



International Microbiota Observatory

Study results by country

Brazil

China

Mexico

Portugal

Spain



– **United States**

France

A large, light gray illustration of a diverse microbiome, featuring various shapes of bacteria and fungi, set against a white background that is slightly offset to the left and top of the dark blue slide.

Methods

Methods

This international survey was conducted online in **7 countries** from March 21st - April 7th 2023. **6,500 people** were interviewed in the 7 countries, among representative samples of the population aged 18 y.o. and more in each country :

-  United States of America (n=1000)
-  Brazil (n=1000)
-  Mexico (n=1000)
-  France (n=1000)
-  Portugal (n=500)
-  Spain (n=1000)
-  China (n=1000)

An automated selection from the Ipsos Panel ensured representative samples in each country (gender, age, employment status and country region) based on quota method.

Comments



ALL COUNTRIES



(n=6500)

= Average response for all 7 countries.

Significant differences have been calculated vs All countries



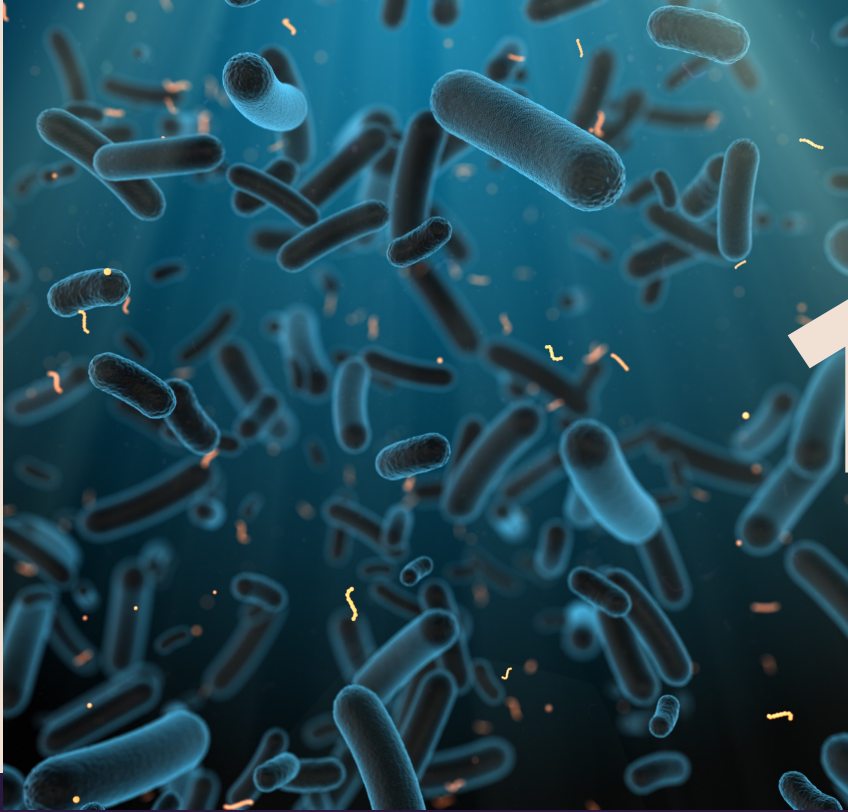
= Focus on detailed results according to different criteria such as gender or age.

-  Significant differences vs country average - superior
-  Significant differences vs country average - inferior

= These indications show results that are statistically different (above or below) the average for all respondents.



All results are presented in %.



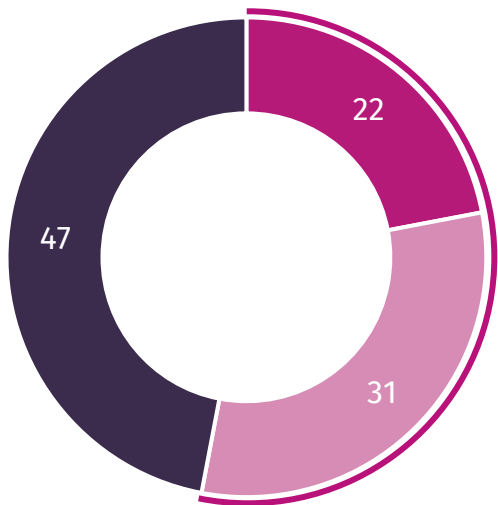
A matter of "words": a very poor understanding of the terms used to talk about the microbiota.



Only a small majority of Americans have heard of the microbiome, a score lower than in the other countries.



Question 2. Have you ever heard of the "microbiome"?
Base: All respondents

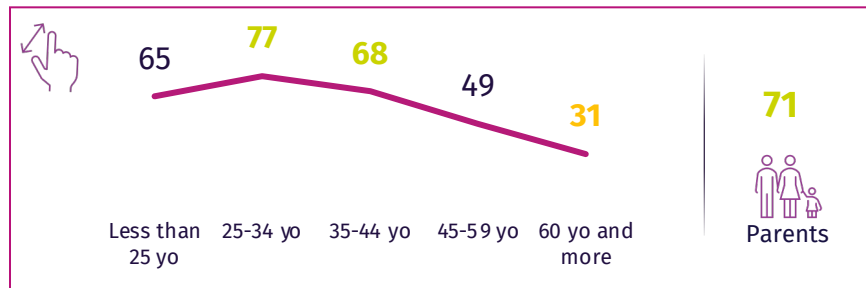


- Yes, and I know exactly what it is
- Yes, but I don't know exactly what it is
- No, I never heard about it

53% have already heard about the term microbiome



64%



● Significant differences vs total - superior ● Significant differences vs total - inferior



Those who know the word "microbiome", associate spontaneously the term with bacteria, small, body and environment.



Question 1. When you hear the word "microbiome", what information, words and feelings come to mind?
Base: People who have heard of the "microbiome" n=512



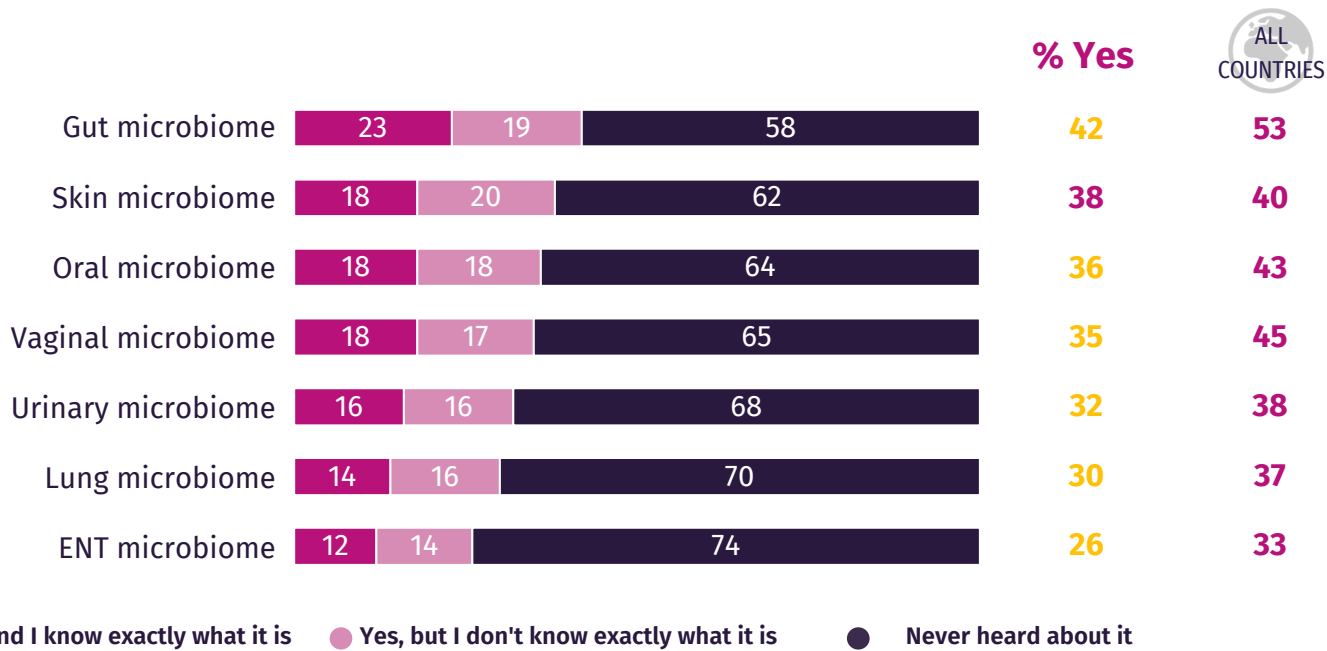
Precision: The keyword cloud is a visual representation of the most used keywords by respondents to this open question. The more words are displayed, the more the term was cited.



If more than 2 respondents in 5 have heard of the term “gut microbiome”, the level of knowledge about the other types of microbiomes remains low and inferior to the other countries.

Question 3. And more specifically, have you ever heard of the following terms?

Base: All respondents



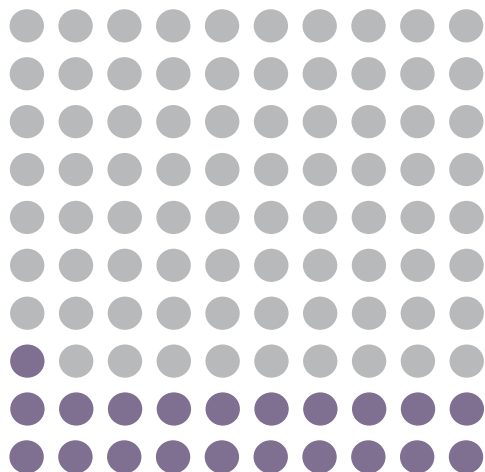


Little is known precisely about the diversity of the microbiome, even more for respondents over 45 yo.



Question 3. And more specifically, have you ever heard of the following terms?

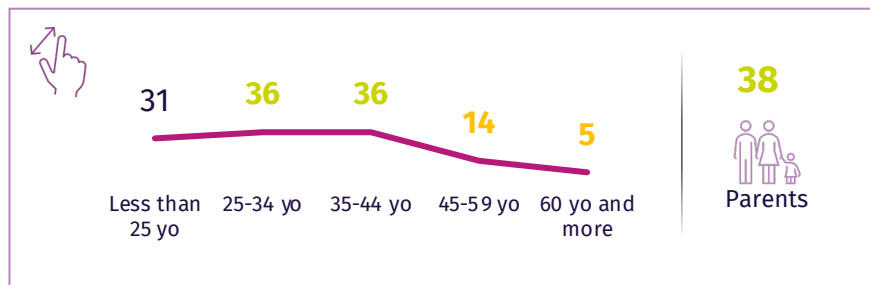
Base: All respondents



21% have already heard of each microbiome:
 Gut, vaginal, skin, lung, urinary, Oral and ENT microbiome



