

## The Priority Report by



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.

GAME CHANGERS

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).

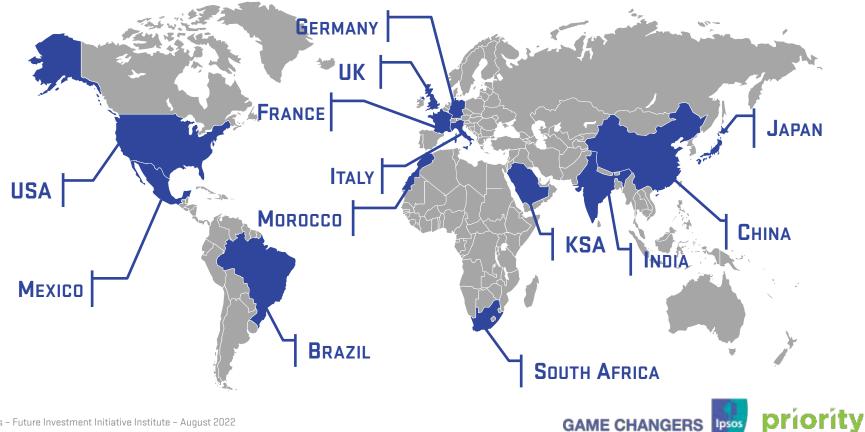
Brazil, China, India, Mexico, Morocco, Saudi Arabia, South Africa have lower levels of internet penetration and so these samples should not be considered nationally representative, and instead be considered to represent a more affluent and population. These are still a vital social group to understand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



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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.

#### SURVEY TARGET: 13 COUNTRIES REPRESENTING 50.3% **OF THE WORLD 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.

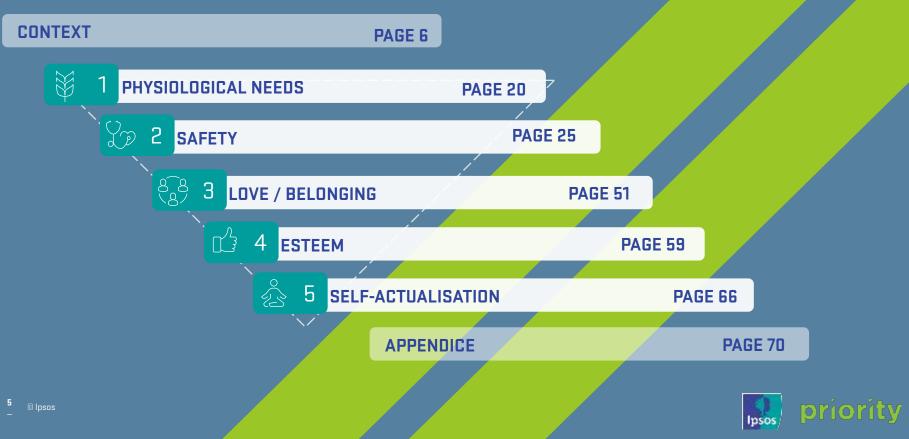
Emerging countries\*: Mexico, Brazil, China, India, Saudi Arabia, South Africa, Morocco.

\*Emerging Market Report 2021, Cornell University.





## SUMMARY



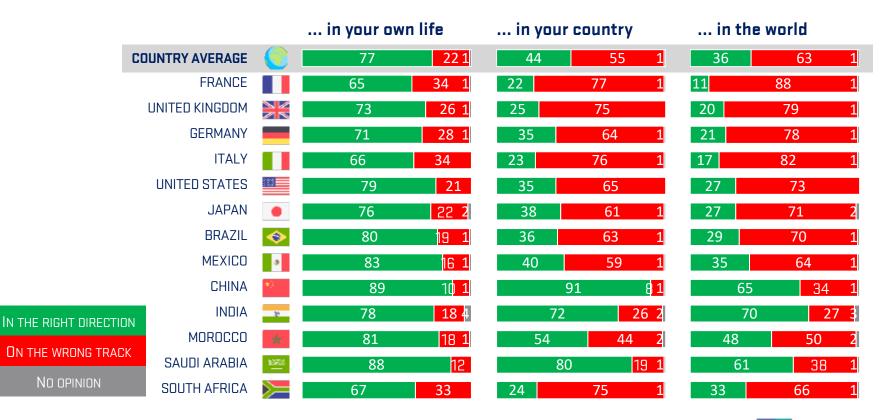
# CONTEXT

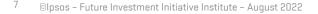
## CITIZENS' GENERAL PERCEPTION OF THE SITUATION IN THE WORLD AND IN THEIR COUNTRY





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





GAME CHANGERS

## 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?

			6 <u>High-Incor</u>	ne	7 Emerging Co	untries
	13 Countries	Average	Countries Av		Average	
AVERAGE	77	22 1	71	28 1	81	181
BY GENDER			l			
Male	77	22 1	71	28 1	82	171
Female	76	23 1	72	27 1	80	18 2
BY AGE			1			
Less than 35 yo	78	21 1	75	25	80	191
From 35 to 55 yo	76	23 1	69	31	81	17 2
More than 55 yo	75	23 2	72	27 1	81	172
BY SOCIAL GRADE						
White collars	81	181	78	22	84	151
Blue collars	75	24 1	70	30	79	19 2
Inactive	71	28 1	63	36 1	76	22 2
Retirees	75	23 2	71	27 2	82	15 3
BY EDUCATION LEVEL			1			
Higher education	81	181	76	23 1	85	141
Medium education	75	24 1	70	29 1	80	191
Lower education	71	27 2	66	33 1	75	23 2
<b>BY PARTY AFFILIATION</b>						
Left	76	23 1	73	26 1	79	20 1
Center	75	24 1	75	24 1	75	24 1
Right	76	23 1	73	26 1	80	18 2
No affiliation	71	28 1	66	33 1	75	23 2

IN THE RIGHT DIRECTION ON THE WRONG TRACK NO OPINION

GAME CHANGERS

## 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?

			6 <u>High-In</u>		7 <u>Emerging</u>	<u>Countries</u>
	13 Count	ries Average	<u>Countrie</u>	<u>s</u> Average	Average	
AVERAGE	44	55 1	29	70 1	57	42 1
BY GENDER						
Male	48	51 1	33	66 1	60	38 2
Female	41	58 1	26	74	54	45 1
<u>BY AGE</u>						
Less than 35 yo	48	51 1	35	65	55	44 1
From 35 to 55 yo	46	53 1	28	72	59	40 1
More than 55 yo	37	61 2	28	71 1	56	42 2
BY SOCIAL GRADE			1			
White collars	49	50 1	36	64	59	40 1
Blue collars	40	59 1	25	75	52	46 2
Inactive	44	55 1	25	75	56	43 1
Retirees	38	60 2	27	72 1	59	39 2
BY EDUCATION LEVEL			1			
Higher education	51	48 1	34	65 1	64	35 1
Medium education	40	59 1	25	74 1	54	45 1
Lower education	40	59 1	29	71	49	49 2
BY PARTY AFFILIATION						
Left	39	60 1	34	65 1	44	55 1
Center	34	66	34	66	33	66 1
Right	39	60 1	29	70 1	57	41 2
No affiliation	32	67 1	23	76 1	42	56 2

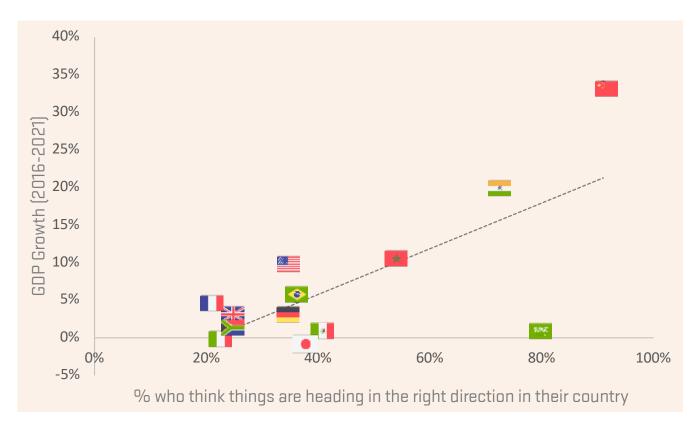
GAME CHANGERS

IN THE RIGHT DIRECTION

IN THE WRONG TRACK

No opinion

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



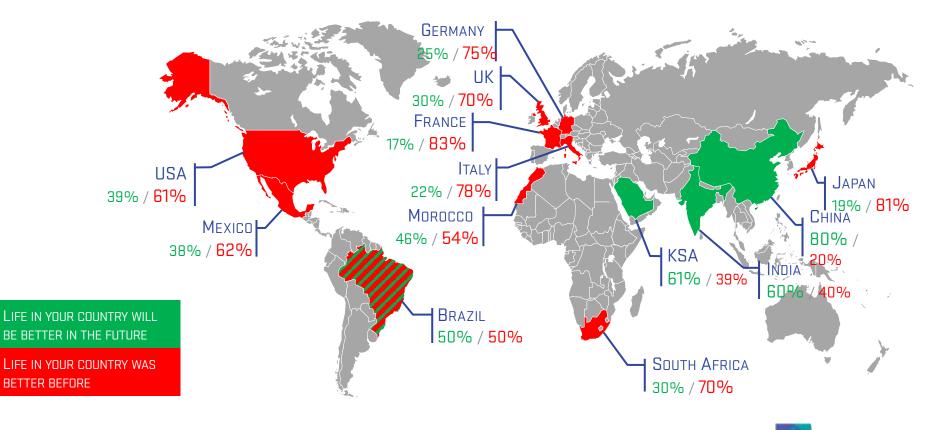


#### Would you say things in the world are generally headed in the right direction, or do you feel things are off on the wrong track?

