

priority

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The Priority Report

by  **FII INSTITUTE** | Impact
Future Investment Initiative Institute | on Humanity

22 September 2022

SURVEY DESIGN



TARGET

Survey conducted in 13 countries among representative samples of the population aged 18 and over in each country.

A total of 130 000 individuals were interviewed.



COLLECTION DATE

August 10th to August 29th 2022.



METHOD

Online interviews.

Representative samples of the population aged 18+ in each of the surveyed countries.

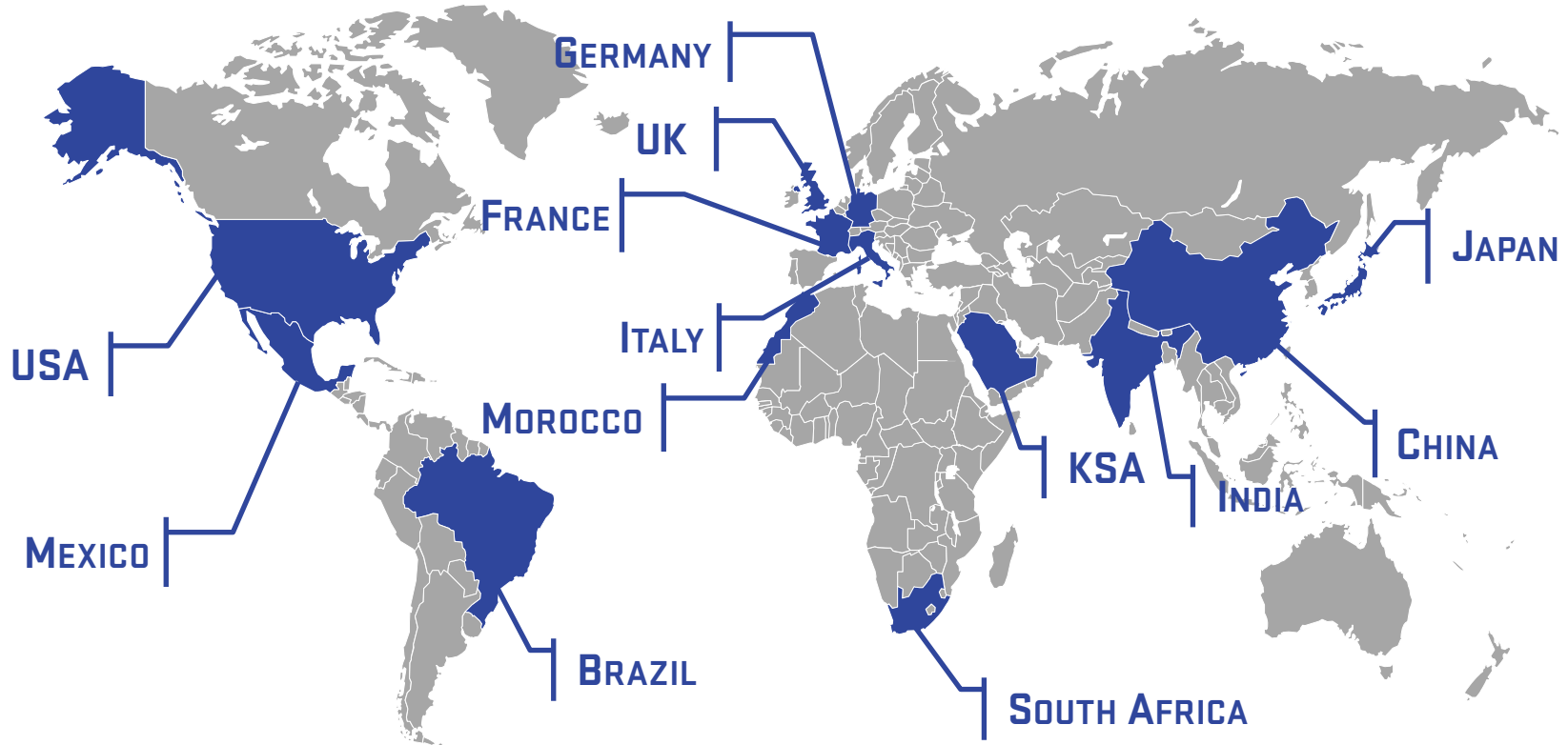
Quota method: gender, age, occupation, region and market size (+ cast in India, race in USA, Brazil and South Africa, citizenship in Saudi Arabia).

Brazil, China, India, Mexico, Morocco, and South Africa have lower levels of internet penetration and so these samples should not be considered nationally representative, and instead be considered to represent a more affluent and population. These are still a vital social group to understand in these countries, representing an important and emerging middle class.



This report has been produced in accordance with international standard ISO 20252 "Market, opinion and social research". This report was proofread by Mathieu Gallard, Research Manager, Public Affairs.

THE ENTIRE POPULATION OF THE 13 COUNTRIES CHOSEN FOR THIS SURVEY REPRESENT 50.3% OF THE GLOBAL POPULATION



DETAILS ON READING THE RESULTS

The “Global Country Average” we use in this report reflects the average result for all the countries where the survey was conducted. It has not been adjusted to the population size of each country.

In addition, in order to analyze the results in more detail, in this report we have systematically presented, in addition to the overall results, the results for two groups of countries:

High-income countries:

Germany, France, UK, Italy, USA, Japan.

Emerging countries*:

Mexico, Brazil, China, India, Saudi Arabia, South Africa, Morocco.

*Emerging Market Report 2021, Cornell University.

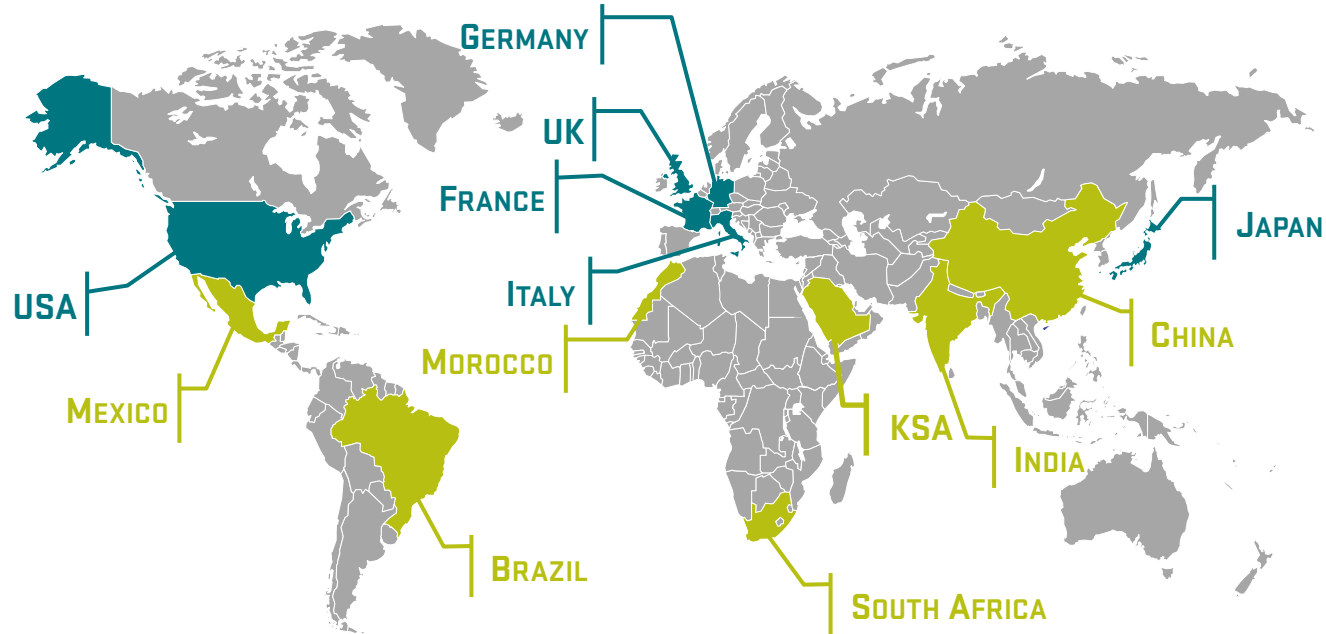


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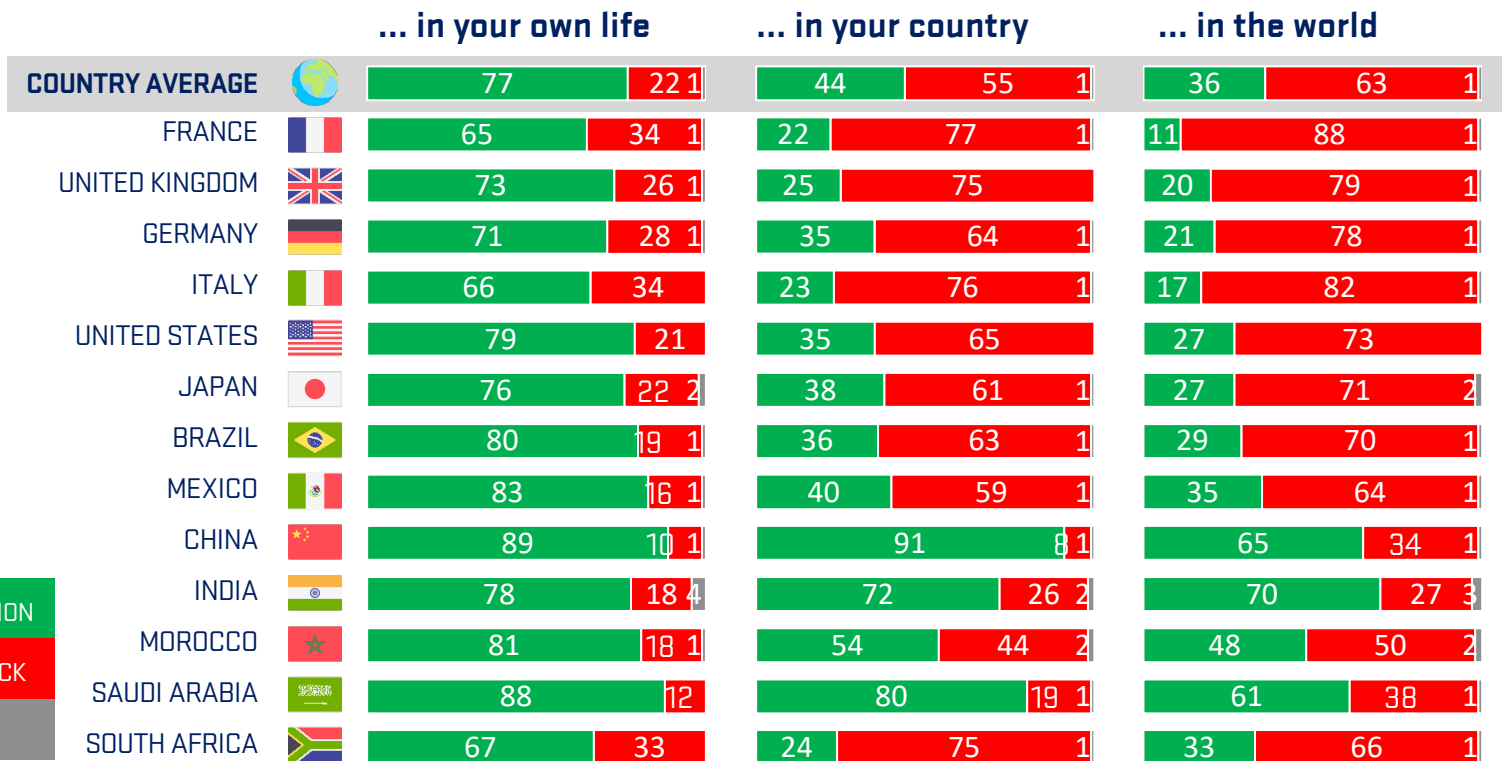
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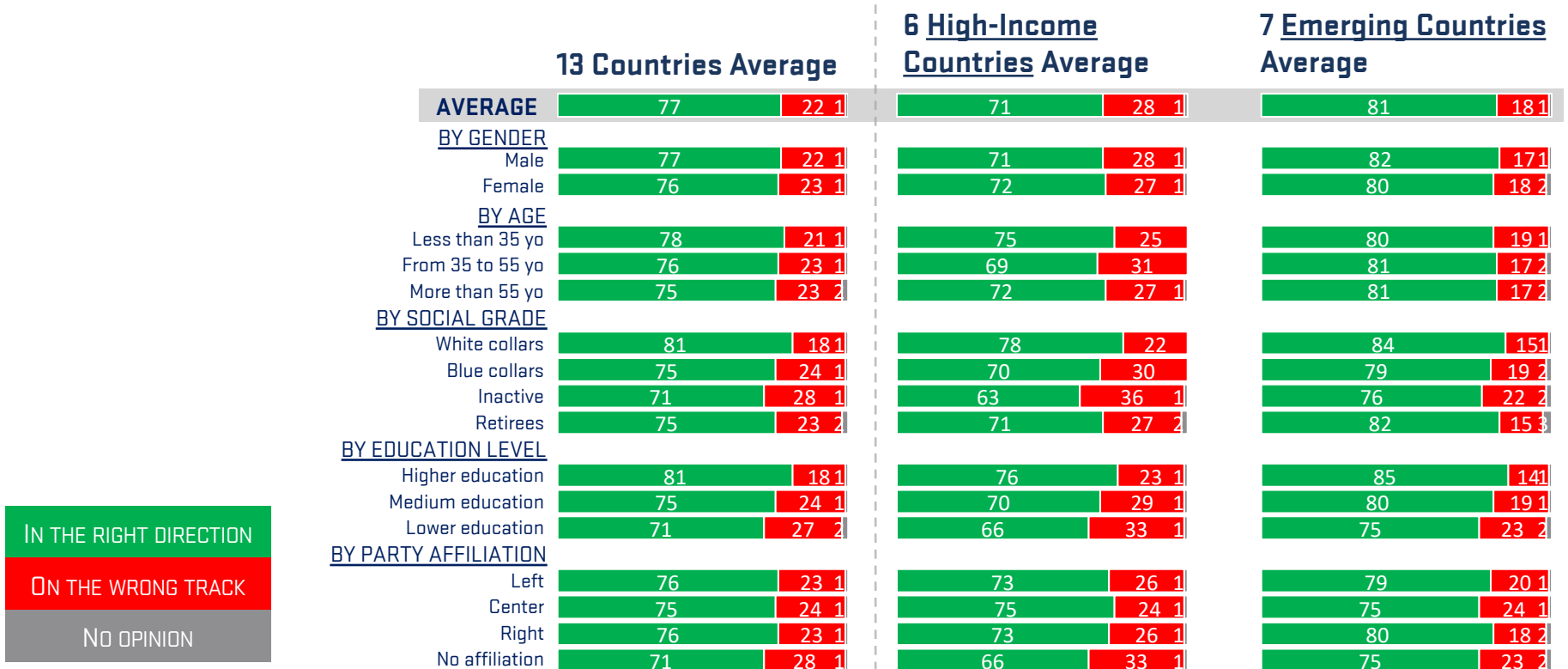
CONTEXT

CITIZENS' GENERAL
PERCEPTION OF THE
SITUATION IN THE WORLD
AND IN THEIR COUNTRY

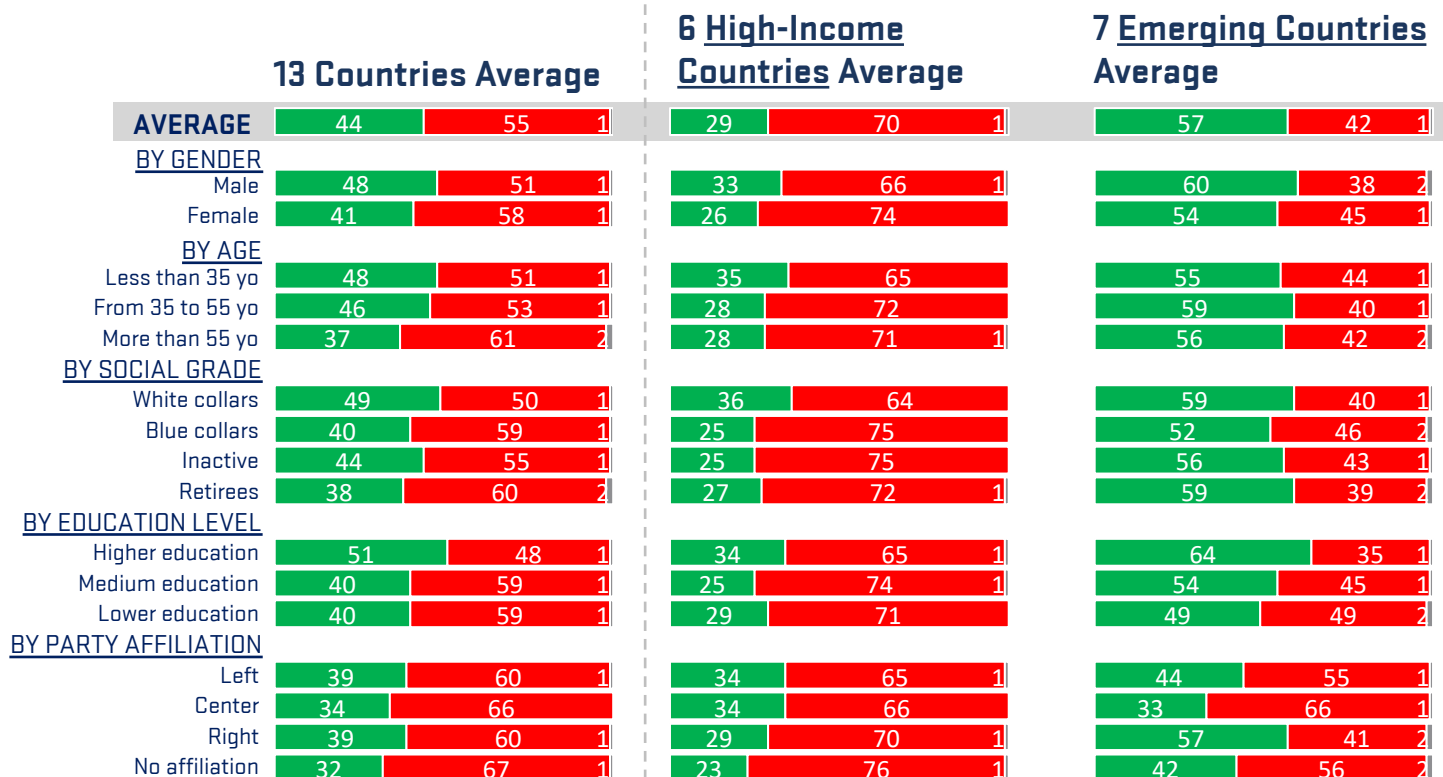
Would you say things in your country / in your own life / in the world are generally headed in the right direction, or do you feel things are off on the wrong track?



Would you say things in your own life are generally headed in the right direction, or do you feel things are off on the wrong track?



Would you say things in your country are generally headed in the right direction, or do you feel things are off on the wrong track?

