

LGBT+ PRIDE 2021 GLOBAL SURVEY

A 27-country Ipsos survey

Conducted April 23 – May 7, 2021

For more information, go to <https://www.ipsos.com/en/ipsos-lgbt-pride-2021-global-survey>

GAME CHANGERS



LGBT+ PRIDE 2021 GLOBAL SURVEY – KEY FINDINGS

GENDER IDENTITY AND SEXUAL ATTRACTION: A GENERATION GAP

On average, across the 27 countries surveyed, those who describe themselves as transgender, non-binary, non-conforming, gender-fluid, or in a way other than male or female make up 4% of Gen Z vs. 2% of Millennials, 1% of Gen X and less than 1% of Boomers

Younger adults are also much more likely to say they are equally attracted to both sexes

LGBT EXPOSURE AND ENGAGEMENT: WIDE VARIATIONS

Exposure to LGBT people and engagement with the LGBT+ community varies widely across countries: 66% in Brazil report having a gay or lesbian relative, friend or colleague vs. 7% in Japan and South Korea

LGBT EQUALITY: STRONG SUPPORT IN MOST COUNTRIES

Anti-discrimination laws and equal marriage and adoption rights for LGBT people are supported by majorities in most of the 27 countries but are fiercely opposed in a few of them

Globally, there is a lot more support than opposition toward corporate activism promoting equality

LGBT VISIBILITY: MORE SUPPORT THAN OPPOSITION

Majorities in most (but not all) countries support LGBT people being open about their sexual orientation or gender identity with everyone

On average, there is more support than opposition toward LGBT people displaying affection in public and more LGBT characters on TV, in films and in advertising

LGBT ATHLETES: A MIXED PICTURE

There is a great deal of support in most countries for lesbian, gay and bisexual athletes in sports teams being open about their orientation

On the other hand, when it comes to allowing transgender athletes to perform according to the gender they identify with, public opinion is divided and varies widely across countries

GENDER IDENTITY AND SEXUAL ORIENTATION

GENDER IDENTITY AND SEXUAL ORIENTATION - SUMMARY

On average, across the 27 countries surveyed, 4% in Gen Z identify as other than male or female vs. 1% among all adults

On average, 1% of adults describe themselves identify as “transgender”, “non-binary/non-conforming/gender-fluid” or “in another way” rather than as “male” or “female”

The proportion of those who do so ranges varies widely across generations and countries:

- From 4% of Gen Z (born in or after 1997) and 2% of Millennials (born 1981-1996) to 1% of Gen X (born 1965-1980) and less than 1% of Baby Boomers (born 1946-1964)
- Highest at 3% in Germany and Sweden, 2% in 10 countries, 1% or less in the other 12 countries

On average, globally, 80% identify as heterosexual, 3% as gay, lesbian or homosexual, 4% as bisexual, 1% as pansexual or omnisexual, 1% as asexual, 1% as “other”, and 11% don’t know or won’t say.

- Several countries show large proportions of adults unable or unwilling to define their sexual orientation: 39% in Malaysia, 33% in Turkey, 24% in India, 19% in Russia and 15% in Mexico.
- Identification as lesbian/gay/homosexual ranges from 5% in Brazil, Spain, Australia, Canada and the Netherlands to 1% in Hungary, Peru, Italy, Poland, Japan, China, South Korea, and less than 1% in Russia
- Globally, males are more likely to identify as gay or homosexual (4%) than are women as lesbian or homosexual (1%); the same applies to Gen Z (4%) and Millennials (3%) vs. Gen X (2%) and Boomers (1%)
- The incidence of self-identified bisexuals ranges from 9% in India and 7% in Brazil and Mexico to 1% in Turkey, Japan, and South Korea
- Globally, Gen Z members are much more likely to identify as bisexual (9%) than Millennials (4%), Gen Xers (3%) and Boomers (2%)
- The US is the only country where as many as 2% identify as pansexual/omnisexual
- Sweden has the highest prevalence of those describing themselves as asexual (3%)
- Turkey (5%) and Japan (3%) have the largest proportion of adults identifying their sexual orientation as “other”

Globally, 7% say they are only or mostly attracted to the same sex, 4% equally to both sexes, 83% only to the opposite sex and 6% don’t know or prefer not to say.

The proportion of those who report being only/most/equally attracted to the same sex barely varies by gender and education level globally, but it differs greatly depending on age and geography:

- 18% of Gen Z, 12% of Millennials, 9% of Gen X, 7% of Boomers
- More than 15% in Australia, Brazil, Belgium, and India vs. 4% in Russia

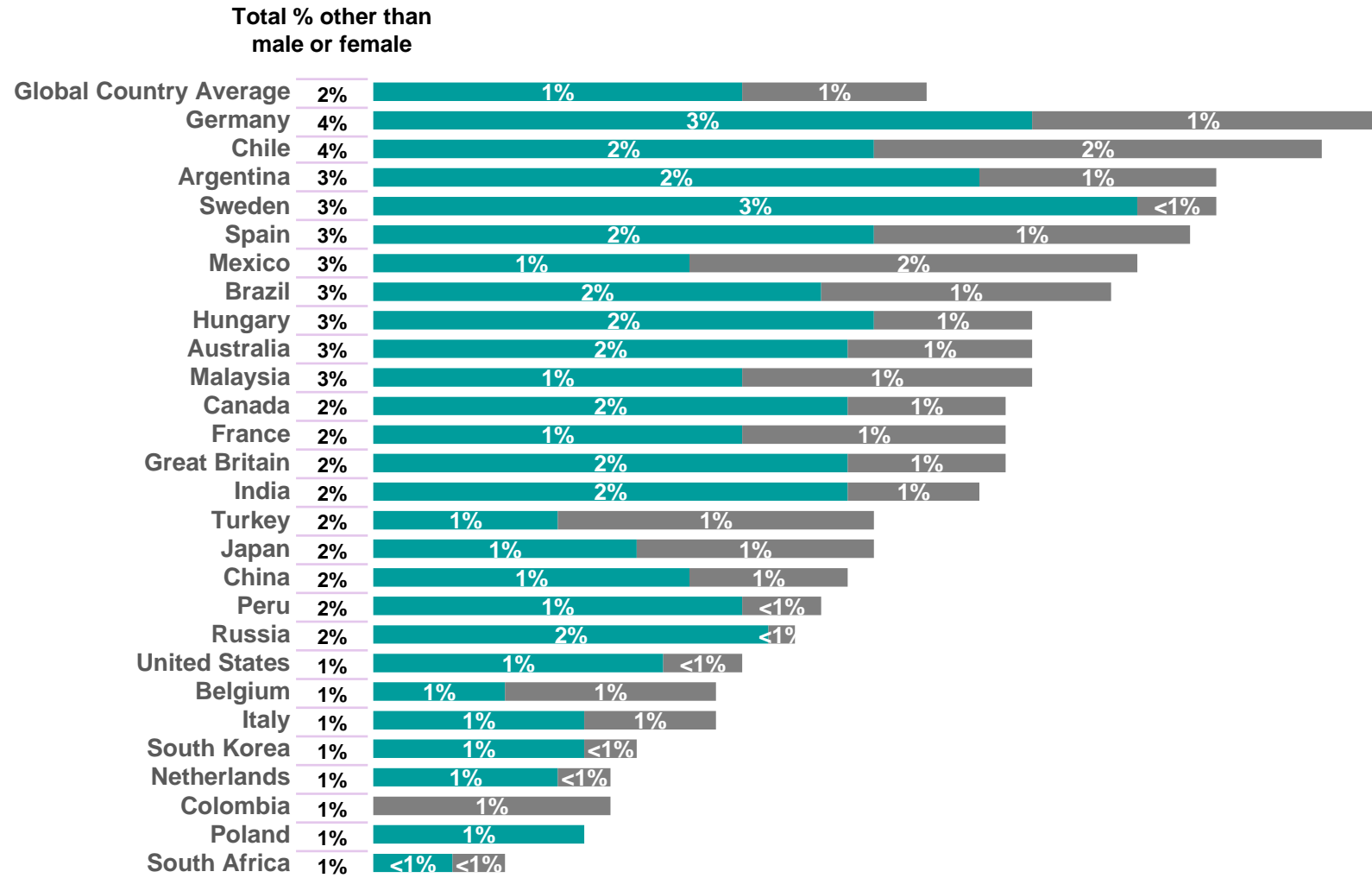
Sexual attraction and reported orientation are mostly but not perfectly aligned:

- 80% of self-identified heterosexuals report being only attracted to the opposite sex and 12% mostly so
- 60% of self-identified lesbians and gays say they are only attracted to the same sex and 24% mostly so
- 48% of self-identified bisexuals say they are equally attracted to both sexes but more say they are mostly attracted to the opposite sex (28%) than to the same sex (9%)

Those who identify their gender as any of transgender, non-binary/non-gender conforming/gender-fluid, or other are diverse in their reported orientation: 19% describe themselves as heterosexual, 19% as homosexual, 17% as pan/omnisexual, 12% as asexual, 9% as bisexual, 7% as other and 16% don’t know or won’t say

GENDER IDENTITY BY COUNTRY

Q. How do you currently describe yourself?



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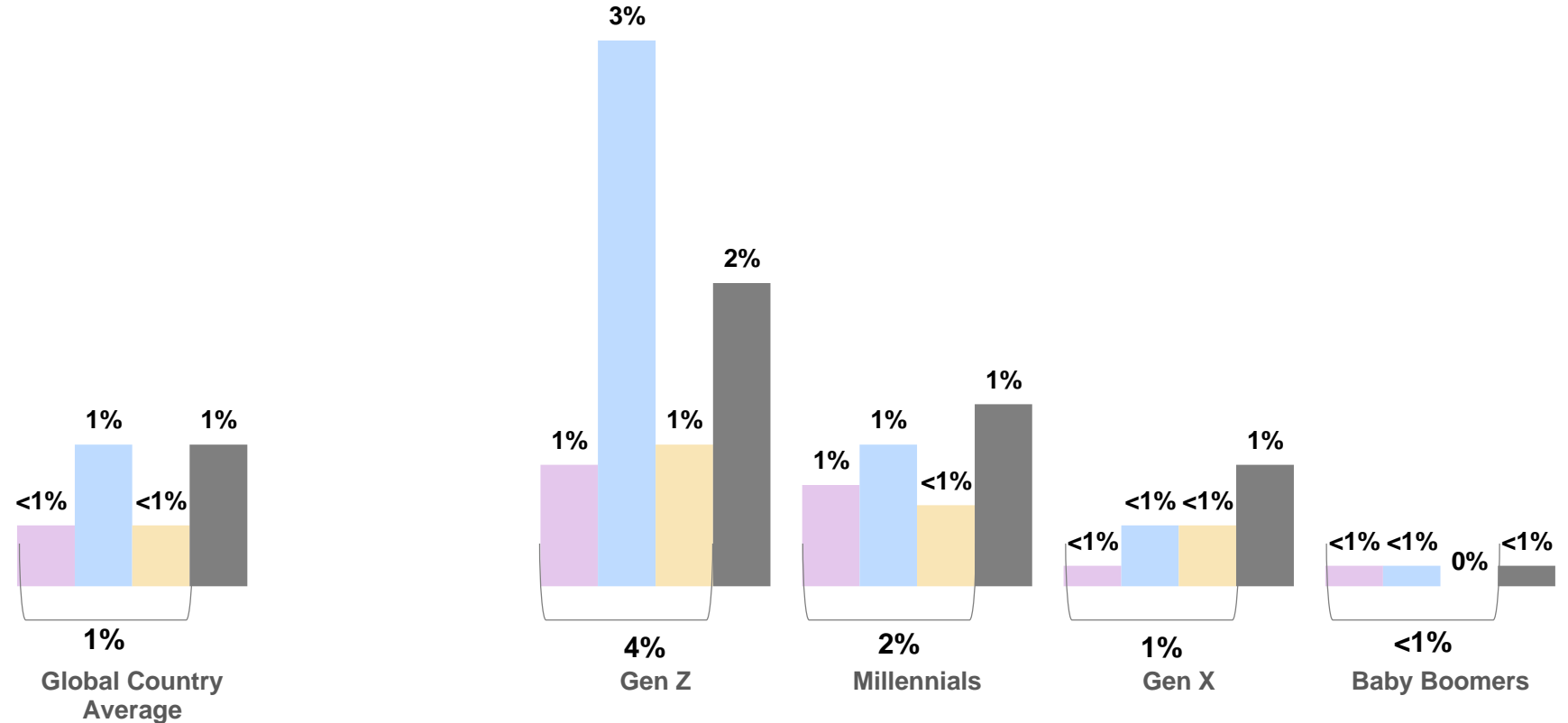
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■ "Transgender", "non-binary/non-conforming/gender-fluid" or "in another way" ■ Prefer not to say

GENDER IDENTITY BY KEY GENERATION (GLOBAL COUNTRY AVERAGE)

Q. How do you currently describe yourself?

- Gen Z: Born 1997 and later (i.e., no older than 23/24)
- Millennials: Born 1981-1996 (i.e., ages 24/25-39/40)
- Gen X: Born 1965-1980 (i.e., ages 40/41-55/56)
- Baby Boomers: Born 1946-1964 (i.e., ages 56/57-74)