				6 <u>High-</u>	<u>Income</u>	7 <u>Emerging l</u>	<u>Countries</u>
		13 Count	ries Average	<u>Countri</u>	es Average	Average	
	AVERAGE	36	63 1	20	79 1	49	50 1
	BY GENDER						
	Male	38	61 1	22	77 1	50	48 2
	Female	34	65 1	19	80 1	48	51 1
	<u>BY AGE</u>						
	Less than 35 yo	44	55 1	30	69 1	51	48 1
	From 35 to 55 yo	37	62 1	20	80	49	49 2
	More than 55 yo	24	74 2	15	84 1	42	55 3
	BY SOCIAL GRADE						
	White collars	39	60 1	26	73 1	50	<u>49 1</u>
	Blue collars	36	63 1	19	81	49	49 2
	Inactive	38	61 1	21	79	50	<u>49 1</u>
	Retirees	22	76 2	13	86 1	40	57 3
	BY EDUCATION LEVEL			I			
	Higher education	40	<u>59 1</u>	24	75 1	52	<u>47 1</u>
	Medium education	33	66 1	17	82 1	48	<u>51 1</u>
IN THE RIGHT DIRECTION	Lower education	33	66 1	21	78 1	44	54 2
	BY PARTY AFFILIATION			I			
On the wrong track	Left	32	67 1	23	76 1	41	<u>58 1</u>
	Center	30	68 2	21	78 1	38	60 2
Νο ορινιον	Right	31	68 1	20	79 1	52	47 1
	No affiliation	28	71 1	18	82	39	59 2

priori GAME CHANGERS

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



priority

GAME CHANGERS



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

				6 <u>High-In</u>		7 <u>Emerging</u>	<u>Countries</u>
		13 Coun	tries Average	<u>Countrie</u> :	<u>s</u> Average	Average	
LIFE IN YOUR COUNTRY	AVERAGE	40	60	25	75	52	48
WILL BE BETTER IN THE	BY GENDER	10		20	70		
FUTURE	Male	43	57	28	72	55	45
TOTORE	Female	37	63	23	77	49	51
LIFE IN YOUR COUNTRY WAS	BY AGE	10	5.4	27	<b>C</b> 2	Γ4	40
	Less than 35 yo	46	54	37	63	51	49
BETTER BEFORE	From 35 to 55 yo More than 55 yo	41 30	<u>59</u> 70	25 18	75 82	53	<u>47</u> 47
	BY SOCIAL GRADE	50	70	10	02	22	47
	White collars	44	56	31	69	55	45
	Blue collars	36	64	21	<u>09</u>	47	53
	Inactive	40	60	24	76	50	50
	Retirees	32	68	19	81	58	42
	BY EDUCATION LEVEL	JL	00	15	01	50	72
	Higher education	45	55	29	71	57	43
	Medium education	39	61	23	77	53	47
	Lower education	34	66	22	78	44	56
I	BY PARTY AFFILIATION				, 0		30
-	Left	38	62	33	67	44	56
	Center	35	65	33	67	37	63
	Right	31	69	20	80	52	48
	No affiliation	29	71	19	81	41	59



GAME CHANGERS Ipsos

priority

## **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:** 

<b>Cost of living</b> , energy bills spiraling out of control, <b>everything going up in price</b> (Female, 27 yo, UK)	High prices for everything like gas and food but <b>no increase in money coming in for the family</b> (Female, 74 yo, USA)
The rise in prices of the <b>main</b> <b>products for consumption</b> (Female, 37 yo, Mexico)	<b>The high cost of living</b> with the high price of housing is very exaggerated (Female, 30 yo, Saudi Arabia)
Increasing product cost and <b>food oil prices</b> 55 (Male, 24 yo, India)	Little help for the <b>middle classes who bear</b> <b>the cost of inflation</b> (Female, 37 yo, France)
<b>The decrease in the purchasing power</b> 55 of the citizen (Female, 26 yo, Morocco)	Inflation and rising prices of a large number of commodities (Male, 25 yo, China)

GAME CHANGERS

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

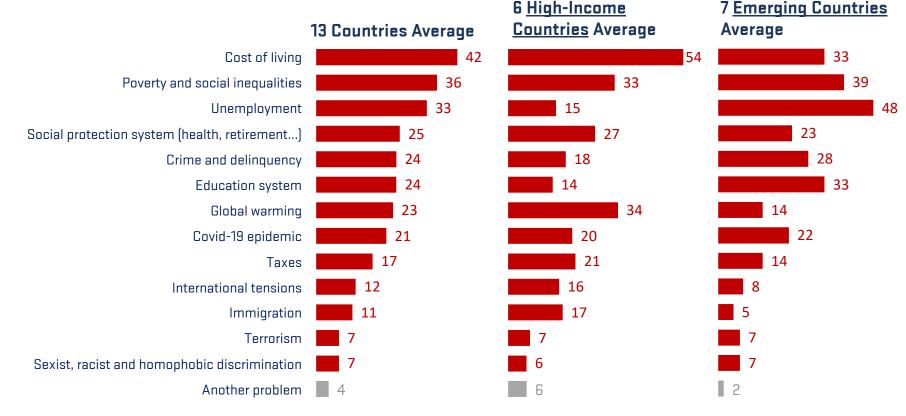
						20 			*	•)	*	$(\mathbf{\dot{\pi}})$	Notice L	$\succ$
	COUNTRY AVERAGE	FRANCE	UNITED KINGDOM	GERMANY	ITALY	UNITED STATES	JAPAN	BRAZIL	MEXICO	CHINA	INDIA	MOROCCO	SAUDI ARABIA	SOUTH AFRICA
Cost of living	42	60	79	49	53	53	30	32	20	28	21	40	46	41
Poverty and social inequalities	36	31	37	43	28	23	35	65	52	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		14	10		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	З	9	12	2	1	2	2	4	4	1

priority

GAME CHANGERS

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

GAME CHANGERS Ipsos

#### Top 3 priorities for citizens by demographic



#### MALE Cost of living – 41% 2 Poverty and social inequalities - 36%

Unemployment - 32%



#### BY FULCATION LEVEL

BY SOCIAL GRADE





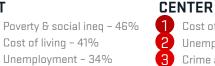
LEFT

Cost of living – 43% Poverty & social ineq – 35%

Cost of living - 41%

Unemployment - 34%





B)

Cost of living – 46% Unemployment - 40% Crime and delinguency- 36%

#### BLUE COLLARS Cost of living – 43%

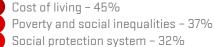
Poverty & social ineq – 40% З

RIGHT

#### Cost of living – 44%

2 Poverty & social ineq - 28% Crime and delinquency- 27%

#### MORE THAN 55 YO



#### LOWER EDUCATION



Cost of living – 43% Poverty and social inequalities – 38% Unemployment - 35%

#### RETIREES



Cost of living – 47% 2 Poverty & social ineq – 35% Social protection system – 34%

#### NO AFFILIATION



Poverty & social ineq – 40% Unemployment - 36%





З

#### Poverty and social inequalities - 34% HIGHER EDUCATION

Unemployment - 38%

Cost of living - 37%

Cost of living – 42% Poverty and social inequalities - 34% Unemployment - 31%

Cost of living – 43% 2 Poverty and social inequalities – 37% З Unemployment - 33%

Unemployment - 34%

FEMALE

2

З

2

Cost of living – 44%

Unemployment - 33%

Cost of living – 45%

Unemployment - 35%

MEDIUM EDUCATION

FROM 35 TO 55 YO

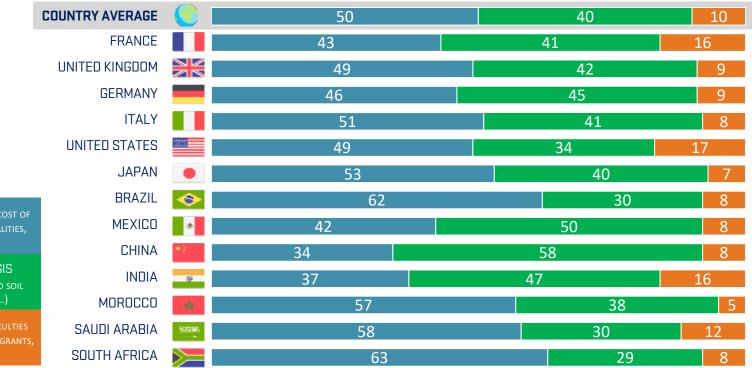
Poverty and social inequalities – 37%

Poverty and social inequalities - 38%

## INACTIVE



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 SUCIAL 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?