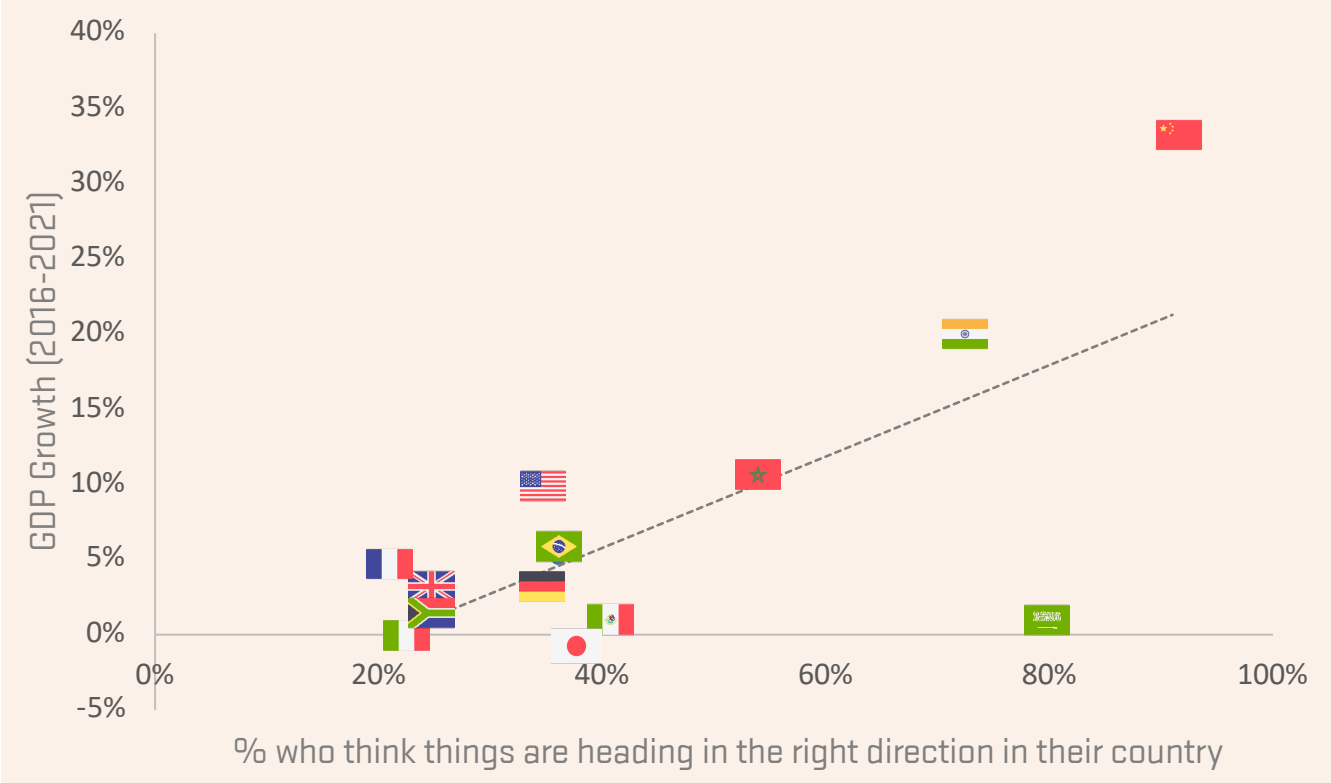


IN THE RIGHT DIRECTION

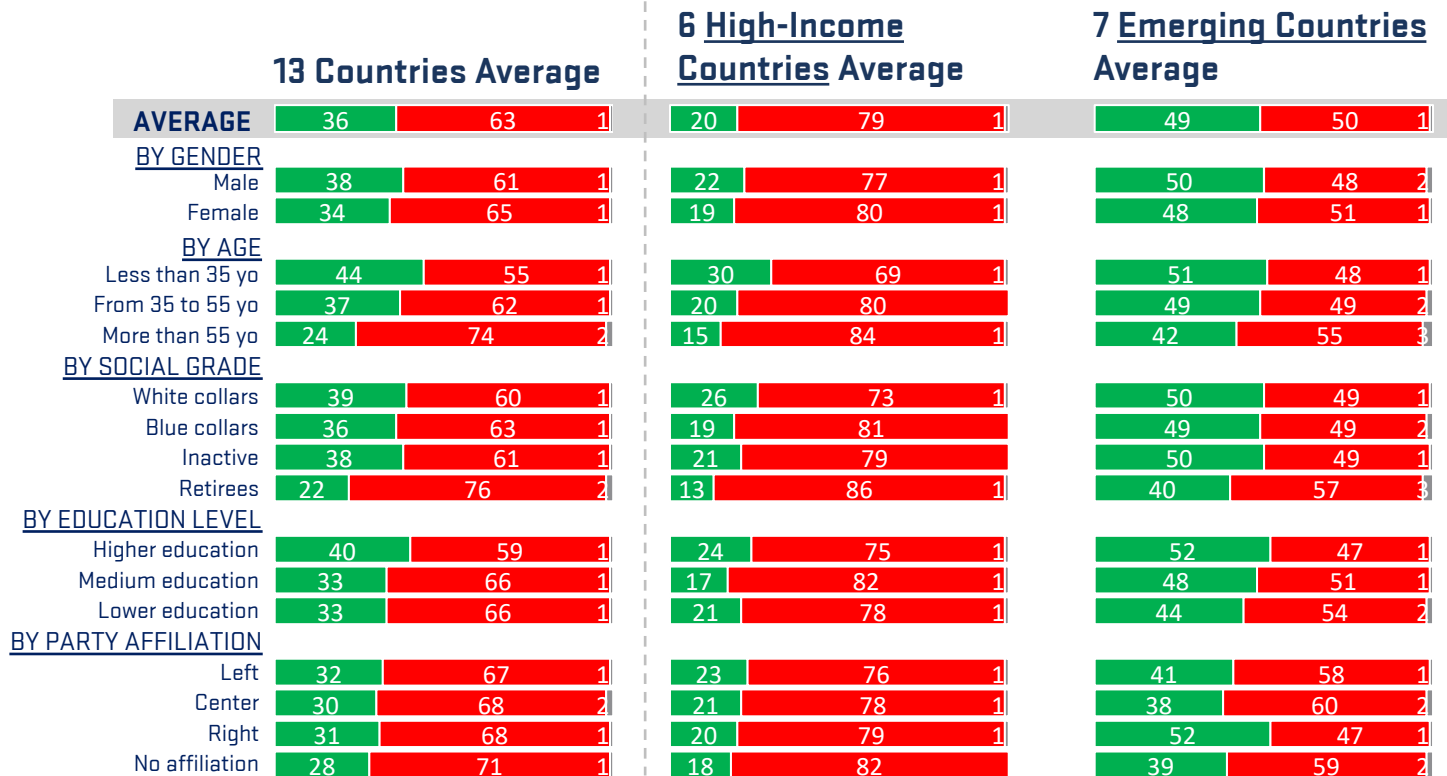
IN THE WRONG TRACK

NO OPINION

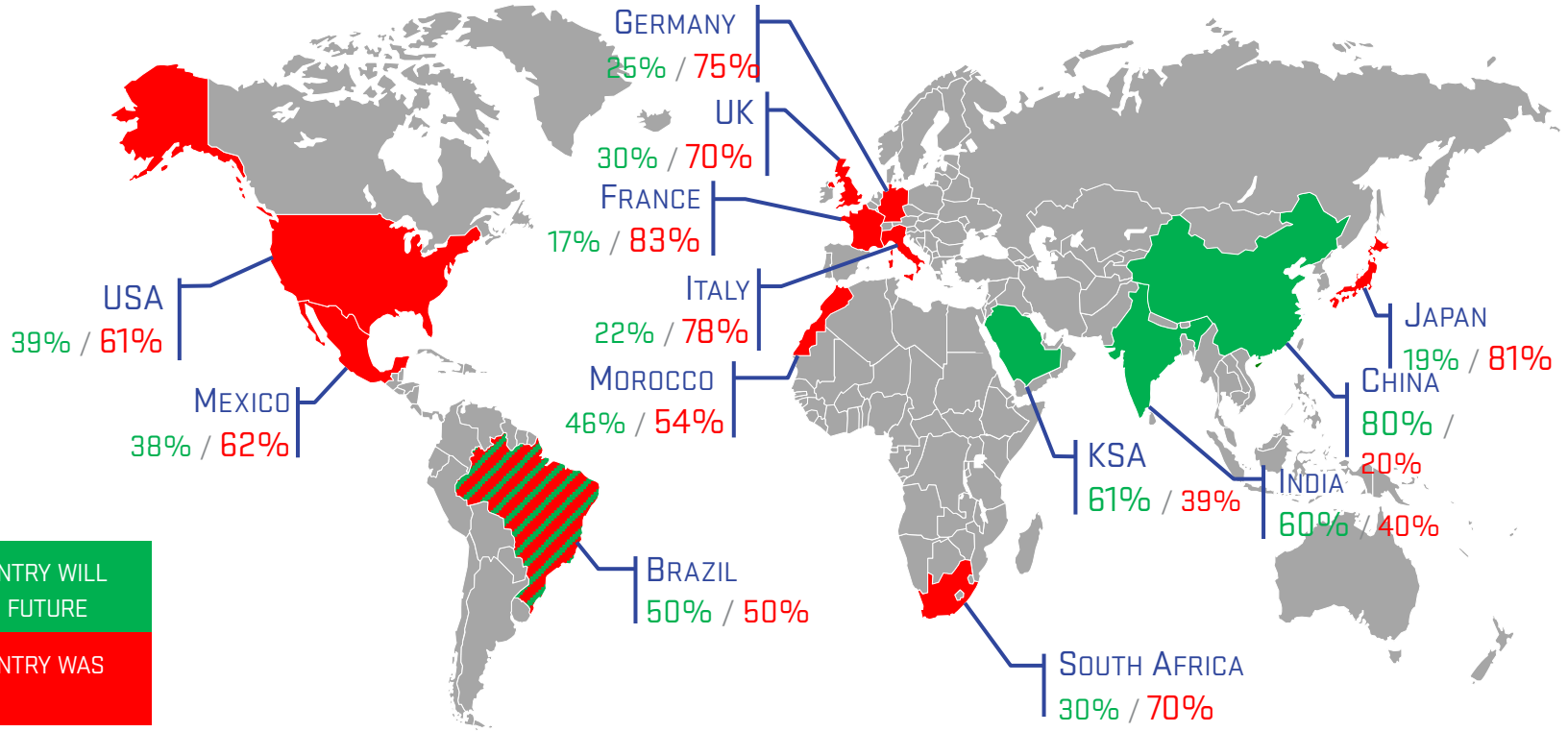
Relation between optimism in country's future and GDP growth between 2016 and 2021



Would you say things in the world are generally headed in the right direction, or do you feel things are off on the wrong track?



With which of the following two sentences do you most agree?



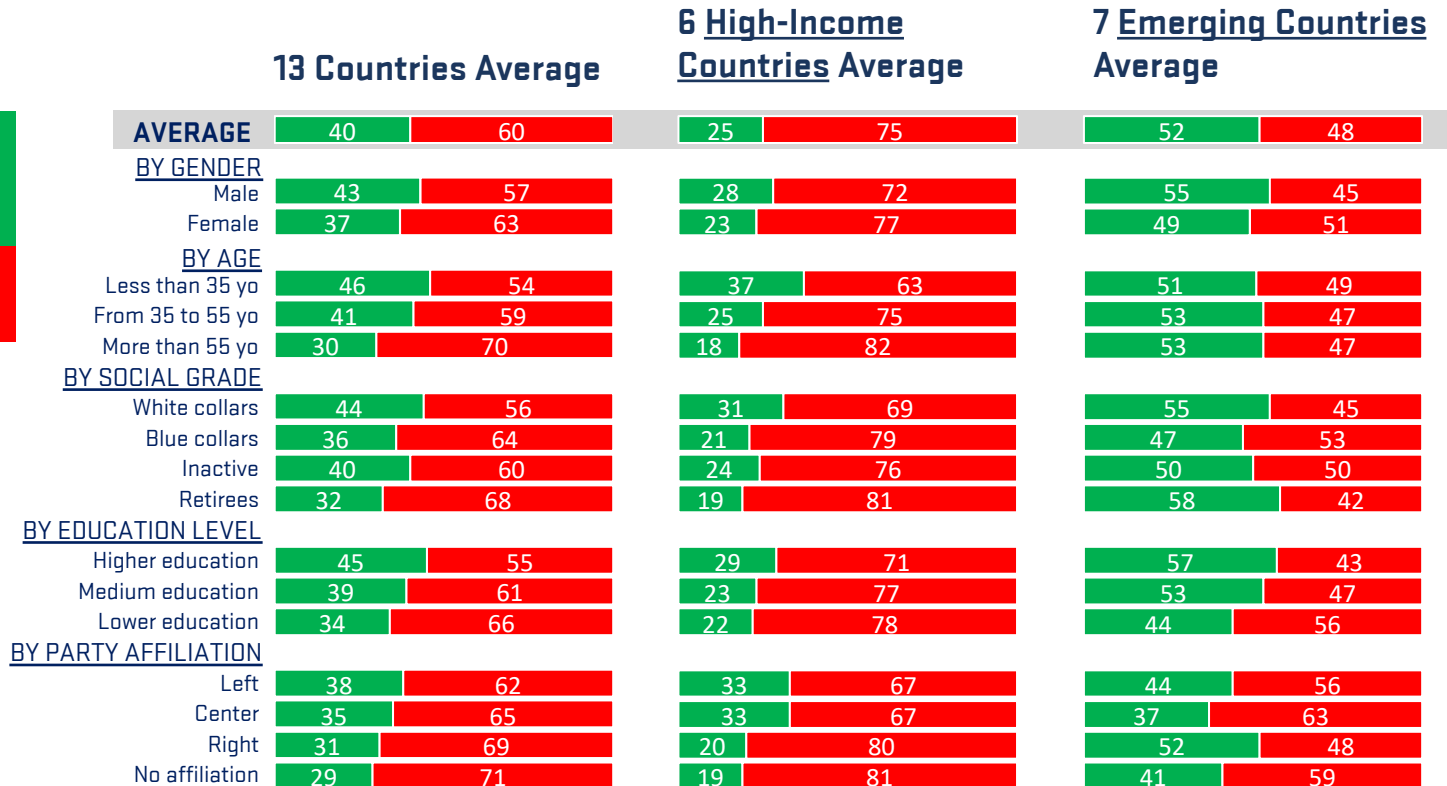
LIFE IN YOUR COUNTRY WILL BE BETTER IN THE FUTURE

LIFE IN YOUR COUNTRY WAS BETTER BEFORE

With which of the following two sentences do you most agree?

LIFE IN YOUR COUNTRY WILL BE BETTER IN THE FUTURE

LIFE IN YOUR COUNTRY WAS BETTER BEFORE



COST OF LIVING and inflation are the most important problems faced in one's country nowadays

Snapshot of surveyed people answers to "the most important problems" they are currently facing – their **priorities** are:

Cost of living, energy bills spiraling out of control, **everything going up in price**
(Female, 27 yo, UK)



High prices for everything like gas and food but no increase in money coming in for the family
(Female, 74 yo, USA)

The rise in prices of the main products for consumption
(Female, 37 yo, Mexico)



The high cost of living with the high price of housing is very exaggerated
(Female, 30 yo, Saudi Arabia)

Increasing product cost and food oil prices
(Male, 24 yo, India)

















Little help for the middle classes who bear the cost of inflation
(Female, 37 yo, France)

The decrease in the purchasing power of the citizen
(Female, 26 yo, Morocco)



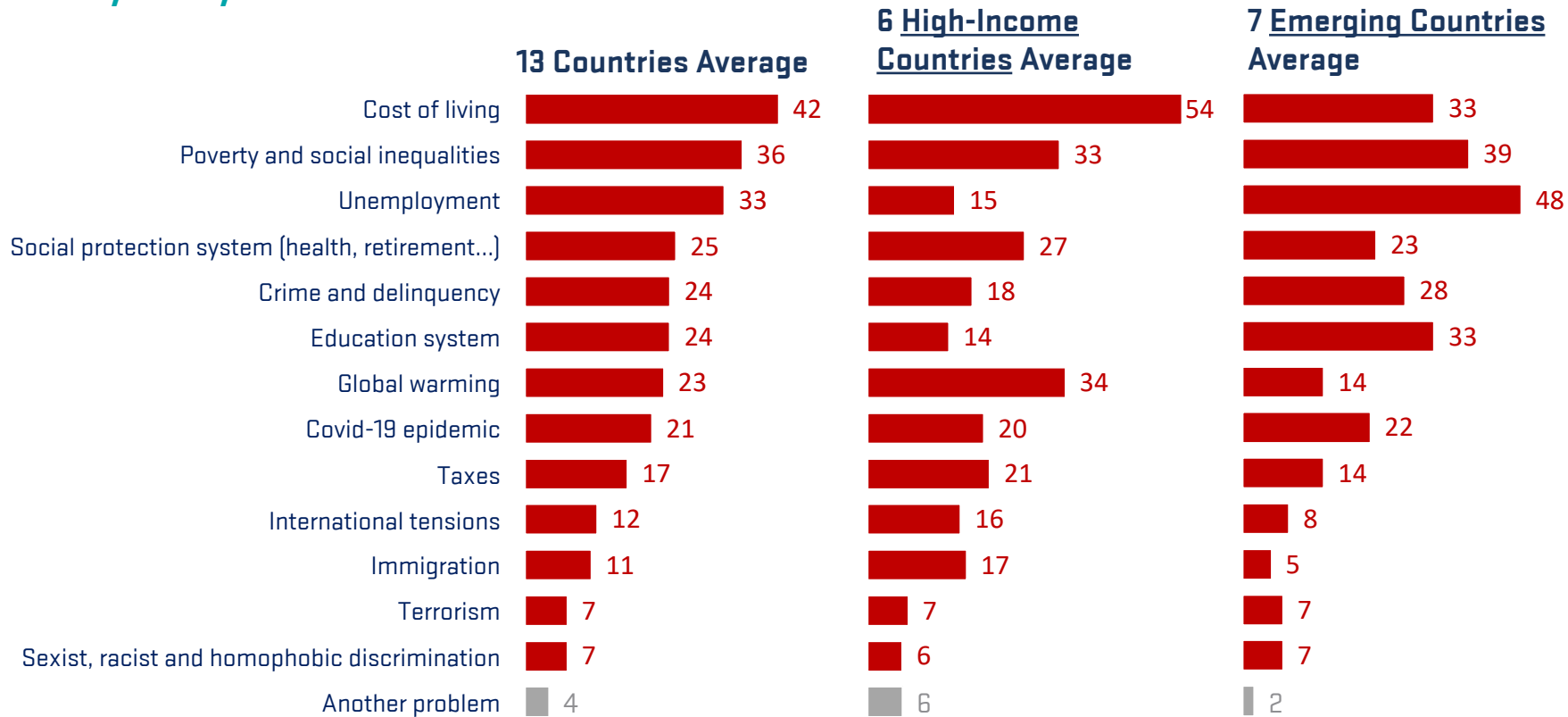
Inflation and rising prices of a large number of commodities
(Male, 25 yo, China)

What do you think should be the top three priorities of the government in your country today?

	 COUNTRY AVERAGE	 FRANCE	 UNITED KINGDOM	 GERMANY	 ITALY	 UNITED STATES	 JAPAN	 BRAZIL	 MEXICO	 CHINA	 INDIA	 MOROCCO	 SAUDI ARABIA	 SOUTH AFRICA
Cost of living	42	60	79	49	53	53	30	32	20	28	21	40	46	41
Poverty and social inequalities	36	31	37	43	28	23	35	65	52	28	26	35	21	46
Unemployment	33	12	9	8	39	12	11	54	44	20	52	47	39	80
Social protection system (health, retirement...)	25	23	27	36	19	25	34	23	18	48	17	32	15	8
Crime and delinquency	24	33	14	10	14	30	9	24	72	8	21	11	8	51
Education system	24	17	9	16	10	18	12	36	32	27	40	42	30	26
Global warming	23	43	34	42	35	24	24	9	16	27	20	8	11	8
Covid-19 epidemic	21	8	13	17	15	18	48	14	10	59	25	20	19	6
Taxes	17	10	18	16	31	19	32	19	11	5	18	11	28	6
International tensions	12	13	12	19	15	11	29	3	2	29	6	9	8	2
Immigration	11	27	19	18	14	23	4	1	5	2	3	11	6	9
Terrorism	7	8	7	6	2	12	5	1	5	3	11	9	19	1
Sexist, racist, homophobic discrimination	7	5	5	5	7	12	5	10	6	4	10	1	5	9
Another problem	4	3	4	3	3	9	12	2	1	2	2	4	4	1

Up to 3 answers per respondent

What do you think should be the top three priorities of the government in your country today?



Up to 3 answers per respondent

Top 3 priorities for citizens by demographic

BY GENDER



MALE

- 1 Cost of living - 41%
- 2 Poverty and social inequalities - 36%
- 3 Unemployment - 32%

FEMALE

- 1 Cost of living - 44%
- 2 Poverty and social inequalities - 37%
- 3 Unemployment - 33%

BY AGE



LESS THAN 35 YO

- 1 Unemployment - 38%
- 2 Cost of living - 37%
- 3 Poverty and social inequalities - 34%

FROM 35 TO 55 YO

- 1 Cost of living - 45%
- 2 Poverty and social inequalities - 38%
- 3 Unemployment - 35%

MORE THAN 55 YO

- 1 Cost of living - 45%
- 2 Poverty and social inequalities - 37%
- 3 Social protection system - 32%

BY EDUCATION LEVEL



HIGHER EDUCATION

- 1 Cost of living - 42%
- 2 Poverty and social inequalities - 34%
- 3 Unemployment - 31%

MEDIUM EDUCATION

- 1 Cost of living - 43%
- 2 Poverty and social inequalities - 37%
- 3 Unemployment - 33%

LOWER EDUCATION

- 1 Cost of living - 43%
- 2 Poverty and social inequalities - 38%
- 3 Unemployment - 35%

BY SOCIAL GRADE



WHITE COLLARS

- 1 Cost of living - 43%
- 2 Poverty & social ineq - 35%
- 3 Unemployment - 33%

BLUE COLLARS

- 1 Cost of living - 43%
- 2 Poverty & social ineq - 40%
- 3 Unemployment - 34%

INACTIVE

- 1 Cost of living - 39%
- 2 Unemployment - 39%
- 3 Poverty & social ineq - 36%

RETIREES

- 1 Cost of living - 47%
- 2 Poverty & social ineq - 35%
- 3 Social protection system - 34%

BY PARTY AFFILIATION



LEFT

- 1 Poverty & social ineq - 46%
- 2 Cost of living - 41%
- 3 Unemployment - 34%

CENTER

- 1 Cost of living - 46%
- 2 Unemployment - 40%
- 3 Crime and delinquency - 36%

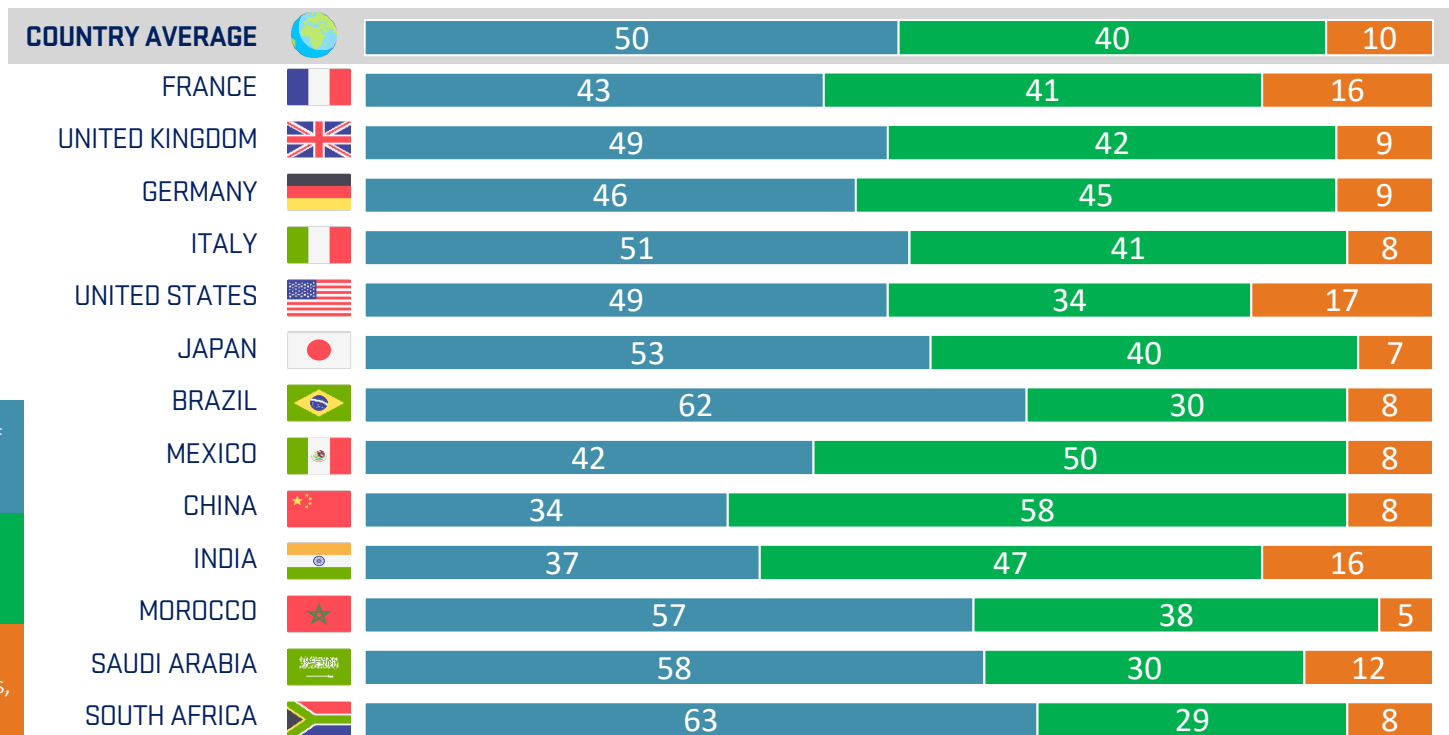
RIGHT

- 1 Cost of living - 44%
- 2 Poverty & social ineq - 28%
- 3 Crime and delinquency - 27%

NO AFFILIATION

- 1 Cost of living - 46%
- 2 Poverty & social ineq - 40%
- 3 Unemployment - 36%

Among the great crises that are frequently talked about nowadays, which one seems to you the **priority** for the future of the next generations and of the planet?