26%



But only **6%** know precisely all of them

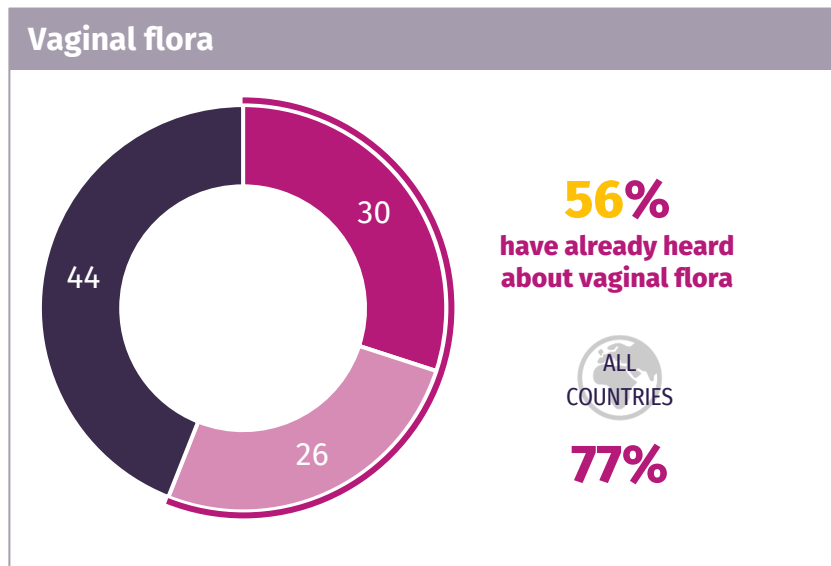
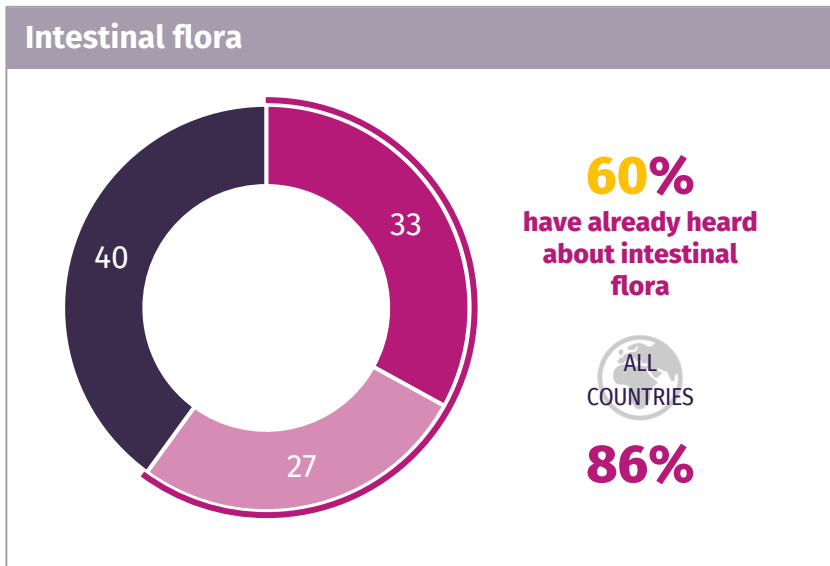


5%



Americans seem slightly more aware of the term “flora” instead of microbiome, although the level of knowledge is significantly lower than in the other countries.

Question 2bis. And have you ever heard of these terms?
Base: All respondents



● Yes, and I know exactly what it is
 ● Yes, but I don't know exactly what it is
 ● No, I never heard about it

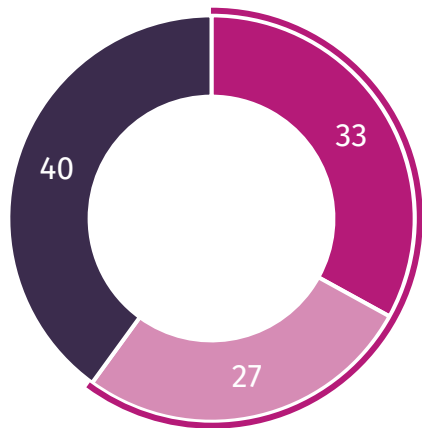


The 25-44 age group is more aware of the intestinal flora. On the other hand, people over 60 seem less familiar with it.



Question 2bis. And have you ever heard of these terms?
Base: All respondents

Intestinal flora



60%
have already heard
about intestinal
flora

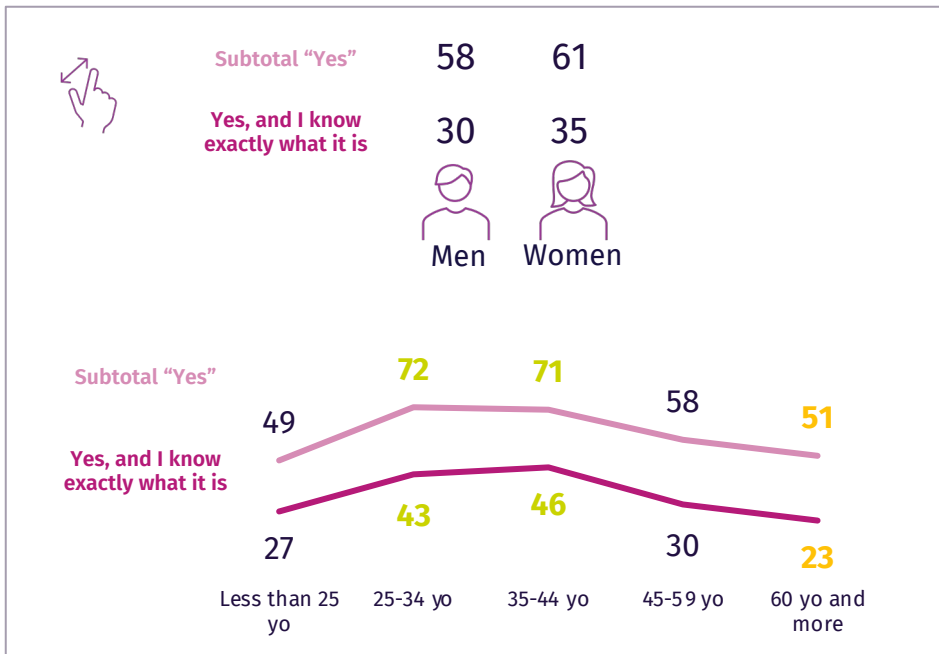


86%

- Yes, and I know exactly what it is
- Yes, but I don't know exactly what it is
- No, I never heard about it

● Significant differences vs All countries - superior

● Significant differences vs All countries - inferior



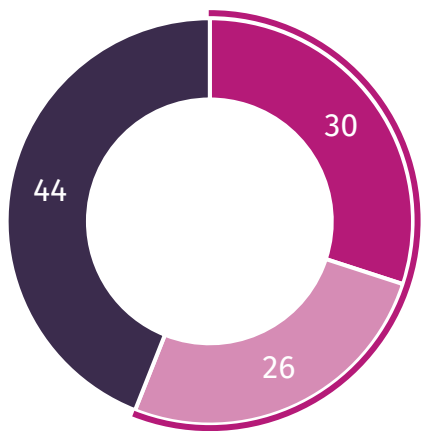


The 25-44 age group and women are more aware of the vaginal flora, unlike people over 60yo.



Question 2bis. And have you ever heard of these terms?
Base: All respondents

Vaginal flora



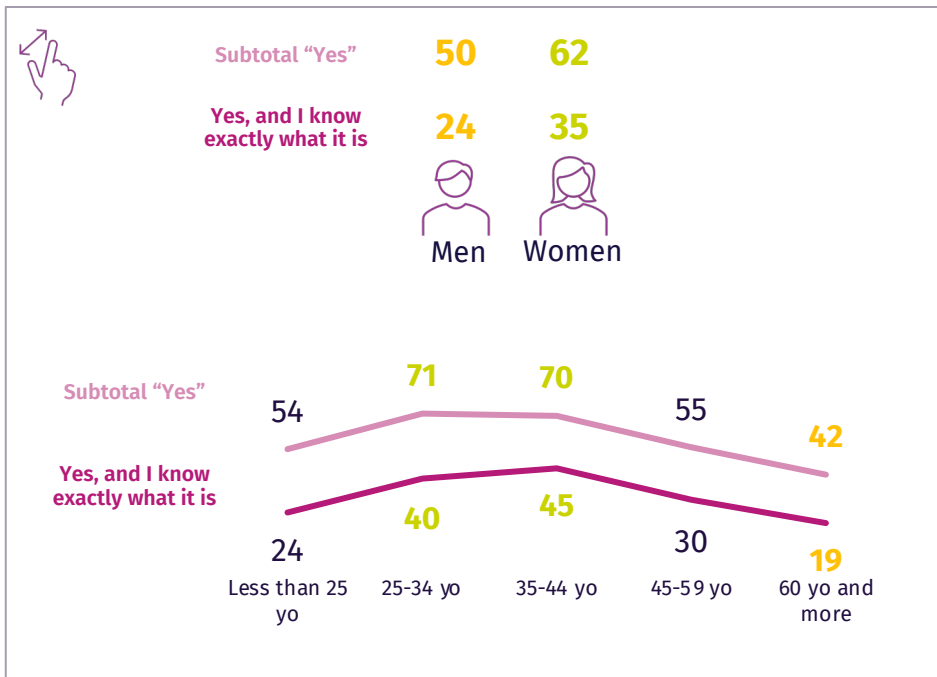
56%
have already heard
about vaginal flora

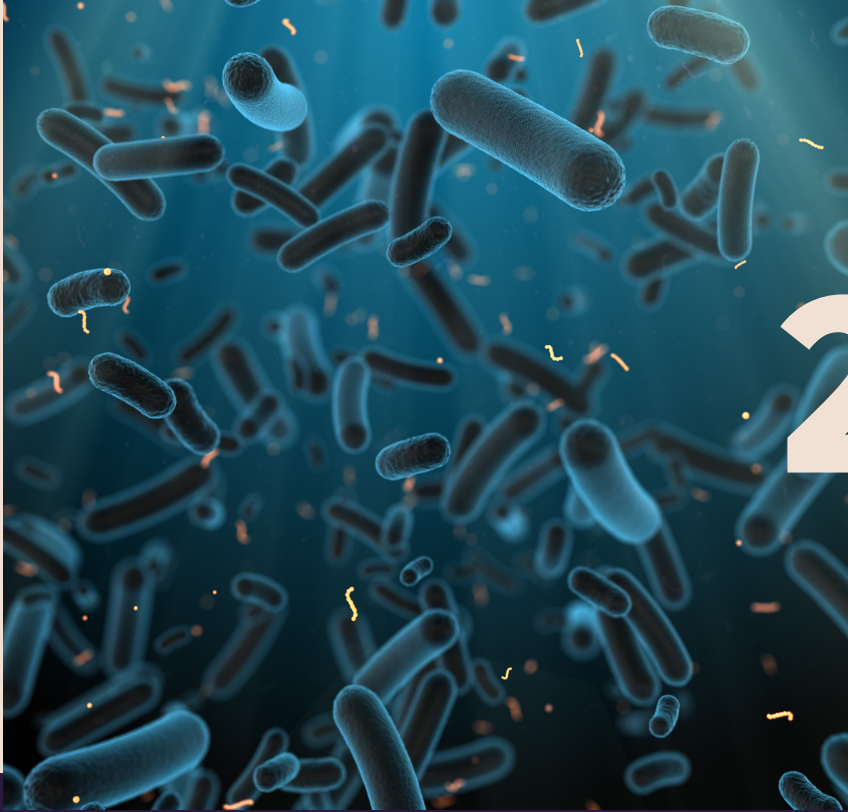


77%

- Yes, and I know exactly what it is
- Yes, but I don't know exactly what it is
- No, I never heard about it

● Significant differences vs All countries - superior ● Significant differences vs All countries - inferior





Although knowledge about the causes and consequences of an imbalanced microbiome is poor, some essential information are known by most people

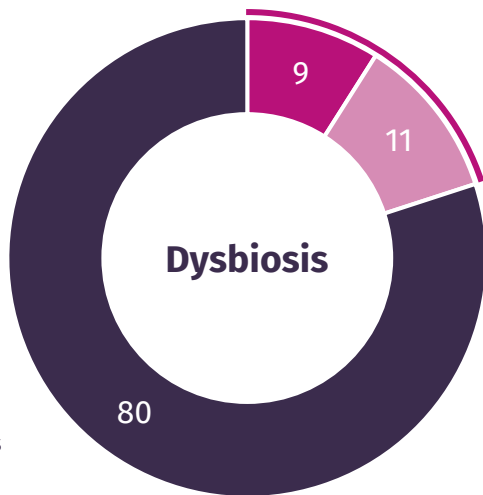


Dysbiosis is far from being a common term for Americans: only 1 in 5 have heard about it.