		13 Countri	ies Average	6 <u>High-Inco</u> Countries /		7 <u>Emerging</u> Average	<u>Countries</u>
	AVERAGE	50	40 10	48	41 11	51	40 9
	<u>BY GENDER</u>			·			
	Male	47	42 11	45	42 13	48	42 10
	Female	52	39 9	51	40 9	52	39 9
	<u>BY AGE</u>			1			
	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			1			
	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
THE SOCIAL CRISIS (RISING COST OF	Retirees	44	46 10	42	47 11	47	46 7
LIVING, INCREASING SOCIAL INEQUALITIES, LACK OF SOCIAL MOBILITY)	BY EDUCATION LEVEL			1			
	Higher education	47	43 10	44	46 10	49	41 10
THE ENVIRONMENTAL CRISIS	Medium education	49	42 9	49	41 10	49	43 8
(CLIMATE CHANGE, AIR, WATER AND SOIL	Lower education	54	35 11	54	33 13	55	36 9
POLLUTION, LOSS OF BIODIVERSITY)	<b>BY PARTY AFFILIATION</b>						
THE IDENTITY CRISIS	Left	47	44 9	42	51 7	53	36 11
	Center	50	42 8	47	43 10	51	42 7
(DIFFICULTIES LINKED TO THE INTEGRATION OF MIGRANTS, LOSS OF TRADITIONAL	Right	49	37 14	50	33 17	46	45 9
VALUES)	No affiliation	57	36 7	57	36 7	57	37 6
	-						

GAME CHANGERS

priority



# PHYSIOCIOLOGICAL NEEDS





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

	۲							<b>(</b>	a.	*>	6	*	988a 	>
% « Satisfied » (Very satisfied + somewhat satisfied)	COUNTRY AVERAGE	FRANCE	UNITED KINGDOM	GERMANY	ITALY	UNITED STATES	JAPAN	BRAZIL	MEXICO	CHINA	ΙΝΟΙΑ	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?

	13 Countries Average	SATISFIED	6 <u>High-Income</u> <u>Countries</u> Average SATIS	7 <u>Emerging</u> FIED <u>Countries</u> Average	SATISFIED
Your ability to get enough food	39 45	5 <mark>12</mark> 4 84	<b>40 46 <mark>13</mark> 86</b>	<b>39 43 1</b> 3	3 <mark>4</mark> 1 82
Your ability to get the right clothes	33 49	<mark>14</mark> 4 82	<b>32</b> 52 <mark>13</mark> 84	4 33 47 <mark>1</mark> 4	51 80
The basic equipment of your home (heating, lighting, water)	33 48	<mark>13</mark> 51 81	<mark>32</mark> 50 <mark>14</mark> 88	2 34 46 <mark>1</mark> 4	5180
Your ability to have a variety of quality food	31 48	<mark>16</mark> 5 79	<b>32</b> 49 <b>13</b> 8	<mark>31</mark> 45 <mark>17</mark>	6 <mark>1 76</mark>
Your housing (size, location)	32 46	<mark>16</mark> 6 78	<b>33</b> 48 <mark>14</mark> 5 81	30 45 <mark>18</mark>	61 <b>75</b>
The quality of the environment where you live (air quality, water quality)	24 49	20 7 73	<b>21</b> 52 <b>216</b> 73	25 47 20	7 <mark>1 72</mark>
The duration and quality of your sleep	24 43	24 9 67	<mark>18</mark> 44 <mark>281</mark> 0 68	28 43 21	<b>7</b> 1 71
VERY SATISFIED SOMEWH,	AT SATISFIED	Somewhat dissatis	FIED VERY DISSATISF	IED NO OPINION	Ν



#### Level of satisfaction with basic priorities

	0	2		(	ŕŕ	h .					I			I	-	1	
% « Satisfied » (Very satisfied + somewhat satisfied)	COUNTRIES AVERAGE	GEN	IDER		AGE			SOCIAL	GRADE		EDUC	CATION L	EVEL	F	PARTY AF	FILIATIO	N
		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	ND 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)				GEN	DER				AI	<b>R</b> Ge	1				sc		GRA	DE	1	
				MA	LE	FEM	IALE	LESS 35			35 TO YO	MORE 55		WH COLL		BL COLI		INAC	TIVE	RETI	REES
	Your ability to get enough food	86	82	87	82	84	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
6 High-Income Countries	Your housing (size, location)	81	75	83	76	79	73	73	74	78	73	88	81	83	79	76	68	72	73	90	77
AVERAGE 7 Emerging Countries	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
AVERAGE	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

priority

GAME CHANGERS

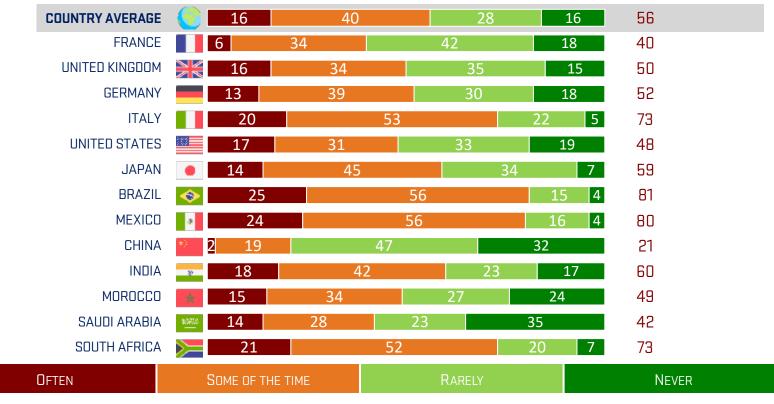
Question : Today, would you say that you are satisfied or dissatisfied with these different aspects of your life?

## **SAFETY NEEDS**



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

SOME OF THE TIME





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

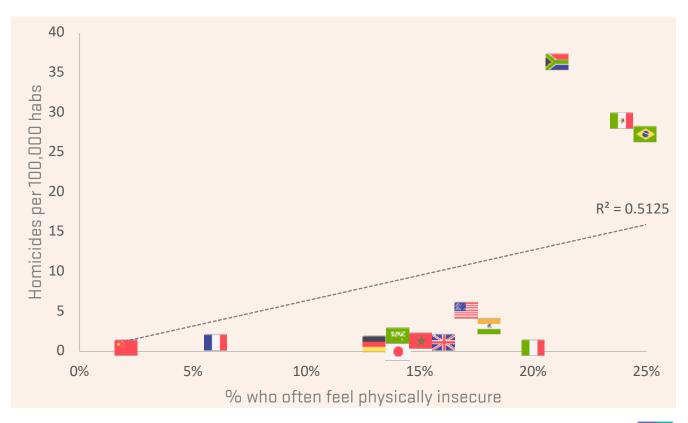
	13 Cc	ountries	Average	OFTEN / SOME OF THE 1	l Co	ligh-Inco untries			TEN / F THE TIME	-	<u>erging</u> Itries A	verage		OFTEN / DF THE TIME
AVERAGE	16	40	28 1	6 56	14	39	33	14	53	17	41	24	18	58
BY GENDER				_	·									
Male	13	38	31 1		12		35		19	14	40		10	54
Female	19	42	25 1	.4 61	17	41	30	12	58	20	43	21	16	63
BY AGE				_					_					
Less than 35 yo	21	43		<u>12</u> 64	2				35	20	44			64
From 35 to 55 yo	15	40	27 1		16		30		56	15	39			54
More than 55 yo BY SOCIAL GRADE	11	37	35 1	7 48	8	36	40	16 4	14	15	40	28	17	55
White collars	15	40	29 1	6 55	15	39	32	14	54	16	41	25	18	57
Blue collars	16	46		3 62	14		30		57	17	47	23		64
Inactive	20	41		4 61	2		27		52	20	41	23		61
Retirees		34	37 20		8	34	42		12					45
BY EDUCATION LEVEL				-										
Higher education	14	38	29 19	9 52	14	37	34	15	51	15	37	25	23	52
Medium education	16	42		3 58	15		31	_	56	17	43	27	13	60
Lower education	18	42	26 1	4 60	15		33		54	20	45	20	15	65
BY PARTY AFFILIATION					l									
Left	20	45	25	10 65	16	38	33	13	54	25	5	3 1	.6 6	78
Center	17	44	28	11 61	11	35	37	17 4	16	22	53	1	9 6	75
Right	14	41	30 1	.5 55	12	40	34	14	52	18	43	24	15	61
No affiliation	18	42	26 1	.4 60	16	41	30	13	57	20	43	22	15	63
Often			Some C		4E		Rar	ELY			1	NEVER		
ation : In your even day life, dr		fool physic			ampla									

GAME CHANGERS

priority

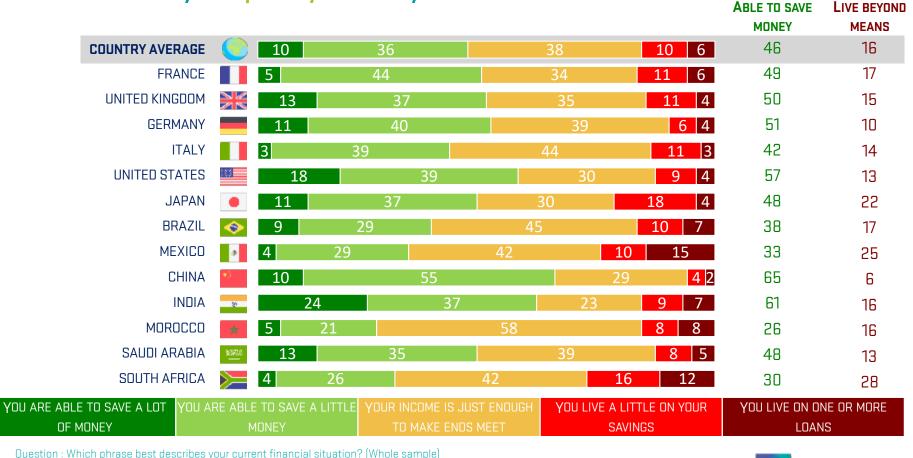
Question : In your everyday life, do you ever feel physically insecure? (Whole sample)