THE SOCIAL CRISIS (RISING COST OF LIVING, INCREASING SOCIAL INEQUALITIES, LACK OF SOCIAL MOBILITY...)

THE ENVIRONMENTAL CRISIS (CLIMATE CHANGE, AIR, WATER AND SOIL POLLUTION, LOSS OF BIODIVERSITY...)

THE IDENTITY CRISIS (DIFFICULTIES LINKED TO THE INTEGRATION OF MIGRANTS, LOSS OF TRADITIONAL VALUES...)

Which crisis should be the priority for the future?

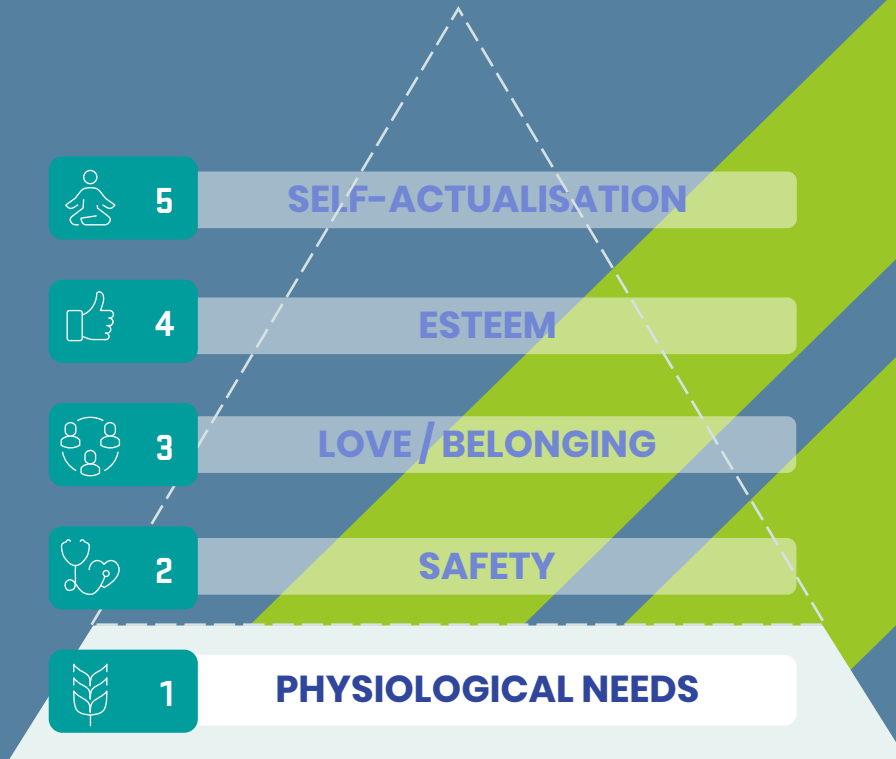
THE SOCIAL CRISIS (RISING COST OF LIVING, INCREASING SOCIAL INEQUALITIES, LACK OF SOCIAL MOBILITY...)

THE ENVIRONMENTAL CRISIS (CLIMATE CHANGE, AIR, WATER AND SOIL POLLUTION, LOSS OF BIODIVERSITY...)

THE IDENTITY CRISIS (DIFFICULTIES LINKED TO THE INTEGRATION OF MIGRANTS, LOSS OF TRADITIONAL VALUES...)

	13 Countries Average			6 High-Income Countries Average			7 Emerging Countries Average		
AVERAGE	50	40	10	48	41	11	51	40	9
BY GENDER									
Male	47	42	11	45	42	13	48	42	10
Female	52	39	9	51	40	9	52	39	9
BY AGE									
Less than 35 yo	51	39	10	51	38	11	51	39	10
From 35 to 55 yo	52	38	10	53	36	11	51	40	9
More than 55 yo	45	45	10	42	47	11	50	43	7
BY SOCIAL GRADE									
White collars	48	41	11	47	41	12	50	40	10
Blue collars	54	37	9	56	35	9	53	39	8
Inactive	52	39	9	52	39	9	52	39	9
Retirees	44	46	10	42	47	11	47	46	7
BY EDUCATION LEVEL									
Higher education	47	43	10	44	46	10	49	41	10
Medium education	49	42	9	49	41	10	49	43	8
Lower education	54	35	11	54	33	13	55	36	9
BY PARTY AFFILIATION									
Left	47	44	9	42	51	7	53	36	11
Center	50	42	8	47	43	10	51	42	7
Right	49	37	14	50	33	17	46	45	9
No affiliation	57	36	7	57	36	7	57	37	6

PHYSIOLOGICAL NEEDS



1

Would you say that you are satisfied or dissatisfied with these most basic priorities?

% « Satisfied »
(Very satisfied + somewhat satisfied)



COUNTRY
AVERAGE



FRANCE



UNITED
KINGDOM



GERMANY



ITALY



UNITED
STATES



JAPAN



BRAZIL



MEXICO



CHINA



INDIA



MOROCCO



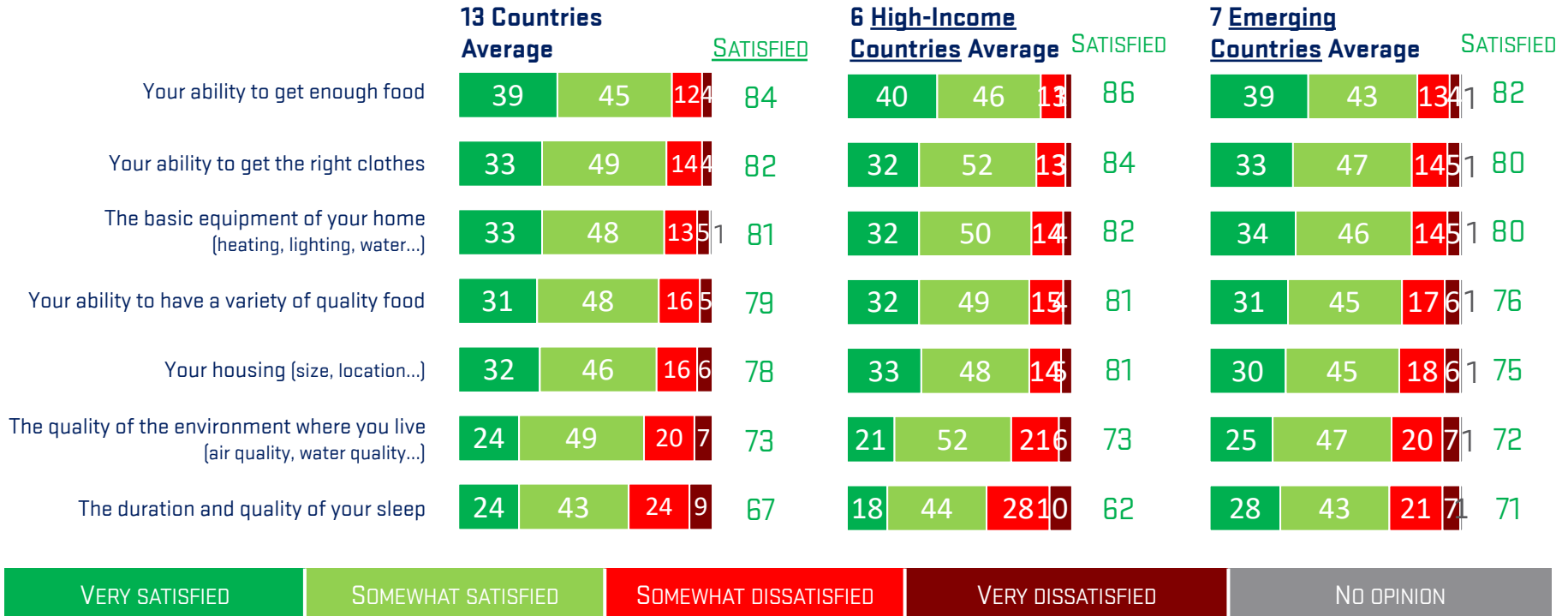
SAUDI
ARABIA



SOUTH
AFRICA

	COUNTRY AVERAGE	FRANCE	UNITED KINGDOM	GERMANY	ITALY	UNITED STATES	JAPAN	BRAZIL	MEXICO	CHINA	INDIA	MOROCCO	SAUDI ARABIA	SOUTH AFRICA
Your ability to get enough food	84	80	86	87	88	88	85	73	79	94	87	82	87	71
Your ability to get the right clothes	82	81	86	88	84	84	81	73	78	92	86	69	86	74
The basic equipment of your home (heating, lighting, water...)	81	80	85	82	82	89	76	81	81	91	87	64	85	69
Your ability to have a variety of quality food	79	75	85	79	85	85	75	66	74	85	85	73	86	69
Your housing (size, location...)	78	83	82	84	81	84	72	79	77	75	82	58	82	70
The quality of the environment where you live (air quality, water quality...)	73	73	79	73	61	82	70	73	70	76	82	59	82	62
The duration and quality of your sleep	67	59	61	65	62	67	56	65	67	71	83	70	76	66

Are you satisfied with how your most basic priorities are being met?



Level of satisfaction with basic priorities

% « Satisfied » (Very satisfied + somewhat satisfied)	COUNTRIES AVERAGE	GENDER		AGE			SOCIAL GRADE				EDUCATION LEVEL			PARTY AFFILIATION			
		MALE	FEMALE	LESS THAN 35 YO	FROM 35 TO 55 YO	MORE THAN 55 YO	WHITE COLLARS	BLUE COLLARS	INACTIVE	RETIRES	HIGHER EDUC.	MEDIUM EDUC.	LOWER EDUC.	LEFT	CENTER	RIGHT	NO AFFILIATION
Your ability to get enough food	84	84	83	82	83	88	87	79	79	90	88	84	77	82	82	86	79
Your ability to get the right clothes	82	84	79	80	80	87	85	78	76	89	86	81	76	81	81	85	75
The basic equipment of your home (heating, lighting, water...)	81	82	80	80	79	85	84	76	78	85	84	81	76	82	80	83	74
Your ability to have a variety of quality food	79	80	77	77	77	82	82	73	74	84	83	78	73	79	78	81	71
Your housing (size, location...)	78	79	76	74	75	86	80	72	73	86	80	78	74	80	77	81	71
The quality of the environment where you live (air quality, water quality...)	73	74	71	71	72	75	75	67	70	76	75	72	70	72	72	76	66
The duration and quality of your sleep	67	69	64	68	64	68	70	61	64	69	70	66	62	65	68	68	61

Level of satisfaction with basic priorities

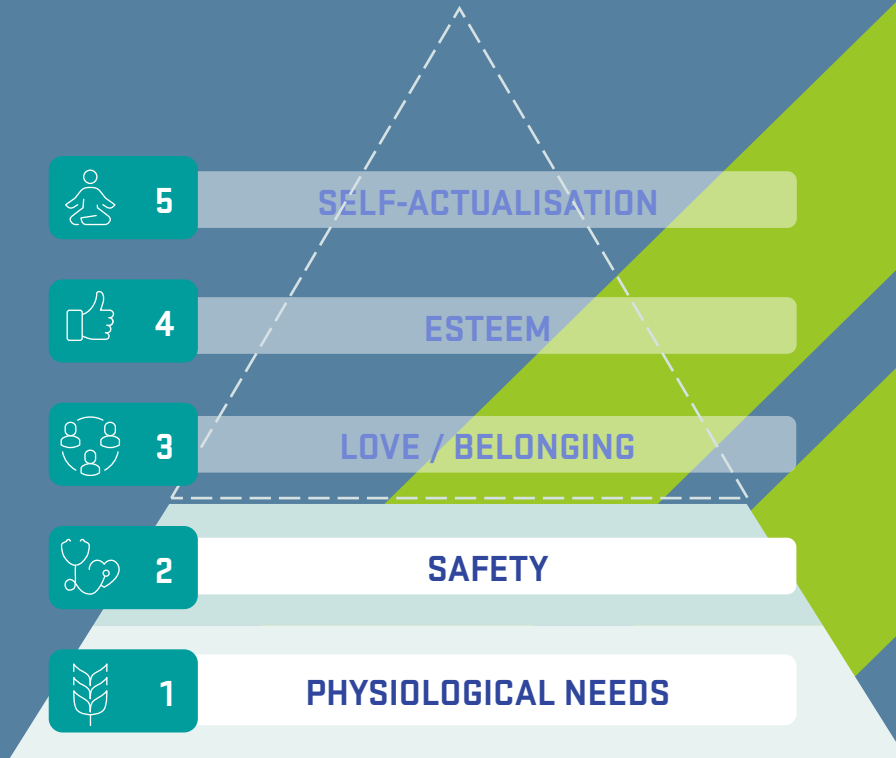
% « Satisfied » (Very satisfied + somewhat satisfied)		COUNTRIES AVERAGE		GENDER				AGE					SOCIAL GRADE								
		GLOBE		MALE		FEMALE		LESS THAN 35 YO		FROM 35 TO 55 YO		MORE THAN 55 YO	WHITE COLLARS		BLUE COLLARS		INACTIVE		RETIRES		
Your ability to get enough food	86	82	87	82	84	82	82	82	82	84	82	90	82	89	86	82	76	79	79	90	87
Your ability to get the right clothes	84	80	87	82	81	78	81	79	81	79	89	83	87	84	81	76	77	75	90	86	
The basic equipment of your home (heating, lighting, water...)	82	80	84	81	81	78	80	79	80	79	86	82	85	83	78	74	76	78	88	81	
Your ability to have a variety of quality food	81	76	83	77	78	76	79	76	77	77	85	76	84	81	76	71	73	74	87	79	
Your housing (size, location...)	81	75	83	76	79	73	73	74	78	73	88	81	83	79	76	68	72	73	90	77	
The quality of the environment where you live (air quality, water quality...)	73	72	75	74	71	70	70	72	72	72	76	72	74	75	71	65	69	72	78	72	
The duration and quality of your sleep	62	71	65	73	58	69	63	71	56	70	66	73	64	74	55	66	57	70	67	74	

6 HIGH-INCOME COUNTRIES
AVERAGE

7 EMERGING COUNTRIES
AVERAGE

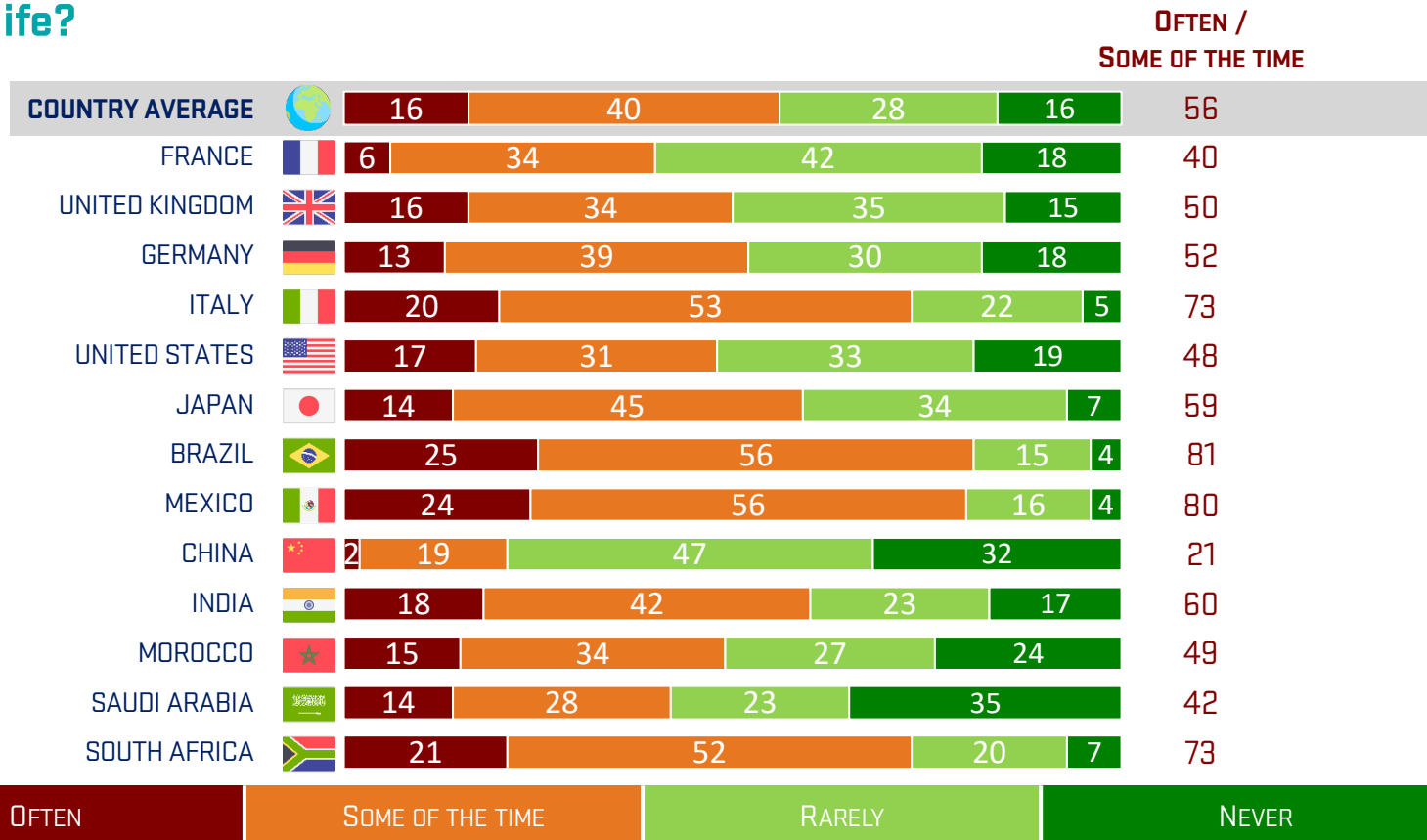
Question : Today, would you say that you are satisfied or dissatisfied with these different aspects of your life?

SAFETY NEEDS

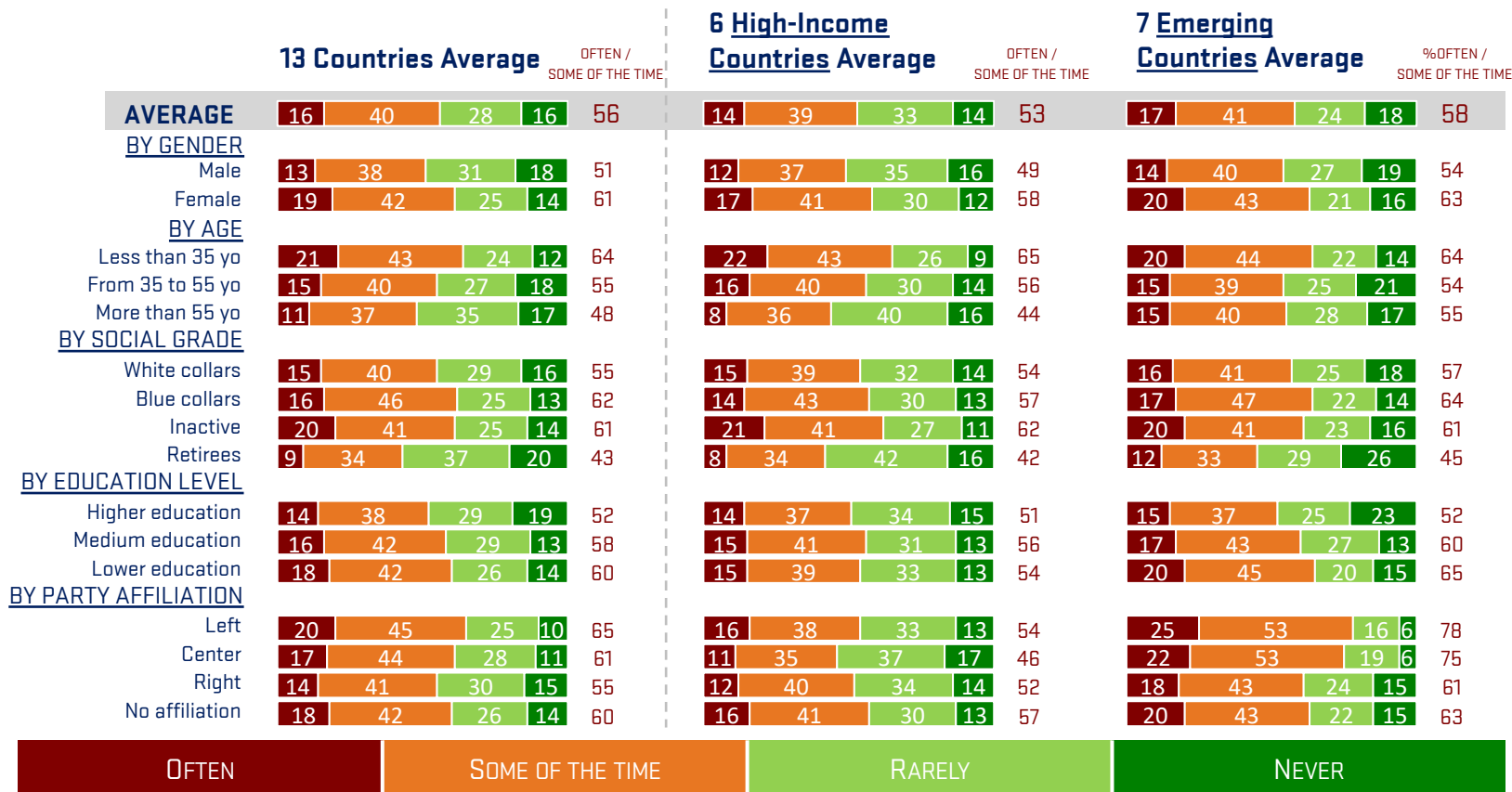


2

When it comes to the **priority of safety**, do you ever feel physically insecure in your everyday life?