Question 3. And more specifically, have you ever heard of the following terms?

Base: All respondents

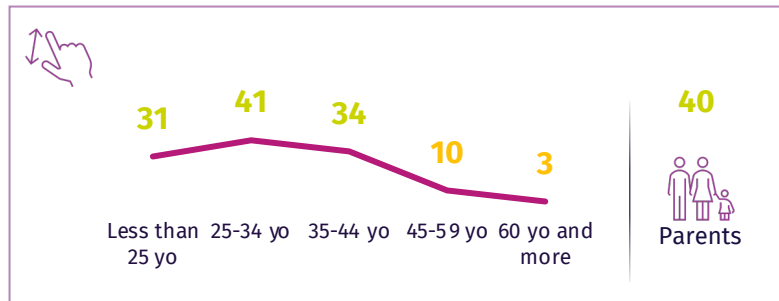


- Yes, and I know exactly what it is
- Yes, but I don't know exactly what it is
- Never heard about it

20% have already heard about the term 'dysbiosis'



28%



● Significant differences vs total - superior ● Significant differences vs total - inferior

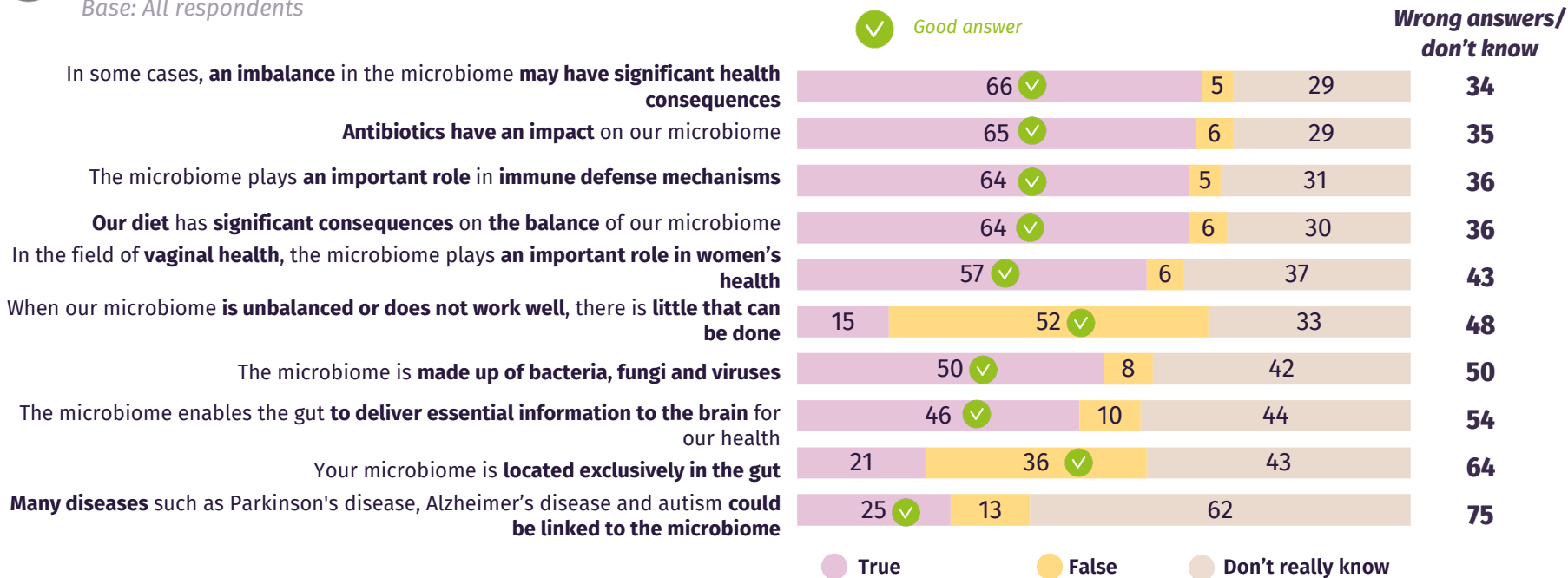


2 Americans in 3 know that an imbalanced microbiome is dangerous for health, that antibiotics and diet have an impact on it, and that it plays an essential role in the immune system.



Question 4. For each of the following statements, tell us if you think it is TRUE or FALSE. If you are unsure about your answer, answer I do not really know.

Base: All respondents





Americans' level of knowledge of the microbiome is also lower than in the other countries.

Question 4. For each of the following statements, tell us if you think it is TRUE or FALSE. If you are unsure about your answer, answer I do not really know. / Base: All respondents

% good answer	Total	ALL COUNTRIES
In some cases, an imbalance in the microbiome may have significant health consequences	66	75
Antibiotics have an impact on our microbiome	65	66
The microbiome plays an important role in immune defense mechanisms	64	72
Our diet has significant consequences on the balance of our microbiome	64	74
In the field of vaginal health, the microbiome plays an important role in women's health	57	66
When our microbiome is unbalanced or does not work well, there is little that can be done	52	53
The microbiome is made up of bacteria, fungi and viruses	50	54
The microbiome enables the gut to deliver essential information to the brain for our health	46	53
Your microbiome is located exclusively in the gut	36	45
Many diseases such as Parkinson's disease, Alzheimer's disease and autism could be linked to the microbiome	25	25



The 25-44yo and parents have better knowledge about microbiome.



Question 4. For each of the following statements, tell us if you think it is TRUE or FALSE. If you are unsure about your answer, answer I do not really know.

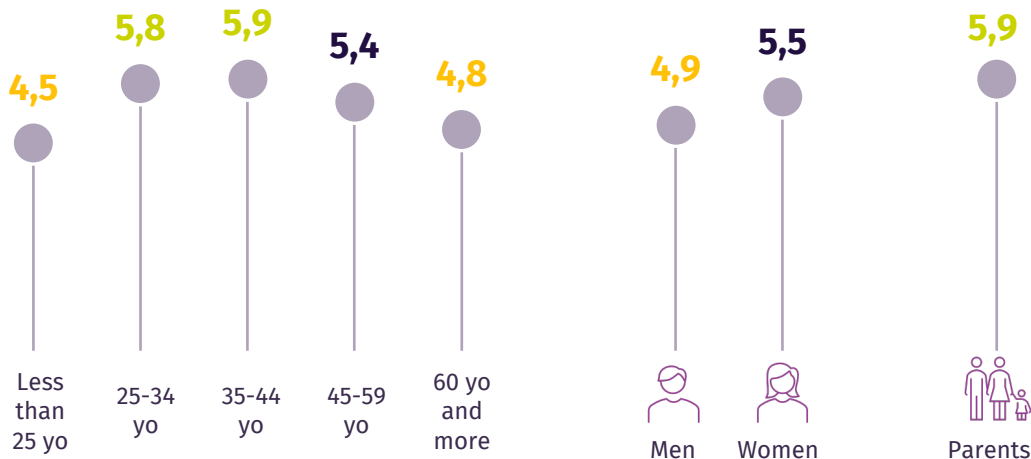
Base: All respondents



5,8

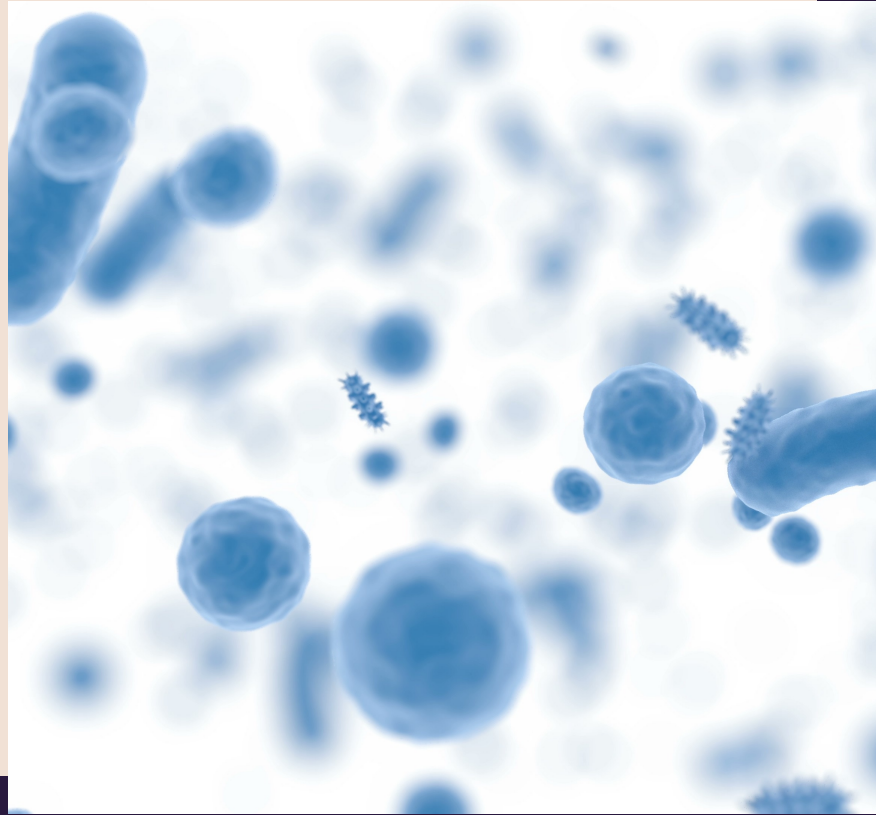
5,3/10

Number of good responses on average



● Significant differences vs total - superior

● Significant differences vs total - inferior



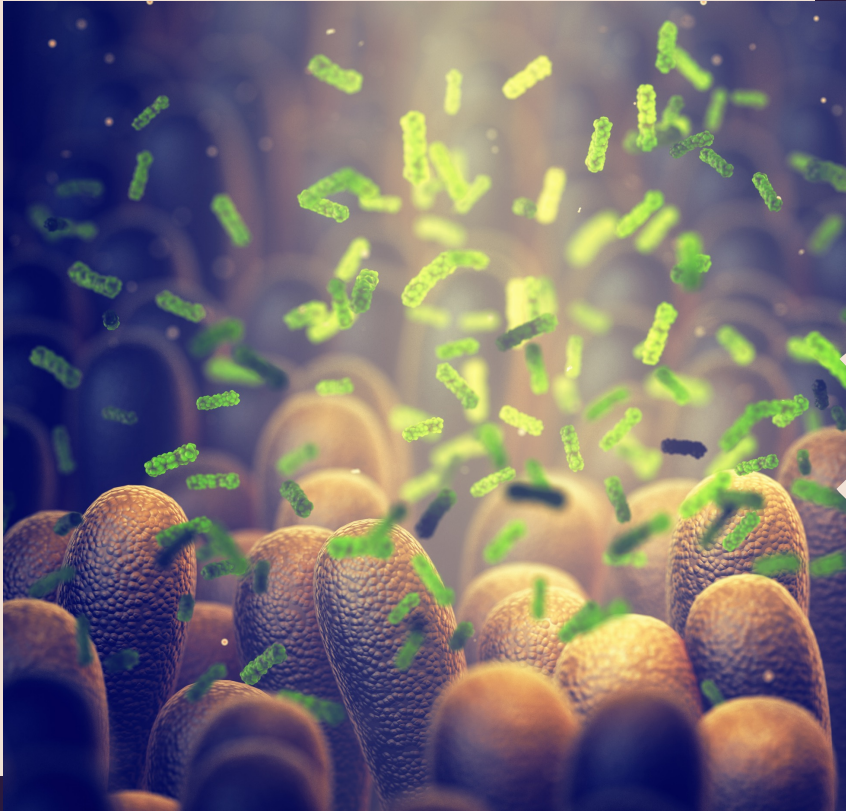
Text displayed to respondents:

The microbiome (or microbial flora) is a group of microorganisms such as bacteria, viruses, fungi and archaea, which live in symbiosis in our body, mainly in our digestive tract but also on the skin, in the lungs, ears, mouth and vagina.