## 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?



GAME CHANGERS

lpsos

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

	1:	3 Coun	tries	Δver	aue		6 <u>F</u>	ligh-l	ncom	e C	ount	ries	7 <u>Em</u>	<u>erging</u>	Cou	ntries	<u>5</u>
		500011	the s		%	% Live beyond means	Av	erage	;	AE	% BLE TO SAVE MONEY	% Live beyond means	Aver	age	AB	% LE TO SAVE L MONEY	% LIVE BEYOND MEANS
AVERAGE	1(	) 36	38	106	46	16	10	40	35	114	50	15	<b>10</b> 33	40	98	43	17
BY GENDER	<u>२</u>						1										
Male	_		36	<b>10</b> 6	48	16	12	41	33	10		14	<b>11</b> 34	38	98	45	17
Female	5	35	39	107	44	17	9	38	37	115	47	16	9 33	41	98	42	17
BY AGI					40	10					<b>F1</b>	10				47	10
Less than 35 ye			35	115	49	16 17	12	39	33	115	51 47	16 17	12 35	37	115	47 40	16 17
From 35 to 55 yo More than 55 yo			39 38	98 10	<b>44</b> 46	17	<u>10</u> 9	<u>37</u> 41	36 36	116 11		17 14	11 31 5 32	4 <u>1</u> 42	89 912	42 27	21
YOU ARE ABLE TO SAVE BY SOCIAL GRAD		38	38		40	10	9	41	30	113	50	14	5 32	42	912	57	L1
A LOT OF MONEY White collars	s <u>1</u> 4	43	31	75	57	12	16	46	28	73	62	10	13 41	34	66	54	12
YOU ARE ABLE TO SAVE	s 7	30	45	108	37	18	6 3	4		118	40	19	8 27	49	88	35	16
		28	40	16 8	36	24	6 2	9	42 1	176		23	9 27	40	10 0		24
A LITTLE MONEY Retirees		38	40	106	44	16	8	42	36	11	50	14	2 30	48	7 13	32	20
YOUR INCOME IS JUST BY EDUCATION LEVE																	
ENOUGH TO MAKE ENDS Higher education			32	94	55	13	14	44	29	10	58	13	<b>13</b> 40		76	53	13
MEET Medium education		33	42	107	41	17		38	40	105	45	15	9 27	45			19
YOU LIVE A LITTLE BY PARTY AFFILIATION		31	41	138	38	21	7 3	34	39	<u>14</u> 6	41	20	7 28	42	<mark>12</mark> 11	35	23
ON YOUR SAVINGS	t 12	2 37	35	106	49	16	13	41	33	94	54	13	11 32	37	11 9	43	20
YOU LIVE ON ONE	r 9	34	36	<mark>12</mark> 9	43	21	11	45	30	10	56	14	8 24	42	13 13	32	26
Righ		36	37	105	48	15	11	39	35	114	50	15	13 30	40	98	43	17
OR MORE LOANS No affiliation	י 5	29	44	13 9	34	22	6 3	3	40 1	147	39	21	424	48	<mark>12</mark> 12	28	24

GAME CHANGERS

priority

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

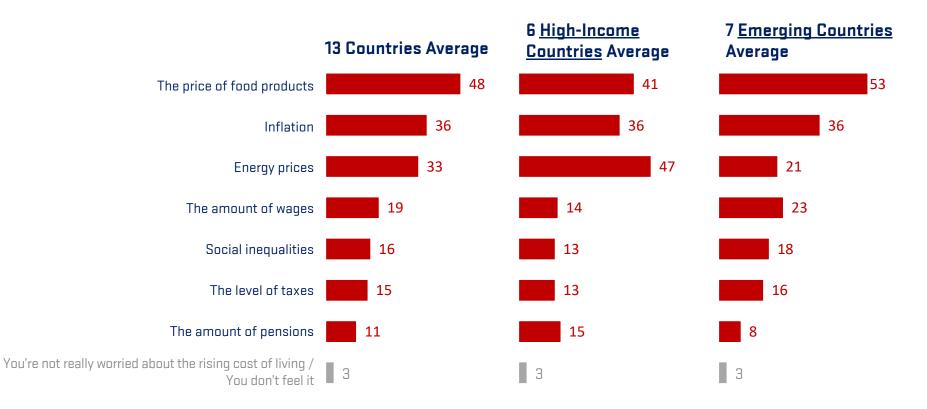
There has been a lot of talk over the past several months about the difficulties associated with the rising cost of living. Which concern has become your priority?

	COUNTRY AVERAGE	FRANCE	UNITED Kingdom	GERMANY	ITALY	UNITED STATES	JAPAN	<b>BRAZIL</b>	MEXICO	•) China	* INDIA	* Morocco	SAUDI ARABIA	SOUTH AFRICA
The price of food products	48	42	36	39	39	46		57	62	36		65	48	67
Inflation	36	40	33	42	26		22	42	54		25	15	25	45
Energy prices	33	46	72	51		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	З	8	13	11	11	8	4
You're not really worried about the rising cost of living / You don't feel it	З	З	З	2	2	5	5	1	1	7	5	2	5	1

GAME CHANGERS

Up to 2 answers per respondent

#### Which concern related to cost of living is your priority?



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GAME CHANGERS

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

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#### Which concern related to cost of living is your priority?

	۲	2	7	(	<b>Å Å</b> Í	h						P								
	COUNTRIES AVERAGE	GEN	IDER		AGE			SOCIAL	GRADE		EDUC	CATION L	EVEL	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		4	3	4	З	З	3	2	З	4	4	2	З	2	2	З	4			

priority

GAME CHANGERS Ipsos

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

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#### Which concern related to cost of living is your priority?

6 High-Income Countries Average	COUN	TRIES		GEN	DER	2				<b>B</b> GE	h					CIAL	GR/	ADE .				DUC							PAR	TY A	FFIL	IATIO		
7 Emerging Countries Average			M	ALE	FEM	IALE		YO	FROM 55		MURE 55		WH COLL		BL COLI		INAC	TIVE	RETI	REES	HIG ED		MED		ED		LE	FT	CEN	TER	RI	GHT	NI AFFILI/	
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	4	4	З	3	5	З	2	З	3	4	3	3	3	2	З	3	З	6	4	4	3	2	3	3	2	1	4	-	3	3	5	3

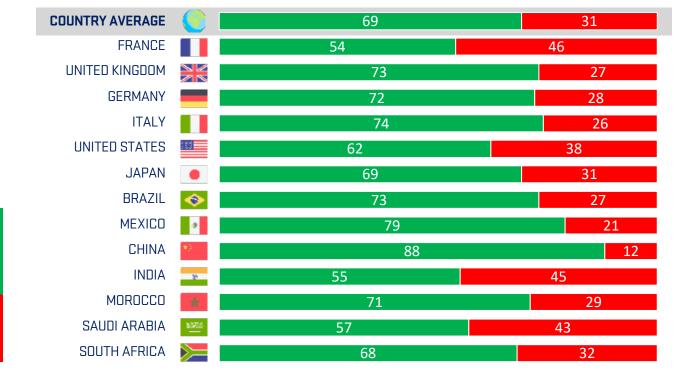
priority

GAME CHANGERS

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

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



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

THEY SHOULD BE <u>REDUCED</u> 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?

		13 Countries	s Average		ligh-Incor untries Av		7 <u>Emerging (</u> Average	<u>ountries</u>
	AVERAGE	69	31		67	33	70	30
	<u>BY GENDER</u>							
	Male	69	31		67	33	70	30
	Female	69	31		67	33	70	30
	<u>BY AGE</u>							
	Less than 35 yo	66	34		65	35	67	33
	From 35 to 55 yo	69	31		64	36	72	28
	More than 55 yo	73	27		72	28	74	26
	<u>BY SOCIAL GRADE</u>			 				
	White collars	66	34	: <b></b>	62	38	70	30
	Blue collars	68	32		65	35	70	30
	Inactive	70	30		72	28	69	31
THEY SHOULD BE	Retirees	74	26		72	28	78	22
	BY EDUCATION LEVEL			i				
<u>STRENGTHENED</u> BECAUSE THERE	Higher education	69	31		67	33	71	29
IS NOT ENOUGH SOLIDARITY	Medium education	69	31		68	32	70	30
WITH THE PEOPLE WHO NEED IT	Lower education	68	32		66	34	70	30
	BY PARTY AFFILIATION			1				
THEY SHOULD BE <u>REDUCED</u>	Left	74	26		75	25	72	28
BECAUSE IT IS TOO EXPENSIVE	Center	66	34		64	36	67	33
	Right	61	39		59	41	66	34
AND ENCOURAGES ASSISTANCE	No affiliation	69	31		67	33	72	28



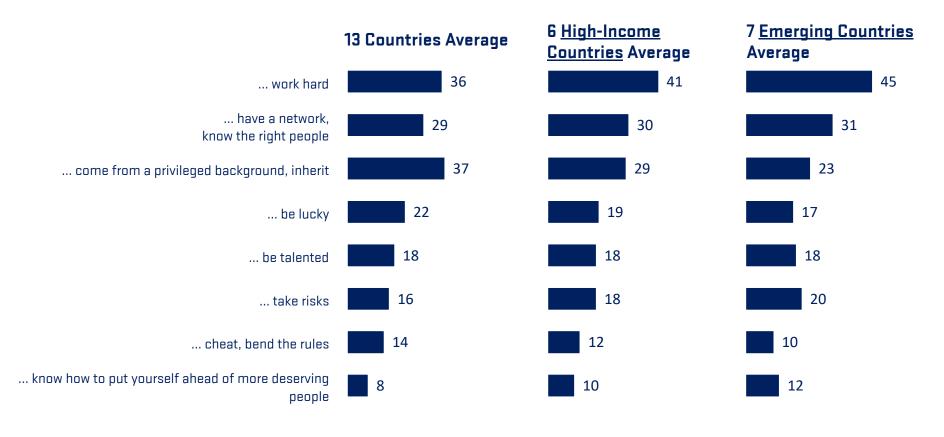
### What should be your priority if you want to get rich?