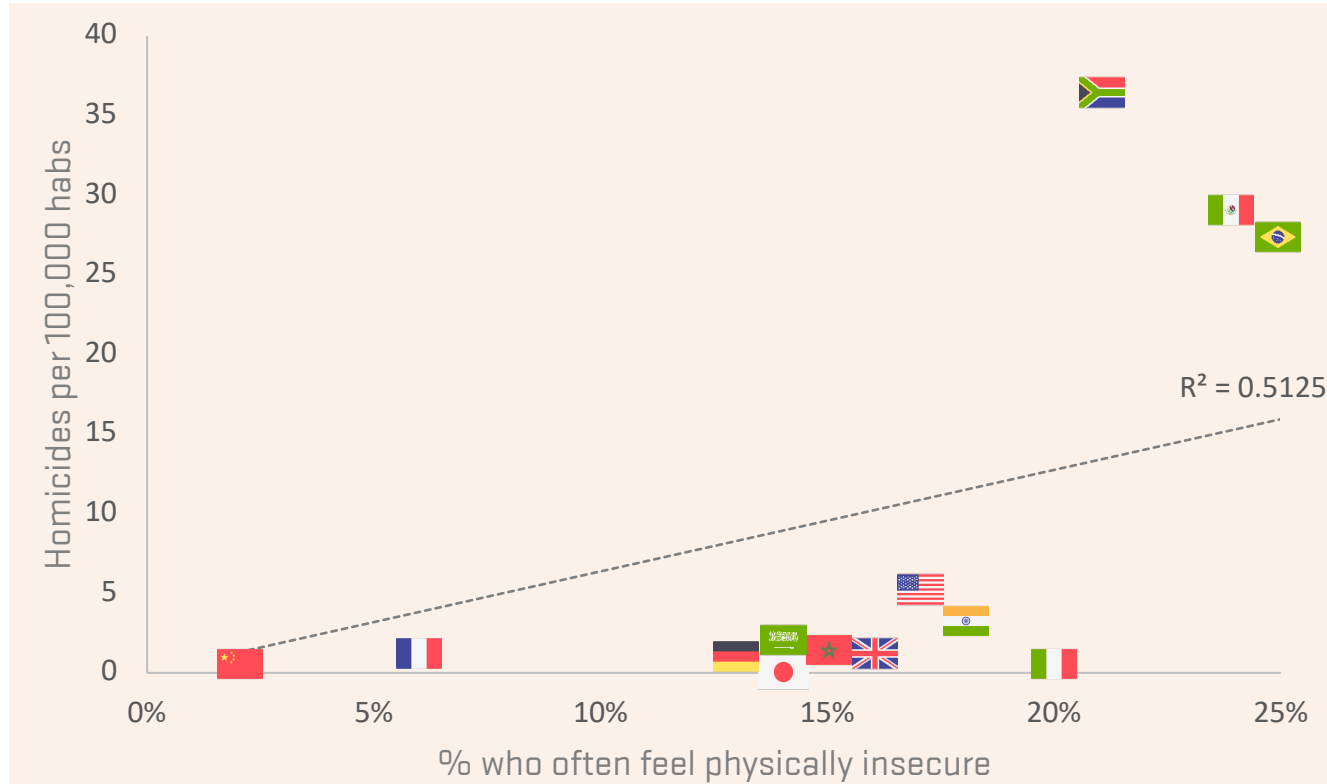


Safety as a priority: What is your sense of physical insecurity?

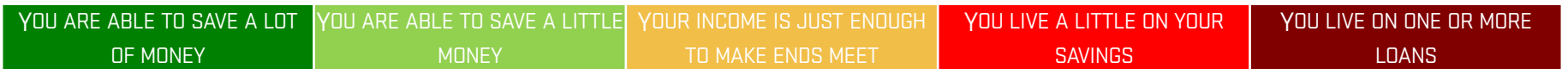
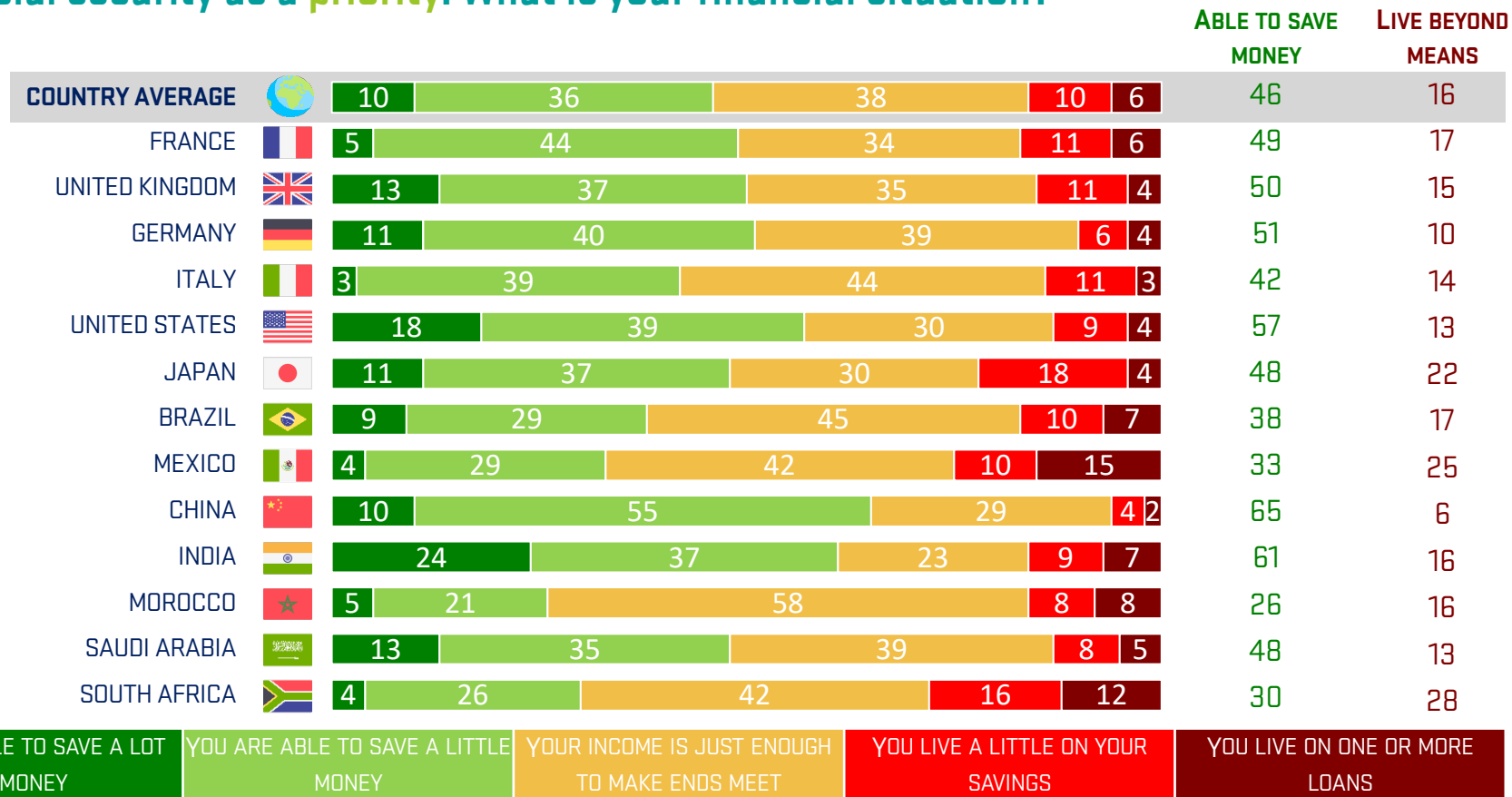


Question : In your everyday life, do you ever feel physically insecure? (Whole sample)

Relation between the sense of physical insecurity and the number of homicides per 100,000 habs



Financial security as a priority: What is your financial situation?



Question : Which phrase best describes your current financial situation? (Whole sample)

Financial security as a priority: What is your financial situation?

13 Countries Average

6 High-Income Countries Average

7 Emerging Countries Average

	13 Countries Average				%		6 High-Income Countries Average				%		7 Emerging Countries Average				%	
					ABLE TO SAVE MONEY	LIVE BEYOND MEANS					ABLE TO SAVE MONEY	LIVE BEYOND MEANS					ABLE TO SAVE MONEY	LIVE BEYOND MEANS
AVERAGE	10	36	38	106	46	16	10	40	35	114	50	15	10	33	40	98	43	17
BY GENDER																		
Male	11	37	36	106	48	16	12	41	33	101	53	14	11	34	38	98	45	17
Female	9	35	39	107	44	17	9	38	37	115	47	16	9	33	41	98	42	17
BY AGE																		
Less than 35 yo	12	37	35	115	49	16	12	39	33	115	51	16	12	35	37	115	47	16
From 35 to 55 yo	10	34	39	98	44	17	10	37	36	116	47	17	11	31	41	89	42	17
More than 55 yo	8	38	38	106	46	16	9	41	36	111	50	14	5	32	42	912	37	21
BY SOCIAL GRADE																		
White collars	14	43	31	75	57	12	16	46	28	71	62	10	13	41	34	66	54	12
Blue collars	7	30	45	108	37	18	6	34	41	118	40	19	8	27	49	88	35	16
Inactive	8	28	40	168	36	24	6	29	42	176	35	23	9	27	40	159	36	24
Retirees	6	38	40	106	44	16	8	42	36	111	50	14	2	30	48	713	32	20
BY EDUCATION LEVEL																		
Higher education	13	42	32	94	55	13	14	44	29	101	58	13	13	40	34	76	53	13
Medium education	8	33	42	107	41	17	7	38	40	105	45	15	9	27	45	109	36	19
Lower education	7	31	41	138	38	21	7	34	39	146	41	20	7	28	42	1211	35	23
BY PARTY AFFILIATION																		
Left	12	37	35	106	49	16	13	41	33	94	54	13	11	32	37	119	43	20
Center	9	34	36	129	43	21	11	45	30	101	56	14	8	24	42	1313	32	26
Right	12	36	37	106	48	15	11	39	35	111	50	15	13	30	40	98	43	17
No affiliation	5	29	44	139	34	22	6	33	40	147	39	21	4	24	48	1212	28	24

YOU ARE ABLE TO SAVE A LOT OF MONEY

YOU ARE ABLE TO SAVE A LITTLE MONEY

YOUR INCOME IS JUST ENOUGH TO MAKE ENDS MEET

YOU LIVE A LITTLE ON YOUR SAVINGS

YOU LIVE ON ONE OR MORE LOANS

Question : Which phrase best describes your current financial situation? (Whole sample)

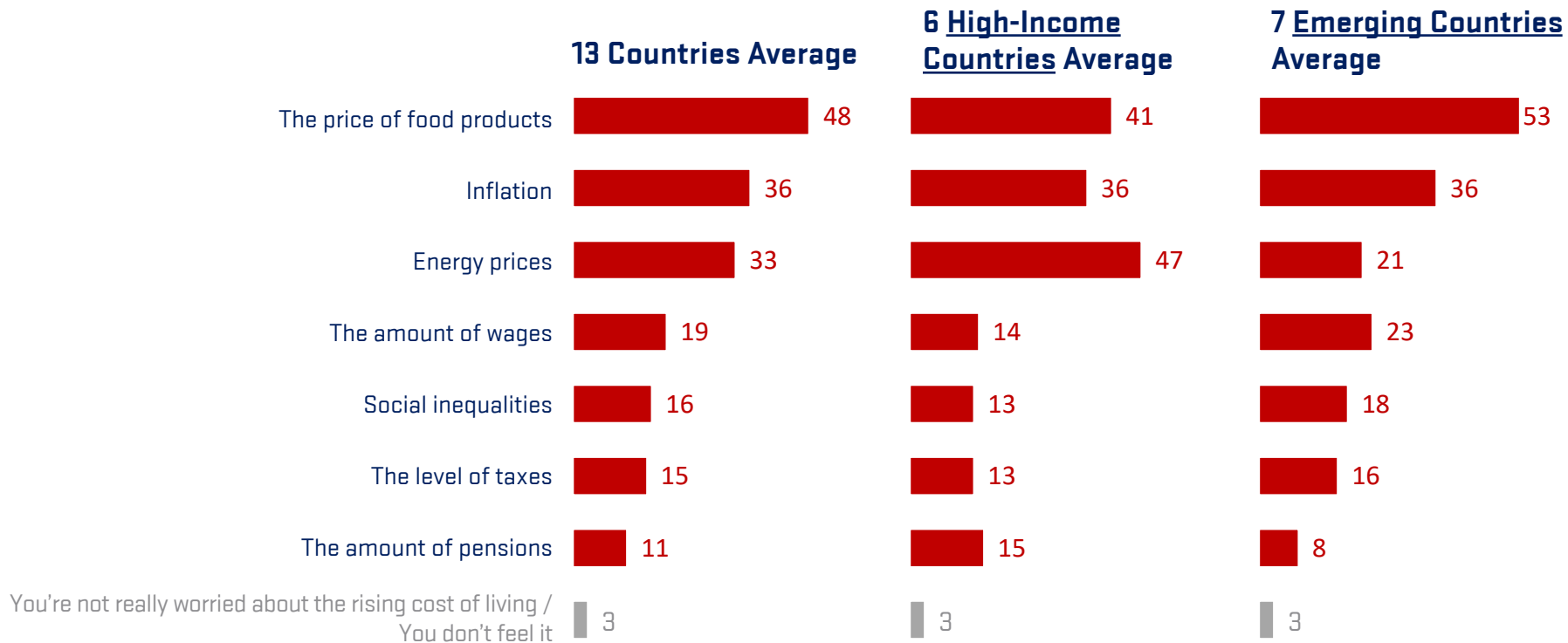
There has been a lot of talk over the past several months about the difficulties associated with the rising cost of living. Which concern has become your priority?



	COUNTRY AVERAGE	FRANCE	UNITED KINGDOM	GERMANY	ITALY	UNITED STATES	JAPAN	BRAZIL	MEXICO	CHINA	INDIA	MOROCCO	SAUDI ARABIA	SOUTH AFRICA
The price of food products	48	42	36	39	39	46	44	57	62	36	38	65	48	67
Inflation	36	40	33	42	26	55	22	42	54	46	25	15	25	45
Energy prices	33	46	72	51	57	27	28	12	9	15	24	36	21	34
The amount of wages	19	19	11	6	19	13	19	22	28	34	14	29	20	18
Social inequalities	16	12	11	20	13	11	12	29	11	21	26	16	11	12
The level of taxes	15	7	8	10	19	17	17	18	15	6	27	6	29	11
The amount of pensions	11	19	8	15	11	7	29	3	8	13	11	11	8	4
You're not really worried about the rising cost of living / You don't feel it	3	3	3	2	2	5	5	1	1	7	5	2	5	1

Up to 2 answers per respondent

Which concern related to cost of living is your priority?



Question : There has been a lot of talk over the past several months about the difficulties associated with the rising cost of living. Among the following aspects related to this subject, which ones worry you the most? (Whole sample) - Up to 2 answers per respondent

Which concern related to cost of living is your priority?



COUNTRIES AVERAGE

GENDER

AGE

SOCIAL GRADE

EDUCATION LEVEL

PARTY AFFILIATION

		MALE	FEMALE	LESS THAN 35 YO	FROM 35 TO 55 YO	MORE THAN 55 YO	WHITE COLLARS	BLUE COLLARS	INACTIVE	RETIREES	HIGHER EDUC.	MEDIUM EDUC.	LOWER EDUC.	LEFT	CENTER	RIGHT	NO AFFILIATION
The price of food products	48	44	51	47	48	47	43	50	54	45	42	50	52	48	50	46	53
Inflation	36	37	35	35	36	37	41	32	32	36	37	36	35	39	44	37	30
Energy prices	33	34	32	25	34	43	34	29	28	45	34	33	32	35	34	38	34
The amount of wages	19	18	20	25	22	8	21	27	19	6	21	19	17	19	15	15	21
Social inequalities	16	16	15	17	16	14	16	16	16	14	16	17	13	20	15	12	13
The level of taxes	15	14	15	18	15	10	16	15	16	9	16	14	13	12	14	17	13
The amount of pensions	11	12	11	7	8	21	9	11	8	25	12	11	12	11	8	15	11
You're not really worried about the rising cost of living / You don't feel it	3	4	3	4	3	3	3	2	3	4	4	2	3	2	2	3	4

Question : There has been a lot of talk over the past several months about the difficulties associated with the rising cost of living. Among the following aspects related to this subject, which ones worry you the most? (Whole sample) - Up to 2 answers per respondent

Which concern related to cost of living is your priority?



COUNTRIES AVERAGE



GENDER



AGE



SOCIAL GRADE



EDUCATION LEVEL



PARTY AFFILIATION

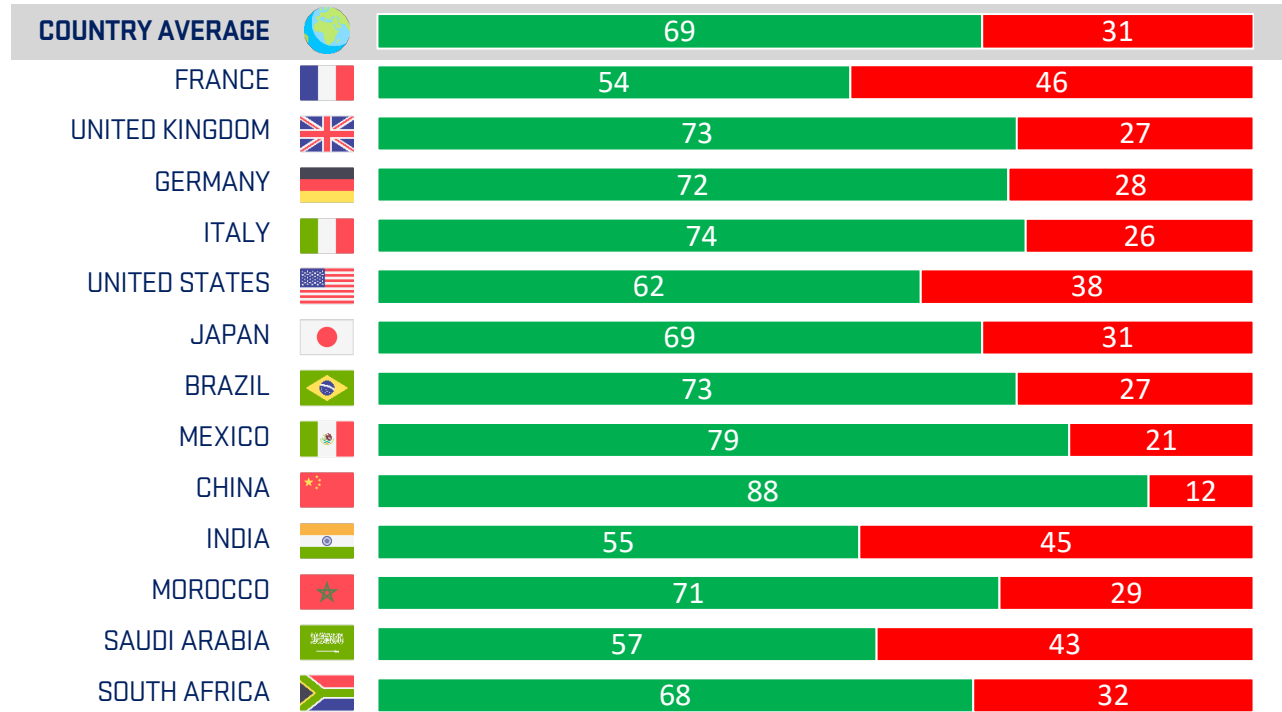
6 HIGH-INCOME COUNTRIES AVERAGE

7 EMERGING COUNTRIES AVERAGE

	COUNTRIES AVERAGE		GENDER		AGE						SOCIAL GRADE						EDUCATION LEVEL			PARTY AFFILIATION														
			MALE	FEMALE	LESS THAN 35 YO	FROM 35 TO 55 YO	MORE THAN 55 YO	WHITE COLLARS	BLUE COLLARS	INACTIVE	RETIREES	HIGHER EDUC.	MEDIUM EDUC.	LOWER EDUC.	LEFT	CENTER	RIGHT	NO AFFILIATION																
The price of food products	41	53	36	50	46	56	38	53	42	52	42	56	35	50	42	55	49	56	41	54	35	47	42	58	47	57	40	57	39	59	41	55	43	63
Inflation	36	36	37	38	35	34	39	34	36	37	35	40	41	41	31	32	33	31	36	37	37	37	36	35	35	35	38	41	46	42	38	34	29	30
Energy prices	47	21	49	22	45	21	36	19	48	23	53	23	48	23	39	22	44	18	55	24	49	22	48	20	43	22	49	19	43	25	48	21	44	24
The amount of wages	14	23	13	23	15	24	23	26	19	25	5	14	17	24	23	30	14	22	2	12	16	25	14	24	13	20	15	22	13	18	11	22	17	25
Social inequalities	13	18	14	18	13	17	15	19	13	17	12	17	14	18	14	18	13	18	12	16	14	18	14	20	11	15	19	21	13	17	8	17	10	16
The level of taxes	13	16	13	15	13	17	18	18	14	15	9	12	15	16	15	15	13	18	8	9	13	18	14	15	12	14	9	16	13	15	16	20	15	12
The amount of pensions	15	8	17	9	13	8	9	6	10	7	24	16	12	7	14	9	12	5	25	24	15	9	13	8	16	8	14	7	10	5	17	10	16	6
You're not really worried about the rising cost of living / You don't feel it	3	3	4	4	3	3	5	3	2	3	3	4	3	3	3	2	3	3	3	6	4	4	3	2	3	3	2	1	4	-	3	3	5	3

Question : There has been a lot of talk over the past several months about the difficulties associated with the rising cost of living. Among the following aspects related to this subject, which ones worry you the most? (Whole sample) - Up to 2 answers per respondent

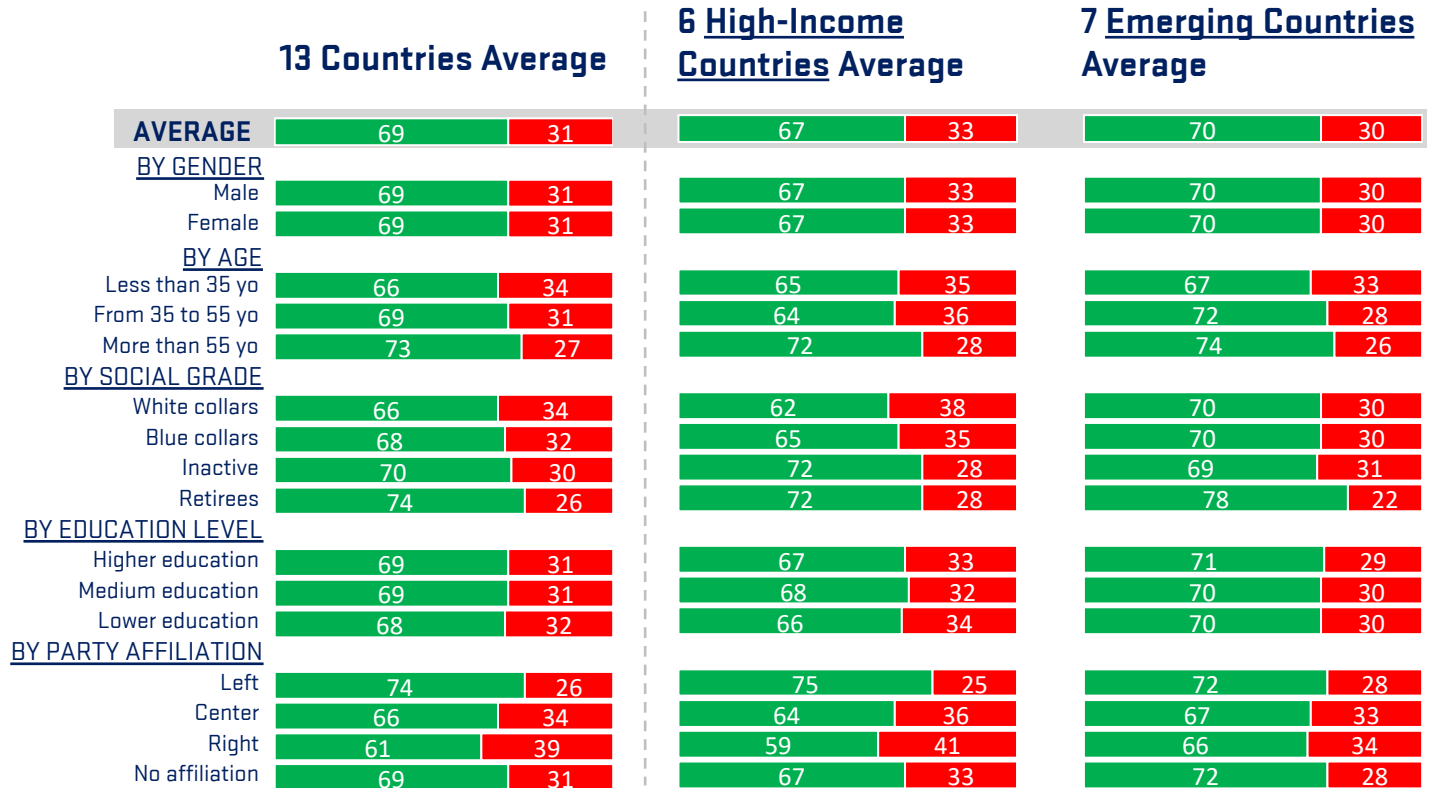
In your country, what should be the **priority** for the social protection system (unemployment assurance, pensions...) and the health care system?