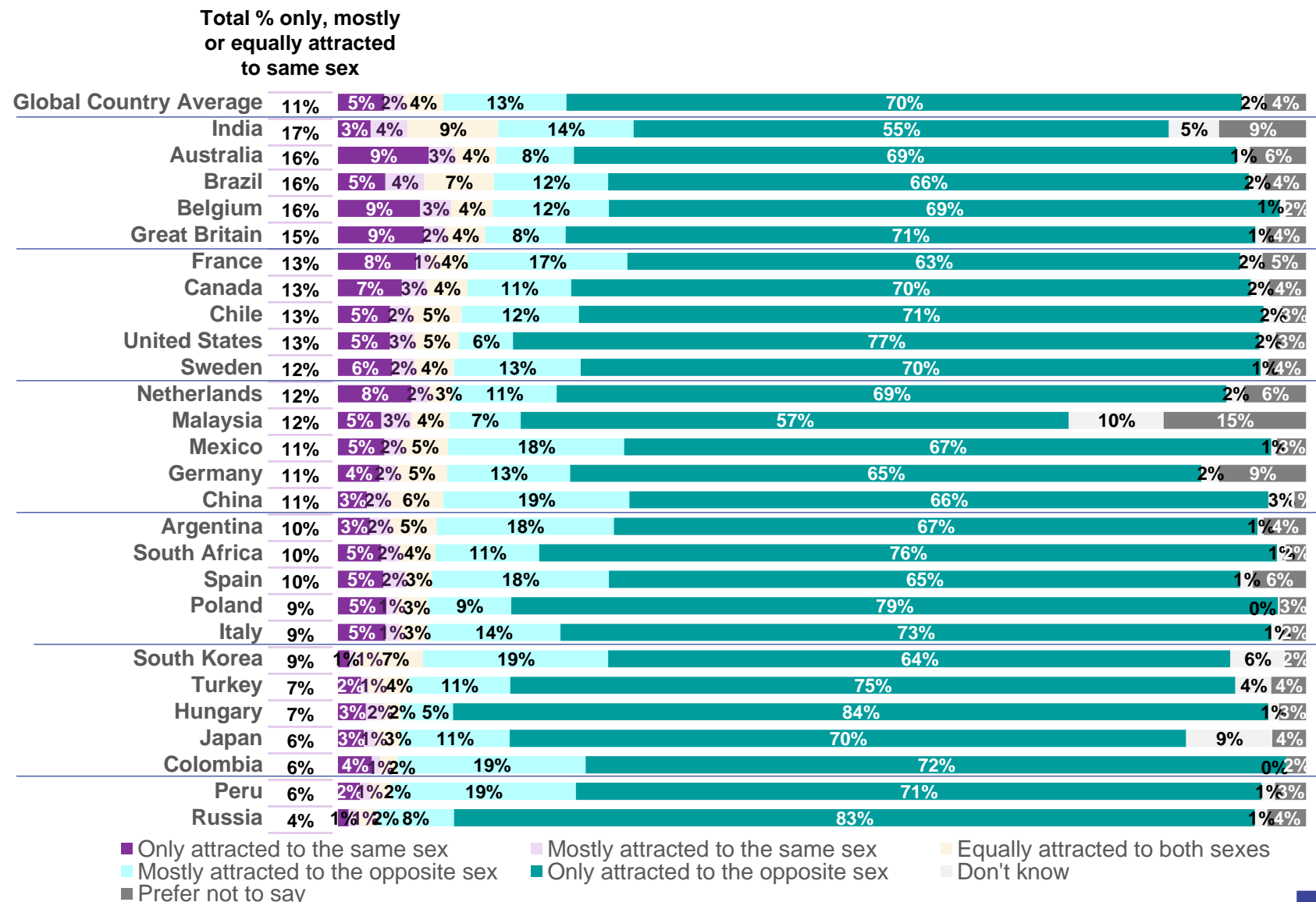
■ Transgender ■ Non-binary, non-conforming or gender-fluid ■ In another way ■ Prefer not to say

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SEXUAL ATTRACTION BY COUNTRY

Q. Which, if any, of the following, best describes how you think of your sexual orientation?



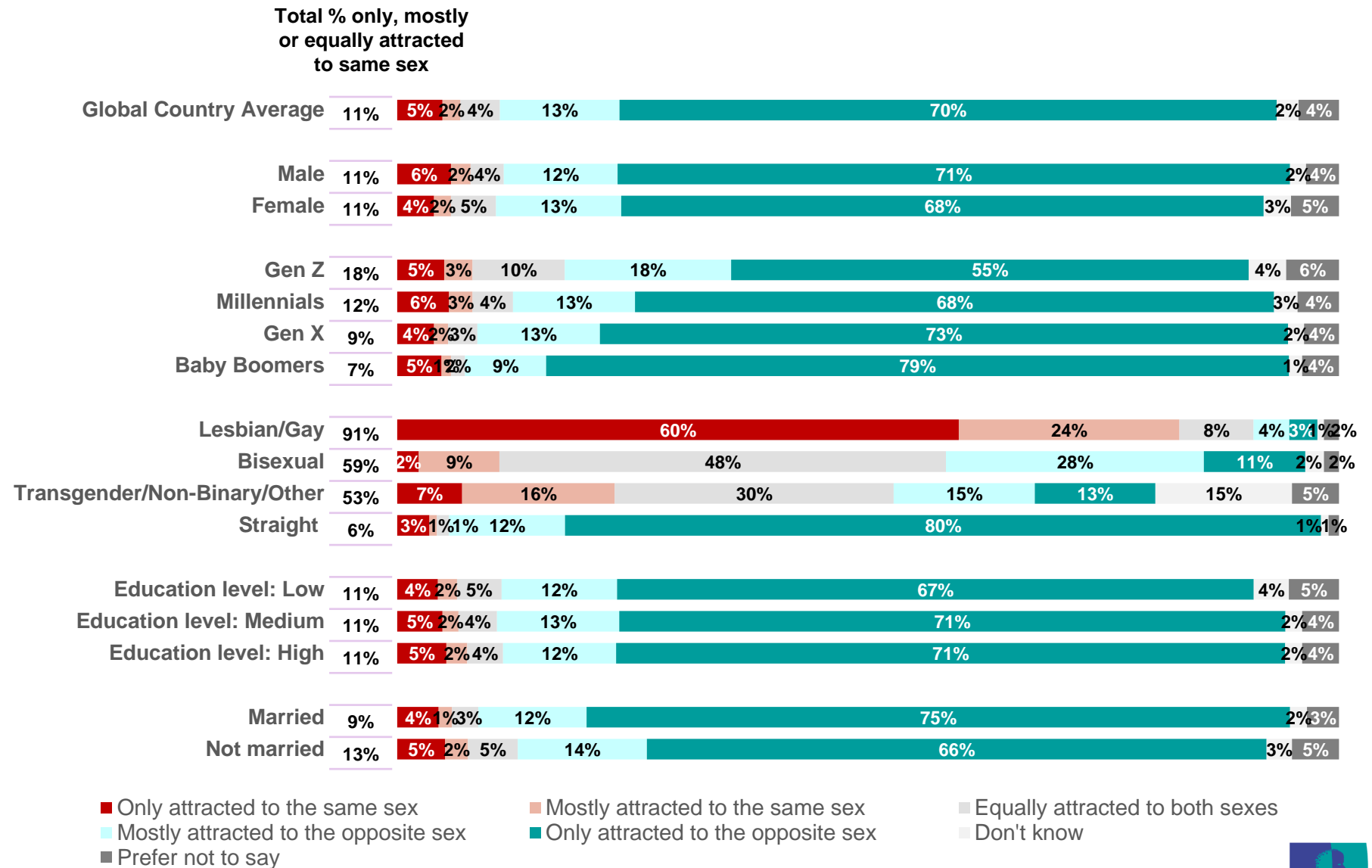
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SEXUAL ATTRACTION BY KEY DEMOS (GLOBAL COUNTRY AVERAGE)

Q. Which, if any, of the following, best describes how you think of your sexual orientation?

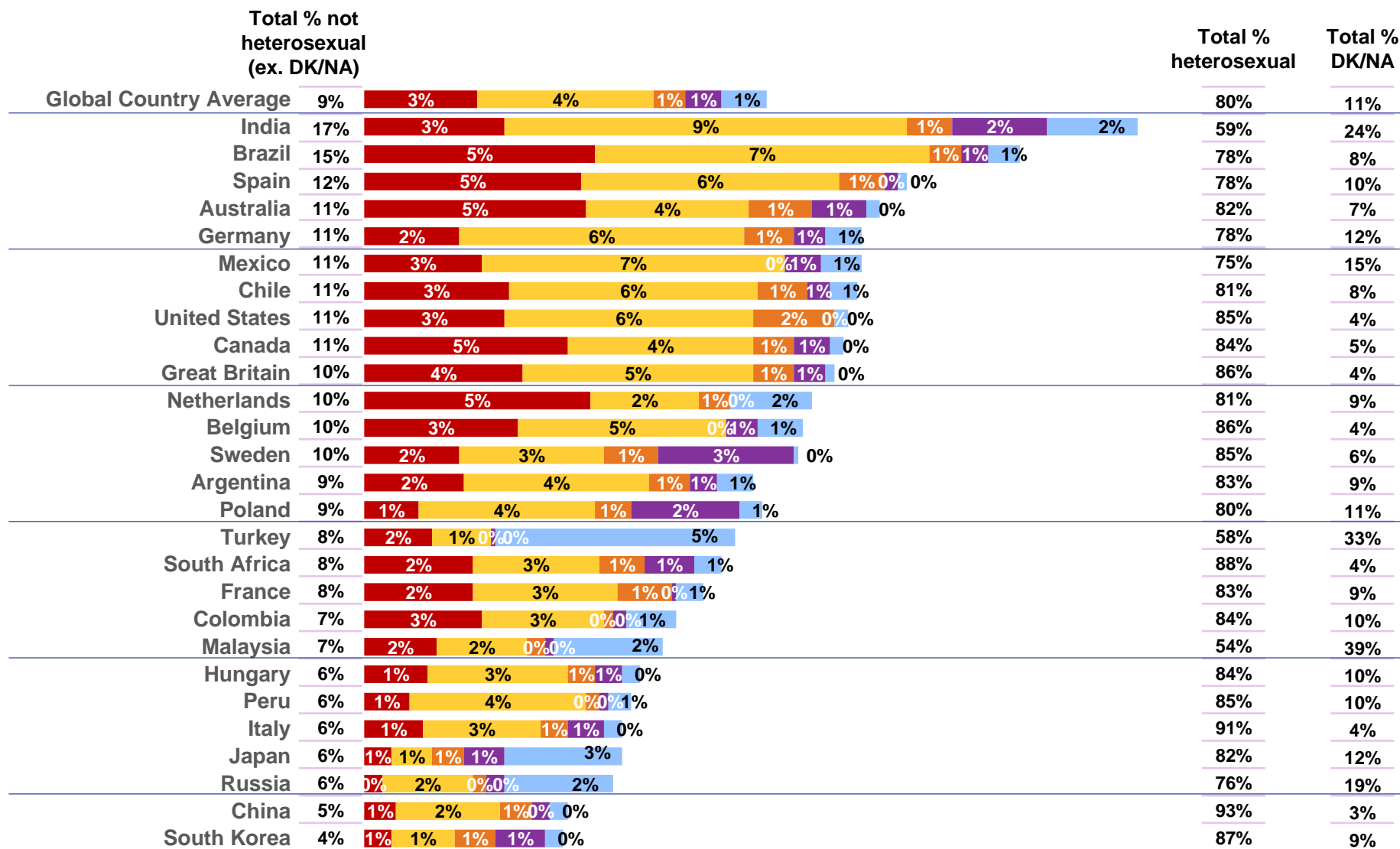


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SEXUAL ORIENTATION BY COUNTRY

Q. Which, if any, of the following would you identify as?



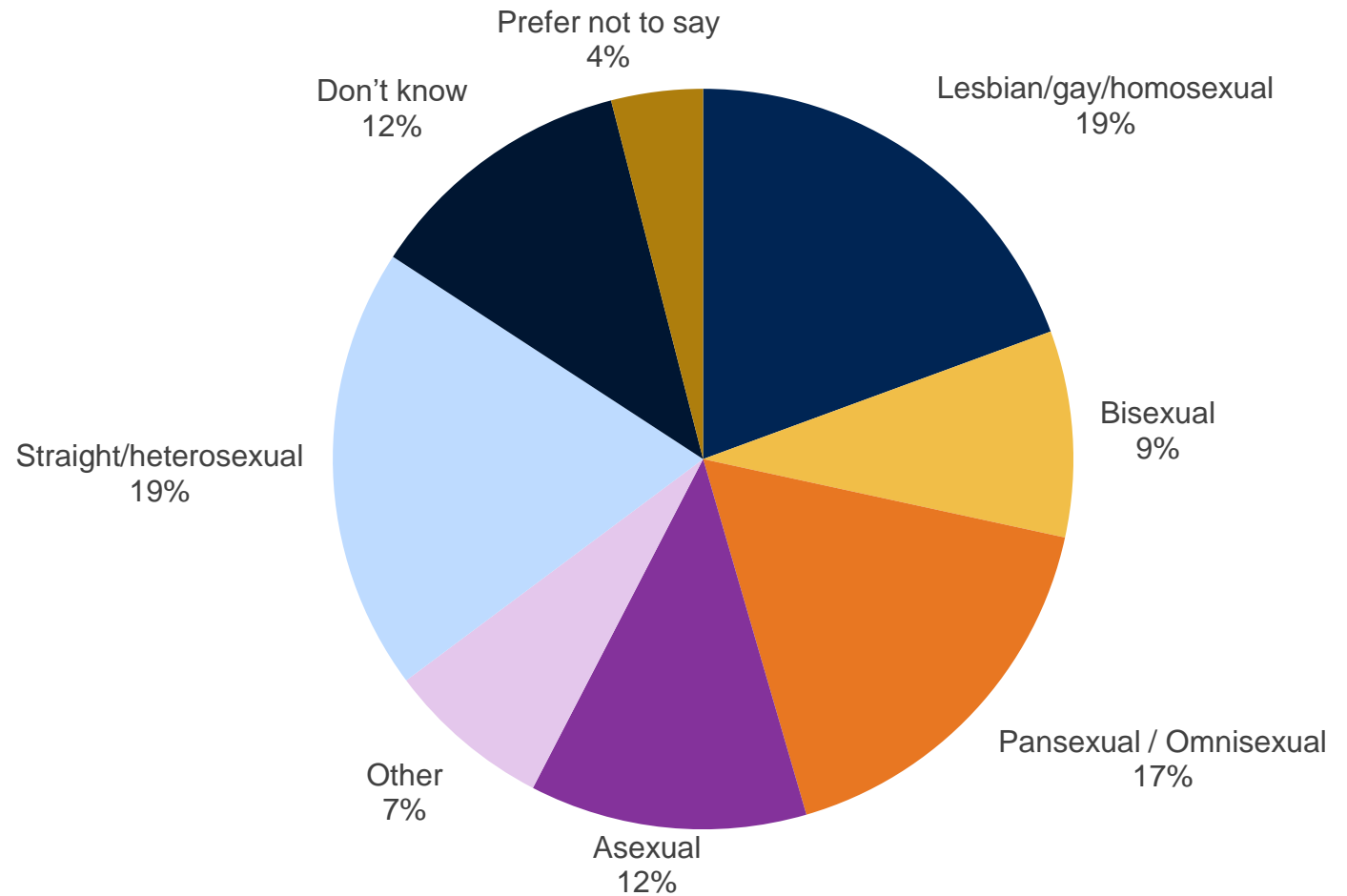
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SEXUAL ORIENTATION OF ADULTS WHO IDENTIFY AS TRANSGENDER, NON-BINARY/GENDER-FLUID/NON-CONFORMING, OR OTHER (GLOBAL COUNTRY AVERAGE)