	COUNTRY AVERAGE	FRANCE	UNITED KINGDOM	GERMANY	ITALY	UNITED STATES	JAPAN	<b>BRAZIL</b>	MEXICO	•) China	s 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

GAME CHANGERS IPSOS Priority

Up to 2 answers per respondent

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



GAME CHANGERS

lpsos

Up to 2 answers per respondent

38

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

				1	<b>* Ť</b> Í	h			R			D		.			
	AVERAGE	GEN	IDER		AGE			SUCIAL	GRADE		EDU	CATION L	EVEL	ŀ	PARTY AF	FILIATIO	N
		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

GAME CHANGERS priority

Up to 2 answers per respondent

### Top ways to get rich according to citizens

6 High-Income Countries Average				GEN	DER					<b>Ř</b>	h				SO	CIAL	GR/	ADE			E	DUC	ATI		EVE	L		Р	ART	Y AF	FILI		N	
7 Emerging Countries Average			м	ALE	FEM	IALE		THAN YD		1 35 TO YO		THAN YO	WH COLI	IITE LARS		LUE LARS	INA	TIVE	RETI	REES	HIG ED		MED EDI		LOV ED		LE	FT	CEN	TER	RIG	нт	OTH Ni AFFILI	0
work har	d 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	63	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 privilege background, inheri		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 luck	y 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	d 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 risk:	s 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 rule:	s 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 yoursel ahead of more deserving people		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

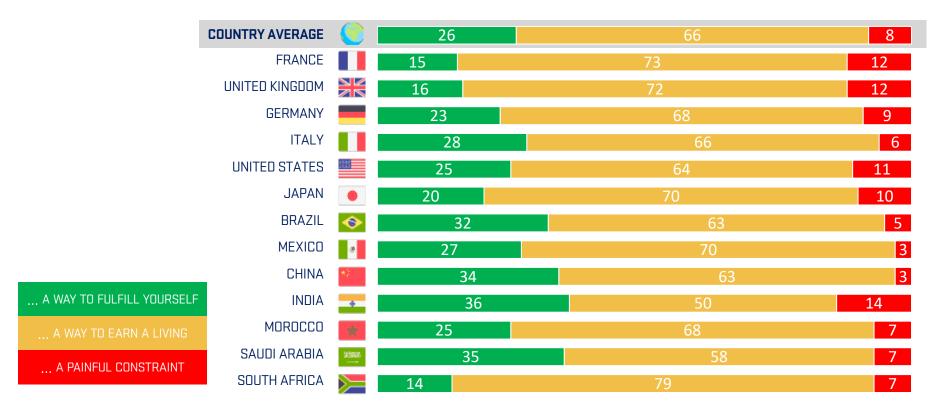
GAME CHANGERS

priority

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

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#### When it comes to work, what is your priority?



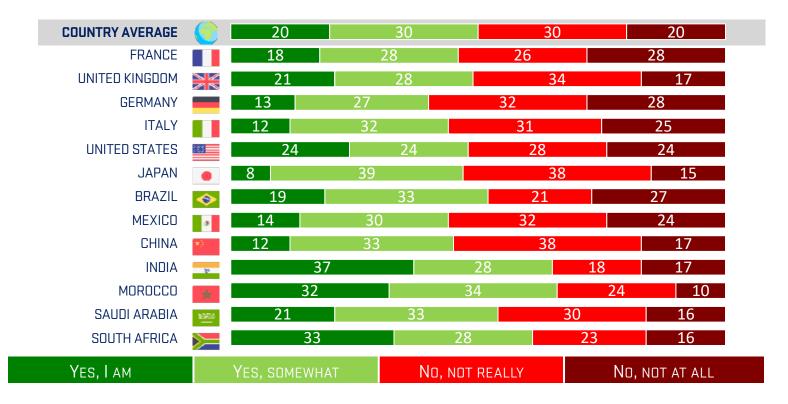


#### When it comes to work, what is your priority?

		13 Cou	ntries Ave	rage	6 <u>High-</u> <u>Countri</u>	<u>Income</u> <u>es</u> Avera	ge*	7 <u>Emergii</u> Average*		<u>ries</u>
	AVERAGE	26	66	8	21	69	10	29	65	6
	BY GENDER				i					
	Male	27	65	8	23	67	10	31	63	6
	Female	24	68	8	20	70	10	27	66	7
	<u>BY AGE</u>									
	Less than 35 yo	25	65	10	22	64	14	27	65	8
	From 35 to 55 yo	25	66	9	19	69	12	29	65	6
	More than 55 yo <u>BY SOCIAL GRADE</u>	27	69	4	23	72	5	34	62	4
	White collars	29	63	8	27	63	10	31	63	6
	Blue collars	19	72	9	14	75	11	23	69	8
	Inactive	24	67	9	17	69	14	29	65	6
	Retirees BY EDUCATION LEVEL	26	70	4	22	74	4	35	62	3
	Higher education	31	62	7	27	64	9	33	60	7
	Medium education	25	68	7	21	70	9	28	66	6
A WAY TO FULFILL YOURSELF	Lower education BY PARTY AFFILIATION	19	72	9	13	74	13	24	69	7
A WAY TO EARN A LIVING	Left	24	67	9	23	67	10	25	67	8
	Center	23	70	7	25	67	8	22	72	6
A PAINFUL CONSTRAINT	Right	26	66	8	22	69	9	34	60	6
	No affiliation	20	70	10	15	73	12	26	68	6

GAME CHANGERS IPSOS Priority

### 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) 5 High-Income 7 Emerging

	13 Countries Average	6 <u>High-Income</u> <u>Countries</u> Average	7 <u>Emerging</u> <u>Countries</u> Average
AVERAGE	20 30 30 20	<b>17</b> 29 <b>31</b> 23	<b>22</b> 32 <b>28</b> 18
BY GENDER Male Female	2030302019313020	1629322317293123	22     31     28     19       23     32     28     17
BY AGE Less th <del>an 35 yo</del> From 35 to 55 yo More than 55 yo	23         34         29         14           19         29         31         21           14         27         27         32	203231171630322212253132	25       35       29       11         22       28       30       20         18       32       19       31
BY SOCIAL GRADE White collars Blue collars	19         30         30         21           22         31         28         19	17         28         32         23           16         31         31         22	2032291928312516
BY EDUCATION LEVEL Higher education Medium education Lower education	20         31         31         18           20         30         27         23           19         30         29         22	18     31     32     19       14     28     31     27       18     28     30     24	21     31     31     17       25     33     23     19       21     30     28     21
BY PARTY AFFILIATION Left Center Right No affiliation	21     31     28     20       21     30     26     23       20     30     28     22       20     27     31     22	18       30       31       21         17       28       32       23         17       29       30       24         14       27       34       25	25312519253122222734201928282519
Yes, I am	YES, SOMEWHAT	NO, NOT REALLY	NO, NOT AT ALL



GAME CHANGERS

priori

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

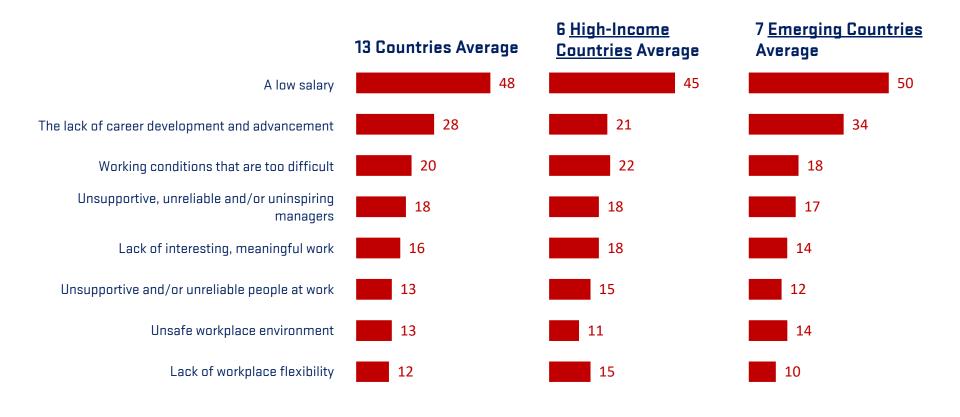
	COUNTRY AVERAGE	FRANCE	UNITED Kingdom	GERMANY	ITALY	UNITED STATES	JAPAN	<b>BRAZIL</b>	* MEXICO	•) China	* INDIA	÷ Morocco	SAUDI ARABIA	SOUTH AFRICA
A low salary	48	43	48	46	50			51		49		57		61
The lack of career development and advancement	28	26	21	18	19	26	15	30	31	39	29	34	32	37
Working conditions 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

GAME CHANGERS

priority

Up to 2 answers per respondent

#### Priorities that might cause employed citizens to quit





#### Priorities that might cause employed citizens to quit

	۲				<b>* * *</b>	1				P				1-	
	COUNTRIES AVERAGE	GEN	IDER		AGE		SOCIAL	GRADE	EDUI	CATION L	EVEL	I	PARTY AF	FILIATIO	N
		MALE	FEMALE	LESS THAN 35 YO	FROM 35 TO 55 YO	MORE THAN 55 YD	WHITE COLLARS	BLUE COLLARS	HIGHER EDUC.	MEDIUM EDUC.	LOWER EDUC.	LEFT	CENTER	RIGHT	ND 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

6 High-Income Countries Average				GEN	DER			(	n n	<b>İ İ</b>	1		so	CIAL	GRA	DE		EDUI			EVEL			I	PART	Y AF	FILIA	אסודא	4	
7 Emerging Countries Average			ма	ILE	FEM	IALE	LESS 35		FROM 55	35 TO YO		THAN YD	WH COLI		BL COLL		HIGI EDI		MED EDI		LOV ED	VER UC.	LE	FT	CEN	TER	RIC		OTH N AFFILI	
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

GAME CHANGERS

priority



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

**COUNTRY AVERAGE** 51 49 FRANCE 47 53 UNITED KINGDOM 43 57 GERMANY 42 58 ITALY 52 48 UNITED STATES 45 JAPAN 52 48 BRAZIL 57 43 MEXICO 60 40 CHINA 73 27 INDIA 55 45 MOROCCO 44 56 SAUDI ARABIA 37 63 SOUTH AFRICA 56 44

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

GAME CHANGERS priority

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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?