THEY SHOULD BE STRENGTHENED
 BECAUSE THERE IS NOT ENOUGH
 SOLIDARITY WITH THE PEOPLE
 WHO NEED IT

THEY SHOULD BE REDUCED
 BECAUSE IT IS TOO EXPENSIVE
 AND ENCOURAGES ASSISTANCE

In your country, what should be the priority for the social protection and the health care system?



THEY SHOULD BE STRENGTHENED BECAUSE THERE IS NOT ENOUGH SOLIDARITY WITH THE PEOPLE WHO NEED IT

THEY SHOULD BE REDUCED BECAUSE IT IS TOO EXPENSIVE AND ENCOURAGES ASSISTANCE

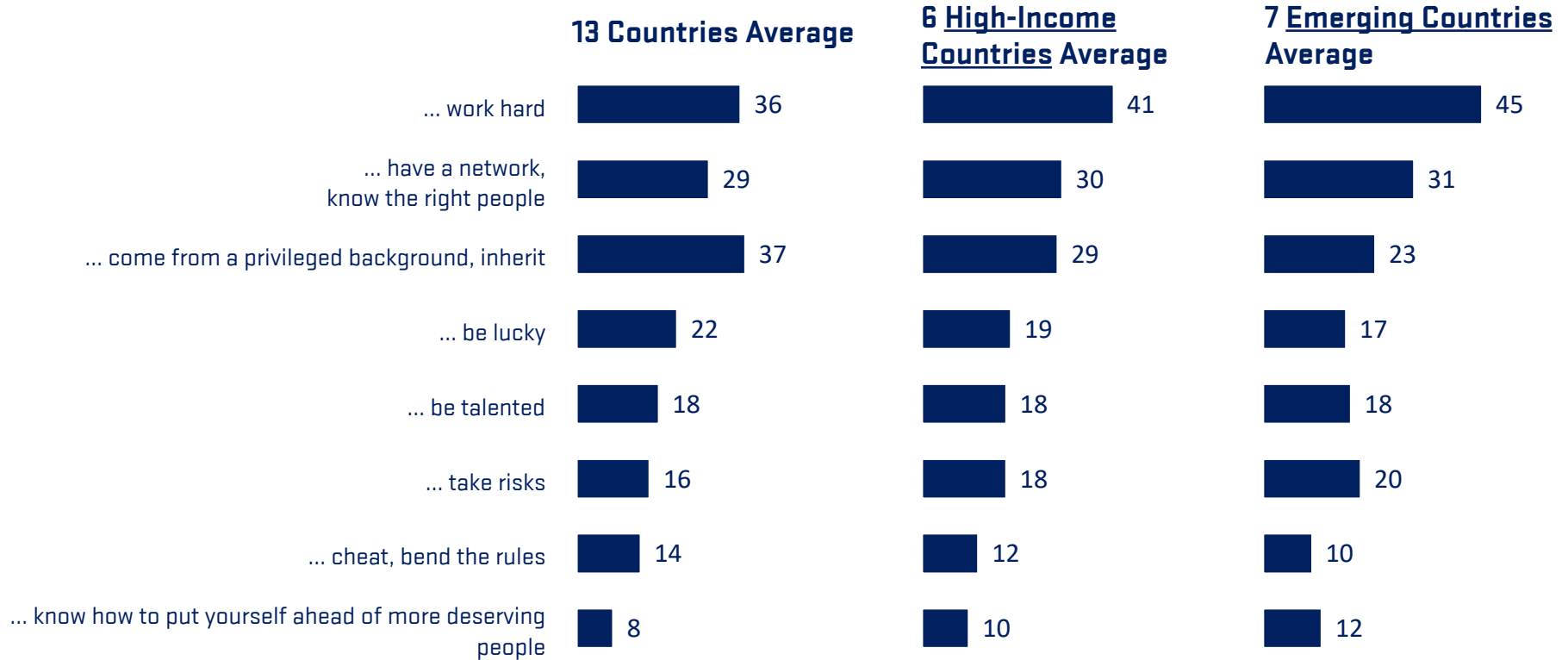
What should be your priority if you want to get rich?



	COUNTRY AVERAGE	FRANCE	UNITED KINGDOM	GERMANY	ITALY	UNITED STATES	JAPAN	BRAZIL	MEXICO	CHINA	INDIA	MOROCCO	SAUDI ARABIA	SOUTH AFRICA
... work hard	41	33	37	28	25	51	43	43	59	47	44	35	45	40
... have a network, know the right people	30	29	34	26	32	31	24	26	36	38	20	29	21	50
... come from a privileged background, inherit	29	44	41	44	36	28	28	35	15	21	15	30	15	27
... be lucky	19	16	18	29	27	14	26	18	7	23	18	21	21	8
... be talented	18	11	14	15	17	19	30	15	22	10	26	18	25	8
... take risks	18	18	17	14	13	21	11	19	25	18	20	17	15	28
... cheat, bend the rules	12	22	13	20	17	10	4	9	4	4	12	16	10	17
... know how to put yourself ahead of more deserving people	10	8	9	8	8	9	8	6	6	24	17	12	14	8

Up to 2 answers per respondent

What should be your **priority** if you want to get rich?



Up to 2 answers per respondent

What should be your priority if you want to get rich?



COUNTRIES
AVERAGE



GENDER



AGE



SOCIAL GRADE



EDUCATION LEVEL



PARTY AFFILIATION

		GENDER		AGE			SOCIAL GRADE				EDUCATION LEVEL			PARTY AFFILIATION			
	COUNTRIES AVERAGE	MALE	FEMALE	LESS THAN 35 YO	FROM 35 TO 55 YO	MORE THAN 55 YO	WHITE COLLARS	BLUE COLLARS	INACTIVE	RETIREES	HIGHER EDUC.	MEDIUM EDUC.	LOWER EDUC.	LEFT	CENTER	RIGHT	NO AFFILIATION
... work hard	41	41	40	39	40	45	41	40	41	43	40	39	43	37	44	47	36
... have a network, know the right people	30	29	32	32	31	28	33	29	30	27	33	30	28	33	35	27	29
... come from a privileged background, inherit	29	26	33	29	29	30	29	30	28	32	28	31	28	34	32	25	33
... be lucky	19	20	18	18	19	20	17	18	20	24	18	20	19	17	15	19	20
... be talented	18	20	16	17	17	21	18	19	17	19	19	18	15	15	17	23	16
... take risks	18	19	17	19	18	17	20	18	17	16	18	18	18	20	20	19	16
... cheat, bend the rules	12	13	11	11	12	13	11	13	11	14	11	13	12	14	11	11	15
... know how to put yourself ahead of more deserving people	10	10	10	12	12	7	12	10	10	7	13	9	9	9	8	9	8

Up to 2 answers per respondent

Top ways to get rich according to citizens

	6 HIGH-INCOME COUNTRIES AVERAGE		COUNTRIES AVERAGE		GENDER		AGE					SOCIAL GRADE					EDUCATION LEVEL			PARTY AFFILIATION														
	MALE	FEMALE	LESS THAN 35 YO	FROM 35 TO 55 YO	MORE THAN 55 YO	WHITE COLLARS	BLUE COLLARS	INACTIVE	RETIRES	HIGHER EDUC.	MEDIUM EDUC.	LOWER EDUC.	LEFT	CENTER	RIGHT	OTHER/ NO AFFILIATION																		
... work hard	36	45	36	46	36	44	31	43	34	44	41	50	36	44	33	45	33	45	41	45	35	44	33	44	40	46	32	42	40	48	44	51	32	41
... have a network, know the right people	29	31	28	30	31	33	33	31	29	32	27	30	31	34	30	28	29	30	25	29	33	33	29	30	25	31	32	34	34	36	26	29	27	32
... come from a privileged background, inherit	37	23	33	19	40	26	39	24	38	22	35	22	36	23	38	24	39	21	35	25	36	21	38	26	36	21	43	25	37	27	29	18	38	27
... be lucky	22	17	22	17	21	16	21	16	22	17	22	17	19	15	24	14	22	18	24	24	19	17	24	17	22	17	21	13	18	11	22	15	23	17
... be talented	18	18	19	20	16	16	17	16	17	17	19	23	18	17	17	20	17	16	18	21	18	20	18	18	17	13	15	16	20	15	23	24	14	17
... take risks	16	20	17	21	14	19	16	21	15	20	16	18	18	21	13	22	14	19	15	17	17	19	15	21	15	21	16	26	17	22	18	21	12	19
... cheat, bend the rules	14	10	17	11	12	10	14	10	15	10	14	10	14	9	16	12	13	10	16	10	13	10	16	10	14	11	15	11	11	12	12	9	16	13
... know how to put yourself ahead of more deserving people	8	12	9	12	7	13	11	13	9	13	6	9	10	14	8	11	9	12	5	10	10	15	8	10	6	11	9	9	8	9	8	11	9	8

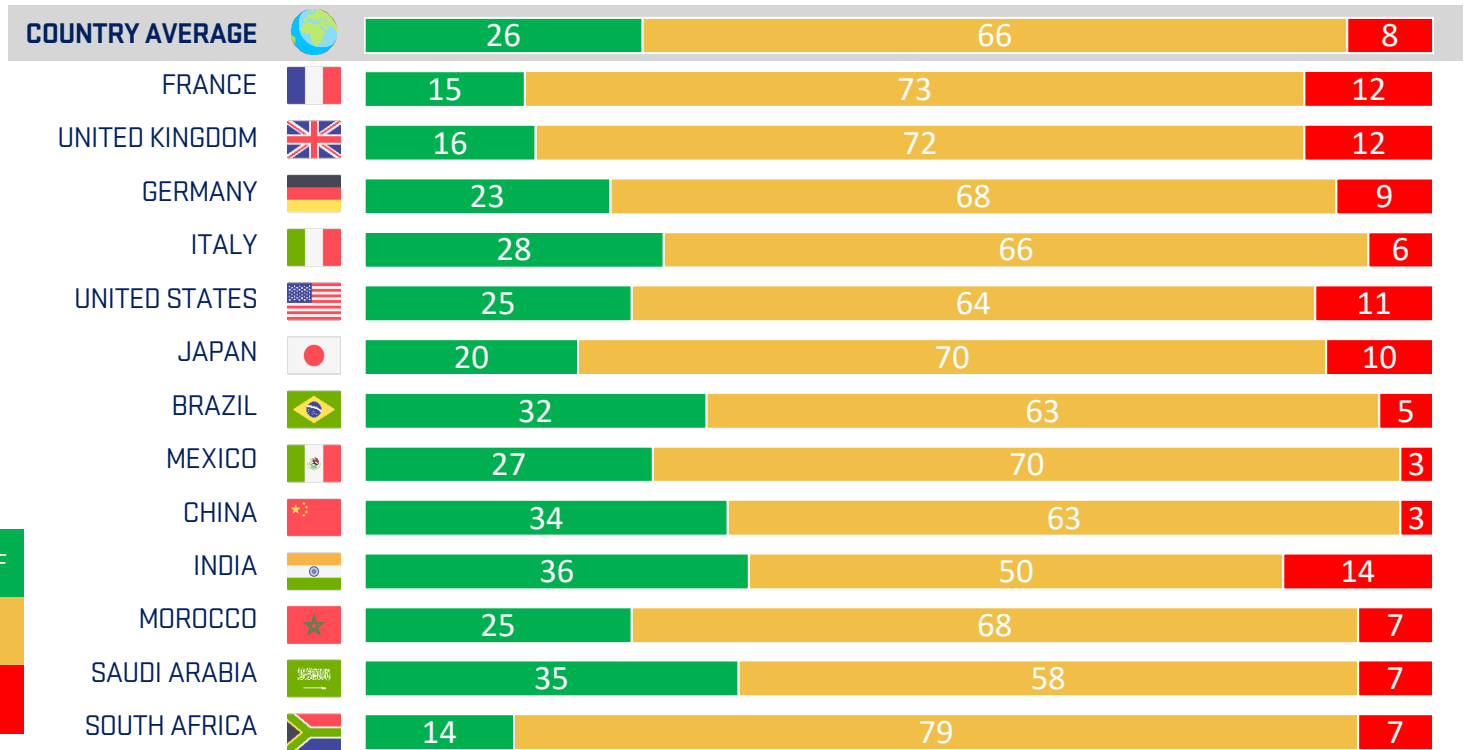
Question : In today's society, would you say that in order to get rich, you must first of all... (Whole sample)

When it comes to work, what is your priority?

... A WAY TO FULFILL YOURSELF

... A WAY TO EARN A LIVING

... A PAINFUL CONSTRAINT

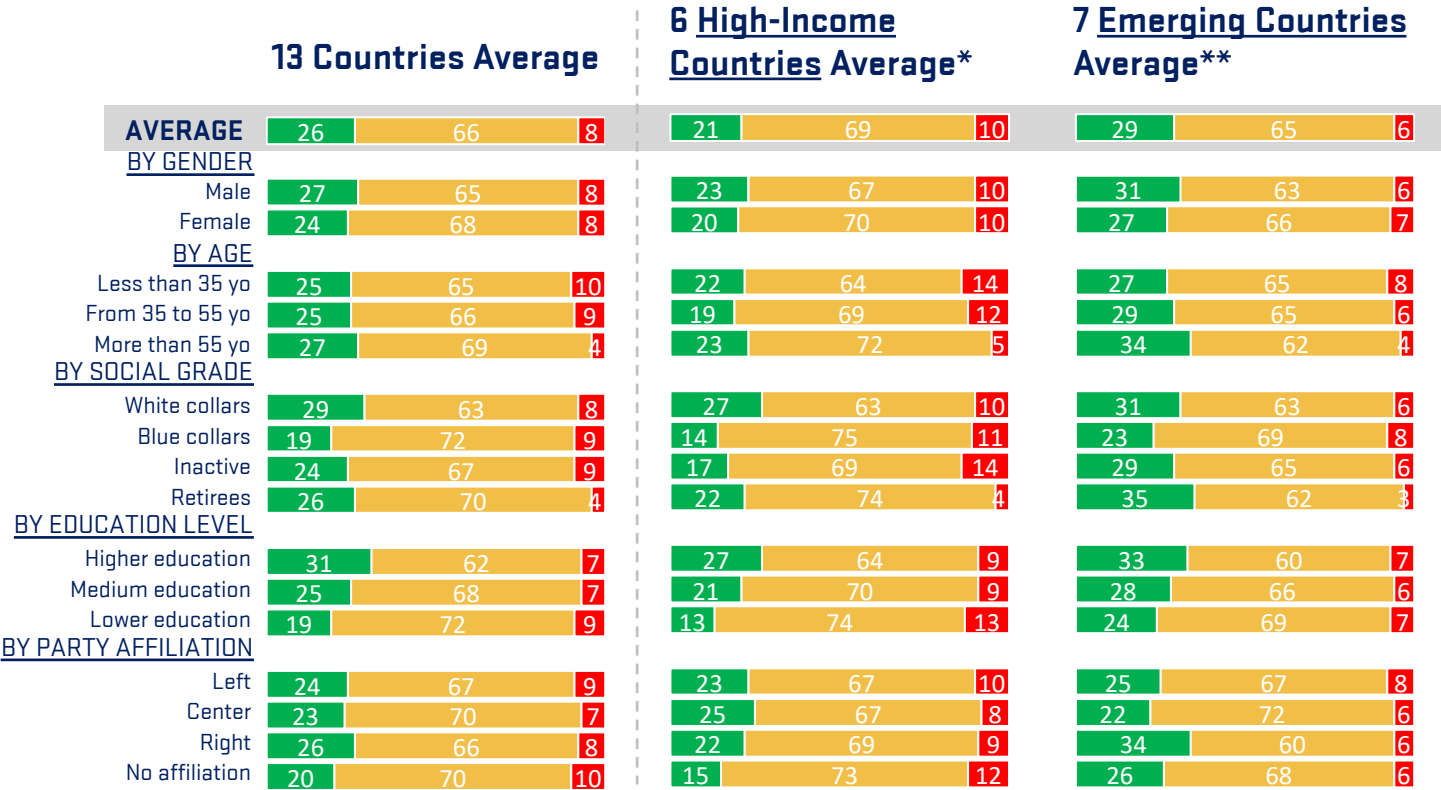


When it comes to work, what is your priority?