Q. Which, if any, of the following would you identify as?

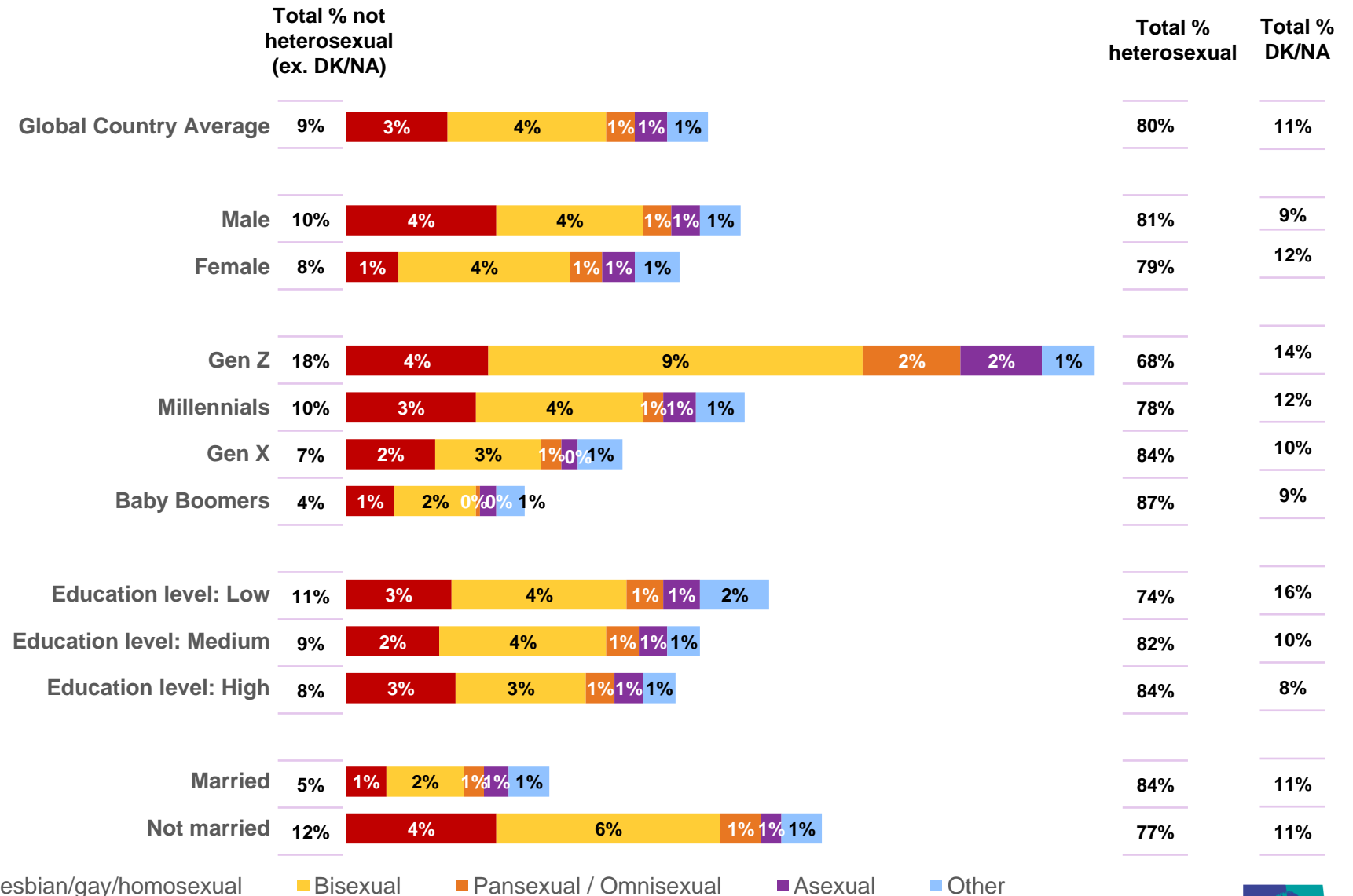


Base: 226 online adults aged 16-74 across 27 countries who identify as transgender, non-binary/non-conforming/gender-fluid, or another way
* Online samples in Brazil, Chile, mainland China, Colombia, India, Malaysia, Mexico, Peru, Russia, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population

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SEXUAL ORIENTATION BY KEY DEMOS (GLOBAL COUNTRY AVERAGE)

Q. Which, if any, of the following would you identify as?



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LGBT+ EXPOSURE & ENGAGEMENT

LGBT EXPOSURE AND ENGAGEMENT - SUMMARY

On average, globally, 42% say they have a relative, friend or colleague who is lesbian, gay or homosexual, 24% one who is bisexual, 10% one who is transgender, 9% one who is non-binary, non-conforming or gender-fluid

- Globally, exposure to a lesbian/gay/homosexual person is more prevalent among women than among men (47% vs 37%) and with Gen Z and Millennials (48% and 45%) than with Gen X and Boomers (39% and 38%); highest in Brazil (66%), Mexico and Chile (64%) and lowest in Japan and South Korea (7%) and, China (11%)
- Exposure to a bisexual person is more prevalent with Gen Z (41%) than with Boomers (11%); highest in Brazil (50%), lowest in Japan (4%)
- Exposure to a transgender person is more prevalent with Gen Z (14%) than with Boomers (6%); highest in Australia and Canada (18% both) and lowest in Russia (1%), South Korea and Hungary (2%)
- Exposure to a non-binary/non-conforming/gender-fluid person is more prevalent with Gen Z (16%) than Boomers (5%); highest in Australia and Canada (16% both), the US and South Africa (14% both) and lowest in Russia (2%), Japan, South Korea and Hungary (3% each)

30% say they have spoken out against someone who is prejudiced against LGBT people

- This includes 40% of Gen Z (vs. 24% of Boomers) and 34% of women (vs. 26% of men)
- Having spoken out against anti-LGBT prejudice is reported by as many as 53% in Argentina and 50% in Chile to as few as 7% in Japan

19% say they have visited a bar or night-club that caters primarily to LGBT people

- This includes 70% of self-identified lesbians and gays, 41% of self-identified bisexuals, 33% of self-identified transgender/non-binary+/other gender adults, and 18% of self-identified heterosexuals
- Experience visiting an LGBT establishment ranges from 35% in Great Britain and 34% in Australia to 4% in Japan and Malaysia

13% say they have attended a public event in support of LGBT people, e.g., a Pride march

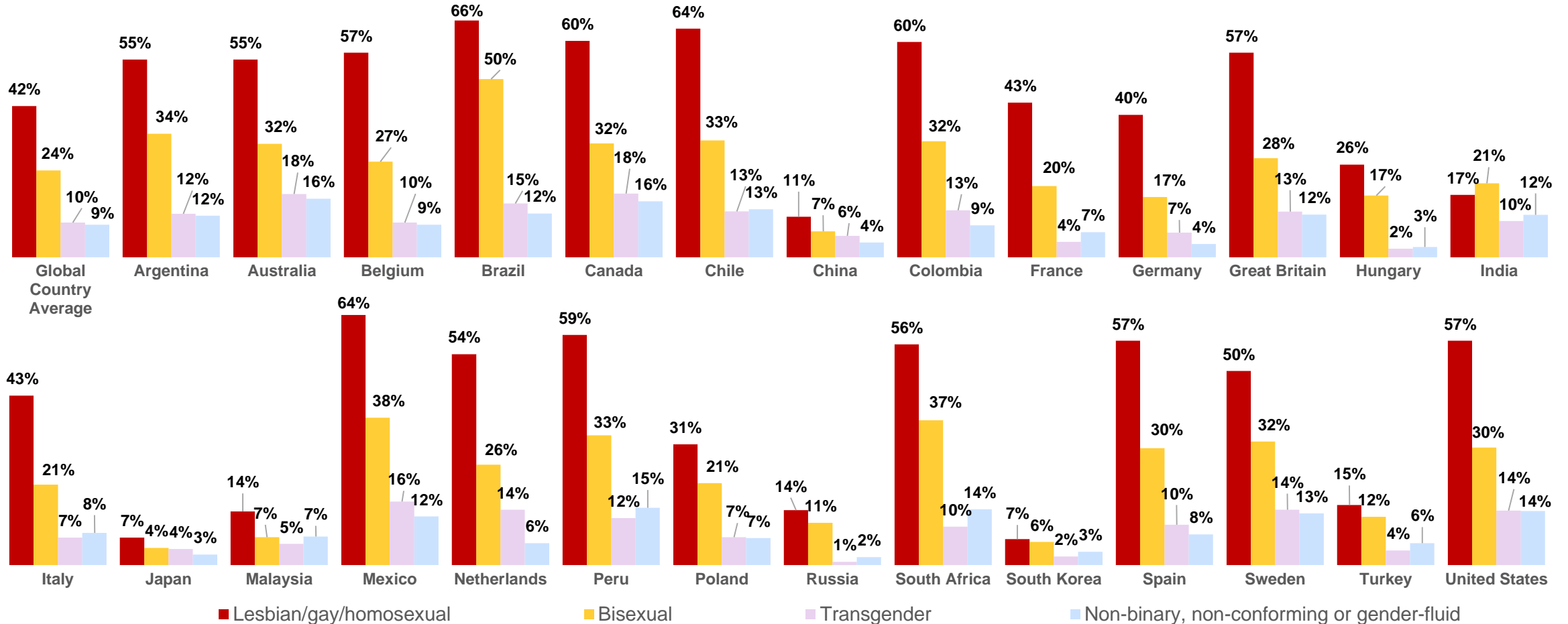
- This includes self-identified gays and lesbians (54% on average globally), bisexuals (37%) and transgender/non-binary+/other gender adults (32%)
- Gen Z (18%) and Millennials (16%) as opposed to Gen X (11%) and Boomers (7%)
- Adults in Spain (22%), Australia, India, Mexico, and South Africa (21%)

11% say they have attended a same-sex wedding

- The incidence of attending a same-sex wedding ranges from 21% in Mexico and 20% in Argentina and Belgium to less than 1% in Russia
- It varies little across gender lines and age groups

EXPOSURE TO SEXUAL ORIENTATIONS AND GENDER IDENTITIES BY COUNTRY

Q. Do you have a relative, friend or work colleague who is: % Yes



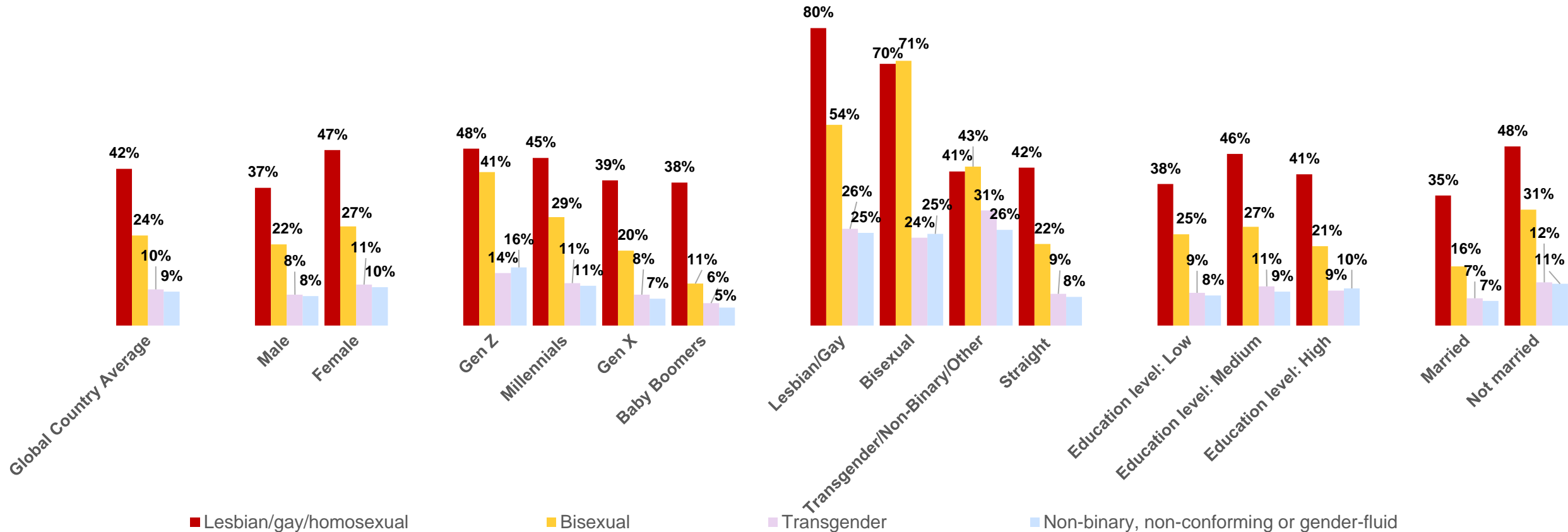
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EXPOSURE TO SEXUAL ORIENTATIONS AND GENDER IDENTITIES BY KEY DEMOS (GLOBAL COUNTRY AVERAGE)