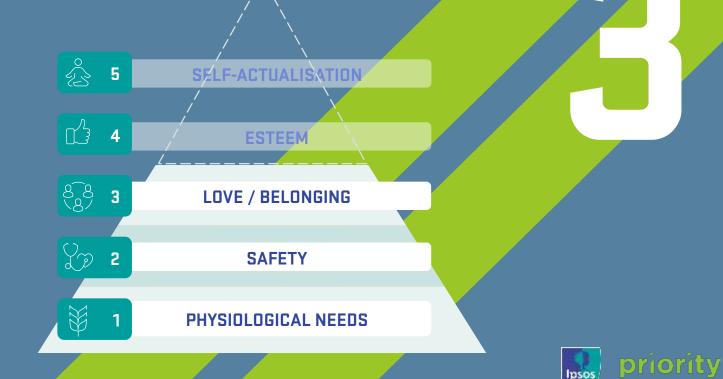
AVERAGE         51         49         47         53         54         46           BY GENDER Male         51         49         48         52         54         46           BY AGE Female         51         49         46         54         55         45           BY AGE ENVIRONMENTAL EMERGENCY, WE MUST TAKE QUICK AND DECISIVE ACTION, EVEN IF IT MEANS ASKING PEOPLE TO MAKE FINANCIAL EFFORTS         BY SOCIAL GRADE BUE COLLARS         51         49         48         52         54         46           FACED WITH THE ECONOMIC AND SOCIAL SITUATION, WE MUST TAKE QUICK AND ENERGETIC MEASURES, EVEN IF IT MEANS PUTTING THE         51         49         51         49         46         54         55         45           BY EDUCATION LEVEL FACED WITH THE ECONOMIC AND SOCIAL SITUATION, WE MUST TAKE QUICK AND ENERGETIC MEASURES, EVEN IF IT MEANS PUTTING THE         52         48         51         49         51         49         55         45           BY PARTY AFFILIATION         52         48         51         49         56         44           SOCIAL SITUATION, WE MUST TAKE QUICK AND ENERGETIC MEASURES, EVEN IF IT MEANS PUTTING THE         Eff         57         43         56         44         55         45			13 Countri	es Average	6 <u>High-Inc</u> Countries		7 <u>Emerging</u> Average**	<u>Countries</u>
Male         51         49         48         52         54         46           Female         51         49         46         54         55         45           BY AGE         BY AGE         55         52         45           BY AGE         54         46         50         50         56         44           Less than 35 yo         54         46         55         52         48           IN THE FACE OF THE         More than 55 yo         49         51         45         55         52         48           MUST TAKE QUICK AND DECISIVE         BY SDCIAL GRADE		AVERAGE	51	49	47	53	54	46
Female         51         49         46         54         55         45           BY AGE         BY AGE		BY GENDER						
BY AGE         Solution         <			51					
Less than 35 yo       54       46       50       50       56       44         IN THE FACE OF THE       From 35 to 55 yo       49       51       45       55       52       48         ENVIRONMENTAL EMERGENCY, WE       More than 55 yo       51       49       47       53       57       43         MUST TAKE QUICK AND DECISIVE       White collars       51       49       48       52       54       46         ACTION, EVEN IF IT MEANS ASKING       Blue collars       50       50       47       53       53       47         PEOPLE TO MAKE FINANCIAL       Efforts       BY EDUCATION LEVEL       49       46       54       61       39         FACED WITH THE ECONOMIC AND       BY EDUCATION LEVEL       Higher education       51       49       46       54       56       44         SOCIAL SITUATION, WE MUST TAKE       Duer education       51       49       46       54       56       44         QUICK AND ENERGETIC MEASURES,       BY PARTY AFFILIATION       49       51       49       55       45         EVEN IF IT MEANS PUTTING THE       Left       57       43       56       44       57       43		Female	51	49	46	54	55	45
IN THE FACE OF THE         From 35 to 55 yo         49         51         45         55         52         48           ENVIRONMENTAL EMERGENCY, WE         More than 55 yo         51         49         47         53         57         43           MUST TAKE QUICK AND DECISIVE         White collars         51         49         48         52         54         46           ACTION, EVEN IF IT MEANS ASKING         Blue collars         50         50         47         53         53         47           PEOPLE TO MAKE FINANCIAL         Blue collars         50         50         49         46         54         55         45           FFORTS         BY EDUCATION LEVEL         Retirees         51         49         46         54         61         39           FACED WITH THE ECONOMIC AND         Medium education         52         48         51         49         53         47           SOCIAL SITUATION, WE MUST TAKE         Higher education         51         49         46         54         56         44           QUICK AND ENERGETIC MEASURES,         EY PARTY AFFILIATION         49         51         42         58         55         45           EVEN IF IT MEANS PUTTING THE <t< td=""><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></t<>								
IN THE FACE OF THEMore than 55 yo514947535743ENVIRONMENTAL EMERGENCY, WEBY SOCIAL GRADEMUST TAKE QUICK AND DECISIVEWhite collars514948525446ACTION, EVEN IF IT MEANS ASKINGBlue collars505047535347PEOPLE TO MAKE FINANCIAL EFFORTSBY EDUCATION LEVEL4946545545PEOPLE TO MAKE FINANCIAL EFFORTSBY EDUCATION LEVEL4946546139FACED WITH THE ECONOMIC AND SOCIAL SITUATION, WE MUST TAKE QUICK AND ENERGETIC MEASURES, EVEN IF IT MEANS PUTTING THELeft574356445743			54	46				
ENVIRONMENTAL EMERGENCY, WE MUST TAKE QUICK AND DECISIVE ACTION, EVEN IF IT MEANS ASKING PEOPLE TO MAKE FINANCIAL EFFORTSBile collars S0514948525446MUST TAKE QUICK AND DECISIVE ACTION, EVEN IF IT MEANS ASKING PEOPLE TO MAKE FINANCIAL EFFORTSWhite collars Blue collars505047535347BY EDUCATION LEVEL PEOPLE TO MAKE FINANCIAL EFFORTSBY EDUCATION LEVEL Higher education4946545545FACED WITH THE ECONOMIC AND SOCIAL SITUATION, WE MUST TAKE QUICK AND ENERGETIC MEASURES, EVEN IF IT MEANS PUTTING THE574356445743								
MUST TAKE QUICK AND DECISIVE ACTION, EVEN IF IT MEANS ASKING PEOPLE TO MAKE FINANCIAL EFFORTSWhite collars514948525446Blue collars50505047535347PEOPLE TO MAKE FINANCIAL EFFORTSRetirees514946545545BY EDUCATION LEVEL Higher education524851496139SOCIAL SITUATION, WE MUST TAKE QUICK AND ENERGETIC MEASURES, EVEN IF IT MEANS PUTTING THEMedium education Lower education514946545644ST495149465456445644SUCIAL SITUATION, WE MUST TAKE EVEN IF IT MEANS PUTTING THELeft574356445743			51	49	47	53	57	43
MOST TAKE QUICK AND DECISIVEBlue collars5145101010ACTION, EVEN IF IT MEANS ASKING PEOPLE TO MAKE FINANCIAL EFFORTSBlue collars505047535347Blue collars505040545545BY EDUCATION LEVEL PEOPLE SUPPLICATION LEVEL Higher education5248514946546139FACED WITH THE ECONOMIC AND SOCIAL SITUATION, WE MUST TAKE QUICK AND ENERGETIC MEASURES, EVEN IF IT MEANS PUTTING THEHigher education Left514946545644SOCIAL SITUATION, WE MUST TAKE LeftLeft574356445743	ENVIRONMENTAL EMERGENCY, WE							
ACTION, EVENTIFIT MEANS ASKING PEOPLE TO MAKE FINANCIAL EFFORTSInactive S1303030BY EDUCATION LEVEL PEOPLE TO MAKE FINANCIAL EFFORTSInactive Retirees514946545545BY EDUCATION LEVEL Higher education SOCIAL SITUATION, WE MUST TAKE QUICK AND ENERGETIC MEASURES, EVEN IF IT MEANS PUTTING THEHigher education Left514946546139BY PARTY AFFILIATION LeftLeft574356445743	MUST TAKE QUICK AND DECISIVE		51	49				
PEOPLE TO MAKE FINANCIAL EFFORTSInactive514946545545BY EDUCATION LEVEL BY EDUCATION LEVEL Medium education514946546139FACED WITH THE ECONOMIC AND SOCIAL SITUATION, WE MUST TAKE QUICK AND ENERGETIC MEASURES, EVEN IF IT MEANS PUTTING THEMedium education Left524851495347Contraction524851495347Contraction5149545644SOCIAL SITUATION, WE MUST TAKE EVEN IF IT MEANS PUTTING THELeft574356445743	ACTION, EVEN IF IT MEANS ASKING		50	50				
EFFORTSBY EDUCATION LEVEL4946546139FACED WITH THE ECONOMIC AND SOCIAL SITUATION, WE MUST TAKE QUICK AND ENERGETIC MEASURES, EVEN IF IT MEANS PUTTING THEHigher education Left524851495347BY PARTY AFFILIATION Left514946545644SOCIAL SITUATION, WE MUST TAKE Lower educationLower education 495142585545QUICK AND ENERGETIC MEASURES, EVEN IF IT MEANS PUTTING THELeft574356445743			51	49				
In Education EducationFACED WITH THE ECONOMIC ANDHigher education524851495347SOCIAL SITUATION, WE MUST TAKEMedium education514946545644QUICK AND ENERGETIC MEASURES, EVEN IF IT MEANS PUTTING THELeft574356445743			51	49	46	54	61	39
FACED WITH THE ECONOMIC AND SOCIAL SITUATION, WE MUST TAKEMedium education Lower education514946545644SOCIAL SITUATION, WE MUST TAKELower education Lower education495142585545QUICK AND ENERGETIC MEASURES, EVEN IF IT MEANS PUTTING THELeft574356445743	EFFURIS							
SOCIAL SITUATION, WE MUST TAKELower education514946545644QUICK AND ENERGETIC MEASURES, EVEN IF IT MEANS PUTTING THEBY PARTY AFFILIATION Left574356445743	Ελρέρ ωπτή της ερονομίς λνη	-	52	48				
QUICK AND ENERGETIC MEASURES,     BY PARTY AFFILIATION     43     51     42     35     43       EVEN IF IT MEANS PUTTING THE     Left     57     43     56     44     57     43			51	49				
EVEN IF IT MEANS PUTTING THE Left 57 43 56 44 57 43			49	51	42	58	55	45
	QUICK AND ENERGETIC MEASURES,				I			
	EVEN IF IT MEANS PUTTING THE		57	43		44	57	43
	ENVIRONMENTAL ISSUE ON THE	Center	54	46	53	47	55	45
BACK BURNER FOR THE MOMENT No officiation 44 56 37 63 54 46	BACK BURNER FOR THE MOMENT		44	56				
No affiliation 47 53 43 57 51 49	BACK BORNERT ON THE MOMENT	No affiliation	47	53	43	57	51	49