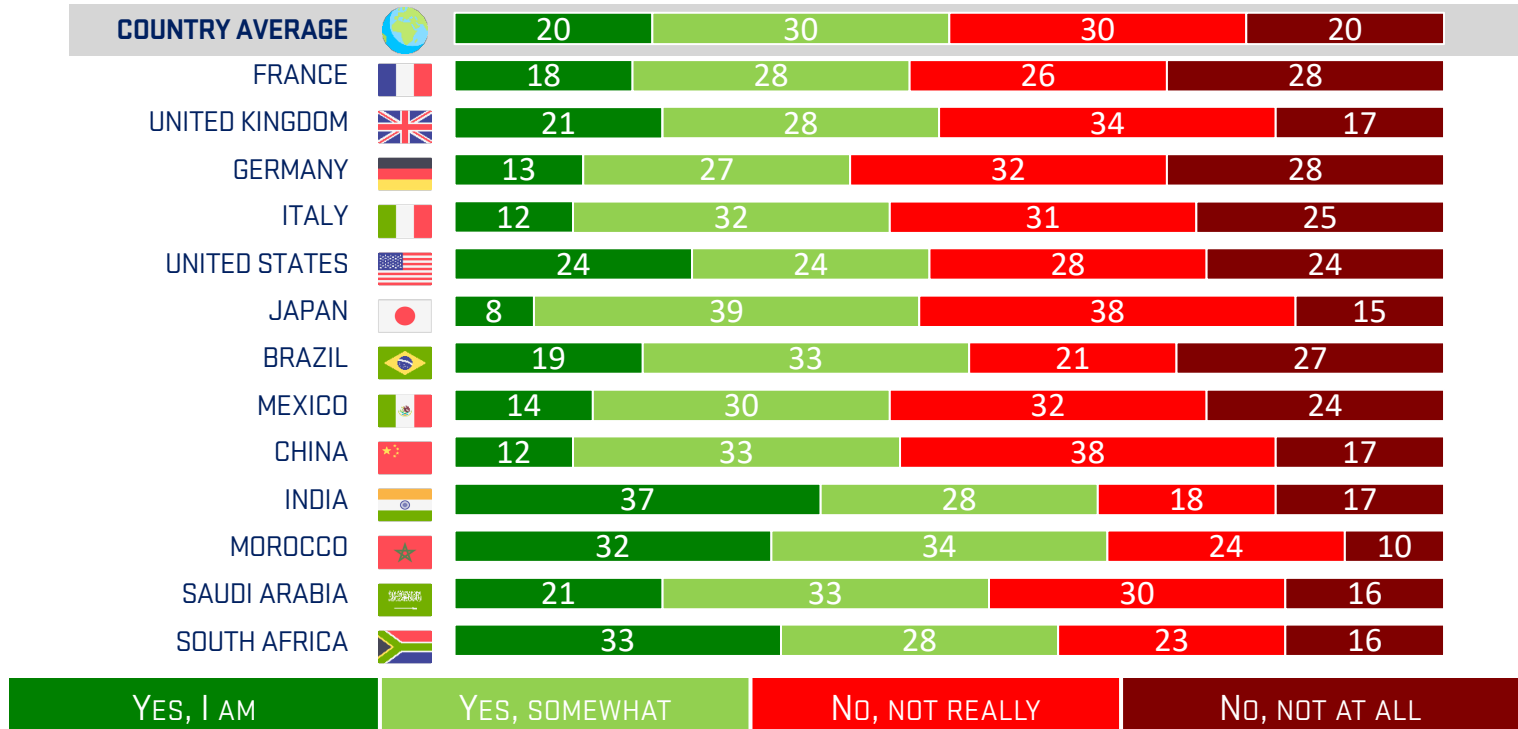
... A WAY TO FULFILL YOURSELF

... A WAY TO EARN A LIVING

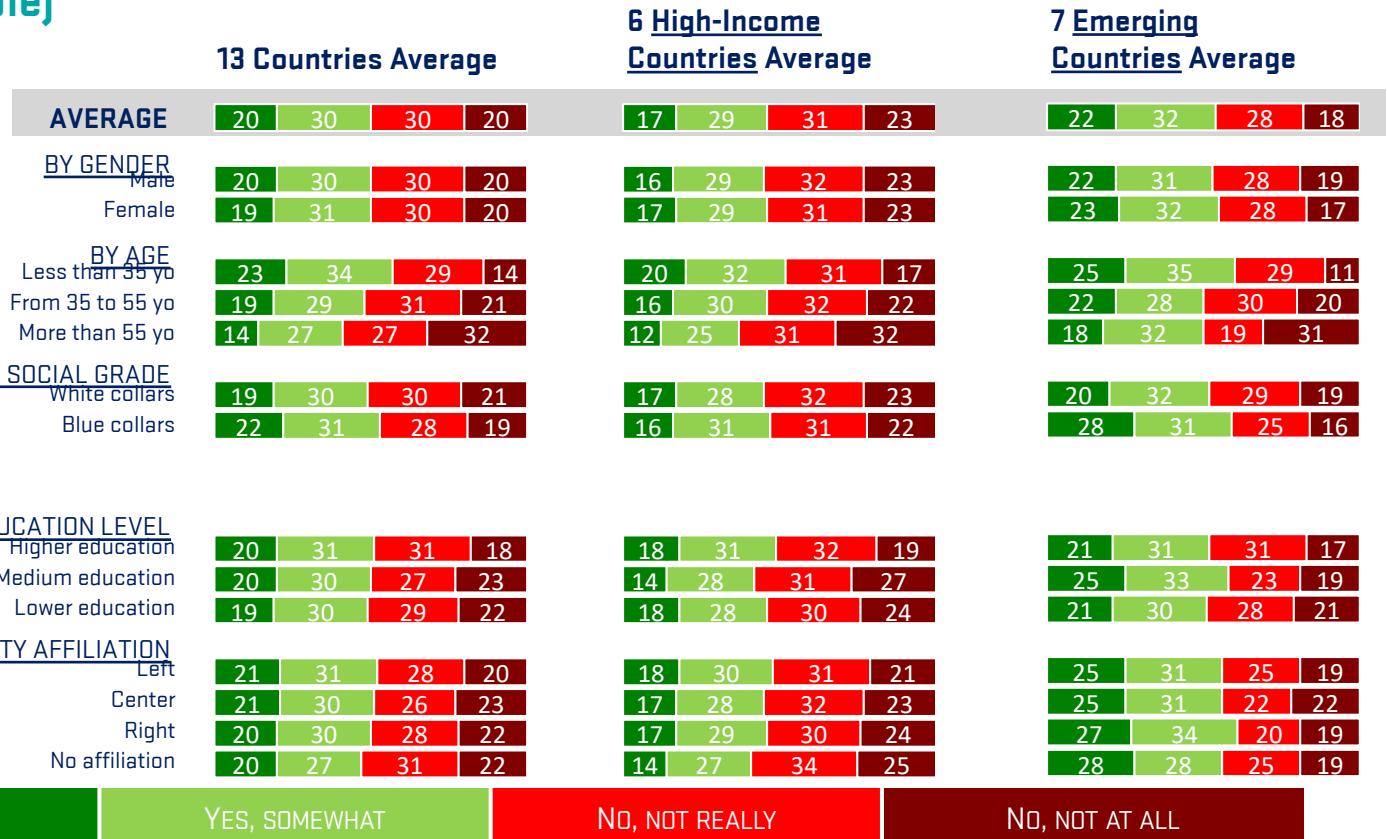
... A PAINFUL CONSTRAINT



Are you seriously thinking of leaving your current job in the near future? (to employed people)



Are you seriously thinking of leaving your current job in the near future? (to employed people)



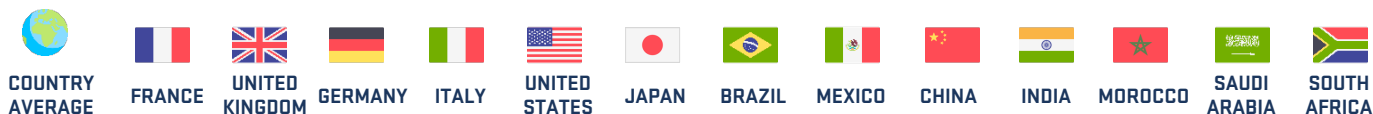
YES, I AM

YES, SOMEWHAT

NO, NOT REALLY

NO, NOT AT ALL

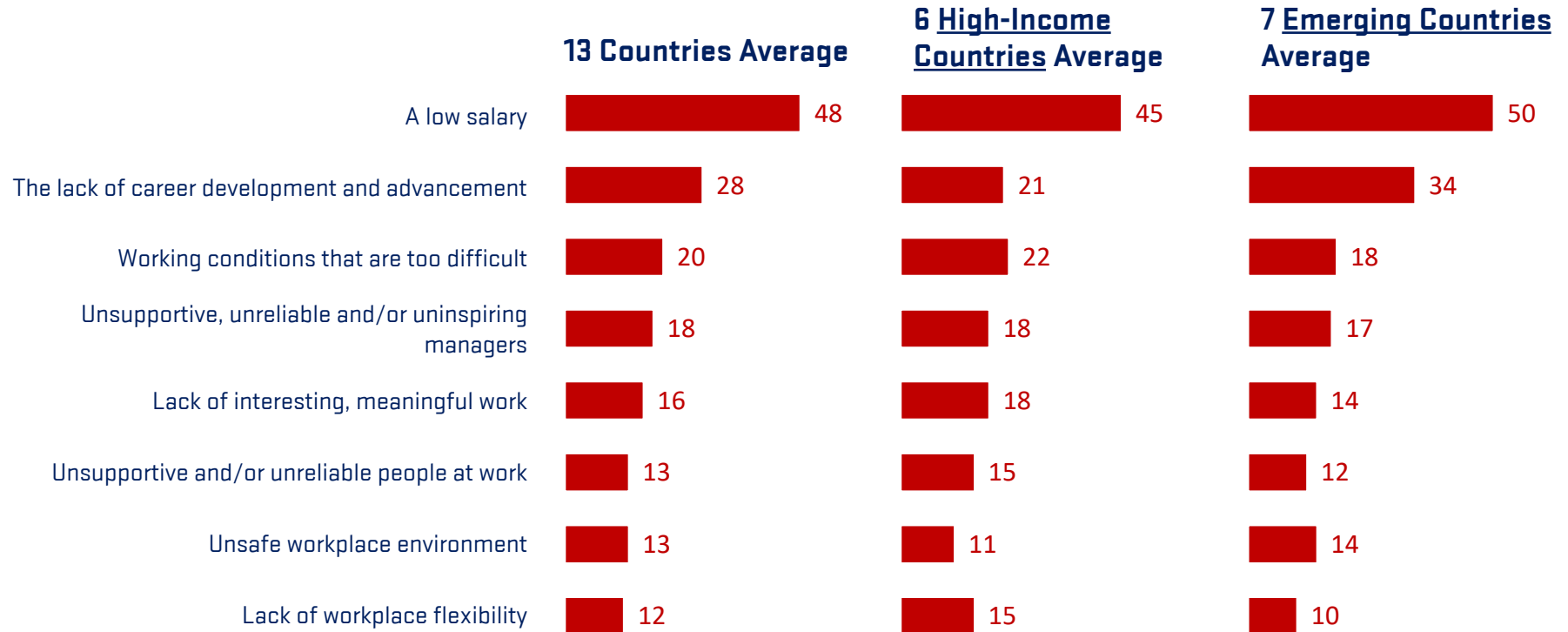
What are the priorities that might lead you to leave your current job?









	COUNTRY AVERAGE	FRANCE	UNITED KINGDOM	GERMANY	ITALY	UNITED STATES	JAPAN	BRAZIL	MEXICO	CHINA	INDIA	MOROCCO	SAUDI ARABIA	SOUTH AFRICA
A low salary	48	43	48	46	50	39	43	51	56	49	37	57	36	61
The lack of career development and advancement	28	26	21	18	19	26	15	30	31	39	29	34	32	37
Working conditions that are too difficult	20	26	22	22	26	17	18	18	17	14	26	24	16	16
Unsupportive, unreliable and/or uninspiring managers	18	19	19	21	14	20	16	17	12	19	21	9	27	14
Lack of interesting, meaningful work	16	19	19	17	14	22	18	11	11	18	16	11	14	12
Unsupportive and/or unreliable people at work	13	14	12	15	14	17	21	14	14	10	12	11	12	10
Unsafe workplace environment	13	12	9	10	16	13	7	12	17	19	12	8	14	14
Lack of workplace flexibility	12	12	15	14	12	15	19	9	11	11	13	7	12	9

Up to 2 answers per respondent







Priorities that might cause employed citizens to quit



Priorities that might cause employed citizens to quit

	 COUNTRIES AVERAGE	 GENDER		 AGE			 SOCIAL GRADE		 EDUCATION LEVEL			 PARTY AFFILIATION			
		MALE	FEMALE	LESS THAN 35 YO	FROM 35 TO 55 YO	MORE THAN 55 YO	WHITE COLLARS	BLUE COLLARS	HIGHER EDUC.	MEDIUM EDUC.	LOWER EDUC.	LEFT	CENTER	RIGHT	NO AFFILIATION
A low salary	48	46	49	49	48	44	44	55	43	51	52	47	48	47	53
The lack of career development and advancement	28	29	27	33	27	19	29	24	31	26	23	27	32	23	23
Working conditions that are too difficult	20	19	20	17	20	21	19	21	18	21	20	21	17	23	19
Unsupportive, unreliable and/or uninspiring managers	18	19	17	17	18	19	19	15	18	17	17	17	16	17	15
Lack of interesting, meaningful work	16	17	15	16	15	19	17	13	18	15	13	17	17	15	15
Unsupportive and/or unreliable people at work	13	13	14	12	14	13	13	14	13	13	15	13	15	15	14
Unsafe workplace environment	13	14	11	12	13	13	14	11	14	11	12	12	13	13	10
Lack of workplace flexibility	12	12	13	14	11	11	13	10	14	12	10	14	12	14	10

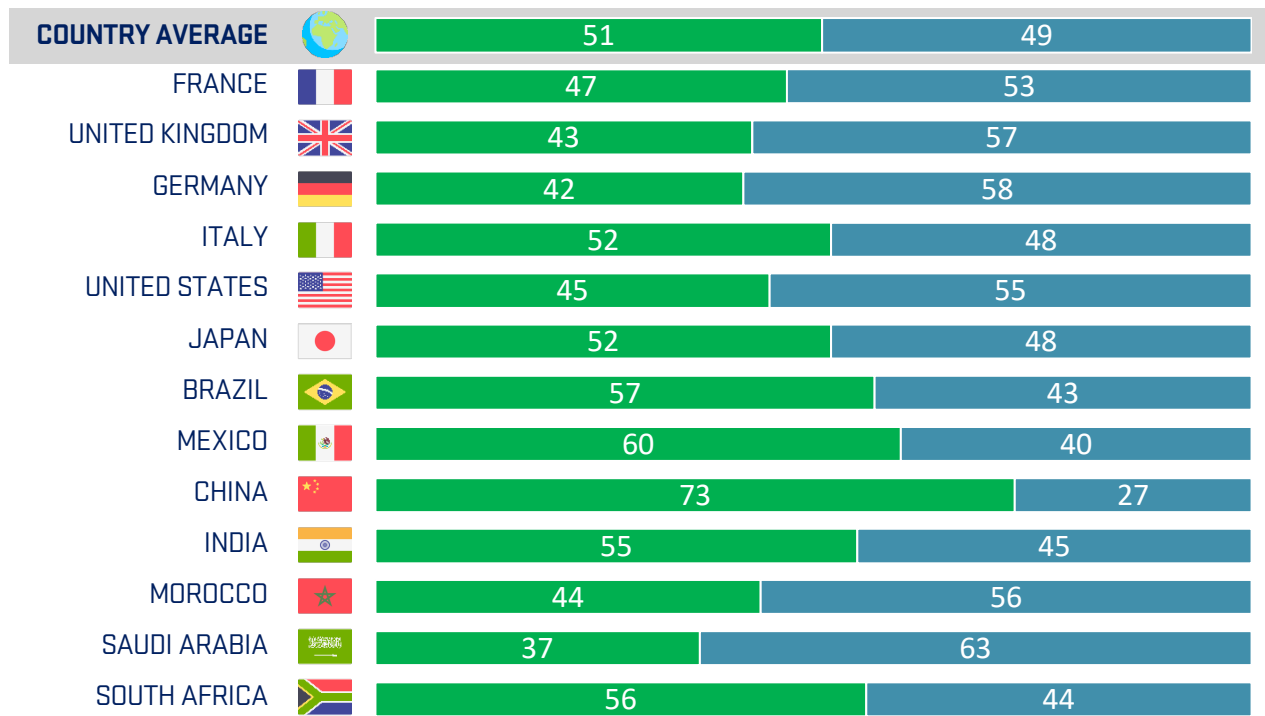
Priorities that might cause employed citizens to quit

	 COUNTRIES AVERAGE		 GENDER				 AGE					 SOCIAL GRADE				 EDUCATION LEVEL					 PARTY AFFILIATION									
	6 HIGH-INCOME COUNTRIES AVERAGE		7 EMERGING COUNTRIES AVERAGE		MALE	FEMALE	LESS THAN 35 YO	FROM 35 TO 55 YO	MORE THAN 55 YO	WHITE COLLARS	BLUE COLLARS	HIGHER EDUC.	MEDIUM EDUC.	LOWER EDUC.	LEFT	CENTER	RIGHT	OTHER/ NO AFFILIATION												
A low salary	45	50	42	49	48	51	48	50	44	51	43	45	41	47	53	56	39	46	50	53	48	57	42	54	36	57	47	45	48	59
The lack of career development and advancement	21	34	22	33	20	35	26	38	22	32	13	30	23	34	16	33	25	36	20	32	14	32	23	32	27	36	18	38	18	30
Working conditions that are too difficult	22	18	21	18	22	18	19	16	23	18	23	19	20	18	24	18	20	17	23	18	22	18	23	19	23	13	22	25	19	18
Unsupportive, unreliable and/or uninspiring managers	18	17	19	18	18	15	17	16	18	17	21	17	19	19	17	13	19	18	18	15	18	17	19	15	19	13	18	15	18	12
Lack of interesting, meaningful work	18	14	20	14	17	13	18	14	18	13	21	17	20	14	15	12	22	14	16	15	15	11	21	12	22	13	16	13	17	11
Unsupportive and/or unreliable people at work	15	12	14	12	17	12	13	12	17	12	15	10	15	12	17	12	15	12	14	11	17	12	14	12	20	10	15	14	16	10
Unsafe workplace environment	11	14	13	15	9	13	12	12	11	15	10	18	12	15	10	12	12	16	11	12	11	13	11	14	10	15	12	13	11	8
Lack of workplace flexibility	15	10	16	9	14	12	17	12	14	9	12	10	16	11	11	8	17	11	13	11	12	8	16	11	16	9	15	9	11	10

About the social and environmental crises, what should be our priority?

IN THE FACE OF THE ENVIRONMENTAL EMERGENCY, WE MUST TAKE QUICK AND DECISIVE ACTION, EVEN IF IT MEANS ASKING PEOPLE TO MAKE FINANCIAL EFFORTS

FACED WITH THE ECONOMIC AND SOCIAL SITUATION, WE MUST TAKE QUICK AND ENERGETIC MEASURES, EVEN IF IT MEANS PUTTING THE ENVIRONMENTAL ISSUE ON THE BACK BURNER FOR THE MOMENT



Question : About the social and environmental crises, what should be our priority? (Whole sample)

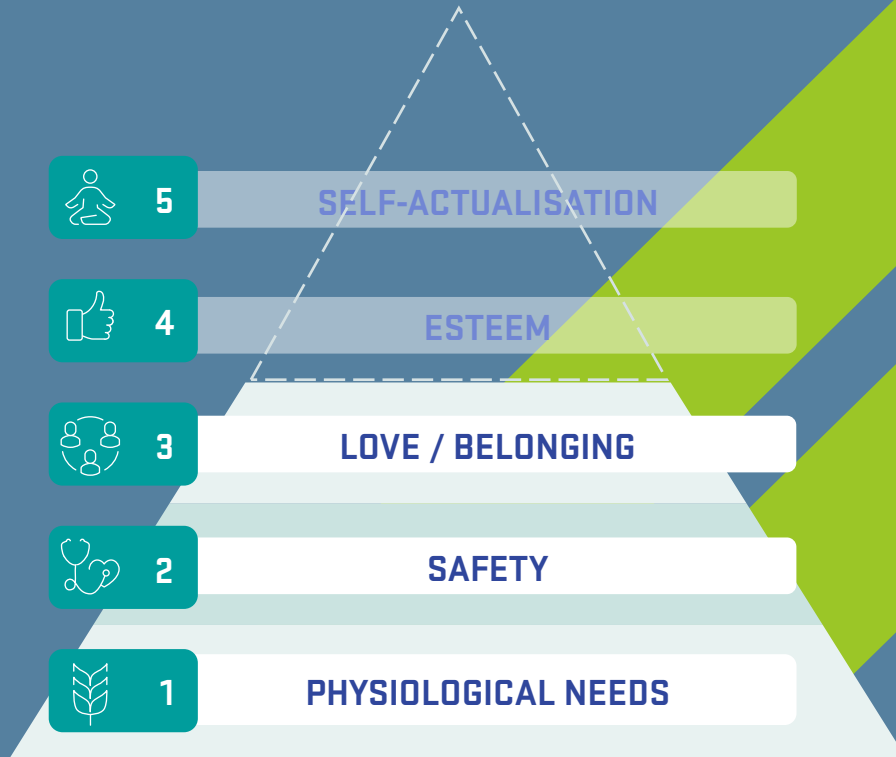
Between the environmental crisis and social crisis, which one should take priority?

IN THE FACE OF THE ENVIRONMENTAL EMERGENCY, WE MUST TAKE QUICK AND DECISIVE ACTION, EVEN IF IT MEANS ASKING PEOPLE TO MAKE FINANCIAL EFFORTS

FACED WITH THE ECONOMIC AND SOCIAL SITUATION, WE MUST TAKE QUICK AND ENERGETIC MEASURES, EVEN IF IT MEANS PUTTING THE ENVIRONMENTAL ISSUE ON THE BACK BURNER FOR THE MOMENT

	13 Countries Average		6 High-Income Countries Average*		7 Emerging Countries Average**	
AVERAGE	51	49	47	53	54	46
BY GENDER						
Male	51	49	48	52	54	46
Female	51	49	46	54	55	45
BY AGE						
Less than 35 yo	54	46	50	50	56	44
From 35 to 55 yo	49	51	45	55	52	48
More than 55 yo	51	49	47	53	57	43
BY SOCIAL GRADE						
White collars	51	49	48	52	54	46
Blue collars	50	50	47	53	53	47
Inactive	51	49	46	54	55	45
Retirees	51	49	46	54	61	39
BY EDUCATION LEVEL						
Higher education	52	48	51	49	53	47
Medium education	51	49	46	54	56	44
Lower education	49	51	42	58	55	45
BY PARTY AFFILIATION						
Left	57	43	56	44	57	43
Center	54	46	53	47	55	45
Right	44	56	37	63	54	46
No affiliation	47	53	43	57	51	49














LOVE/ BELONGING NEEDS



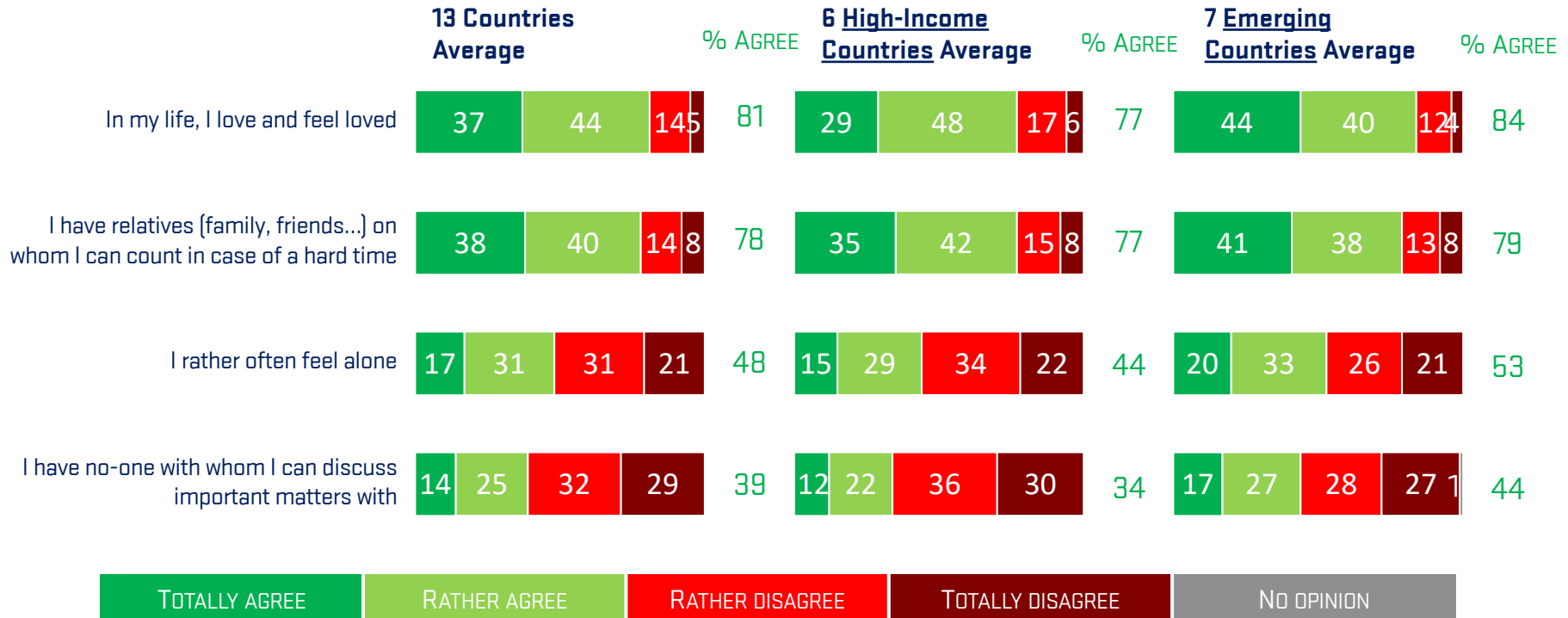
3

Social priorities - Place of social ties in the lives of citizens

Do you agree or disagree with the following sentences?