Q. Do you have a relative, friend or work colleague who is: % Yes



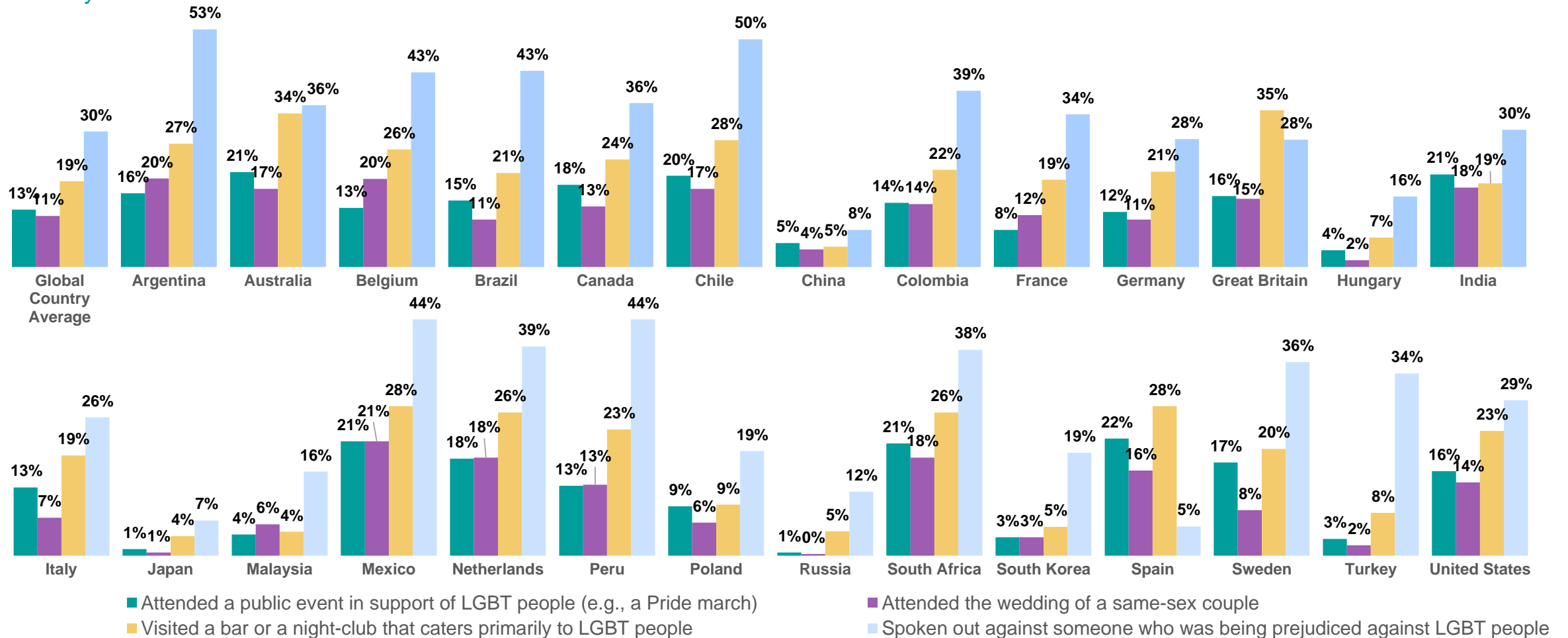
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ENGAGEMENT IN ACTIVITIES INVOLVING OR SUPPORTING LGBT PEOPLE BY COUNTRY

Q. Have you ever:



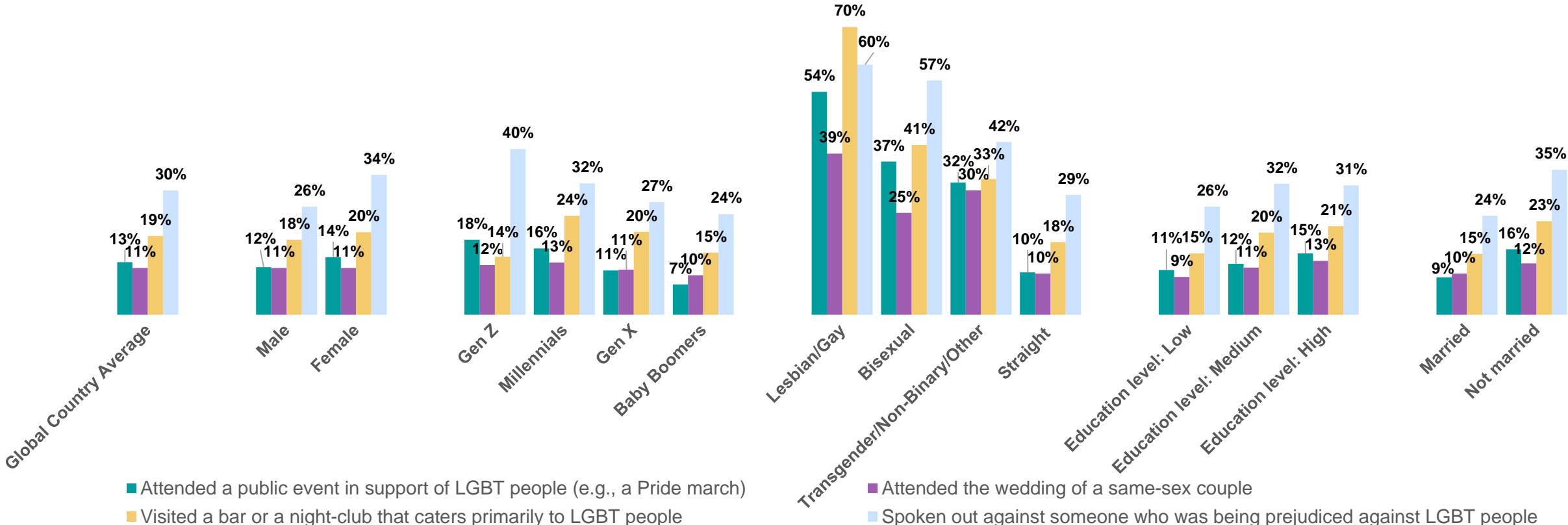
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ENGAGEMENT IN ACTIVITIES INVOLVING OR SUPPORTING LGBT PEOPLE BY KEY DEMOS (GLOBAL COUNTRY AVERAGE)

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SAME-SEX MARRIAGE AND PARENTING

SAME-SEX MARRIAGE AND PARENTING - SUMMARY

On average across all 27 countries, 54% support the right of LGBT people to marry legally and 16% support some other form of legal recognition

- Full majorities in 16 countries and pluralities in 7 other countries support marriage equality
- Only Russia and Malaysia have majorities against any kind of legal recognition of same-sex relationships
- Globally, support for marriage equality is higher among women (60%) than it is among men (48%); it is also higher with Boomers (56%) than with Millennials (54%) and Gen X (47%), but not as high as it is with Gen Z (61%)
- Support for marriage equality has grown or remained stable in each one of 15 countries Ipsos surveyed in 2013 with the highest increases in Argentina, the US, Hungary, Japan and Italy
- On average, 36% globally say their views on same-sex marriage are different than they were five years ago with notably higher proportions in China, South Africa, India and all Latin American countries surveyed

61% agree that same-sex couples should have the same rights to adopt children as heterosexual couples do

- Majorities in 20 countries agree; majorities in Peru, Poland, Malaysia, and Russia disagree
- As with same-sex marriage, support for equal adoption rights is higher among women (67%) than it is among men (55%) and while it is highest with Gen Z, it is higher with Boomers (60%) than with Gen X (55%)
- Support for equal adoption rights is higher or stable in each one of 15 countries Ipsos surveyed in 2013 with the highest increases seen in Argentina, Italy and Hungary

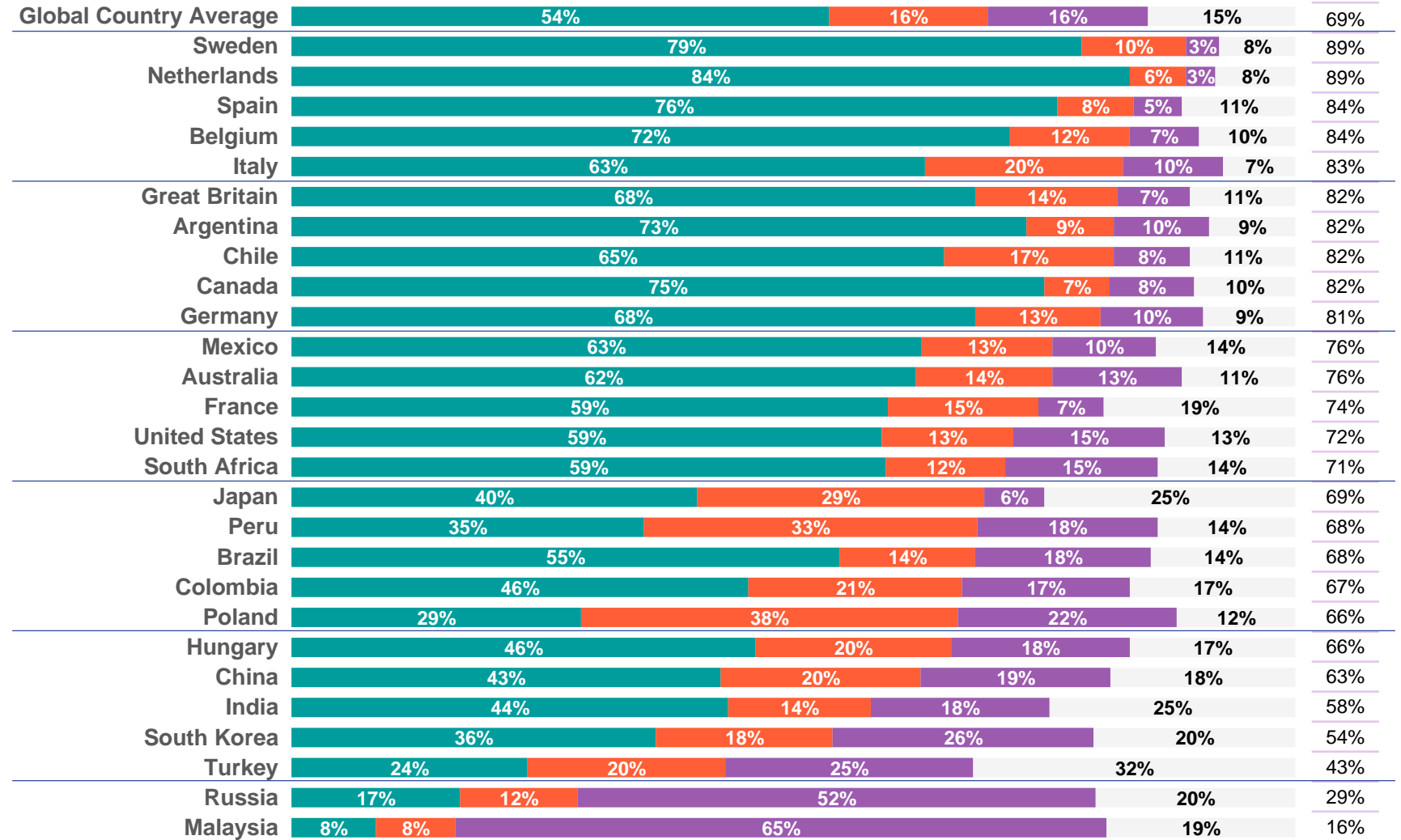
Views on whether same-sex couples are just as likely as other parents to successfully raise children are nearly identical to those on equal adoption rights

- 62% on average globally and majorities in all age groups and in 20 of 27 countries agree same-sex couples are just as likely as other parents to successfully raise children