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GAME CHANGERS Ipsos

priority

# LOVE/ BELONGING NEEDS



#### 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	8RAZIL	* 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
l 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
l 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?

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

	0		T	Ŵ	Î							1				1-	
% « Agree » (total agree + rather agree)	COUNTRIES AVERAGE	GEN	DER		AGE			SOCIAL	GRADE		EDUC	ATION L	EVEL	P	ARTY AF	FILIATIO	N
		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	ND 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
l 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
l rather often feel alone	48	47	50	58	49	36	47	50	57	33	47	48	50	48	48	46	49
l have no-one with whom I can discuss important matters with		41	37	45	40	30	38	43	45	28	37	39	42	39	37	38	40



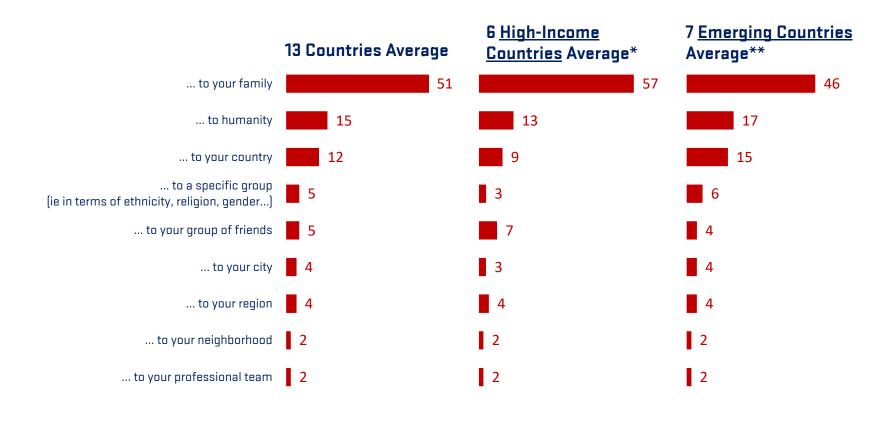
#### Where do you prioritize your belonging?

	COUNTRY AVERAGE	FRANCE	UNITED Kingdom	GERMANY	ITALY	UNITED STATES	JAPAN	BRAZIL	MEXICO	CHINA		<b>MOROCCO</b>	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	З	З	5	1	7	З	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	З	3	4	2	5	6	5	6	2
to your region	4	4	2	З	3	4	5	3	2	3	8	3	3	З
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	З	-	2	2

GAME CHANGERS

priority

#### Where do you prioritize your belonging?







#### Which social connection is your priority?

	<b>()</b>		7	ģ	, ÎÎÎ	1						•		I	1	1-		
	COUNTRIES AVERAGE	GEN	IDER		AGE			SOCIAL	GRADE		EDUC	ATION L	EVEL	PARTY AFFILIATION				
		MALE	FEMALE	LESS THAN 35 YD	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	13	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	5	7	5	4	6	5	5	4	5	5	5	6	6	5	5	
to your city	4	4	4	5	4	3	4	4	4	3	4	4	4	3	З	4	З	
to your region	4	3	4	4	3	3	3	4	4	3	3	4	4	3	4	4	З	
to your neighborhood	2	2	2	2	2	2	2	2	3	2	2	2	З	2	2	2	2	
to your professional team	2	2	1	2	2	1	4	2	-	-	2	2	1	2	2	2	2	

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

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priority

#### Which social connection is your priority?

6 High-Income Countries				GEN	DER	1				<b>R</b> GE	h				SO	CIAL	GR/	ADE			E	ouc			.EVE	L		Р	ART	Y AF	FILI		N	
Average 7 Emerging Countries Average			MA	ALE	FEN	IALE	LESS 35		FROM 55		MORE 55	THAN YO		HITE LARS		LUE LARS	INAI	CTIVE	RETI	REES	HIG ED		MED			VER UC.	LE	FT	CEN	TER	RIC	нт	OTH N AFFILI	10
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	З	4	4	8	5	6	4	7	2	4	3	7	3	5	5	6	2	6	З	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

GAME CHANGERS

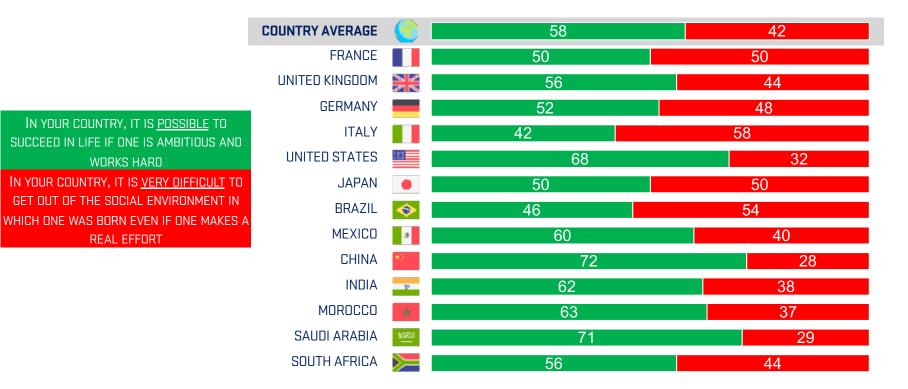
priority

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

## **ESTEEM NEEDS**



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





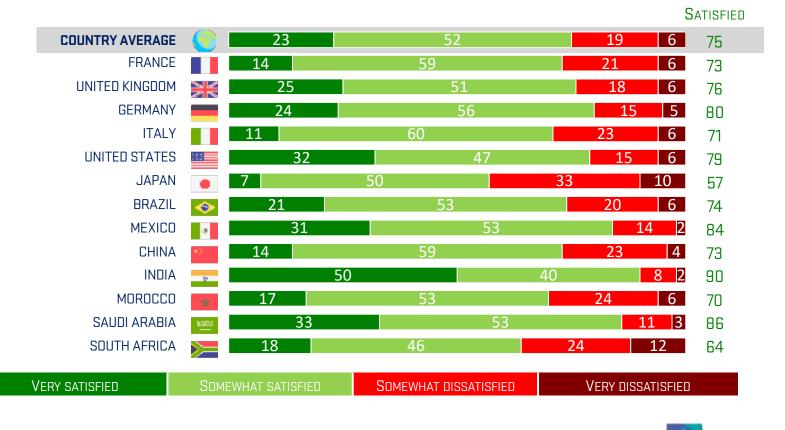
#### Esteem priorities - Opinion on the level of social determinism in citizens' own countries