% « Agree » (Very satisfied + somewhat satisfied)	COUNTRY AVERAGE													
		FRANCE	UNITED KINGDOM	GERMANY	ITALY	UNITED STATES	JAPAN	BRAZIL	MEXICO	CHINA	INDIA	MOROCCO	SAUDI ARABIA	SOUTH AFRICA
In my life, I love and feel loved	81	81	81	78	77	83	61	82	88	84	86	80	86	83
I have relatives (family, friends...) on whom I can count in case of a hard time	78	81	77	79	76	80	68	77	83	84	82	74	82	71
I rather often feel alone	48	38	45	38	49	46	45	51	36	38	71	57	62	52
I have no-one with whom I can discuss important matters with	39	28	32	32	33	35	42	42	32	30	63	51	54	36

Social priorities - Place of social ties in the lives of citizens



Question : Do you agree or disagree with the following sentences?

Social priorities - Place of social ties in the lives of citizens

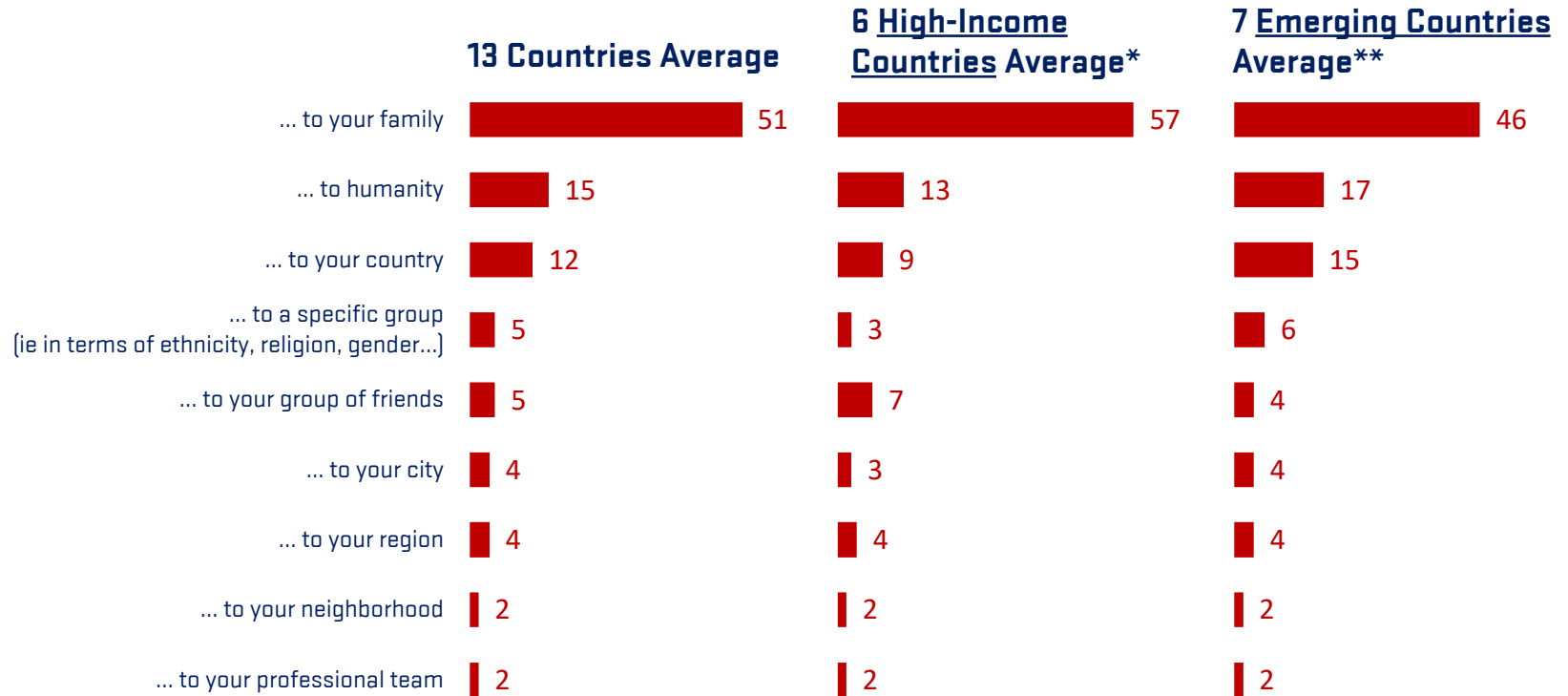
	COUNTRIES AVERAGE	GENDER		AGE			SOCIAL GRADE				EDUCATION LEVEL			PARTY AFFILIATION			
		MALE	FEMALE	LESS THAN 35 YO	FROM 35 TO 55 YO	MORE THAN 55 YO	WHITE COLLARS	BLUE COLLARS	INACTIVE	RETIREES	HIGHER EDUC.	MEDIUM EDUC.	LOWER EDUC.	LEFT	CENTER	RIGHT	NO AFFILIATION
In my life, I love and feel loved	81	81	81	81	80	83	84	78	77	85	83	80	78	83	82	81	75
I have relatives (family, friends...) on whom I can count in case of a hard time	78	78	78	80	78	77	82	77	74	78	82	77	73	79	77	79	71
I rather often feel alone	48	47	50	58	49	36	47	50	57	33	47	48	50	48	48	46	49
I have no-one with whom I can discuss important matters with	39	41	37	45	40	30	38	43	45	28	37	39	42	39	37	38	40

Where do you prioritize your belonging?



	COUNTRY AVERAGE	FRANCE	UNITED KINGDOM	GERMANY	ITALY	UNITED STATES	JAPAN	BRAZIL	MEXICO	CHINA	INDIA	MOROCCO	SAUDI ARABIA	SOUTH AFRICA
... to your family	51	54	61	61	54	53	61	53	73	38	31	34	39	53
... to humanity	15	14	11	9	19	13	9	16	10	21	20	23	16	16
... to your country	12	12	9	5	8	8	12	8	7	26	18	18	24	7
... to a specific group (ie in terms of ethnicity, religion, gender...)	5	2	5	3	3	5	1	7	3	2	4	12	4	10
... to your group of friends	5	8	7	11	5	9	3	6	2	2	6	3	4	4
... to your city	4	2	2	4	5	3	3	4	2	5	6	5	6	2
... to your region	4	4	2	3	3	4	5	3	2	3	8	3	3	3
... to your neighborhood	2	2	2	2	2	3	3	2	-	1	4	2	2	3
... to your professional team	2	2	1	2	1	2	3	1	1	2	3	-	2	2

Where do you prioritize your belonging?



Question : Do you feel first and foremost that you belong...? (To employed people)

Which social connection is your priority?



COUNTRIES
AVERAGE

GENDER

AGE

SOCIAL GRADE

EDUCATION LEVEL

PARTY AFFILIATION

MALE

FEMALE

LESS THAN
35 YO

FROM 35 TO
55 YO

MORE THAN
55 YO

WHITE
COLLARS

BLUE
COLLARS

INACTIVE

RETIREES

HIGHER
EDUC.

MEDIUM
EDUC.

LOWER
EDUC.

LEFT

CENTER

RIGHT

NO
AFFILIATION

... to your family

51

48

54

46

50

59

48

55

49

57

48

52

55

54

54

54

55

... to humanity

15

17

14

16

15

15

14

13

18

16

16

16

12

16

15

12

15

... to your country

12

15

10

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13

11

14

11

12

12

15

11

11

9

9

13

9

... to a specific group
(ie in terms of ethnicity, religion,
gender...)

5

4

6

5

6

2

5

4

5

3

5

4

5

5

5

4

6

... to your group of friends

5

5

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5

5

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5

... to your city

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... to your region

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... to your neighborhood

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... to your professional team

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2

Question : Do you feel first and foremost that you belong...? (To employed people)

Which social connection is your priority?



COUNTRIES AVERAGE



GENDER



AGE



SOCIAL GRADE



EDUCATION LEVEL



PARTY AFFILIATION

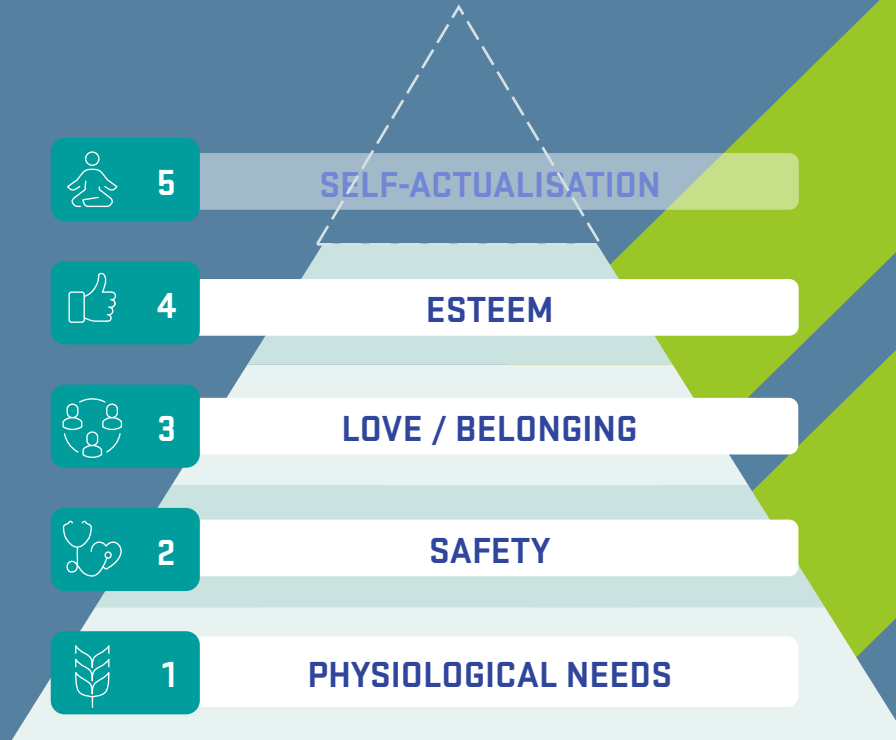
6 HIGH-INCOME COUNTRIES AVERAGE

7 EMERGING COUNTRIES AVERAGE

	MALE		FEMALE		LESS THAN 35 YO	FROM 35 TO 55 YO	MORE THAN 55 YO	WHITE COLLARS	BLUE COLLARS	INACTIVE	RETIRES	HIGHER EDUC.	MEDIUM EDUC.	LOWER EDUC.	LEFT	CENTER	RIGHT	OTHER/ NO AFFILIATION																
... to your family	57	46	53	45	61	47	50	44	56	45	63	52	54	44	60	51	55	45	63	46	54	43	59	46	60	50	53	54	54	54	61	43	61	49
... to humanity	13	17	14	19	11	16	14	17	12	17	13	19	12	15	11	16	15	19	13	21	14	18	13	18	10	15	16	15	17	14	8	19	12	19
... to your country	9	15	11	17	7	14	8	15	9	16	9	15	10	17	7	14	9	14	10	18	10	18	8	14	9	13	8	9	10	8	12	15	6	12
... to a specific group (for example in terms of ethnicity, religion, gender...)	3	6	3	4	4	8	5	6	4	7	2	4	3	7	3	5	5	6	2	6	3	6	3	6	4	7	4	6	3	6	2	6	4	7
... to your group of friends	7	4	7	4	7	4	10	5	7	3	5	2	8	4	7	4	7	4	5	2	7	4	7	4	6	4	8	4	6	6	6	4	7	4
... to your city	3	4	4	4	3	4	5	5	4	5	2	3	4	4	3	4	3	5	2	3	4	4	3	5	3	4	3	4	3	3	3	5	3	3
... to your region	4	4	4	3	3	4	4	4	4	3	3	3	3	4	5	3	3	4	3	3	3	3	3	4	4	3	3	4	3	4	4	5	3	3
... to your neighborhood	2	2	2	2	2	2	2	2	2	2	2	1	2	2	2	2	3	3	2	1	2	2	2	2	3	3	3	2	2	2	2	2	2	2
... to your professional team	2	2	2	2	2	1	2	2	2	2	1	1	4	3	2	1	-	-	-	-	3	2	2	1	1	1	2	2	2	3	2	1	2	1

Question : Do you feel first and foremost that you belong...? (To employed people)

ESTEEM NEEDS

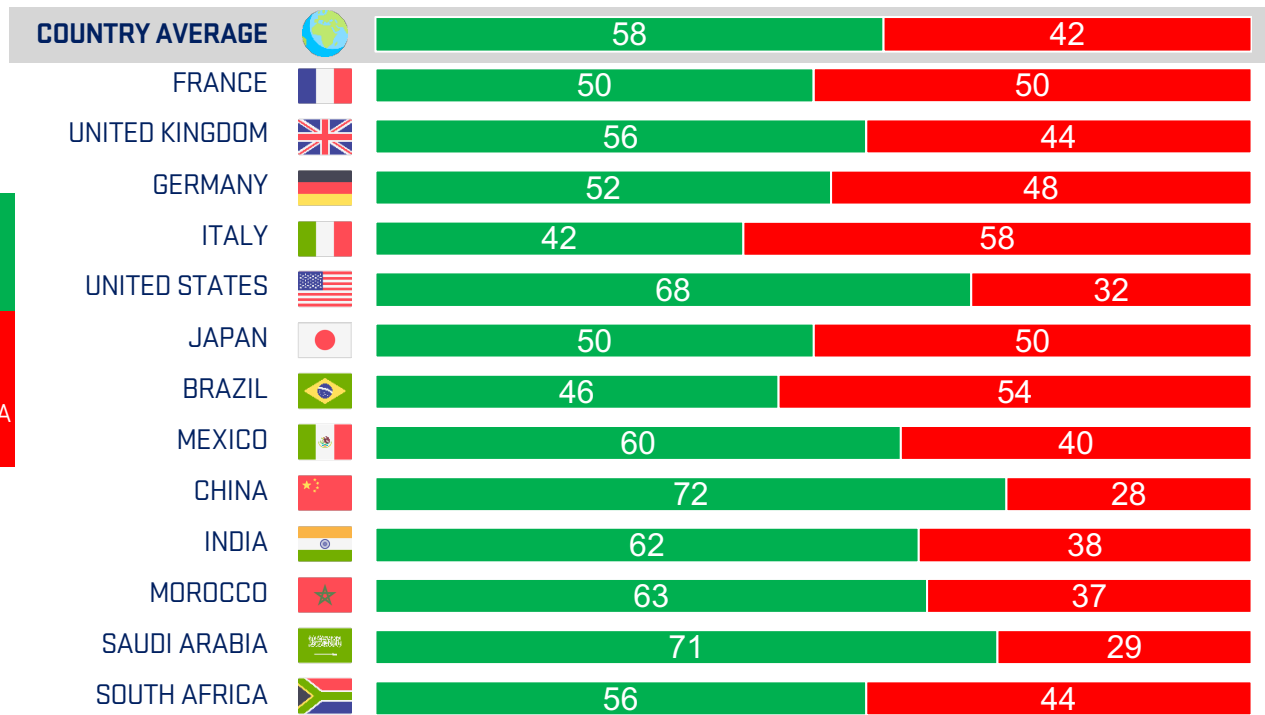


4

Esteem priorities - Which of the following two opinions are you closer to?

IN YOUR COUNTRY, IT IS POSSIBLE TO SUCCEED IN LIFE IF ONE IS AMBITIOUS AND WORKS HARD

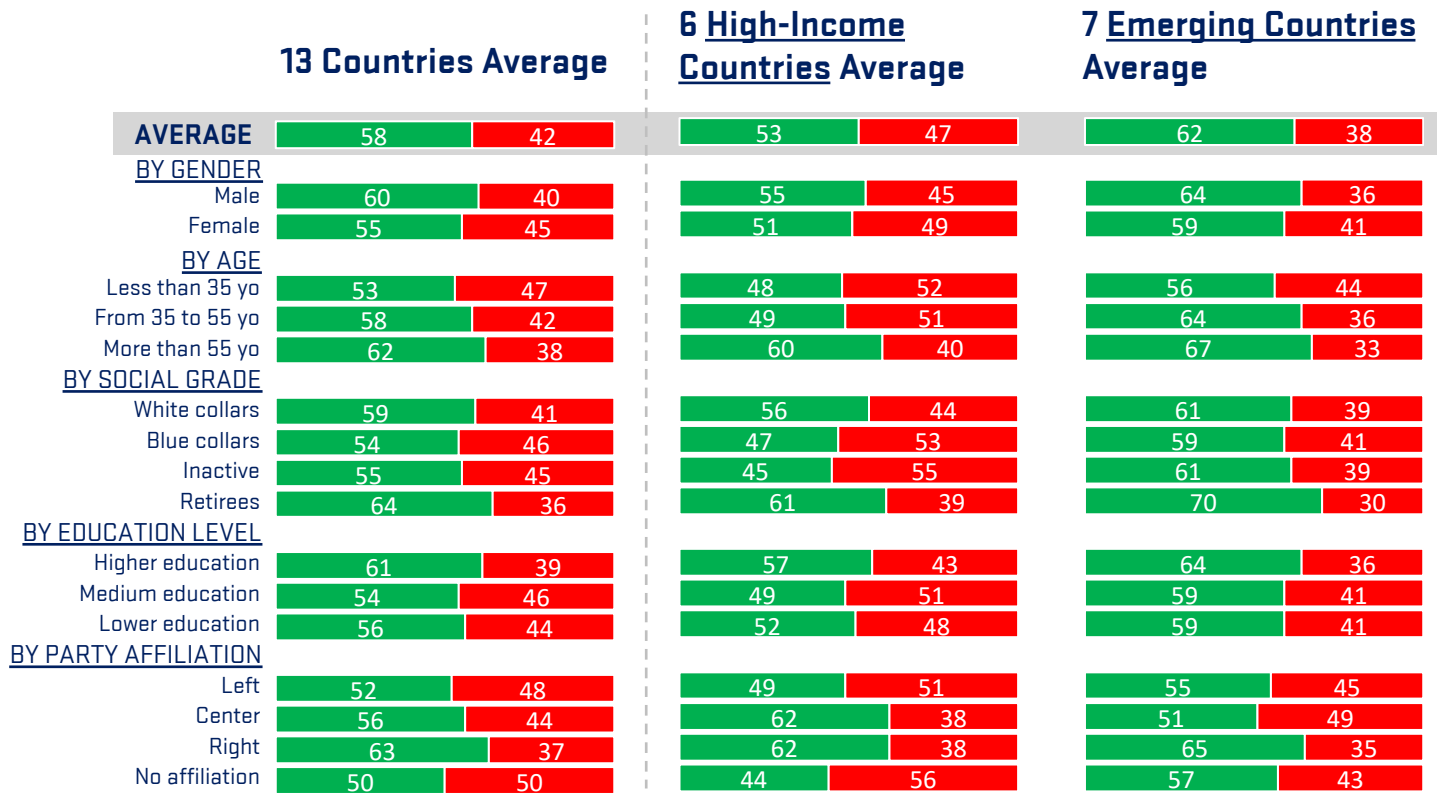
IN YOUR COUNTRY, IT IS VERY DIFFICULT TO GET OUT OF THE SOCIAL ENVIRONMENT IN WHICH ONE WAS BORN EVEN IF ONE MAKES A REAL EFFORT



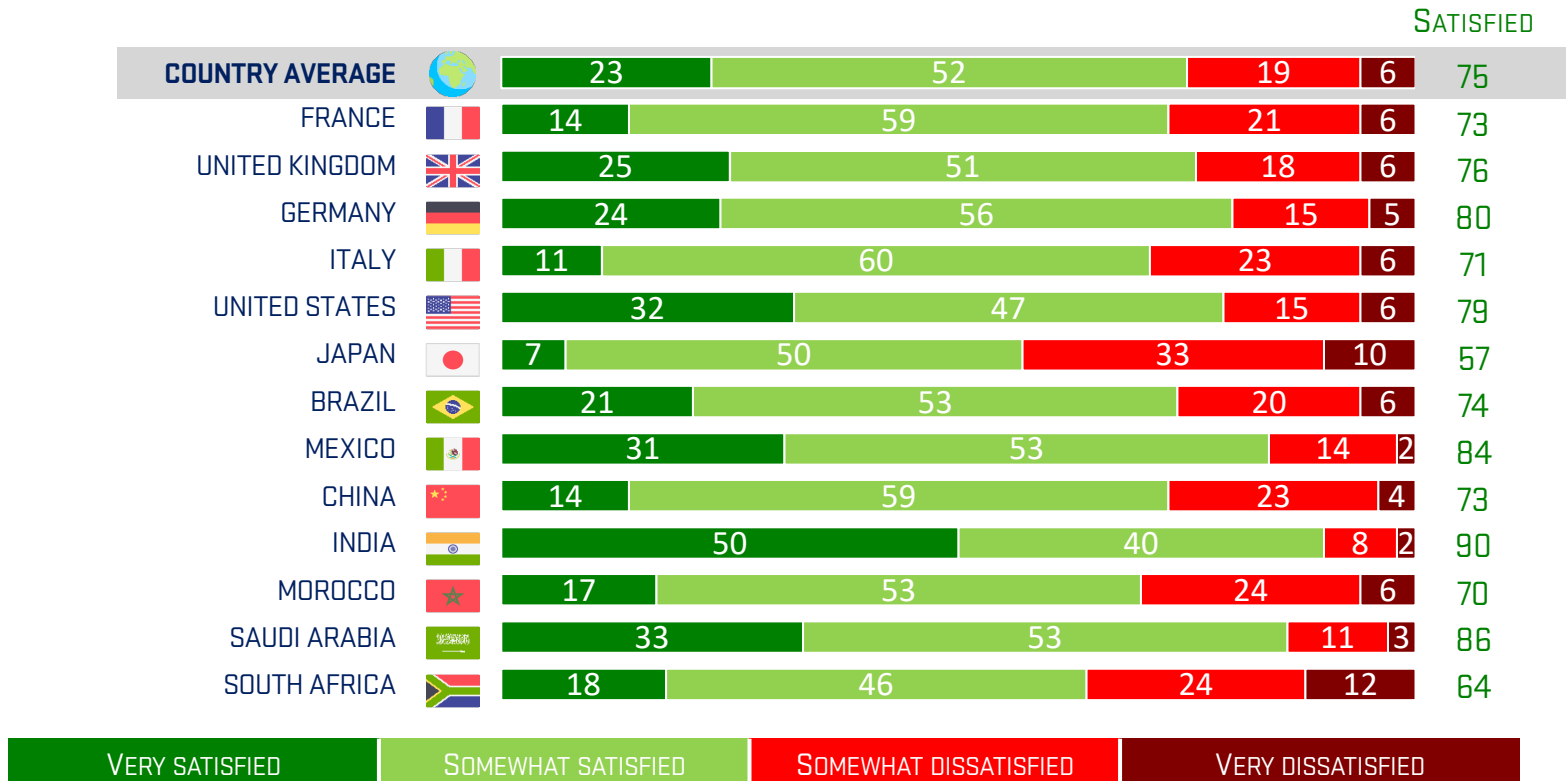
Esteem priorities - Opinion on the level of social determinism in citizens' own countries