The microbiome has many consequences for our health because it fulfils essential functions such as digesting foods, synthesis of vitamins and stimulating our immune system.

A balanced microbiome is also important in preventing certain diseases such as allergies, obesity and chronic inflammatory bowel diseases.

Recent studies also suggest that the microbiome can have an impact on our mental health and behavior, influencing our mood, cognition and motivation.



3

A strong lack of awareness of the behaviors and the solutions to be implemented for maintaining a balanced microbiome

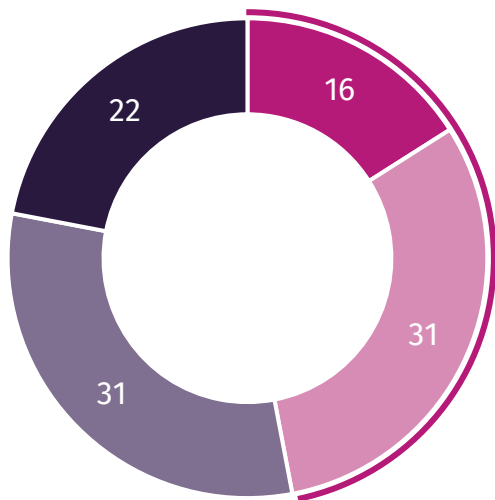


Less than half have adopted specific behaviors to keep their microbiome balanced and functioning as smoothly as possible.



Question 10. And in your daily life, have you adopted specific behaviors to keep your microbiome as balanced and functioning as smoothly as possible?

Base: All respondents

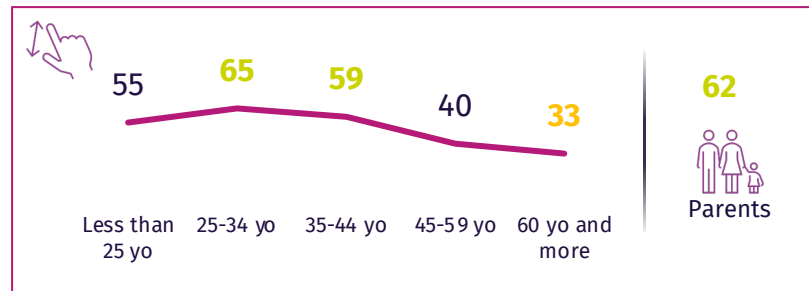


- Yes, a lot
- Yes, a little
- No, not really
- No, not at all

47% have already adopted specific behaviors



57%



● Significant differences vs total - superior ● Significant differences vs total - inferior



Behaviors related to daily washing and vaginal douches are the least identified.

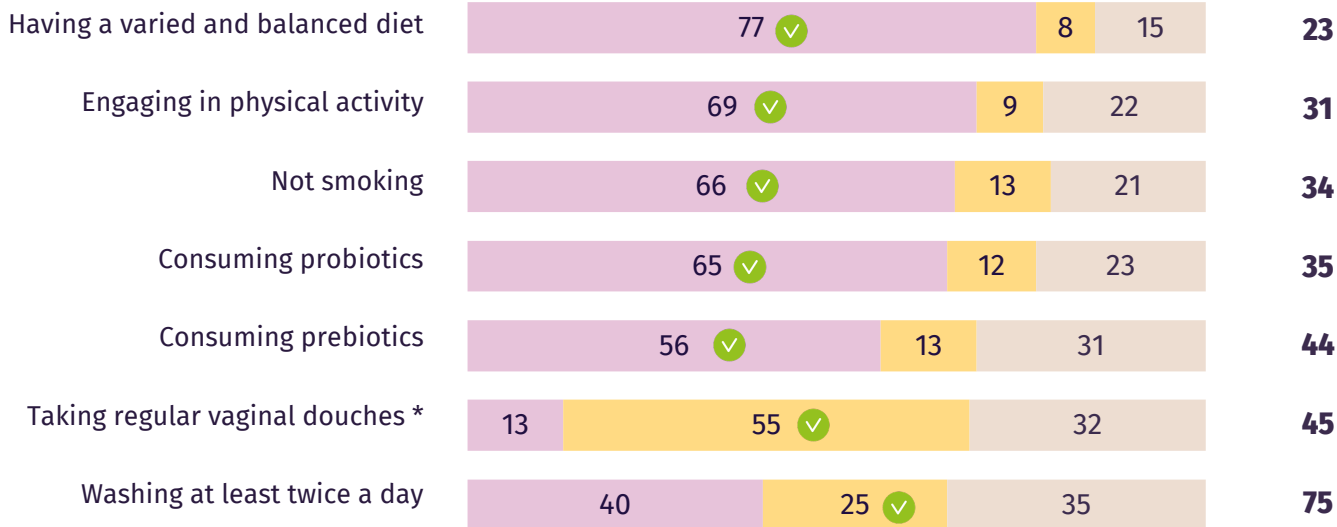


Question 11. Based on what you know, among the following behaviors, which ones have a positive effect on the balance and proper functioning of your microbiome?

Base: All respondents

✓ Good answer

Wrong answers/ don't know



● True ● False ● Don't really know

* Item asked only to women (n=547)



Except for prebiotics and vaginal douches, Americans seem to be less aware of the appropriate behaviors to adopt than in the other countries.

Question 11. Based on what you know, among the following behaviors, which ones have a positive effect on the balance and proper functioning of your microbiome ? Base: All respondents

% good answer	Total	ALL COUNTRIES
Having a varied and balanced diet	77	84
Engaging in physical activity	69	76
Not smoking	66	72
Consuming probiotics	65	62
Consuming prebiotics	56	51
Taking regular vaginal douches *	55	42
Washing at least twice a day	25	35

* Item asked only to women (n=547)



However, some profiles seem to stand out positively: 35-44yo, women and parents.



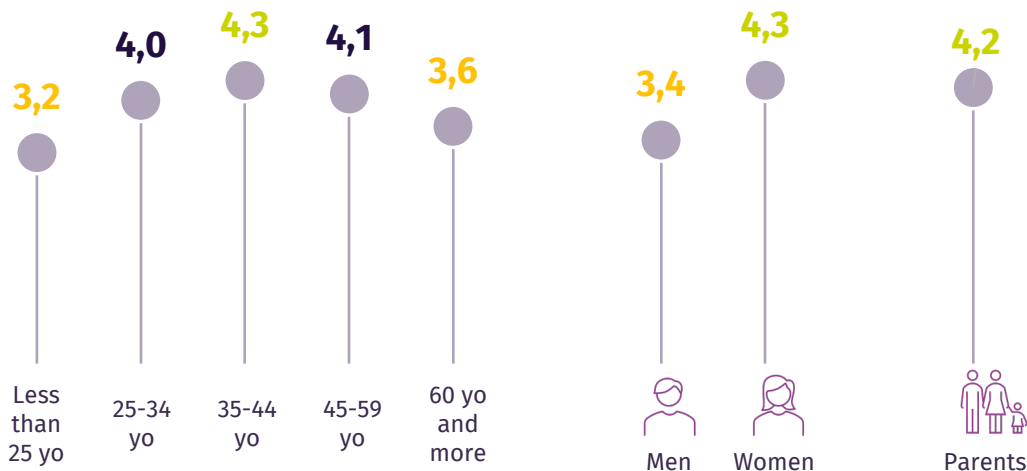
Question 11. Based on what you know, among the following behaviors, which ones have a positive effect on the balance and proper functioning of your microbiome ? Base: All respondents



4,0

3,9/7

Number of good responses on average



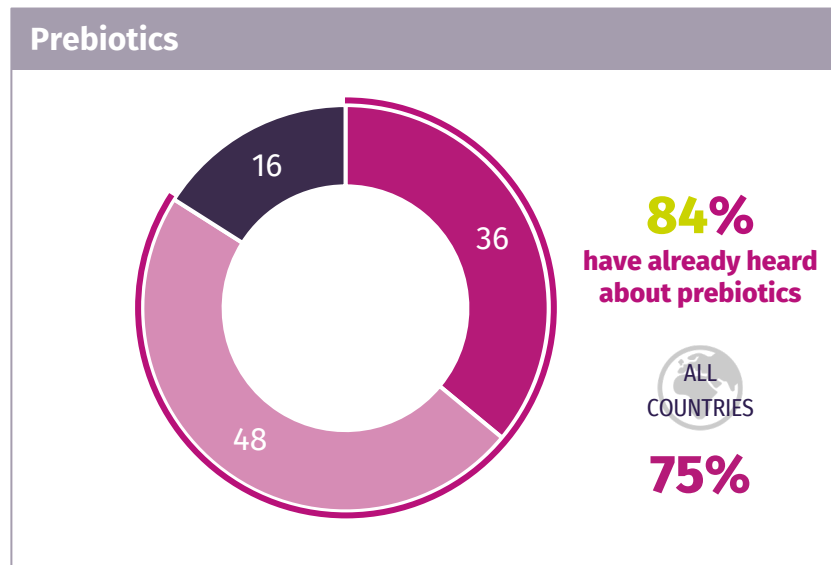
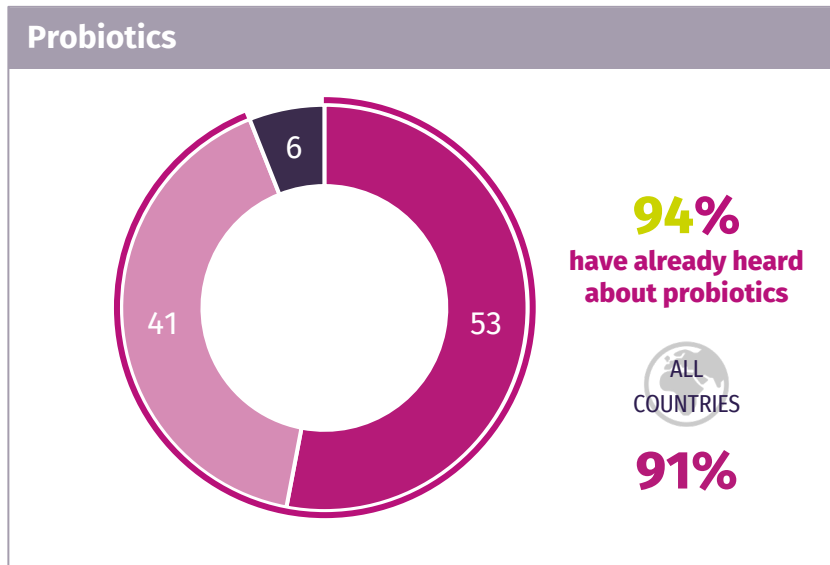
- Significant differences vs total - superior
- Significant differences vs total - inferior



Americans seem to know more about prebiotics and probiotics than the other countries, although a large proportion have little or no idea what they are precisely.



Question 2bis. And have you ever heard of these terms?
Base: All respondents



● Yes, and I know exactly what it is
 ● Yes, but I don't know exactly what it is
 ● No, I never heard about it

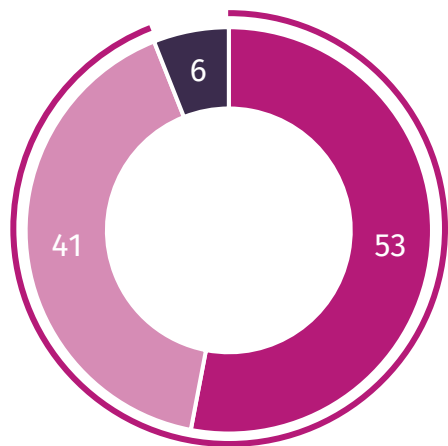


People aged 25-44 yo are more aware of probiotics.



