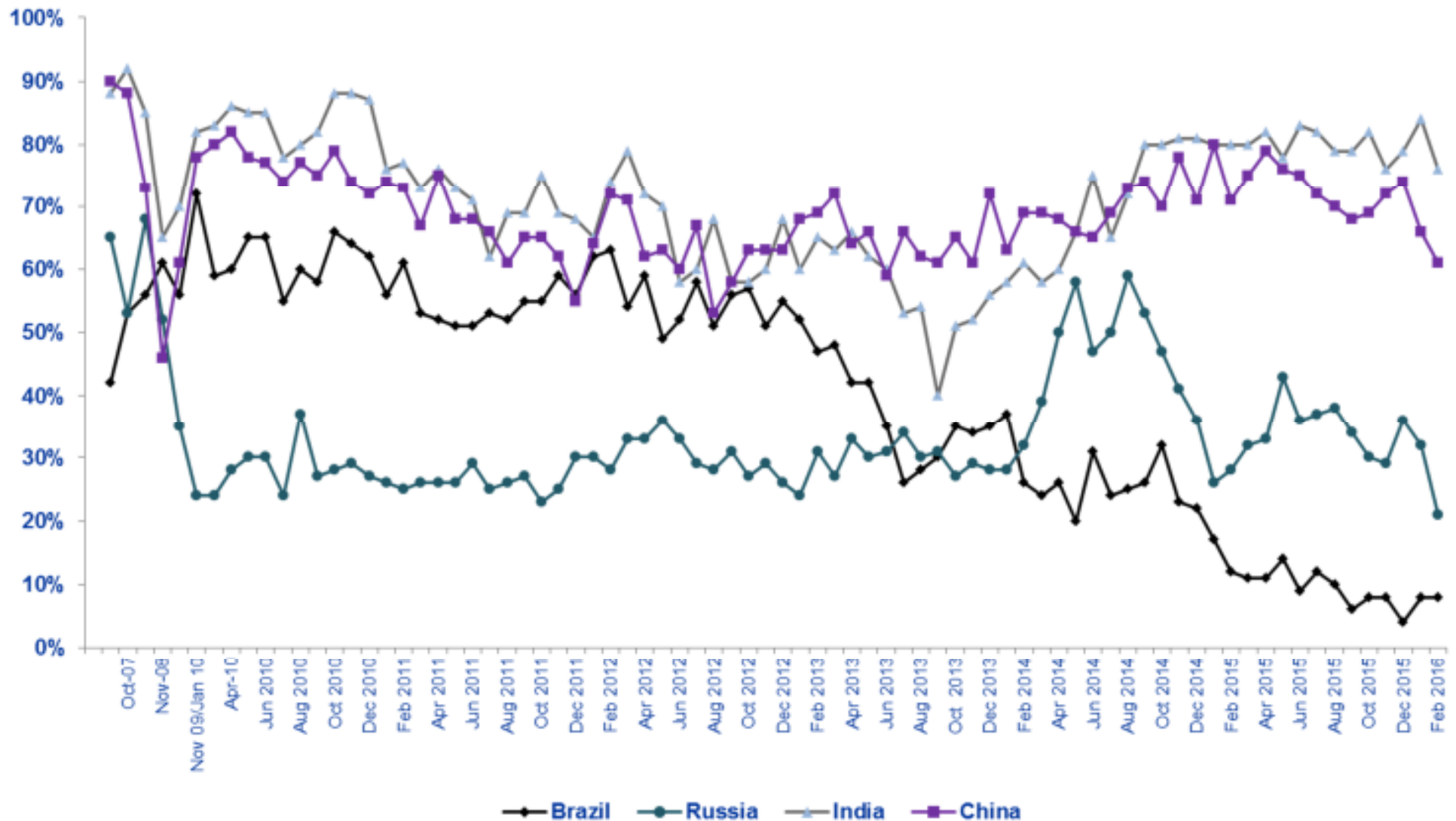


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BRICs are no longer a hedge against the lukewarm consumer confidence of G8 countries