IN YOUR COUNTRY, IT IS POSSIBLE TO SUCCEED IN LIFE IF ONE IS AMBITIOUS AND WORKS HARD

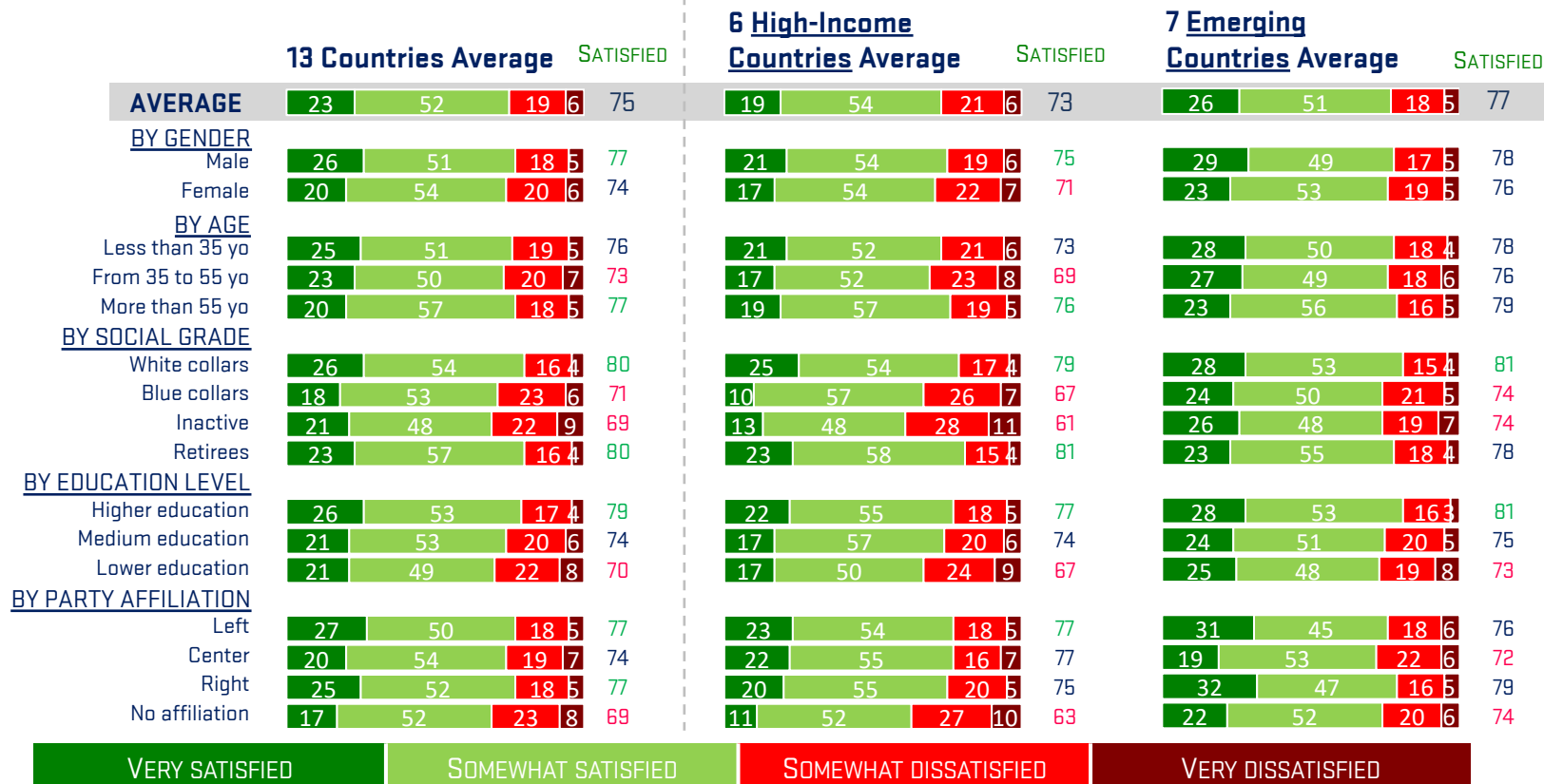
IN YOUR COUNTRY, IT IS VERY DIFFICULT TO GET OUT OF THE SOCIAL ENVIRONMENT IN WHICH ONE WAS BORN EVEN IF ONE MAKES A REAL EFFORT



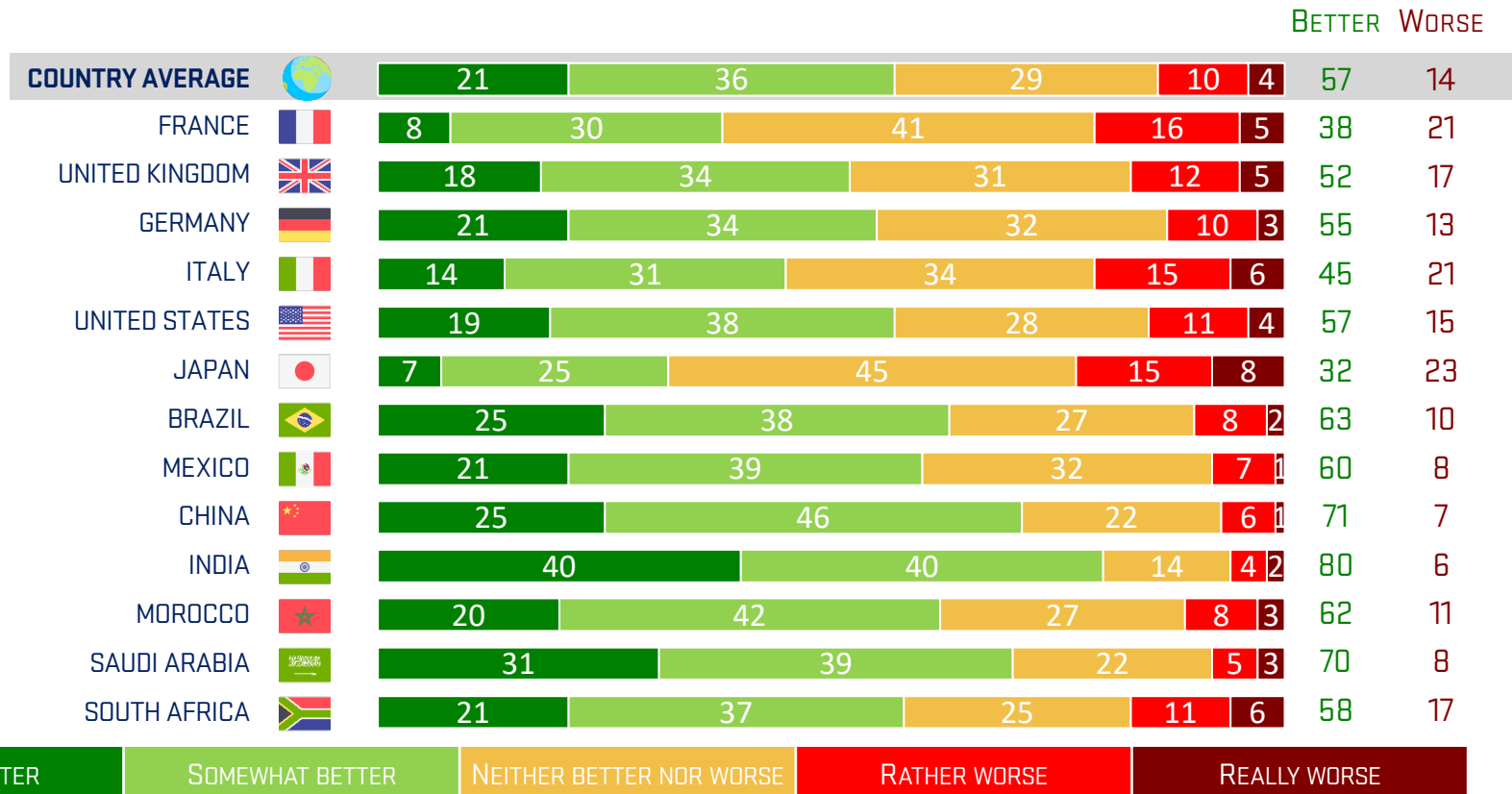
Esteem priorities - Overall satisfaction with one's life



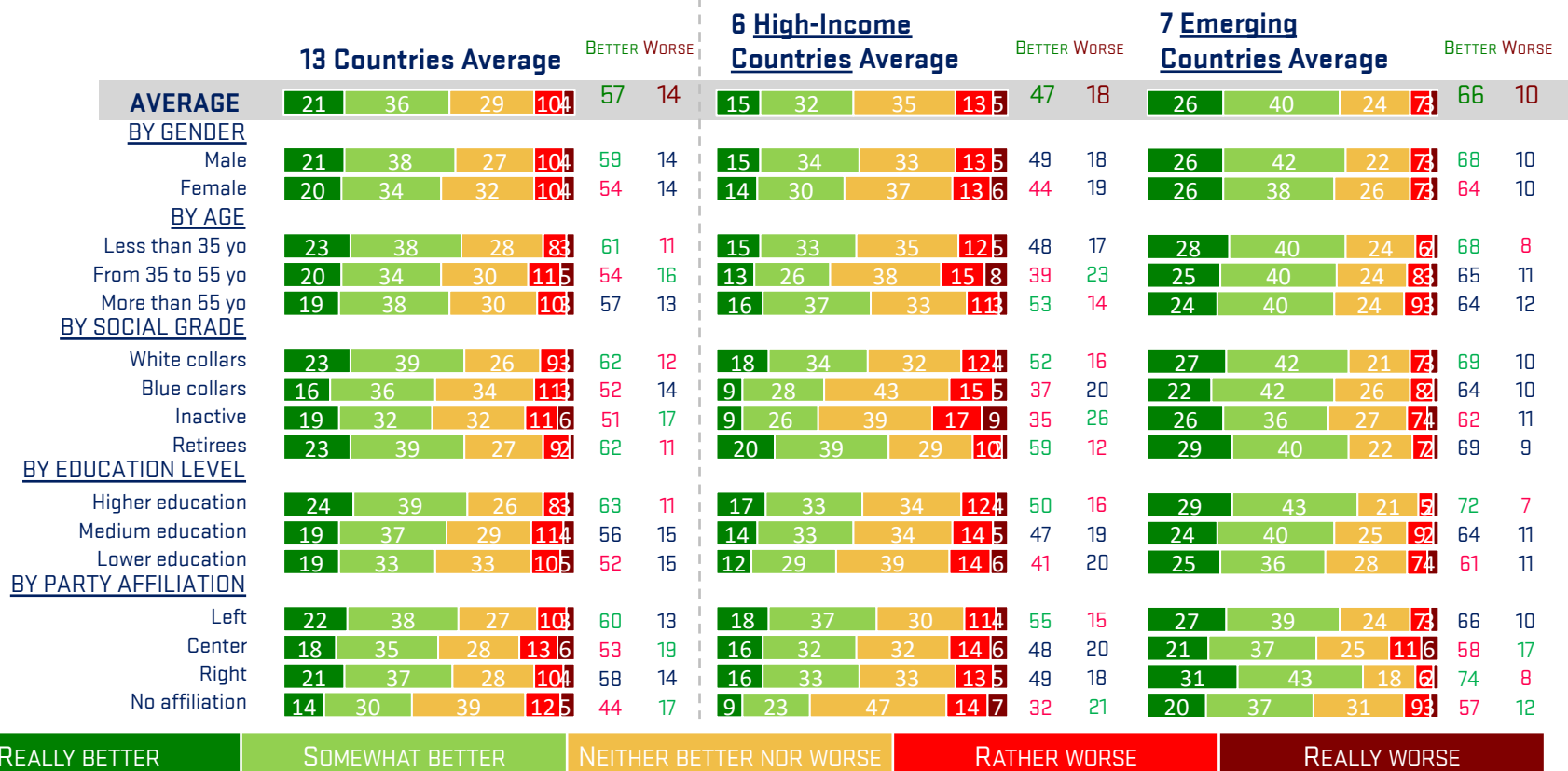
Esteem priorities - Overall satisfaction with one's life



Esteem priorities - Feeling of living a better or worse life than their parents



Esteem priorities - Feeling of living a better or worse life than their parents



REALLY BETTER

SOMEWHAT BETTER

NEITHER BETTER NOR WORSE

RATHER WORSE

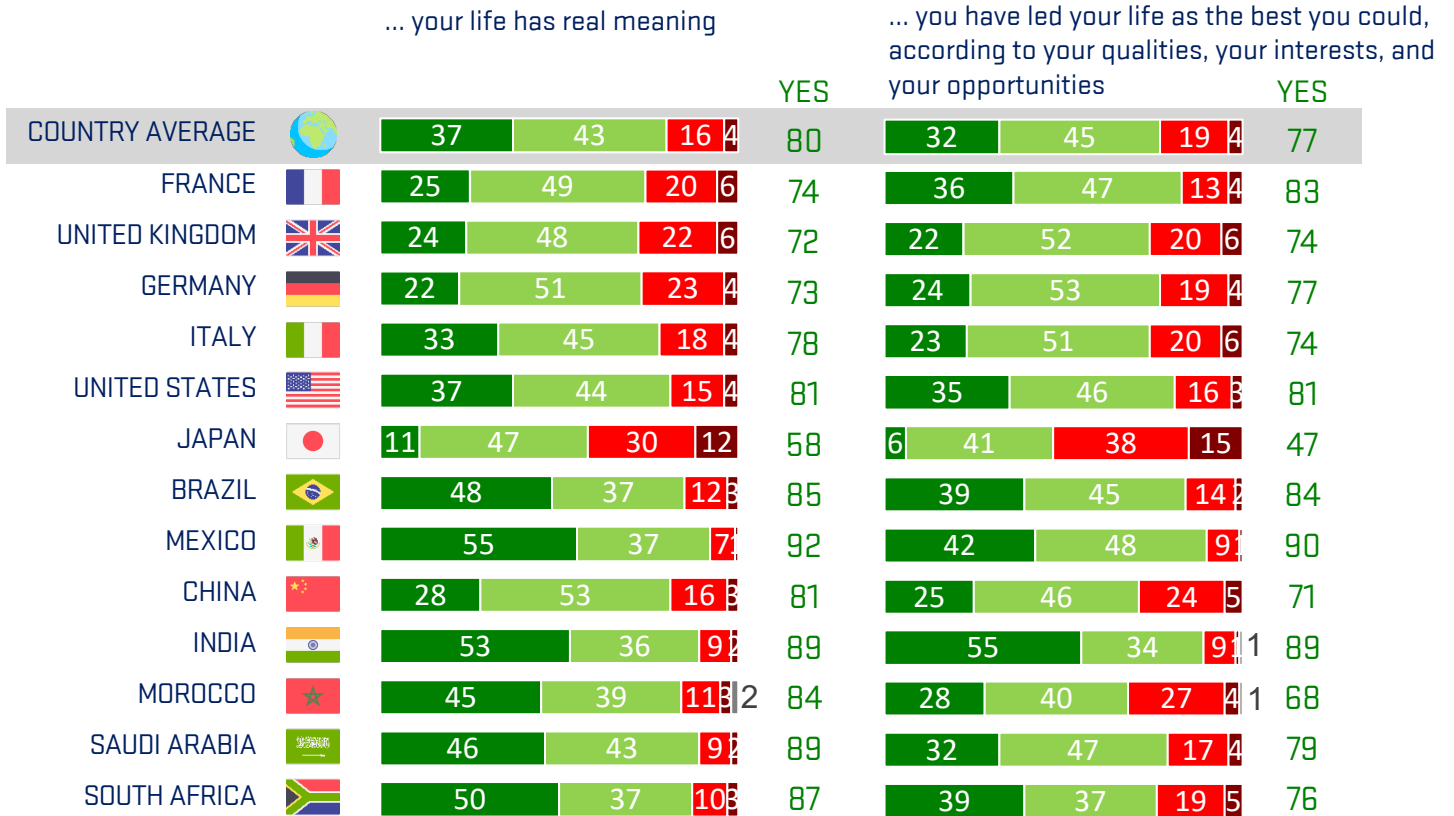
REALLY WORSE

SELF ACTUALISATION



5

Self-Actualisation as a priority: Would you say that you feel that...?



To what extent is the **priority** of self-actualisation being achieved in different demographics?

6 HIGH-INCOME COUNTRIES AVERAGE

7 EMERGING COUNTRIES AVERAGE

% « Yes »
(Yes, I do + Yes, somewhat)



COUNTRIES
AVERAGE



GENDER



AGE



SOCIAL GRADE



EDUCATION LEVEL

















PARTY AFFILIATION

	COUNTRIES AVERAGE		GENDER		AGE			SOCIAL GRADE				EDUCATION LEVEL			PARTY AFFILIATION																			
	MALE	FEMALE	LESS THAN 35 YO	FROM 35 TO 55 YO	MORE THAN 55 YO	WHITE COLLARS	BLUE COLLARS	INACTIVE	RETIREES	HIGHER EDUC.	MEDIUM EDUC.	LOWER EDUC.	LEFT	CENTER	RIGHT	OTHER/ NO AFFILIATION																		
... your life has real meaning	73	87	73	88	72	86	73	86	68	86	77	89	78	89	67	88	63	83	79	88	75	89	73	86	69	84	75	90	76	86	75	88	65	83
... you have led your life as the best you could, according to your qualities, your interests, and your opportunities	73	80	73	81	73	78	70	78	68	80	79	83	78	84	64	78	61	74	83	82	75	82	74	79	67	76	76	85	79	79	75	84	63	75

Question : Would you say that you feel that...?
(Whole sample)

In order to be happier in your life, what would you like to do and what should be your priority?

	 COUNTRY AVERAGE	 FRANCE	 UNITED KINGDOM	 GERMANY	 ITALY	 UNITED STATES	 JAPAN	 BRAZIL	 MEXICO	 CHINA	 INDIA	 MOROCCO	 SAUDI ARABIA	 SOUTH AFRICA
Earn more money	22	25	18	14	18	20	23	23	20	23	21	27	25	35
Be healthier (you or a close family member)	19	19	21	24	18	25	28	15	16	30	13	19	18	9
Have time to pursue your passions	11	9	14	11	15	12	16	6	11	12	9	5	5	13
Have time to care for your family	10	7	12	13	8	11	4	13	17	7	17	6	10	10
Have a more interesting, inspiring job	9	8	6	5	9	6	4	12	14	8	7	13	13	8
Having time to help others, to be involved in charity or association	7	4	4	4	5	6	4	8	8	3	9	10	9	11
Find the person of your life	6	8	9	10	8	7	7	4	4	4	6	2	2	3
Change location, region, or country	6	11	8	7	6	5	3	9	4	3	6	7	3	5
Have children/grandchildren	4	4	4	7	7	3	4	2	2	2	4	3	6	2
Be more recognized by others for your merits and achievements	4	3	2	3	4	3	5	6	3	7	4	5	4	2
Get married	2	2	2	2	2	2	2	2	1	1	4	3	5	2

APPENDICES

Self completion online surveys IIS



To ensure the overall reliability of a survey, all possible error components must be taken into account. That is why Ipsos imposes strict controls and procedures at each stage of the survey process.

UPSTREAM OF THE DATA COLLECTION

Sample : structure and representativeness

Questionnaire : the questionnaire is worded by following an editing process with 12 compulsory standards. It is proofread and approved at a senior level and then sent to the client for final validation. The programming (or questionnaire script) **is tested by at least 2 people and validated.**

Data collection : the interviewers are trained in survey techniques through a dedicated training module prior to any participation in a survey. In addition, they receive or attend a detailed briefing at the start of each survey.

DURING THE DATA COLLECTION

Sampling : Ipsos imposes very strict operating rules for its selection frame in order to maximize the random nature of the sample selection : random selection from telephone listings, quota method, etc.

Fieldwork monitoring : collection is monitored and checked (exclusive link, IP validation, panelists' behavior monitoring penetration, interview length, consistency of responses, participation rate, number of reminders, etc.)

DOWNSTREAM OF THE DATA COLLECTION

The results are analyzed in accordance with the statistical analysis methods (confidence interval versus sample size, significance tests). The first results are systematically checked against the raw results from the data collection. The consistency of results is also checked (particularly the results observed versus comparison sources in our possession).

In cases where sample weighting is used (margin calibration method), this is checked by the processing teams (OP) and then validated by the survey teams.

OUR COMMITMENT



PROFESSIONAL CODES, QUALITY CERTIFICATION AND DATA PROTECTION

Ipsos is a member of the following French and European professional Market Research and Opinion bodies:

- **SYNTEC** (www.syntec-etudes.com), French Union of Market Research companies
- **ESOMAR** (www.esomar.org) the European Society for Opinion and Market Research

Ipsos France is consequently committed to applying the ICC/ESOMAR code for opinion and market research. This code of conduct defines the ethical rules for Market Research professionals and sets out the protection offered to participants.

Ipsos France complies with the applicable laws. Ipsos has appointed a Data Protection Officer and has implemented a compliance plan to GDPR (Règlement (UE) 2016/679). For more information about the Ipsos Data Protection & Privacy Policy relative to personal data : <https://www.ipsos.com/en/privacy-data-protection>

The retention period applicable to interviewees' personal data be as follows, unless otherwise agreed with the client :



- 12 months upon Ad Hoc Study completion
- 3 years upon each wave completion of a Continuous Study.

Ipsos France has received ISO 20252: 2012 certification by AFNOR CERTIFICATION



- This document was drawn up in accordance with these international Codes and Quality standards. The technical elements relative to the execution of the project are described in methodological approach or survey overview in the report.
- This project was carried out in accordance with these international Codes and Quality standards

ABOUT IPSOS

Ipsos is the world's third largest market research company, present in 90 markets and employing more than 18,000 people.

Our passionately curious research professionals, analysts and scientists have built unique multi-specialist capabilities that provide true understanding and 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
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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, Markets and People.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder.
Ultimately, success comes down to a simple truth:
You act better when you are sure.