Question 2bis. And have you ever heard of these terms?
Base: All respondents

Probiotics

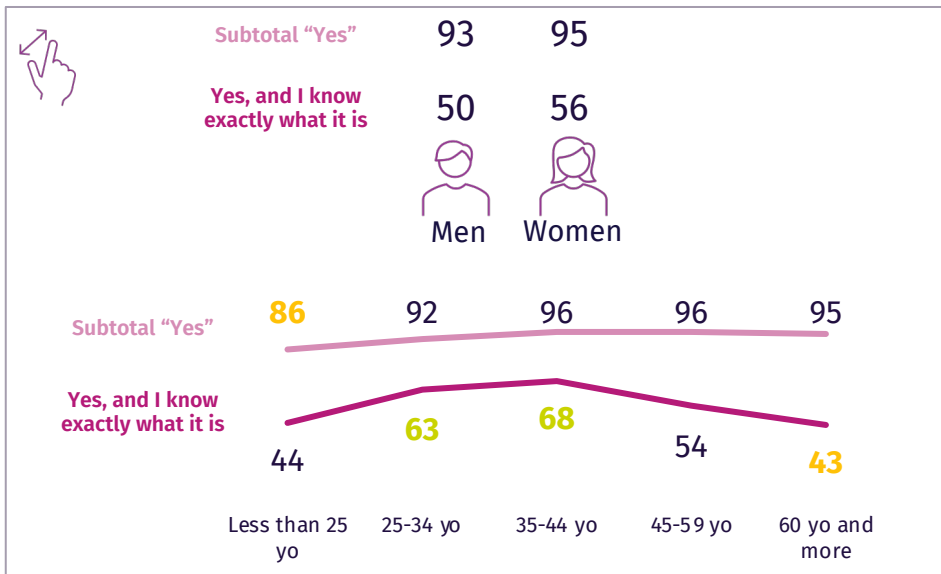


94%
have already heard
about probiotics



91%

- Yes, and I know exactly what it is
- Yes, but I don't know exactly what it is
- No, I never heard about it



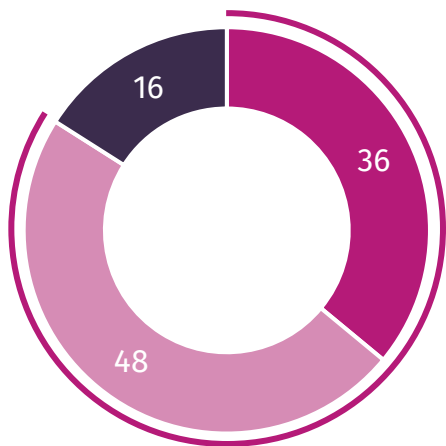


25-44 yo are also the ones who know best prebiotics.



Question 2bis. And have you ever heard of these terms?
Base: All respondents

Prebiotics

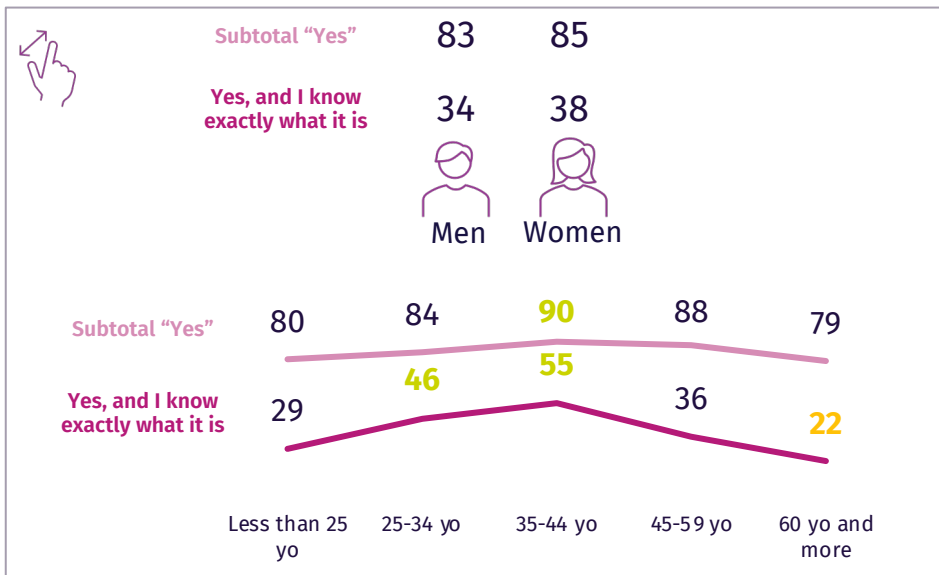


84%
have already heard
about prebiotics



75%

- Yes, and I know exactly what it is
- Yes, but I don't know exactly what it is
- No, I never heard about it





While many people report experiencing wellness problems that may be linked to microbiota imbalances

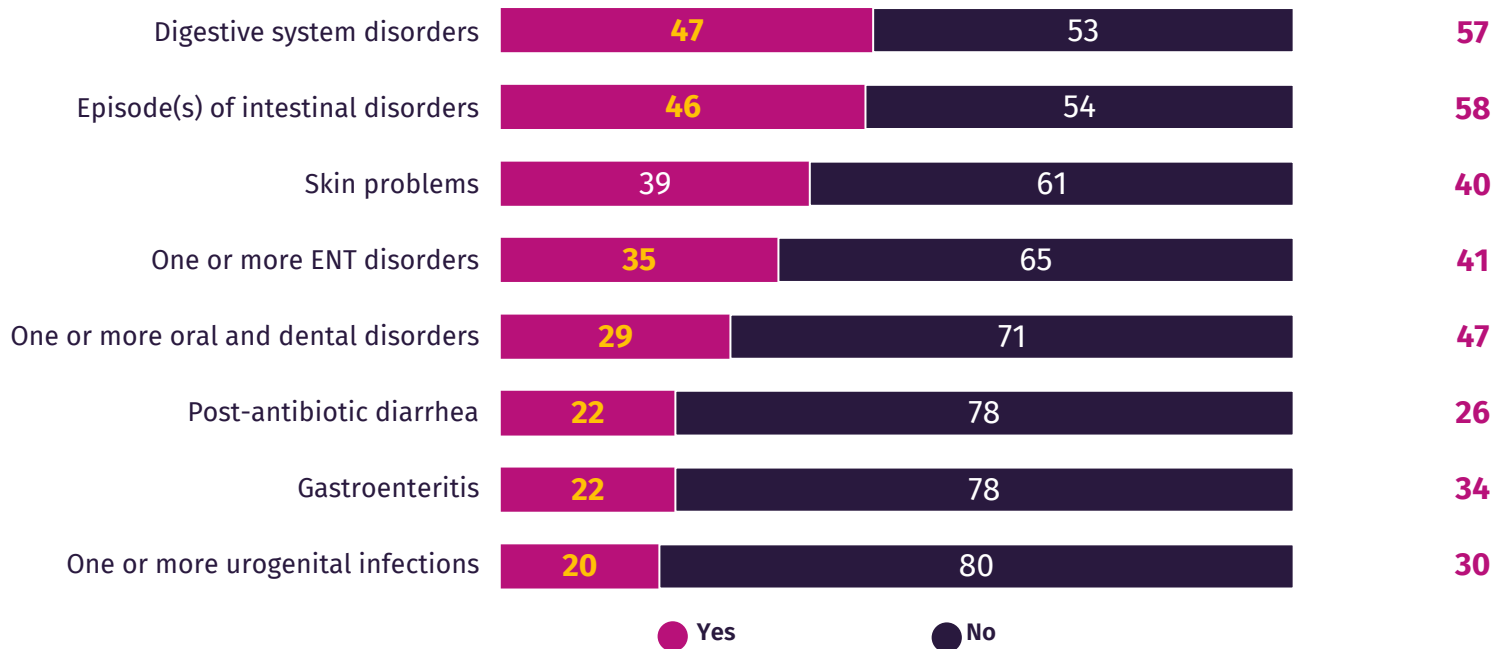


Overall, Americans report fewer health problems over the last 5 years than the other countries. However, almost 1 in 2 have experienced digestive disorders or episodes of intestinal disorders.



Question 11a. Over the past 5 years, have you ever experienced the following problems?

Base: All respondents



● Yes

● No



For the two most experienced problems, namely intestinal and digestive system disorders, Americans seem to associate them less with their microbiome.



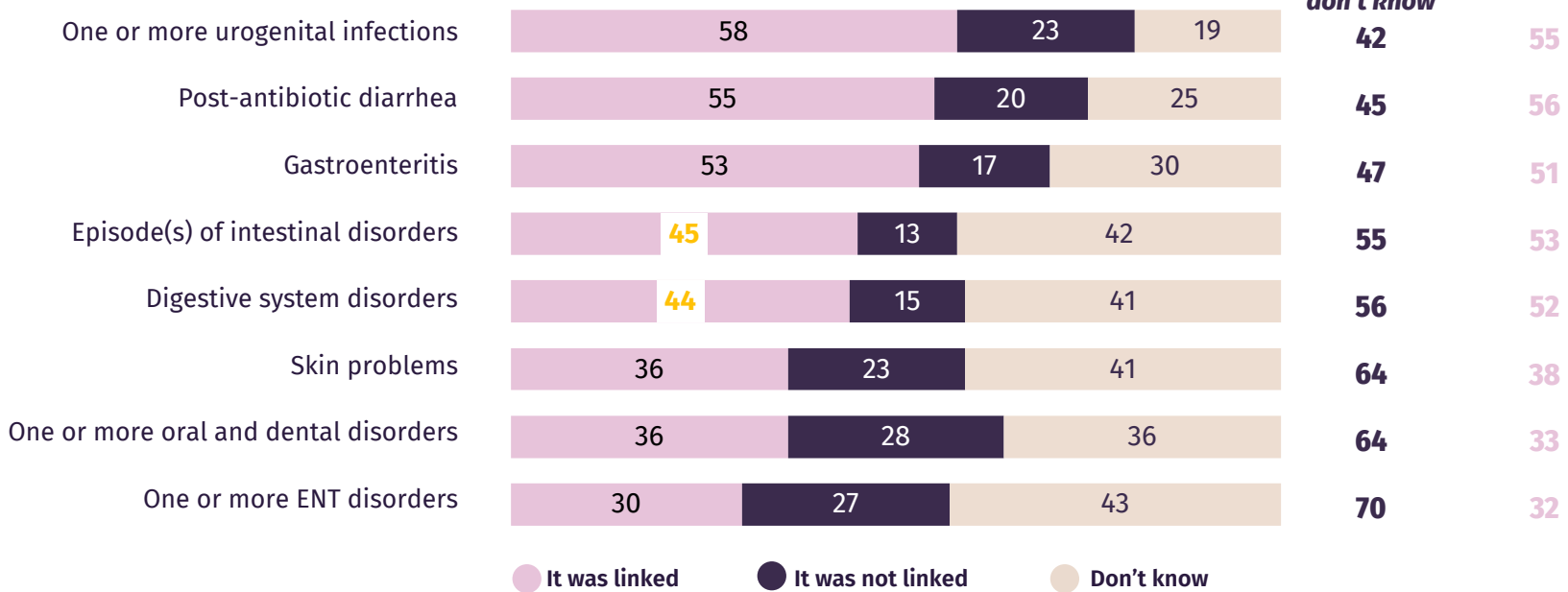
Question 11b. And do you think this or these problems are linked to your microbiome?