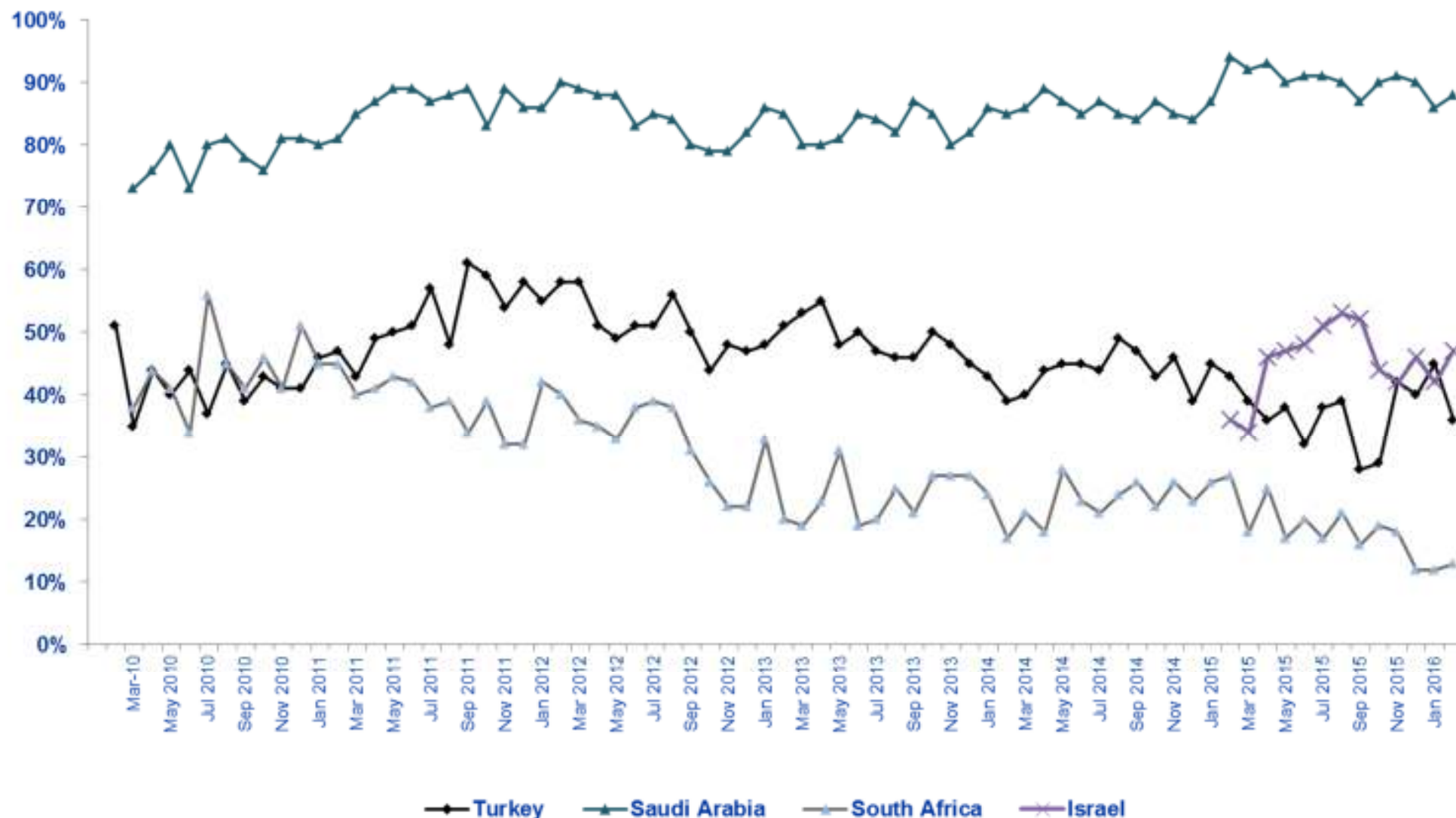
Very Good / Somewhat Good



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?

Saudi Arabia and Israel holding firm, while South Africa and Turkey experiencing a steady decline

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?



About Global@dvisor

Methodology

- These are the findings of the **Global @dvisor Wave 76 (G@76)**, an Ipsos survey conducted between **November 20th** and **December 4th**.
- 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, Israel, Italy, Japan, Mexico, Poland, Russia, Saudi Arabia, 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 18,584 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, Colombia, Hungary, India, Israel, Mexico, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, Sweden and Turkey, where each have a sample approximately 500+.
- Weighting was then employed to balance demographics and ensure that the sample's composition reflects that of the adult population according to the most recent country Census data, 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. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error, and measurement error.

About Ipsos

- Ipsos is an independent market research company controlled and managed by research professionals. Founded in France in 1975, Ipsos has grown into a worldwide research group with a strong presence in all key markets. In October 2011 Ipsos completed the acquisition of Synovate. The combination forms the world's third largest market research company.
- With offices in 85 countries, Ipsos delivers insightful expertise across six research specializations: advertising, customer loyalty, marketing, media, public affairs research, and survey management.
- Ipsos researchers assess market potential and interpret market trends. They develop and build brands. They help clients build long-term relationships with their customers. They test advertising and study audience responses to various media and they measure public opinion around the globe.
- Ipsos has been listed on the Paris Stock Exchange since 1999 and generated global revenues of €1,789 billion (2.300 billion USD) in 2012.
- Visit www.ipsos.com to learn more about Ipsos' offerings and capabilities.