VIEWS ON SAME-SEX MARRIAGE BY COUNTRY

NET
% allow
marriage or
legal recognition

Q. When you think about the rights of same-sex couples, which of the following comes closest to your personal opinion?



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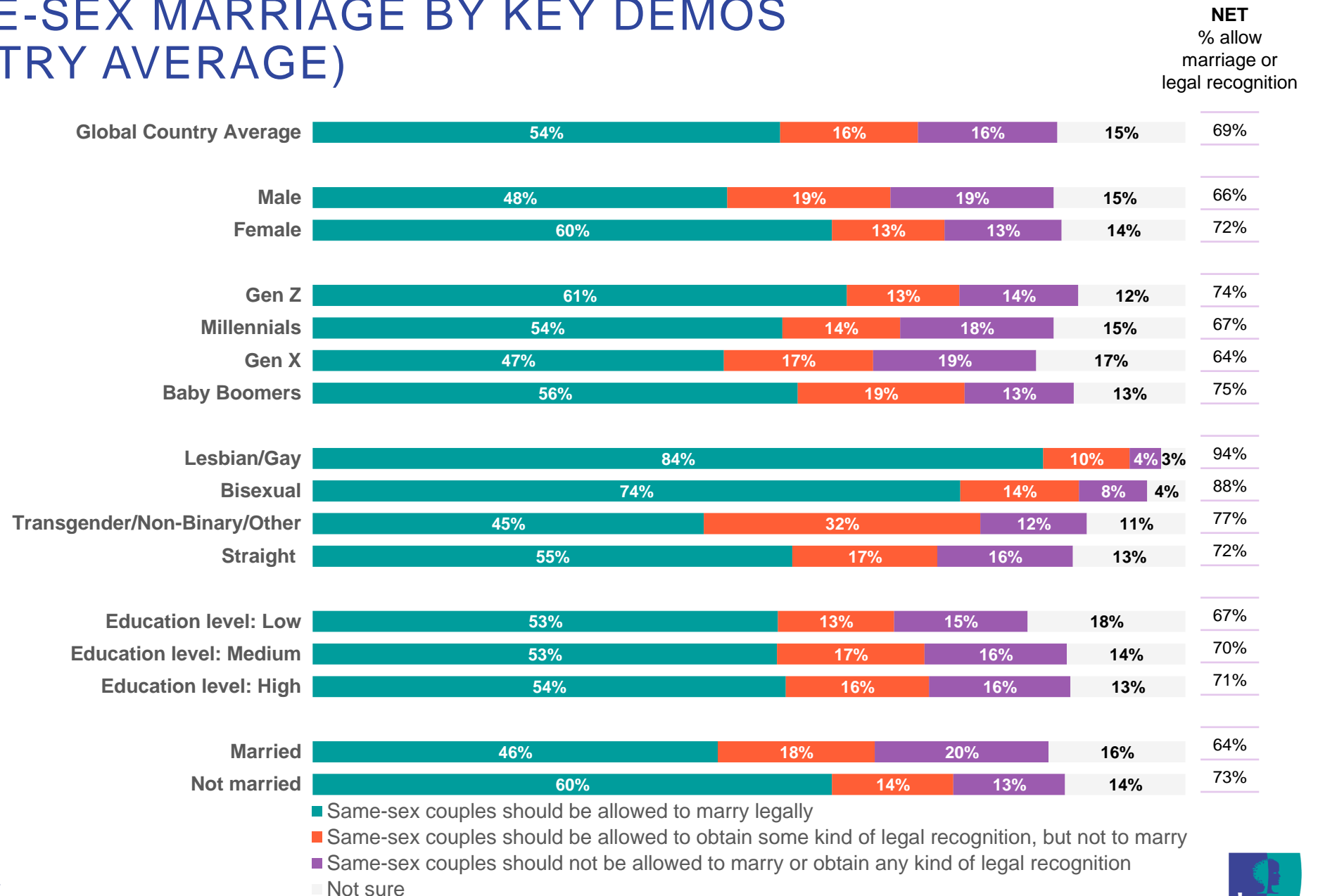
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- Same-sex couples should be allowed to marry legally
- Same-sex couples should be allowed to obtain some kind of legal recognition, but not to marry
- Same-sex couples should not be allowed to marry or obtain any kind of legal recognition
- Not sure



VIEWS ON SAME-SEX MARRIAGE BY KEY DEMOS (GLOBAL COUNTRY AVERAGE)

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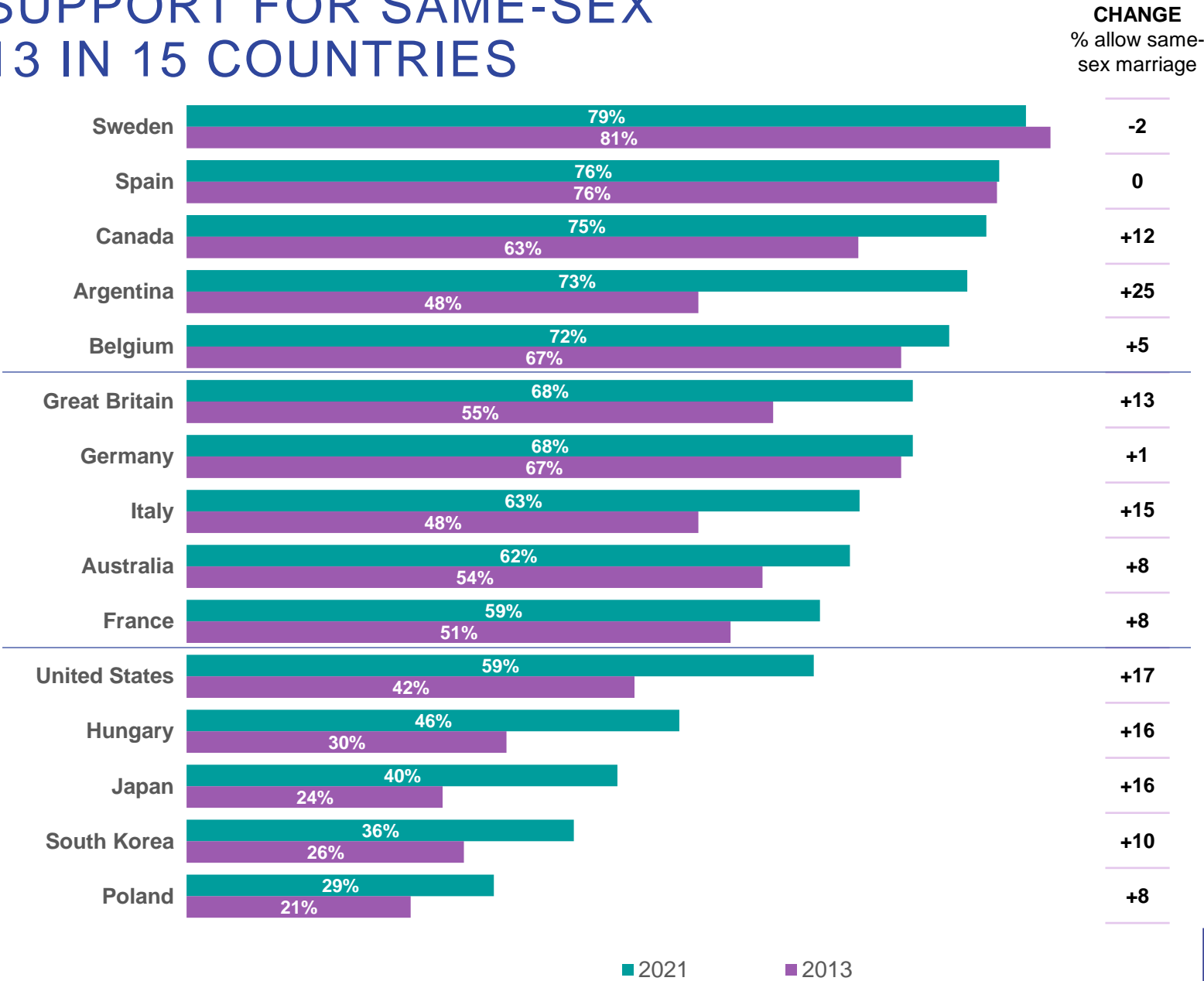
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ACTUAL CHANGE IN SUPPORT FOR SAME-SEX MARRIAGE SINCE 2013 IN 15 COUNTRIES

Q. When you think about the rights of same-sex couples, which of the following comes closest to your personal opinion?

% Same-sex couples should be allowed to marry legally



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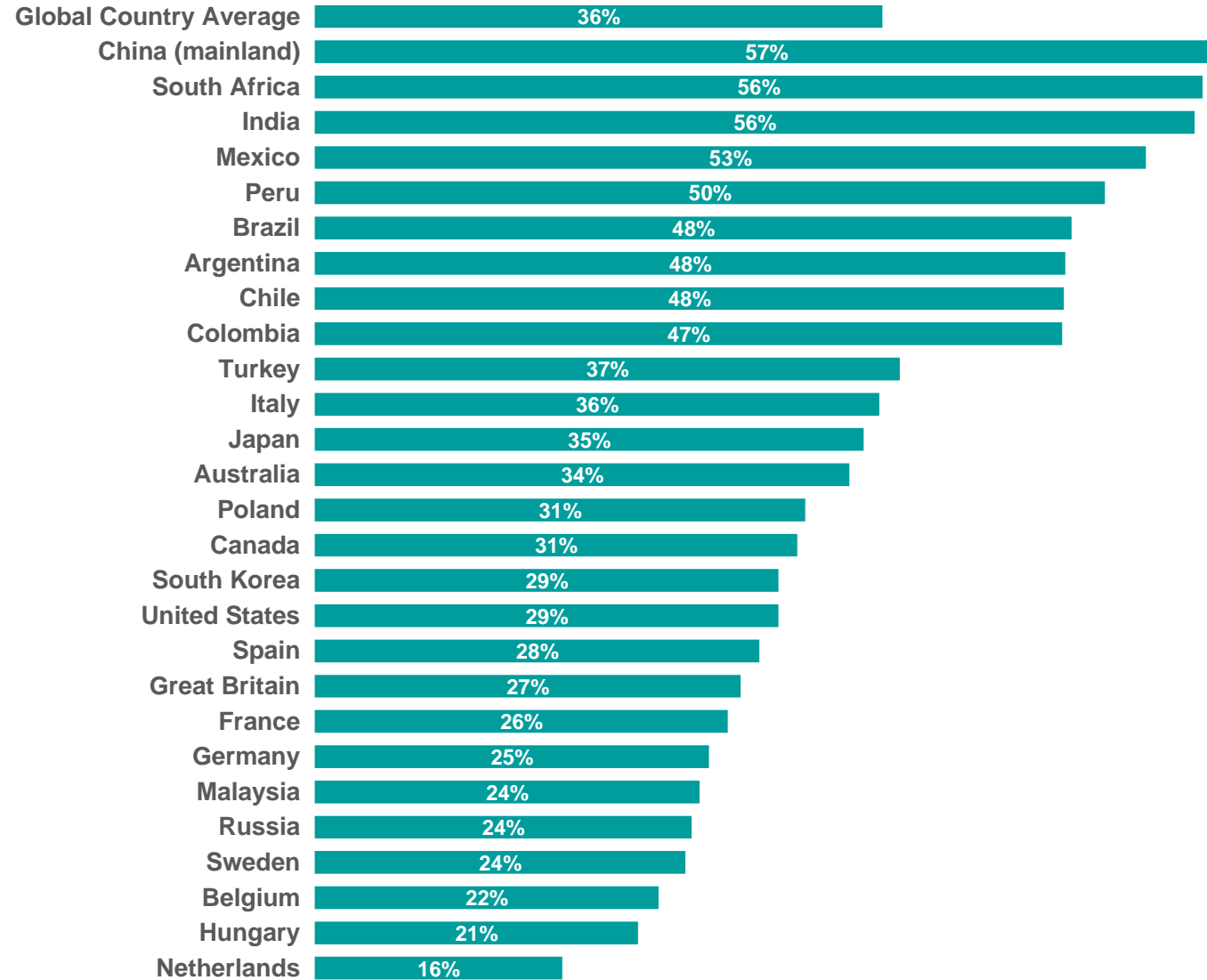


PERCEIVED CHANGE IN VIEWS ABOUT SAME-SEX MARRIAGE BY COUNTRY

Q. Still thinking about same-sex marriage, to what extent do you agree or disagree that:

My views on same-sex marriage are different than they were five years ago

(% Agree)



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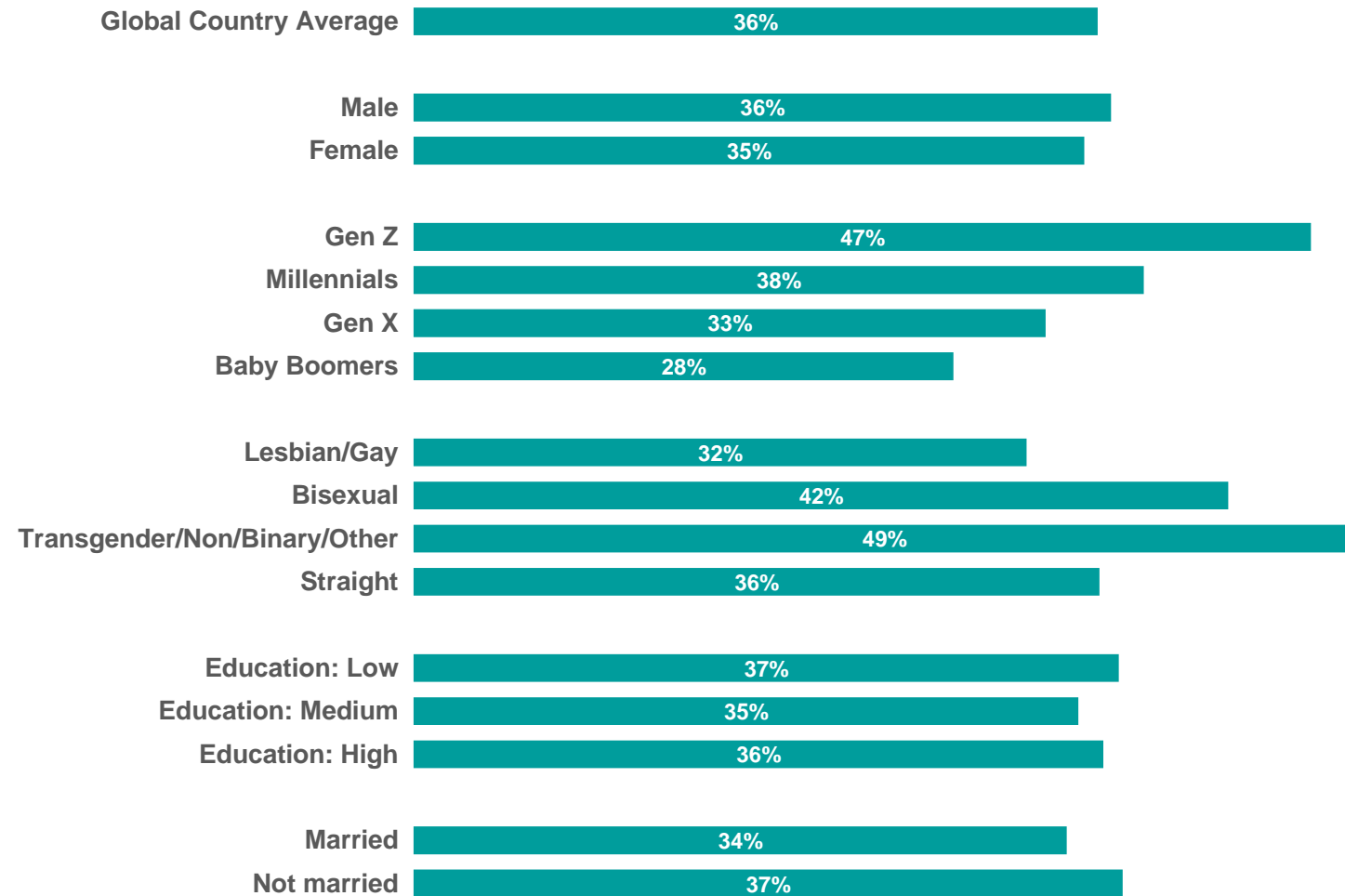
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PERCEIVED CHANGE IN VIEWS ABOUT SAME-SEX MARRIAGE BY KEY DEMOS (GLOBAL COUNTRY AVERAGE)