Base: People who have experienced these problems



% Linked

% Not linked / don't know





**Health professionals
are essential in
teaching patients to
become actors of their
own microbiota health**

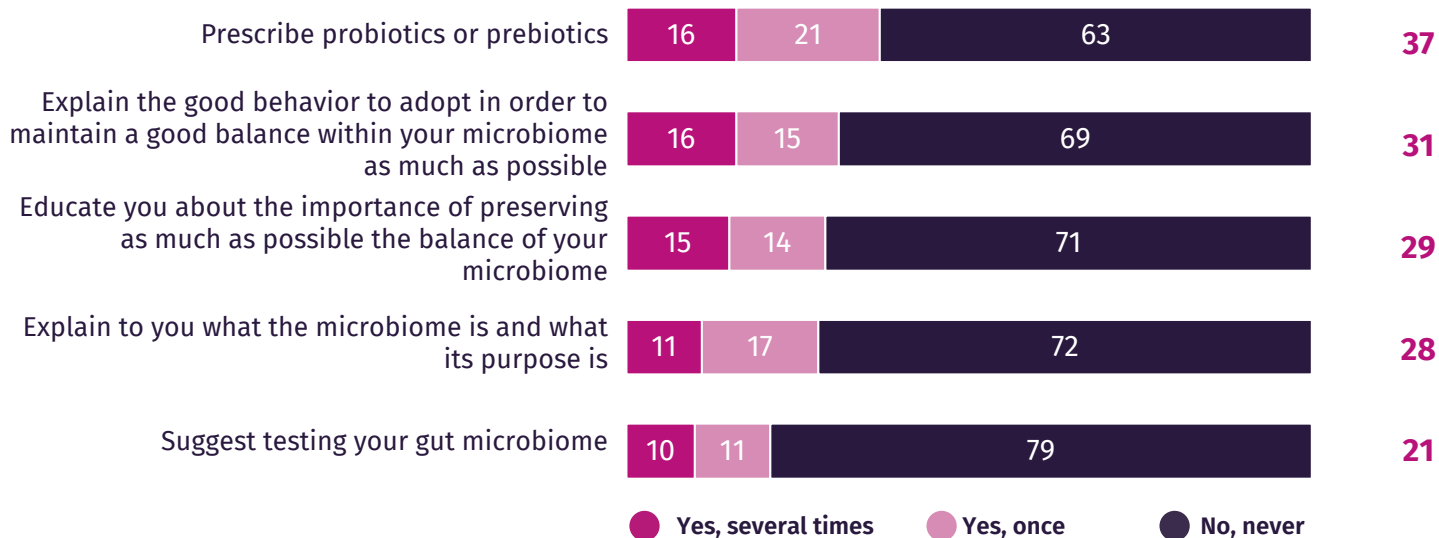


On the subject of microbiome, a very low proportion of health professionals take action with their patients.



Question 5. Have any of the healthcare professionals you have seen ever done any of the following?
Base: All respondents

Only **15%** received **ALL THESE INFORMATION**, at least one time
3% received **all these information several times** % Yes





Compared to the other countries, Americans receive very little prescription and advice about their microbiome from their HCPs.

Question 5. Have any of the healthcare professionals you have seen ever done any of the following?

Base: All respondents

% Yes

	Total	ALL COUNTRIES
% Received ALL THESE INFORMATION, at least one time	15	19
% Received ALL THESE INFORMATION, <u>several times</u>	3	4
Prescribe probiotics or prebiotics	37	46
Explain the good behavior to adopt in order to maintain a good balance within your microbiome as much as possible	31	44
Educate you about the importance of preserving as much as possible the balance of your microbiome	29	42
Explain to you what the microbiome is and what its purpose is	28	37
Suggest testing your gut microbiome	21	30



In detail, significant gaps appear according to the age and gender: the elderly and women receive fewer advice than others.



Question 5. Have any of the healthcare professionals you have seen ever done any of the following? Base: All respondents

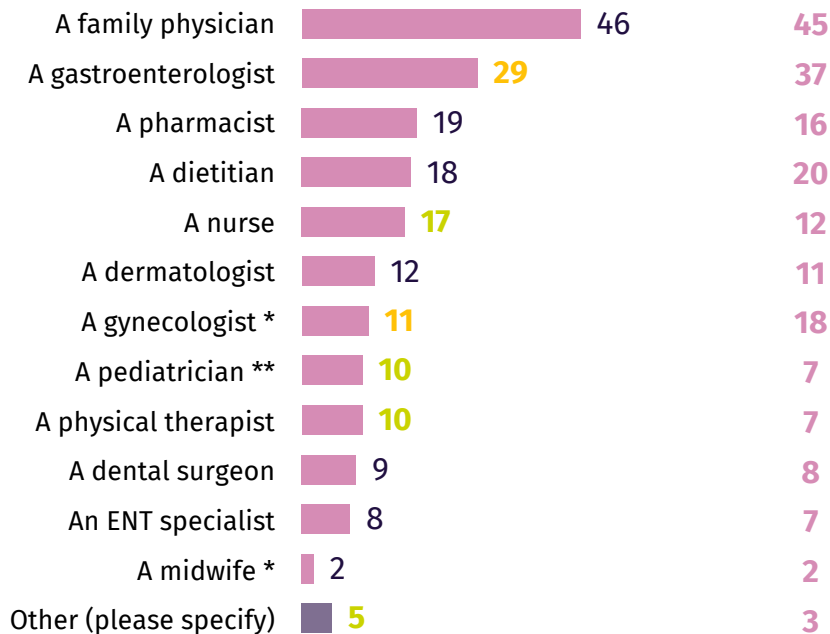
% Yes	Total	Less than 25 yo	25-34 yo	35-44 yo	45-59 yo	60 yo and more	Men	Women	Parents
	base n=1000	n=73	n=188	n=183	n=244	n=312	n=453	n=547	n=329
Prescribe probiotics or prebiotics	37	67	57	50	27	15	43	31	58
Explain the good behavior to adopt in order to maintain a good balance within your microbiome as much as possible	31	53	56	46	20	10	39	24	51
Educate you about the importance of preserving as much as possible the balance of your microbiome	29	56	53	43	18	8	37	22	52
Explain to you what the microbiome is and what its purpose is	28	44	55	42	18	7	35	22	51
Suggest testing your gut microbiome	21	34	42	33	14	5	29	14	42



Family physicians are the main HCPs who provided information about microbiome. Gastroenterologists come in second place, but to a lesser extent.



Question 6. And which healthcare professionals provided you with these explanations?
Base: People who have had an explanation from healthcare professionals (n=433)

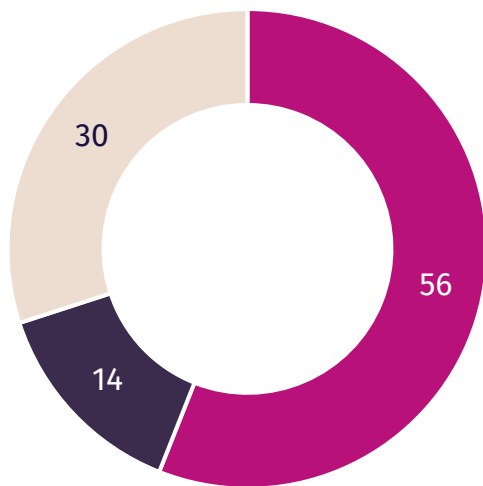


* Item displayed to women
** Item displayed to parents



Even if they remain less numerous than the average of the countries, more than half of the Americans want to test their microbiome.

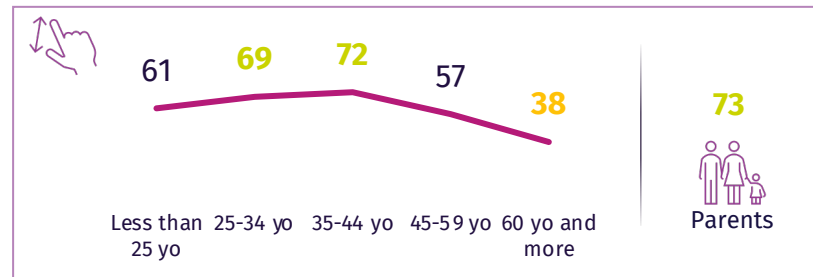
Question 5bis. In your case, do you think it is useful to test your gut microbiome?
Base: All respondents



- Yes
- No
- Wouldn't know

56% think it is useful to test their gut microbiome

ALL COUNTRIES
63%



● Significant differences vs total - superior ● Significant differences vs total - inferior



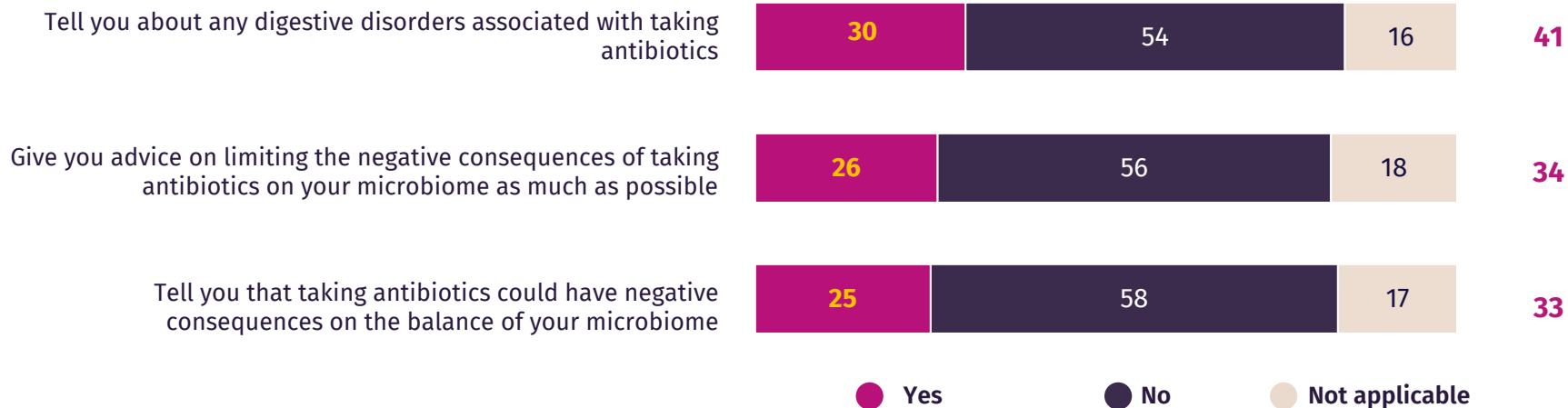
While treated with antibiotics, very few has received advice and information to protect their microbiome.



Question 7. The last time a doctor prescribed antibiotics, did they do the following?
Base: All respondents

Only **15%** received **ALL THESE INFORMATION** from their HCPs

ALL COUNTRIES
% Yes





Once again, a generational gap emerges: people over 60yo are particularly few to have received information and advice when prescribed antibiotics.