		13 Countri	es Average	6 <u>High-Inco</u> <u>Countries</u> A		7 <u>Emerging</u> Average	<u>Countries</u>
	AVERAGE	58	42	53	47	62	38
	BY GENDER						
	Male	60	40	55	45	64	36
	Female	55	45	51	49	59	41
	<u>BY AGE</u>						
	Less than 35 yo	53	47	48	52	56	44
	From 35 to 55 yo	58	42	49	51	64	36
	More than 55 yo	62	38	60	40	67	33
	BY SOCIAL GRADE						
	White collars	59	41	56	44	61	39
	Blue collars	54	46	47	53	59	41
	Inactive	55	45	45	55	61	39
IN YOUR COUNTRY, IT IS <u>POSSIBLE</u>	Retirees	64	36	61	39	70	30
TO SUCCEED IN LIFE IF ONE IS	BY EDUCATION LEVEL						
AMBITIOUS AND WORKS HARD	Higher education	61	39	57	43	64	36
	Medium education	54	46	49	51	59	41
IN YOUR COUNTRY, IT IS <u>VERY</u>	Lower education	56	44	52	48	59	41
<u>DIFFICULT</u> TO GET OUT OF THE	BY PARTY AFFILIATION						
SOCIAL ENVIRONMENT IN WHICH	Left	52	48	49	51	55	45
ONE WAS BORN EVEN IF ONE MAKES	Center	56	44	62	38	51	49
	Night	63	37	62	38	65	35
A REAL EFFORT	No affiliation	50	50	44	56	57	43

GAME CHANGERS

priority

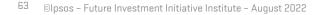
#### Esteem priorities - Overall satisfaction with one's life





#### Esteem priorities - Overall satisfaction with one's life

		13 Coun	tries Av	erage S	GATISFIED		<u>-Income</u> ries Aver	age S	ATISFIED	7 <u>Emer</u> Countr	<u>qinq</u> ies Avera	i <b>ge</b> S	ATISFIED
	AVERAGE	23	52	19 6	75	19	54	21 6	73	26	51	18 5	77
<u> </u>	<u>BY GENDER</u>			_	77				75				70
	Male	26	51	18 5	77 74	21	54	19 6	75 71	29	49	17 5	78 76
	Female	20	54	20 6	/4	17	54	22 7	/1	23	53	19 5	/0
Los	<u>BY AGE</u> s than 35 yo	25	51	19 5	76	21	52	21 6	73	28	50	18 4	78
	n 35 to 55 yo	25 23	51	20 7	73	21 17	<u> </u>	21 6 23 8	69	28	<u> </u>	18 4	76
	re than 55 yo	20	57	18 5	77	19	57	19 5	76	23	56	16 5	79
	CIAL GRADE	20	57			19	57	13 0		23	30	10 0	
	White collars	26	54	16 4	80	25	54	17 4	79	28	53	154	81
	Blue collars	18	53	23 6	71	10	57	26 7	67	24	50	21 5	74
	Inactive	21	48	22 9	69	13	48	28 11	61	26	48	19 7	74
	Retirees	23	57	16 4	80	23	58	15 4	81	23	55	18 4	78
BY EDUCAT	TION LEVEL				i								
High	er education	26	53	17 4	79 <sup>¦</sup>	22	55	18 5	77	28	53	163	81
Mediu	m education	21	53	20 6	74 ¦	17	57	20 6	74	24	51	20 5	75
Low	er education	21	49	22 8	70	17	50	24 9	67	25	48	19 8	73
<u>BY PARTY A</u>					į								
	Left	27	50	18 5	77 ¦	23	54	<u>18</u> 5	77	31	45	18 6	76
	Center	20	54	19 7	74	22	55	16 7	77	19	53	22 6	72
	Right	25	52	18 5	77	20	55	20 5	75	32	47	16 5	79
ſ	No affiliation	17	52	23 8	69	11	52	27 10	63	22	52	20 6	74
١	ery satisfie	D	Son	IEWHAT S	ATISFIED	S	)MEWHAT [	DISSATISFIE	D	Very d	ISSATISFIE	D	



GAME CHANGERS IPSOS Priority

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

**COUNTRY AVERAGE** FRANCE UNITED KINGDOM GERMANY ITALY UNITED STATES JAPAN BRAZIL Ô MEXICO CHINA 6 1 INDIA - 20 4 2 MOROCCO 5 3 SAUDI ARABIA SOUTH AFRICA  $\geq$ **REALLY BETTER RATHER WORSE REALLY WORSE** 



BETTER WORSE

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

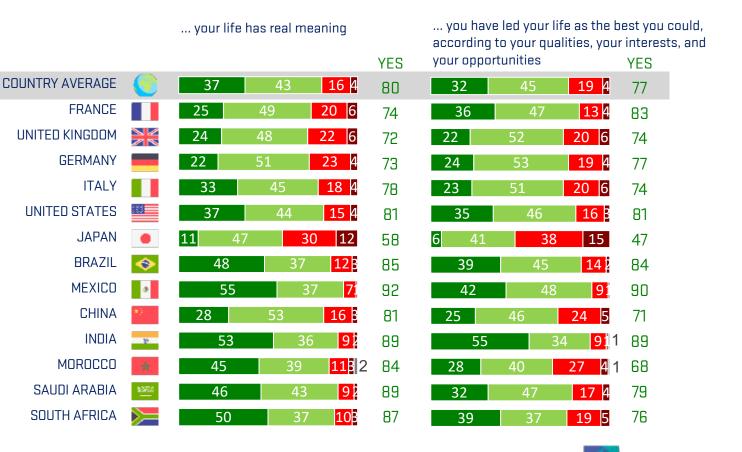
	13 Countries Aver	-	6 <u>High-Income</u> <u>Countries</u> Average	Better Worse	7 <u>Emerging</u> <u>Countries</u> Average	Better Worse
AVERAGE	21 36 29	<b>104</b> 57 14	<b>15</b> 32 35 <b>13</b>	5 47 18	26 40 24 7	66 10
<u>BY GENDER</u>						
Male	21 38 27	<b>10</b> 4 59 14	<b>15</b> 34 33 13		26 42 22 7	
Female <u>BY AGE</u>	20 34 32	<b>10</b> 4 54 14	<b>14</b> 30 37 <b>13</b>	6 44 19	26 38 26 7	64 10
Less than 35 yo	23 38 28	<b>83</b> 61 11	<b>15</b> 33 <b>35 12</b>	<b>5</b> 48 17	28 40 24 6	2 68 8
From 35 to 55 yo	20 34 30	<b>115</b> 54 16	<b>13</b> 26 38 <b>15</b>	8 39 23	25 40 24 8	65 11
More than 55 yo <u>BY SOCIAL GRADE</u>	19 38 30	<b>10</b> 57 13	<b>16</b> 37 <b>33 1</b> 1	13 53 14	24 40 24 9	64 12
White collars	23 39 26	93 62 12	18 34 32 12	4 52 16	27 42 21 7	69 10
Blue collars	16 36 34	<b>113</b> 52 14	9 28 43 15	<b>5 3</b> 7 20	22 42 26 8	2 64 10
Inactive	19 32 32	<b>11</b> 6 51 17	9 26 39 17	9 <mark>35</mark> 26	26 36 27 7	4 62 11
Retirees BY EDUCATION LEVEL	23 39 27	<b>92</b> 62 11	20 39 29 <b>1</b>	02 59 12	29 40 22 7	2 69 9
Higher education	24 39 26	83 63 11	<b>17</b> 33 34 <b>1</b> 2	4 50 16	29 43 21	72 7
Medium education	19 37 29	<b>114</b> 56 15	<b>14</b> 33 <b>34 14</b>	5 47 19	24 40 25 9	2 64 11
Lower education <u>BY PARTY AFFILIATION</u>	19 33 33	<b>105</b> 52 15	<b>12</b> 29 39 14	<mark>6</mark> 41 20	25 36 28 7	4 61 11
Left	22 38 27	<b>10</b> 60 13	18 37 30 11	4 55 15	27 39 24 7	66 10
Center	18 35 28	<b>13</b> 6 53 19	<b>16</b> 32 32 <b>1</b> 4	6 48 20	<b>21</b> 37 <b>25 11</b>	6 58 17
Right	21 37 28	<b>10</b> 4 58 14	<b>16</b> 33 33 13	5 49 18	31 43 18 6	2 74 8
No affiliation	14 30 39	<b>125</b> 44 17	9 23 47 14	7 32 21	20 37 31 9	3 57 12
REALLY BETTER	SOMEWHAT BETTER	NEITHER E	ETTER NOR WORSE	ATHER WORSE	REALLY WO	RSE



## SELF ACTUALISATION



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



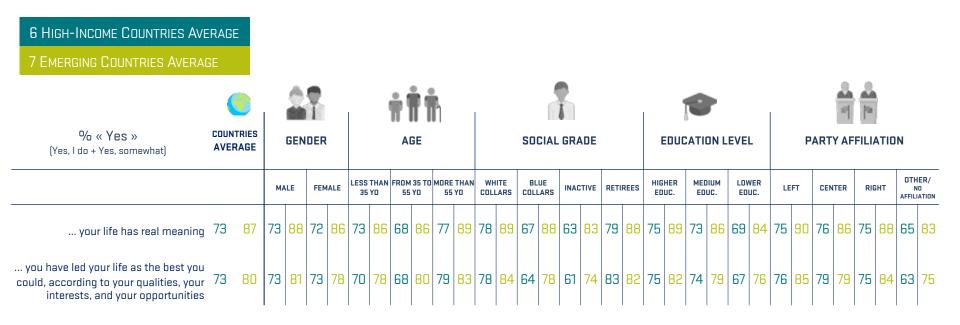
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### To what extent is the priority of self-actualisation being achieved in different demographics?



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

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## 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	З	9	4	З	6	7	З	5
Have children/grandchildren	4	4	4	7	7	З	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	З	7	4	5	4	2
Get married	2	2	2	2	2	2	2	2	1	1	4	3	5	2

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priority

## APPENDICES



#### RELIABILITY OF RESULTS : 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 (DP) 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/privacydata-protection

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



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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 Ouality 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 www.ipsos.com

### **GAME CHANGERS**

In our world of rapid change, the need of reliable information to make confident decisions has never been greater.

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, 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.