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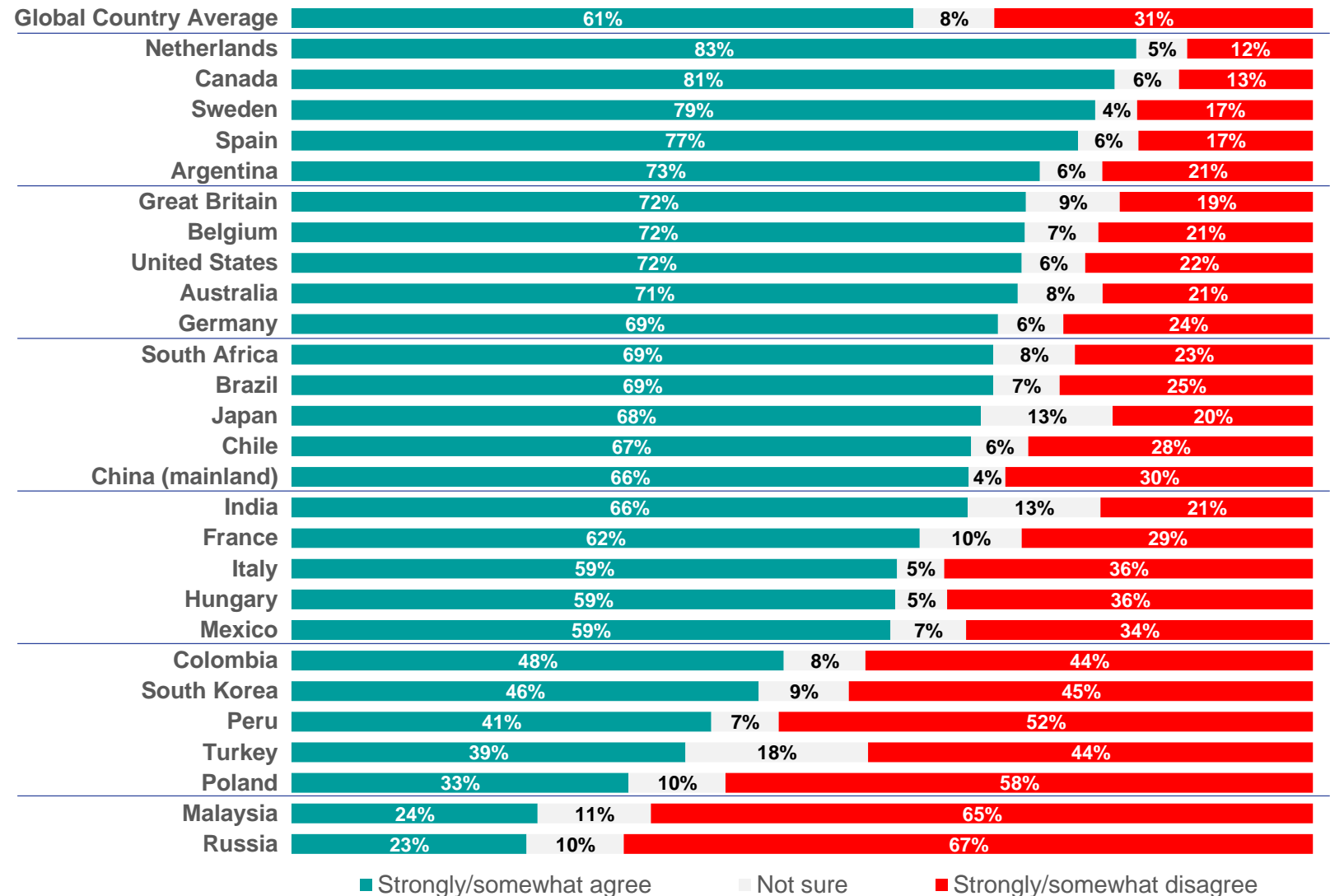
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VIEWS ABOUT SAME-SEX COUPLES' RIGHT TO ADOPT BY COUNTRY

Q. Still thinking about same-sex marriage, to what extent do you agree or disagree that:

Same-sex couples should have the same rights to adopt children as heterosexual couples do



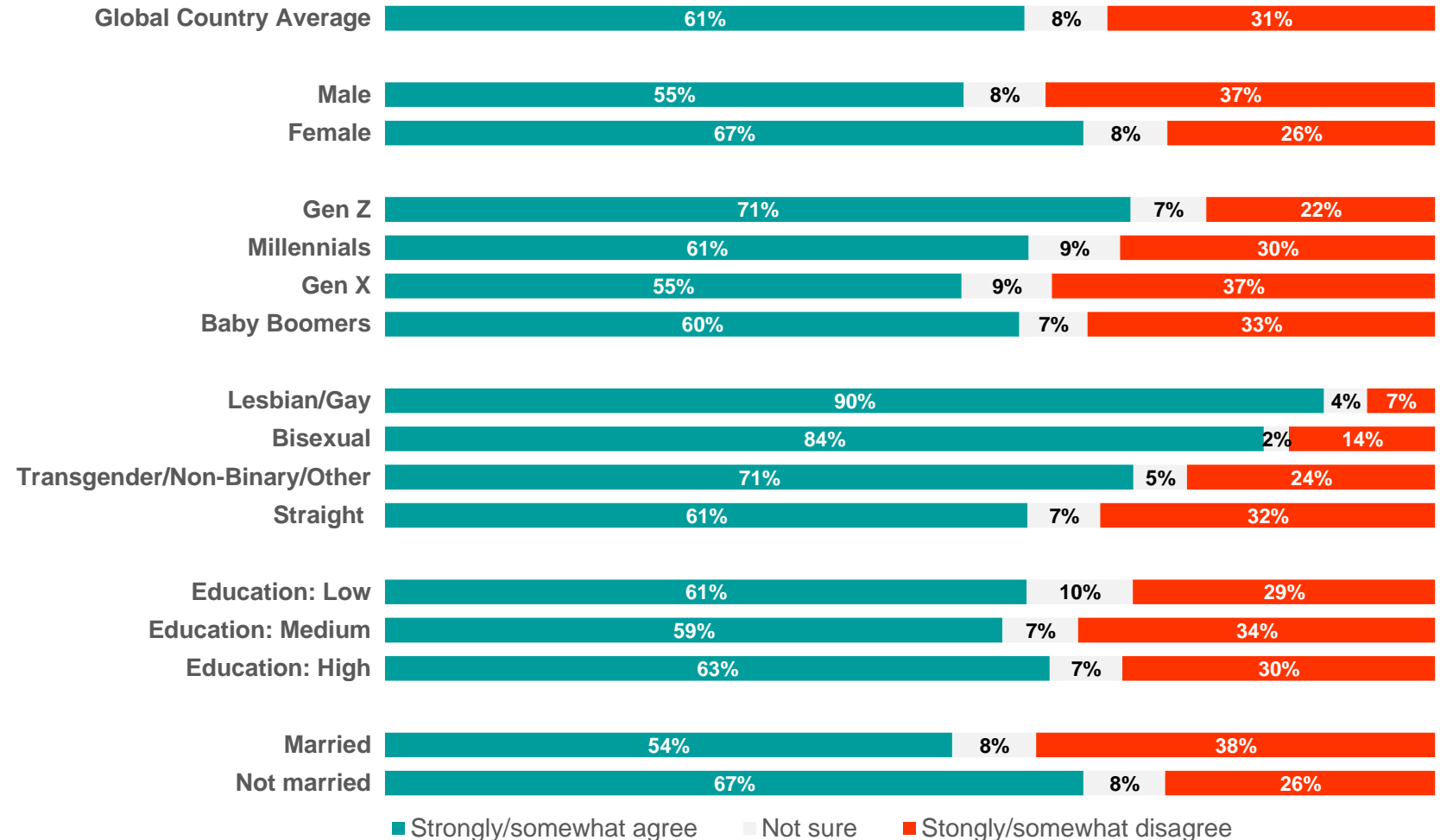
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VIEWS ABOUT SAME-SEX COUPLES' RIGHT TO ADOPT BY KEY DEMOS (GLOBAL COUNTRY AVERAGE)

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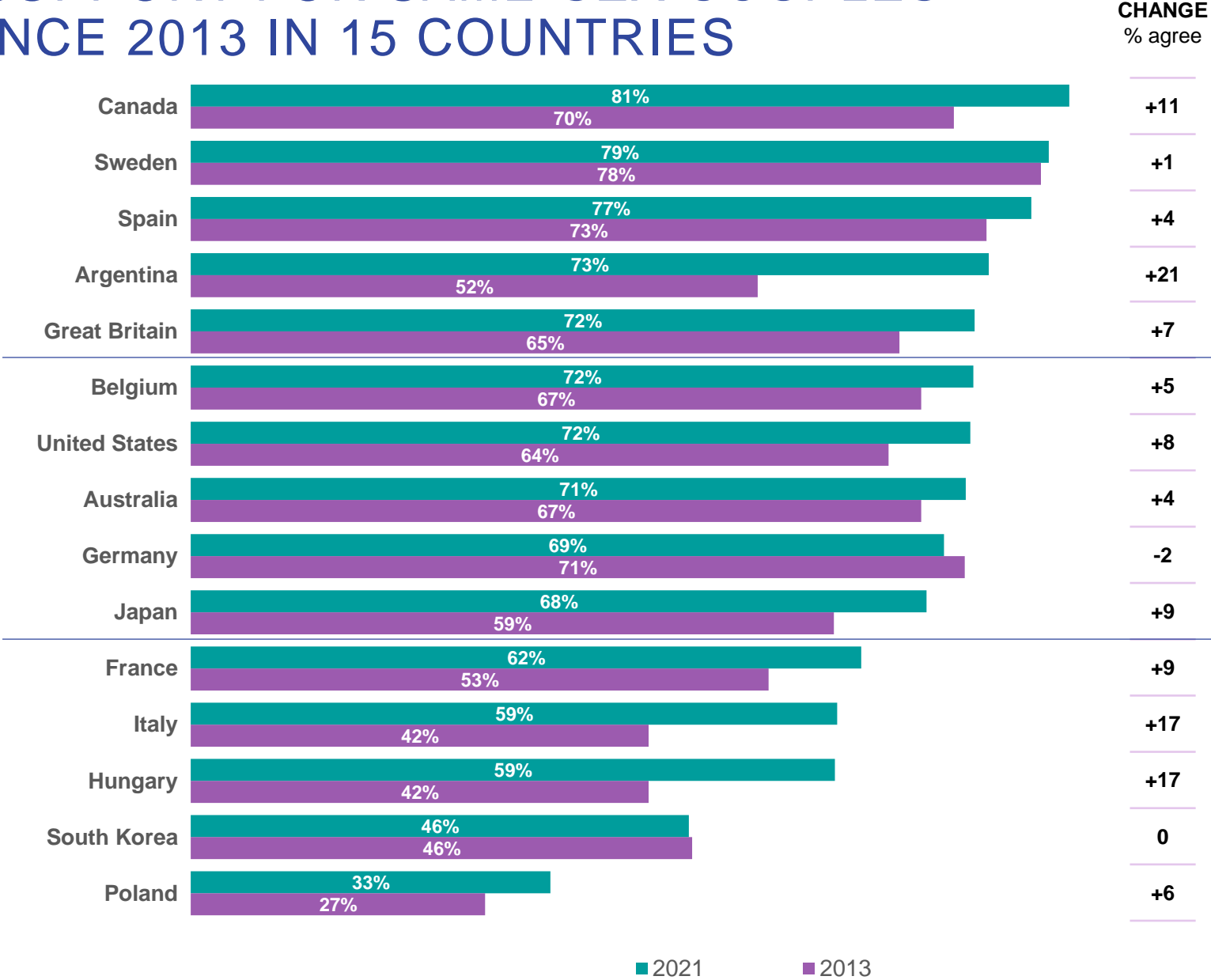
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ACTUAL CHANGE IS SUPPORT FOR SAME-SEX COUPLES' RIGHTS TO ADOPT SINCE 2013 IN 15 COUNTRIES