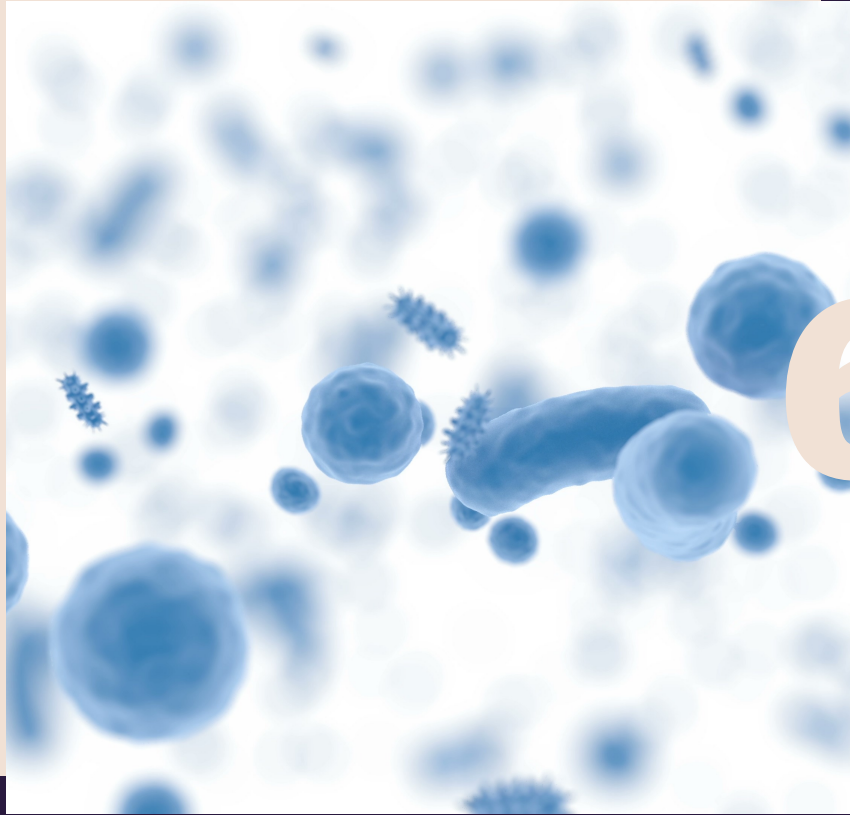
Question 7. The last time a doctor prescribed antibiotics, did they do the following? / Base: All respondents

% Yes

	Total base n=1000	Less than 25 yo n=73	25-34 yo n=188	35-44 yo n=183	45-59 yo n=244	60 yo and more n=312	Parents n=329
% HAVE RECEIVED ALL THESE INFORMATION FROM THEIR HCPS	15	16	21	29	12	6	26
Tell you about any digestive disorders associated with taking antibiotics	30	44	42	42	23	17	44
Give you advice on limiting the negative consequences of taking antibiotics on your microbiome as much as possible	26	43	43	40	18	10	43
Tell you that taking antibiotics could have negative consequences on the balance of your microbiome	25	29	43	38	19	11	42

● Significant differences vs total - superior

● Significant differences vs total - inferior



6

Focus on the vulvo-vaginal microbiome

In the next questions, we will discuss the vulvovaginal microbiome, also known as vaginal flora or vaginal microbiome.

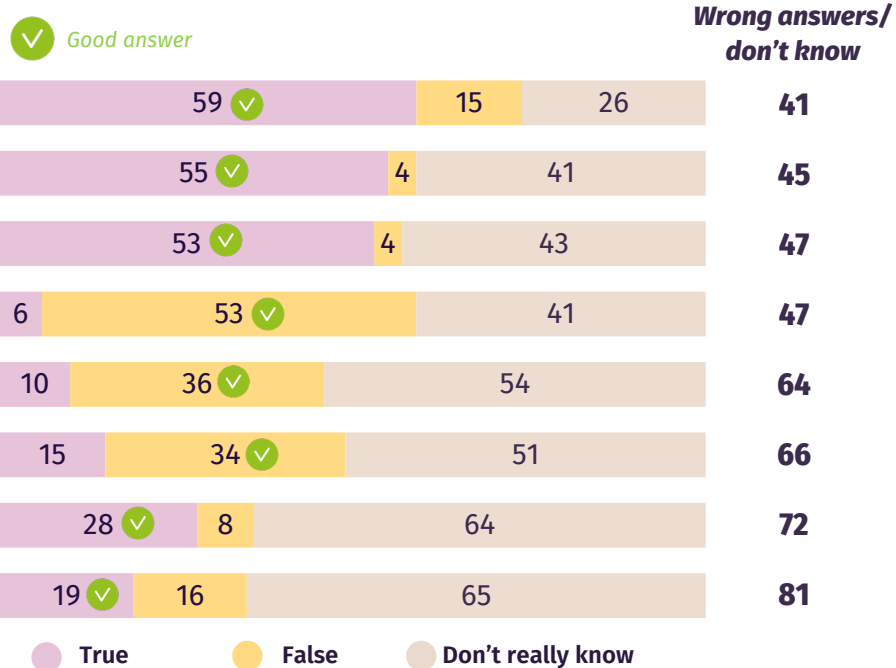


When focusing on the vulvovaginal microbiome, knowledge appears limited.



Question 13. For each of the following statements, tell us if you think it is TRUE or FALSE. If you are unsure about your answer, answer I do not really know.

Base: Women





Although they are more aware that the vagina is self-cleaning, American women appear to know less about the vulvo-vaginal microbiome than women in other countries.

Question 13. For each of the following statements, tell us if you think it is TRUE or FALSE. If you are unsure about your answer, answer I do not really know.

Base: Women

% good answer

	Total	ALL COUNTRIES
The vagina is self-cleaning	59	52
Every woman has a vulvovaginal microbiome that is different from any other woman's	55	60
The vulvovaginal microbiome acts as a barrier, protecting us from pathogenic microorganisms	53	67
From childhood to menopause, a woman's vulvovaginal microbiome remains the same	53	52
Bacterial vaginosis is not associated with an imbalance in the vulvovaginal microbiome	36	35
Vulvovaginal microbiome bacteria are dangerous for the vagina of women	34	37
Delivery (vaginally or cesarean section) has an impact on the newborn's gut microbiome	28	30
The vulvovaginal microbiome is balanced when its bacterial diversity is low	19	27



Women aged 25-44 yo and mothers have more knowledge about vulvovaginal microbiome but their level of knowledge remains low.



Question 13. For each of the following statements, tell us if you think it is TRUE or FALSE. If you are unsure about your answer, answer I do not really know.

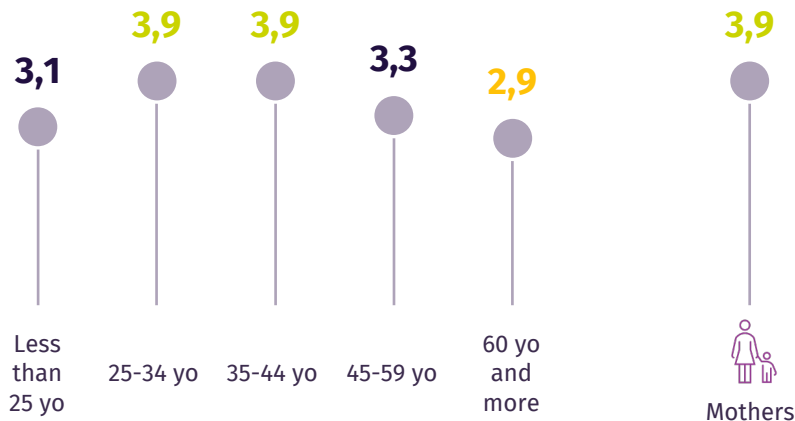
Base: Women



3,6



Number of good responses on average



- Significant differences vs total - superior
- Significant differences vs total - inferior



American women seem to have the same level of knowledge about the vulvo-vaginal microbiome, whatever their age.

Question 13. For each of the following statements, tell us if you think it is TRUE or FALSE. If you are unsure about your answer, answer I do not really know.

Base: Women

% good answer	Total	Less than 25 yo	25-34 yo	35-44 yo	45-59 yo	60 yo and more
	base n=547	n=20	n=99	n=106	n=160	n=162
The vagina is self-cleaning	59	77	72	67	57	46
Every woman has a vulvovaginal microbiome that is different from any other woman's	55	46	62	61	54	52
The vulvovaginal microbiome acts as a barrier, protecting us from pathogenic microorganisms	53	44	59	64	55	44
From childhood to menopause, a woman's vulvovaginal microbiome remains the same	53	34	53	56	54	55
Bacterial vaginosis is not associated with an imbalance in the vulvovaginal microbiome	36	33	43	43	35	30
Vulvovaginal microbiome bacteria are dangerous for the vagina of women	34	41	39	42	30	28
Delivery (vaginally or cesarean section) has an impact on the newborn's gut microbiome	28	15	35	35	27	22
The vulvovaginal microbiome is balanced when its bacterial diversity is low	19	16	24	24	16	16

● Significant differences vs total - superior

● Significant differences vs total - inferior



A particularly low percentage of women have received information or advice from their HCPs about the vulvo-vaginal microbiome.



Question 14. Has the healthcare professional following your gynecological health talked to you about the following?
Base: Women

11% received ALL THESE INFORMATION, at least one time
2% received all these information several times

% Yes

Explain the good behaviors to adopt in order to maintain a good balance within your vulvovaginal microbiome as much as possible



23

Educate you on the importance of preserving as much as possible the balance of your vulvovaginal microbiome



21

Explain to you what the vulvovaginal microbiome is and what its purpose is



19

Suggest testing your vulvovaginal microbiome



14

● Yes, several times ● Yes, once ● No, never



Once again, American women seem to have received significantly less information from their HCPs than the other countries.

Question 14. Has the healthcare professional following your gynecological health talked to you about the following?
Base: Women

% Yes

	Total	ALL COUNTRIES
% Have received ALL THESE INFORMATION, at least one time	11	22
Explain the good behaviors to adopt in order to maintain a good balance within your vulvovaginal microbiome as much as possible	23	42
Educate you on the importance of preserving as much as possible the balance of your vulvovaginal microbiome	21	40
Explain to you what the vulvovaginal microbiome is and what its purpose is	19	35
Suggest testing your vulvovaginal microbiome	14	31



This lack of education is even more pronounced for women over 60 yo: less than 1 in 10 have received information from their HCPs about vulvo-vaginal microbiome.



Question 14. Has the healthcare professional following your gynecological health talked to you about the following?

Base: Women

% Yes	Total	Less than 25 yo	25-34 yo	35-44 yo	45-59 yo	60 yo and more
	base n=547	n=20	n=99	n=106	n=160	n=162
% Have received ALL THE INFORMATION, at least one time	11	22	22	14	10	2
Explain the good behaviors to adopt in order to maintain a good balance within your vulvovaginal microbiome as much as possible	23	35	43	34	16	8
Educate you on the importance of preserving as much as possible the balance of your vulvovaginal microbiome	21	36	38	30	15	8
Explain to you what the vulvovaginal microbiome is and what its purpose is	19	38	41	22	13	6
Suggest testing your vulvovaginal microbiome	14	25	30	23	11	2

● Significant differences vs total - superior

● Significant differences vs total - inferior

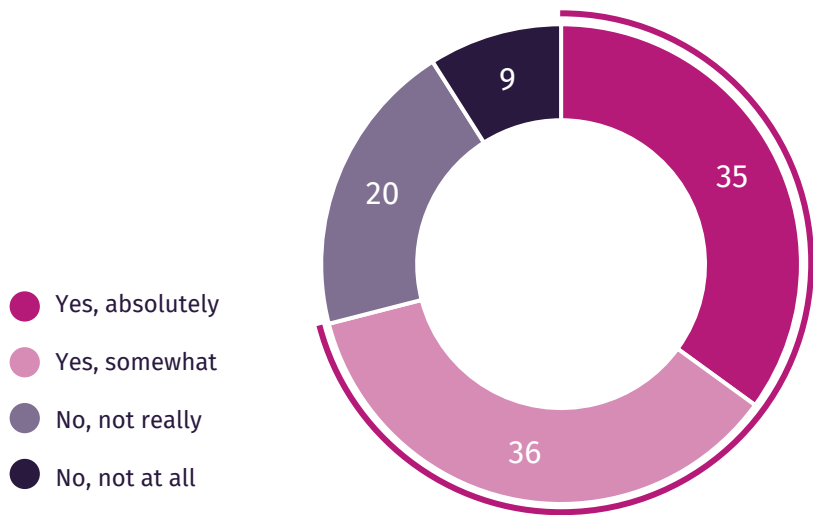


Nearly 3/4 of women would like to receive more information about the importance of the vulvo-vaginal microbiome: a high score, but still lower than all other countries.



Question 15. And would you like the healthcare professional monitoring your gynecological health to tell you more about the importance of your vulvovaginal microbiome and its impact on your health?

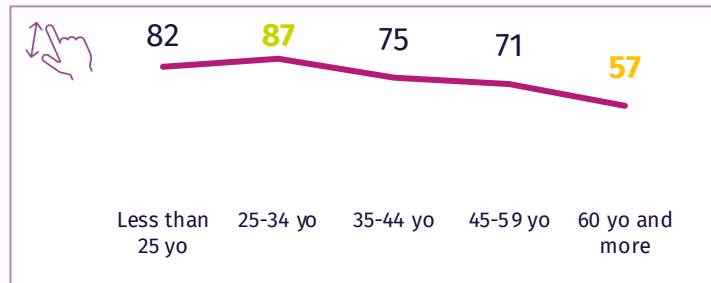
Base: Women



71% would like to have more information about the importance of the vulvovaginal microbiome and its impact on health



86%



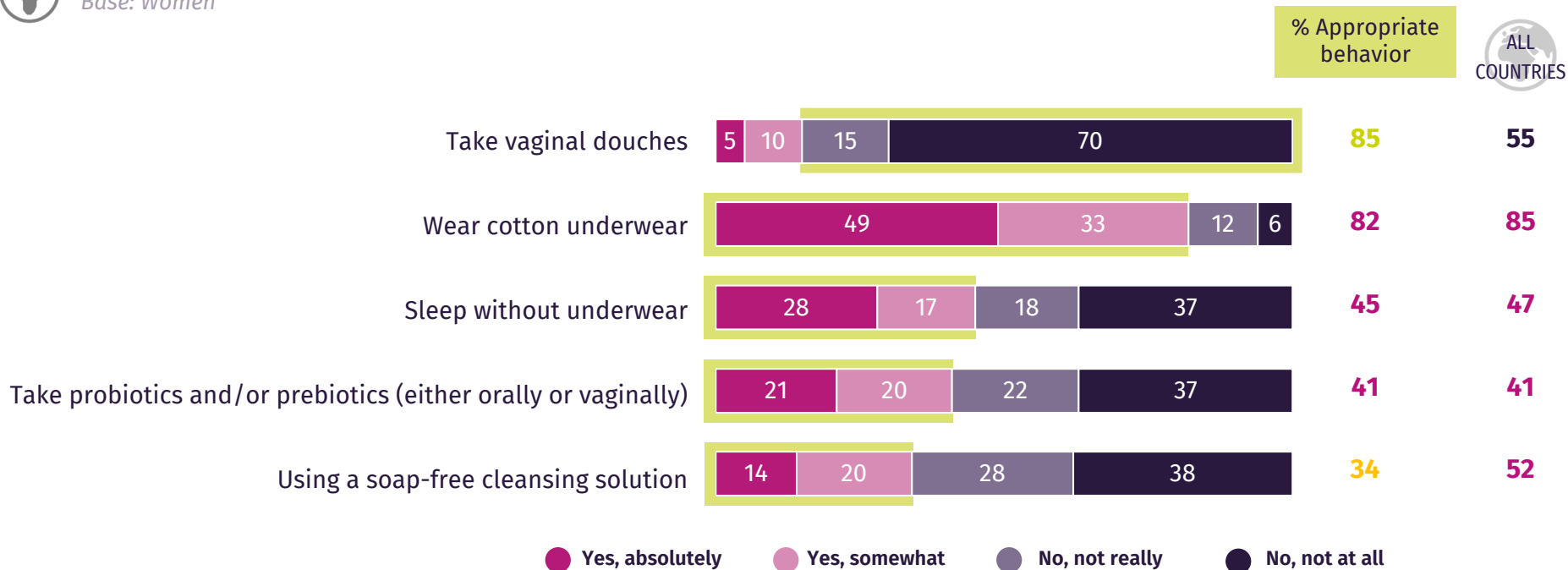
● Significant differences vs total - superior ● Significant differences vs total - inferior



Except the vaginal douches and cotton underwear, the other actions to protect the health of their vulvo-vaginal microbiome is only adopted by a moderate proportion of women.



Question 16. In your daily life, do you regularly adopt the following behaviors?
Base: Women





Women over 60 yo are the least likely to adopt appropriate behaviors for their vulvo-vaginal microbiome.

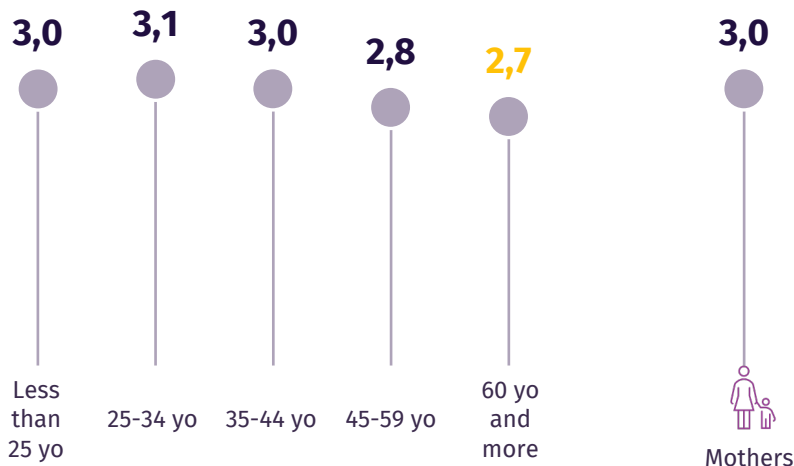


Question 16. In your daily life, do you regularly adopt the following behaviors?
Base: Women



2,8

2,9/5



Number of appropriate behaviors adopted on average

- Significant differences vs total - superior
- Significant differences vs total - inferior



The elderly has less likely to use probiotics or prebiotics and a soap-free cleansing solution.



Question 16. In your daily life, do you regularly adopt the following behaviors?

Base: Women

% Appropriate behavior	Total	Less than 25 yo	25-34 yo	35-44 yo	45-59 yo	60 yo and more
	base n=547	n=20	n=99	n=106	n=160	n=162
Take vaginal douches	85	80	70	78	86	97
Wear cotton underwear	82	85	77	82	82	86
Sleep without underwear	45	64	57	45	41	38
Take probiotics and/or prebiotics (either orally or vaginally)	41	29	54	50	42	29
Using a soap-free cleansing solution	34	44	52	43	30	21

● Significant differences vs total - superior

● Significant differences vs total - inferior

A large, light gray, semi-transparent graphic on the left side of the slide. It consists of a dense, overlapping network of stylized, branching, and elongated shapes that resemble a complex microbial community or a network diagram. The shapes are light gray and set against a white background, which is itself layered over a dark blue background.

Main results

Learnings on the USA results



Awareness of the microbiome & its diversity	
Know exactly what is « microbiome »	22%
Subtotal « Aware »	53%
Subtotal « Aware » of the gut microbiome	42%
Subtotal Aware of all microbiome	21%

Level of knowledge around the microbiota	
Mean of good answers	5,3/10

Level of knowledge around the solutions which can maintain the microbiota balanced	
Know exactly what are probiotics	53%
Know exactly what are prebiotics	36%

Adoption and identification of appropriate behaviors to maintain a balanced microbiota	
Have adopted specific behaviors	47%
Number of behaviors identified in order to maintain the microbiota	3,9/7

Level of information provided by healthcare professionals	
Received at least one piece of information at least once	46%

Key learnings

Americans admit having little knowledge of the microbiome, and its diversity. The most familiar is the gut microbiome but many have never heard about it.

In terms of knowledge, little is known about the role of the microbiome and consequences on health.

Although Americans know a little more about probiotics and prebiotics compared to other countries, few have adopted specific behaviors to maintain their microbiome balanced.

Less than half have received information from their healthcare professional about microbiome, even when antibiotics have been prescribed. This is essential that GPs provide more information in order to drive awareness and to encourage appropriate behaviors.

A large, light gray illustration of a diverse microbiome, featuring various shapes of bacteria, fungi, and viruses, set against a white background that is slightly offset to the left and top of the dark blue page.

ANNEXES

FIABILITÉ DES RÉSULTATS

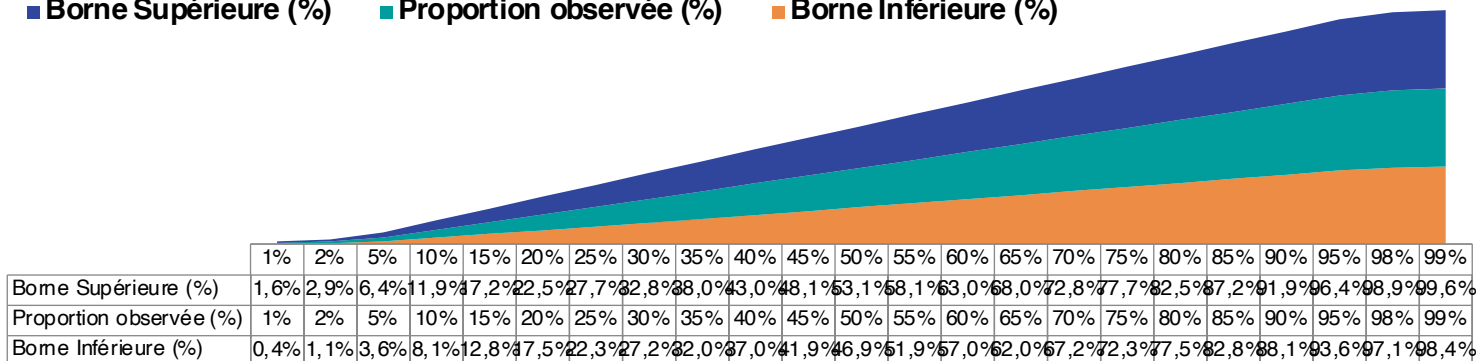
Feuille de calcul

En l'occurrence s'agissant de cette étude :

- Intervalle de confiance : **95%**
- Taille d'échantillon : **1000**

Les proportions observées sont comprises entre :

■ Borne Supérieure (%) ■ Proportion observée (%) ■ Borne Inférieure (%)



SURVEY OVERVIEW

CAWI survey – Online panel



SAMPLE

- **Target** : Male/female 18 and more in each country
- **Selection of the respondent** : participant selection using quotas
- **Sample representativeness** : criteria and sources : gender, age, active/inactive status, regions



DATA COLLECTION

- **Fieldwork dates** : 21 march – 10 April 2023
- **Sample achieved** : 6500 interviews (100 for each country except in Portugal n=500)
- **Data collection** : on line
- **Loyalty program with points- based award system for panelists**
- **Response quality control methods**: monitoring of participants' response behavior (identification of responses that are too quick or careless, e.g. ticked in a straight or zigzag line)
- **Checking of IP and consistency of demographic data.**



DATA PROCESSING

- Weighted sample
- Method used: Rim Weighting Method
- Weighting criteria: criteria and sources : gender, age, active/inactive status, regions

SURVEY MATERIAL THE QUESTIONNAIRE



Questionnaire

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.

SURVEY OVERVIEW

Organization (CAWI survey - Online panel)



ACTIVITIES CARRIED OUT OR COORDINATED BY IPSOS TEAMS IN FRANCE

- Design and methodology
- Validation of scripting
- Coordination and validation of translation
- Coordination of data collection
- Data processing
- Validation of the statistical analyses
- Creation of survey report
- Results presentation design
- Oral presentation Analyses



ACTIVITIES CARRIED OUT BY IPSOS EXPERT LOCAL TEAMS

- Translation
- Scripting
- Sampling (IIS panel)
- Emailing
- Data collection
- Data Map

ABOUT IPSOS

Ipsos is the third largest market research 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 IPS:FP
www.ipsos.com

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.