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% Agree



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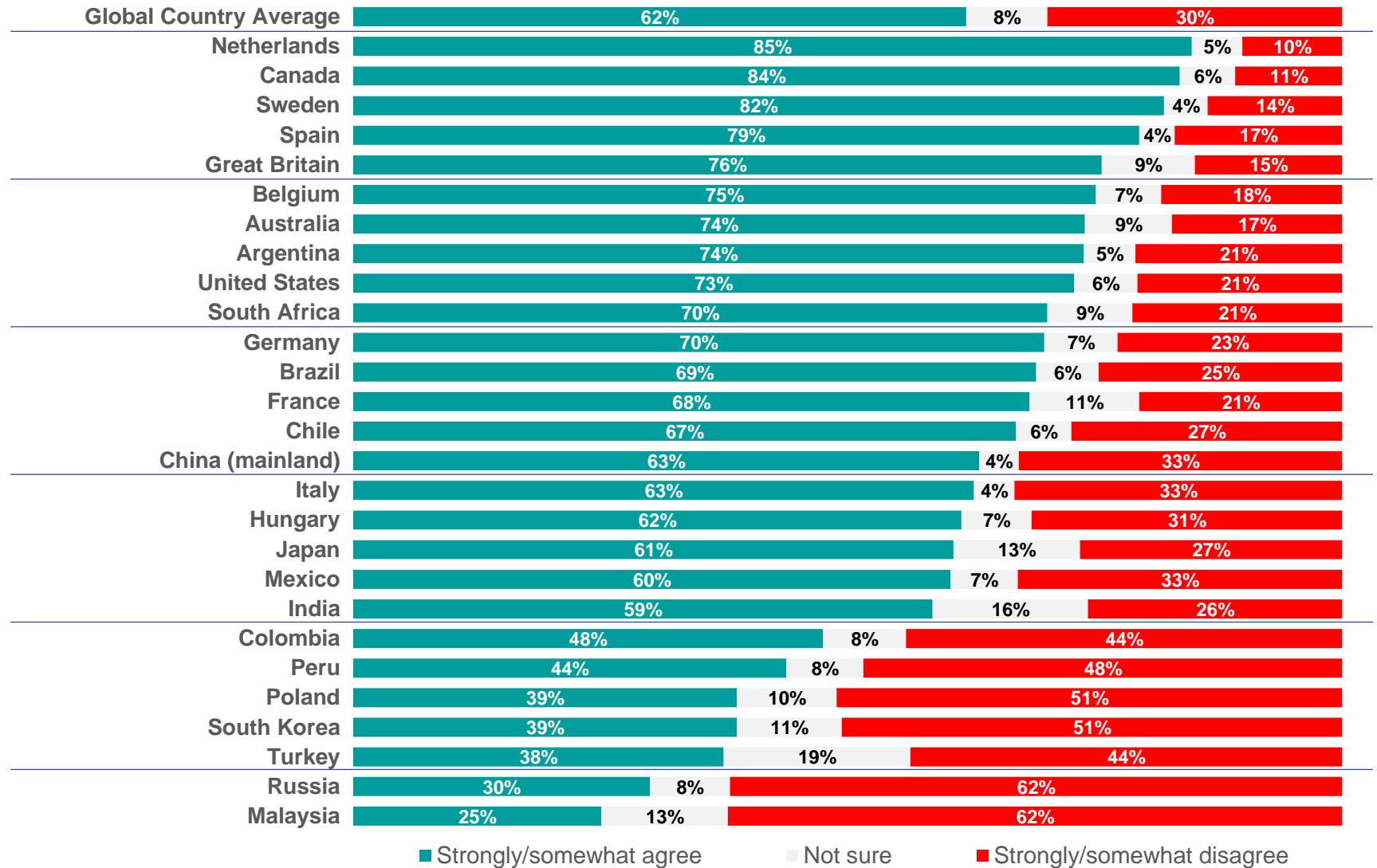
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VIEWS ABOUT SAME-SEX COUPLES' PARENTING BY COUNTRY

Q. Still thinking about same-sex marriage, to what extent do you agree or disagree that:

Same-sex couples are just as likely as other parents to successfully raise children



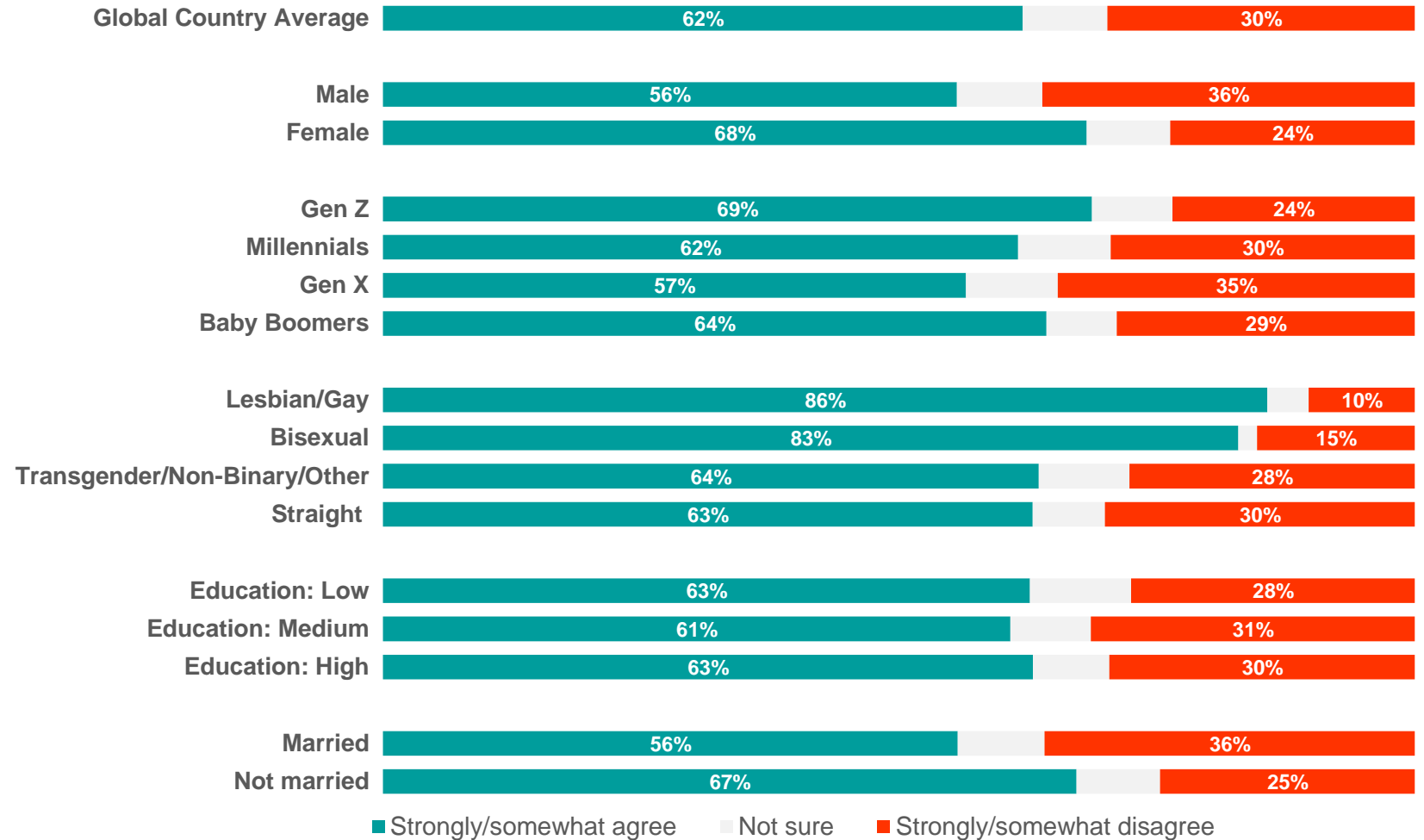
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VIEWS ABOUT SAME-SEX COUPLES' PARENTING BY KEY DEMOS (GLOBAL COUNTRY AVERAGE)

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LGBT+ VISIBILITY AND EQUALITY

LGBT VISIBILITY AND EQUALITY - SUMMARY

On average globally, 51% support LGBT people being open about their sexual orientation or gender identity with everyone vs. 16% who oppose it

- Support is highest in Spain (73%), Argentina (69%) and Chile (68%), lowest in Russia (12%) and Malaysia (14%)
- Support is higher with Gen Z (61%) than with older generations (51% of Millennials, 47% of Gen Y, and 48% of Boomers) and among women than among men (56% vs. 46%)

Support for LGBT people displaying affection in public is more muted with 37% support and 27% opposition globally

- Support is expressed by a majority only in Spain (64%), Sweden (56%), Italy, the Netherlands (52% both) and Belgium (50%); full majorities oppose it in Malaysia (65%), Russia (59%) and South Korea (50%)
- Support is higher among females than males (42% vs. 32%) and with Gen Z (50%) and Millennials (40%) than with Gen X (32%) and Boomers (29%)

Opinions on having more LGBT characters on TV, in films and in advertising align with those about public display of affection with 35% support and 25% opposition on average globally

Globally, 55% on average support laws banning discrimination against LGBT people when it comes to employment, access to education or housing and social services vs. 19% who oppose them

- There is majority support for LGBT anti-discrimination laws in 21 countries, most so in Sweden (71%), Spain and Chile (70%); support is lowest in Russia (24%), Malaysia (27%), Hungary (31%), Turkey (33%) and South Korea (38%),
- Support varies more across gender lines (59% among females vs. 51% among males) than it does across generations (from 59% of Gen Z to 53% of Gen X)

On average, 47% support companies and brands actively promoting equality for LGBT people vs. 19% who oppose it

- There is majority support for corporate activism about LGBT equality in 14 countries with the highest levels in the Netherlands (64%), Spain (63%), Italy and Mexico (61%), and majority opposition only in Malaysia (59%) and Russia (54%)
- Compared to anti-discrimination laws, corporate activism gets as much or more support with Gen Z as well as in India, South Africa, Turkey and Hungary

Views about openly lesbian, gay and bisexual athletes in sports team mirror those about LGBT people in general being out (50% support vs. 16% opposition on average)

- There is a lot more support in for lesbian, gay and bisexual athletes in sports teams being open about their orientation than opposition (50% vs. 16% on average, globally)

But... public opinion is divided about allowing transgender athletes to perform according to the gender they identify with

- On average, globally, as many support as oppose (32% each) transgender athletes competing based on the gender they identify with, rather than the sex they were assigned at birth, while 36% are neutral
- Only India and Spain show (slight) majority support for transgender athletes' right to compete according to their gender; only Russia and Malaysia show majority opposition
- Supporters outnumber opponents the most in Argentina, Chile, the Netherlands, Brazil and France; opponents outnumber supporters the most in South Korea, Poland, the US, Hungary and Great Britain
- Globally, support is higher among females than it is among males (37% vs. 25%) and with Gen Z (42%) than with other age groups

VIEWS ABOUT LGBT EQUALITY AND VISIBILITY (GLOBAL COUNTRY AVERAGE)

Q. To what extent do you support or oppose the following:

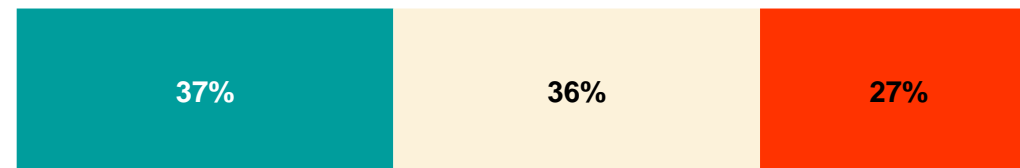
LGBT people being open about their sexual orientation or gender identity with everyone



NET
% support minus
% oppose

+36

LGBT people displaying affection in public (e.g., kissing or holding hands)



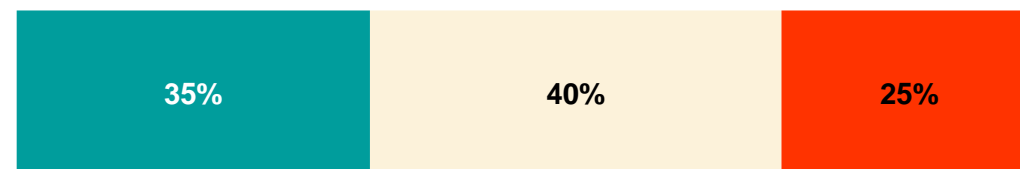
+10

Openly lesbian, gay and bisexual athletes in sports teams



+34

More LGBT characters on TV, in films and in advertising



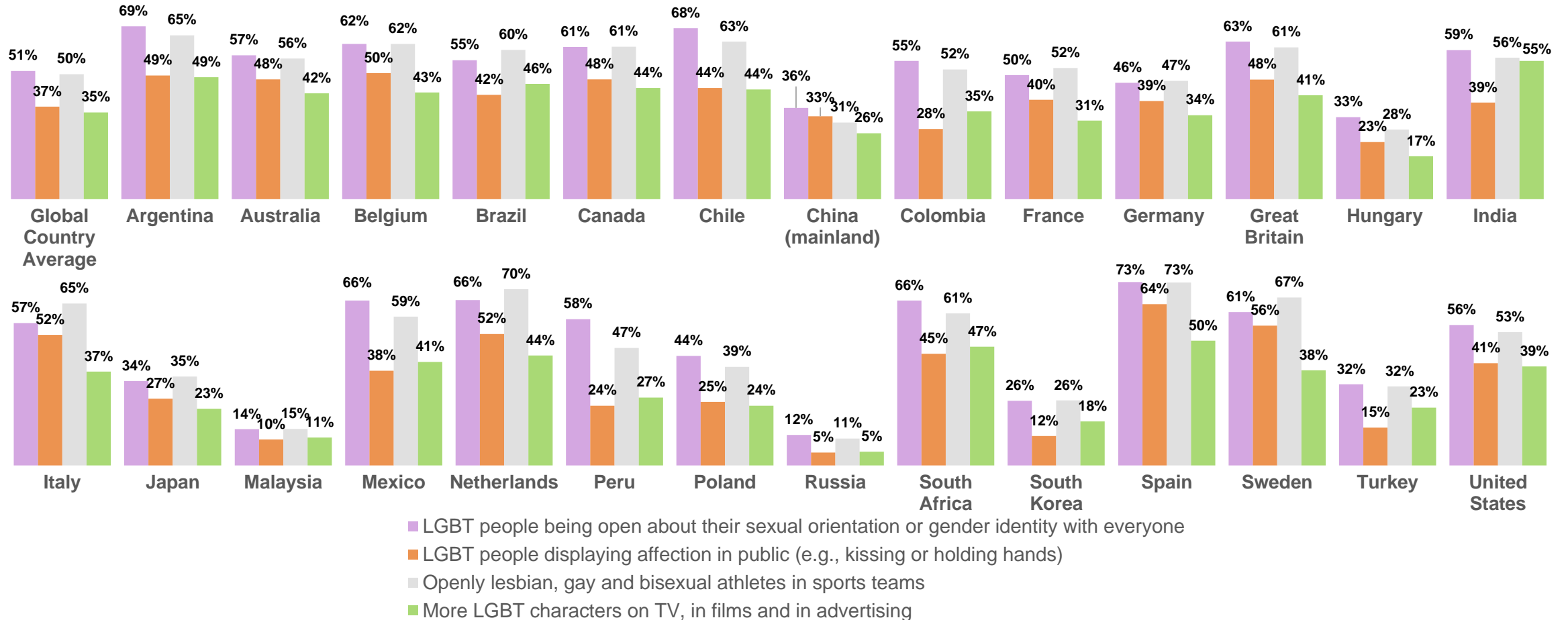
+10

Base: 19,069 online adults aged 16-74 across 27 countries
* Online samples in Brazil, Chile, mainland China, Colombia, India, Malaysia, Mexico, Peru, Russia, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population

The "Global Country Average" 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 and is not intended to suggest a total result.

VIEWS ABOUT LGBT VISIBILITY BY COUNTRY

Q. To what extent do you support or oppose the following: % support



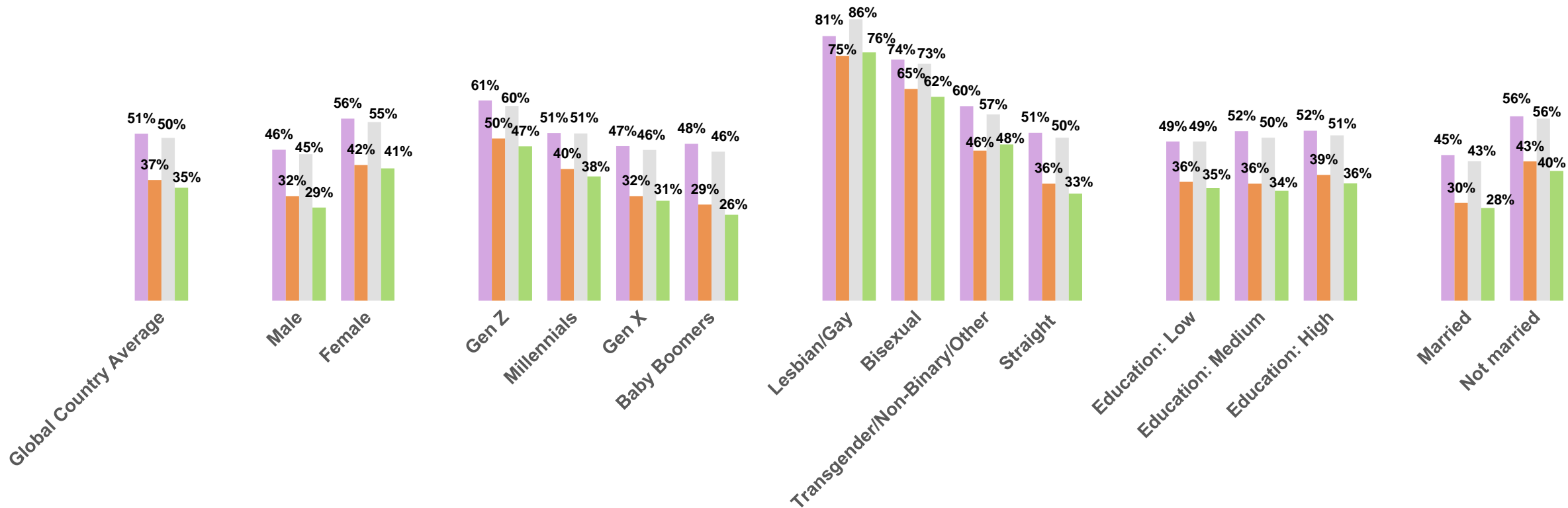
Base: 19,069 online adults aged 16-74 across 27 countries

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VIEWS ABOUT LGBT VISIBILITY BY KEY DEMOS (GLOBAL COUNTRY AVERAGE)

Q. To what extent do you support or oppose the following: % support



- LGBT people being open about their sexual orientation or gender identity with everyone
- LGBT people displaying affection in public (e.g., kissing or holding hands)
- Openly lesbian, gay and bisexual athletes in sports teams
- More LGBT characters on TV, in films and in advertising

Base: 19,069 online adults aged 16-74 across 27 countries
 * Online samples in Brazil, Chile, mainland China, Colombia, India, Malaysia, Mexico, Peru, Russia, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population

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VIEWS ABOUT LGBT EQUALITY AND VISIBILITY (GLOBAL COUNTRY AVERAGE)

Q. To what extent do you support or oppose the following:

Laws banning discrimination against LGBT people when it comes to employment, access to education, housing and social services, etc.



NET
% support minus
% oppose

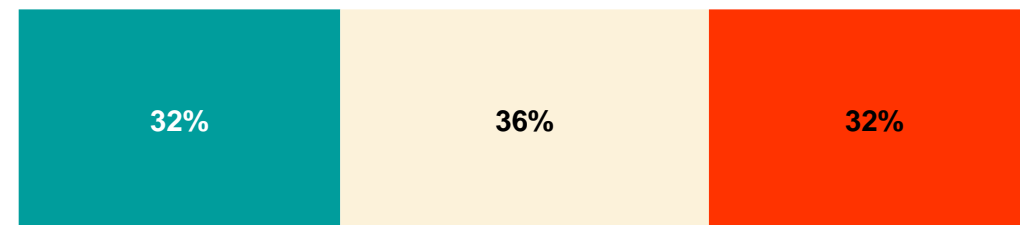
+36

Companies and brands actively promoting equality for LGBT people



+27

Transgender athletes competing based on the gender they identify with rather the sex they were assigned at birth



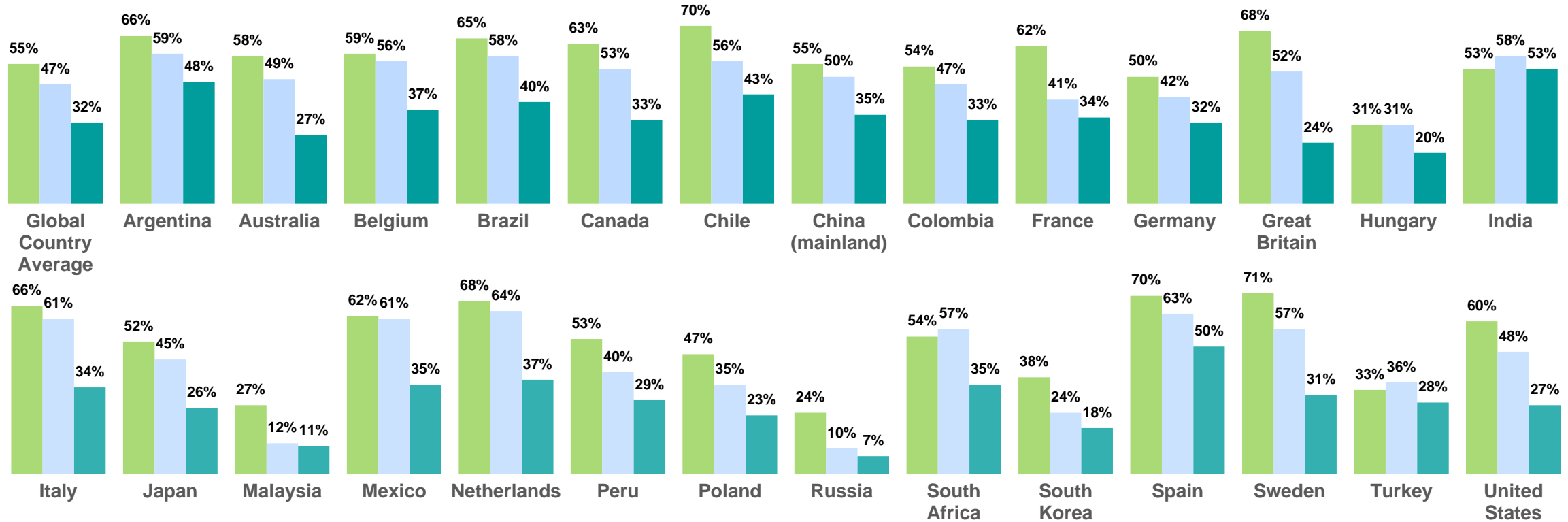
-1

Base: 19,069 online adults aged 16-74 across 27 countries
* Online samples in Brazil, Chile, mainland China, Colombia, India, Malaysia, Mexico, Peru, Russia, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population

The "Global Country Average" 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 and is not intended to suggest a total result.

VIEWS ABOUT LGBT EQUALITY BY COUNTRY

Q. To what extent do you support or oppose the following: % support



- Laws banning discrimination against LGBT people when it comes to employment, access to education, housing and social services, etc.
- Companies and brands actively promoting equality for LGBT people
- Transgender athletes competing based on the gender they identify with rather the sex they were assigned at birth

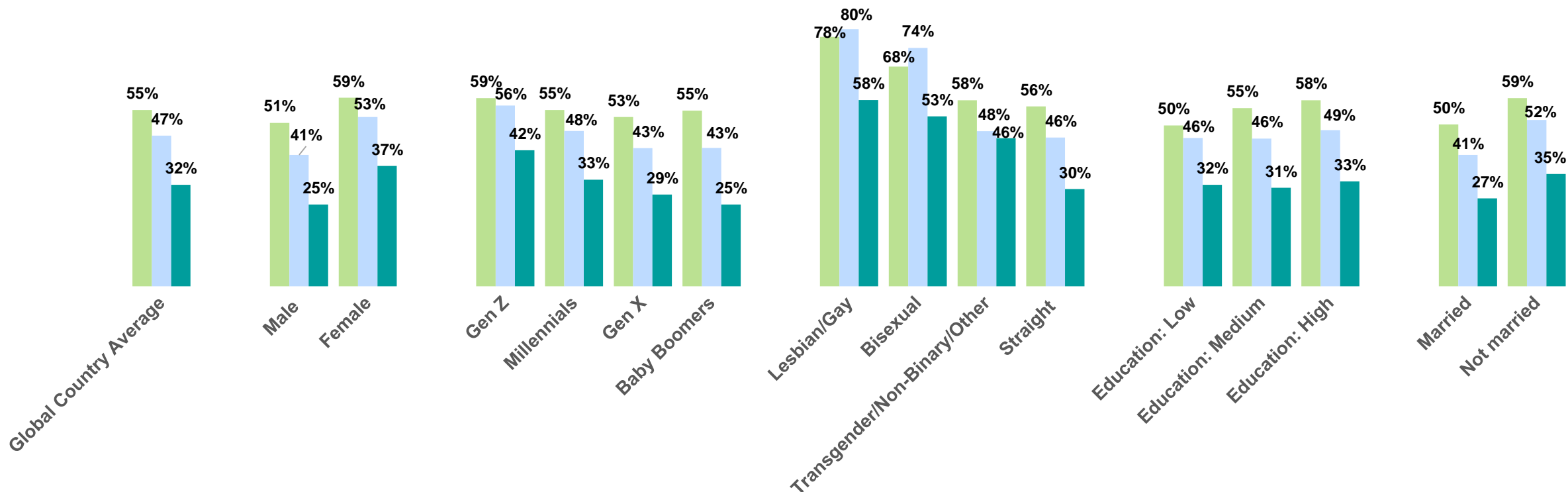
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VIEWS ABOUT LGBT EQUALITY BY KEY DEMOS (GLOBAL COUNTRY AVERAGE)

Q. To what extent do you support or oppose the following: % support



- Laws banning discrimination against LGBT people when it comes to employment, access to education, housing and social services, etc.
- Companies and brands actively promoting equality for LGBT people
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METHODOLOGY

- These are the results of a 27-market survey conducted by Ipsos on its Global Advisor online platform. Ipsos interviewed a total of 19,069 adults aged 18-74 in United States, Canada, Malaysia, South Africa, and Turkey, and 16-74 in 23 other markets between April 23 and May 7, 2021.
- The sample consists of approximately 1,000 individuals in each of Australia, Belgium, Brazil, Canada, China (mainland), France, Germany, Great Britain, Italy, Japan, Spain, and the U.S., and 500 individuals in each of Argentina, Chile, Colombia, Hungary, India, Malaysia, Mexico, the Netherlands, Peru, Poland, Russia, South Africa, South Korea, Sweden, and Turkey.
- The samples in Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, Italy, Japan, the Netherlands, Poland, South Korea, Spain, Sweden, and the U.S. can be taken as representative of these countries' general adult population under the age of 75.
- The samples in Brazil, Chile, China (mainland), Colombia, India, Malaysia, Mexico, Peru, Russia, South Africa and Turkey are more urban, more educated, and/or more affluent than the general population. The survey results for these countries should be viewed as reflecting the views of the more “connected” segment of their population.
- The data is weighted so that each country's sample composition best reflects the demographic profile of the adult population according to the most recent census data.
- Where results do not sum to 100 or the ‘difference’ appears to be +/-1 more/less than the actual, this may be due to rounding, multiple responses or the exclusion of don't know or not stated responses.
- The precision of Ipsos online polls is calculated using a credibility interval with a poll of 1,000 accurate to +/- 3.5 percentage points and of 500 accurate to +/- 4.8 percentage points. For more information on the Ipsos use of credibility intervals, please visit the Ipsos website.
- The publication of these findings abides by local rules and regulations.

ABOUT IPSOS

Ipsos is the third largest Insights and Analytics company in the world, present in 90 markets and employing more than 18,000 people.

Our research professionals, analysts and scientists have built unique multi-specialist capabilities that provide powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 business solutions are based on primary data coming from our surveys, social media monitoring, and qualitative or observational techniques.

“Game Changers” – our tagline – summarises our ambition to help our 5,000 clients to navigate more easily our deeply changing world.

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
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GAME CHANGERS

In our world of rapid change, the need for 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.

