

Boardroom Sentiment

Survey of Business Leaders

April 25, 2023

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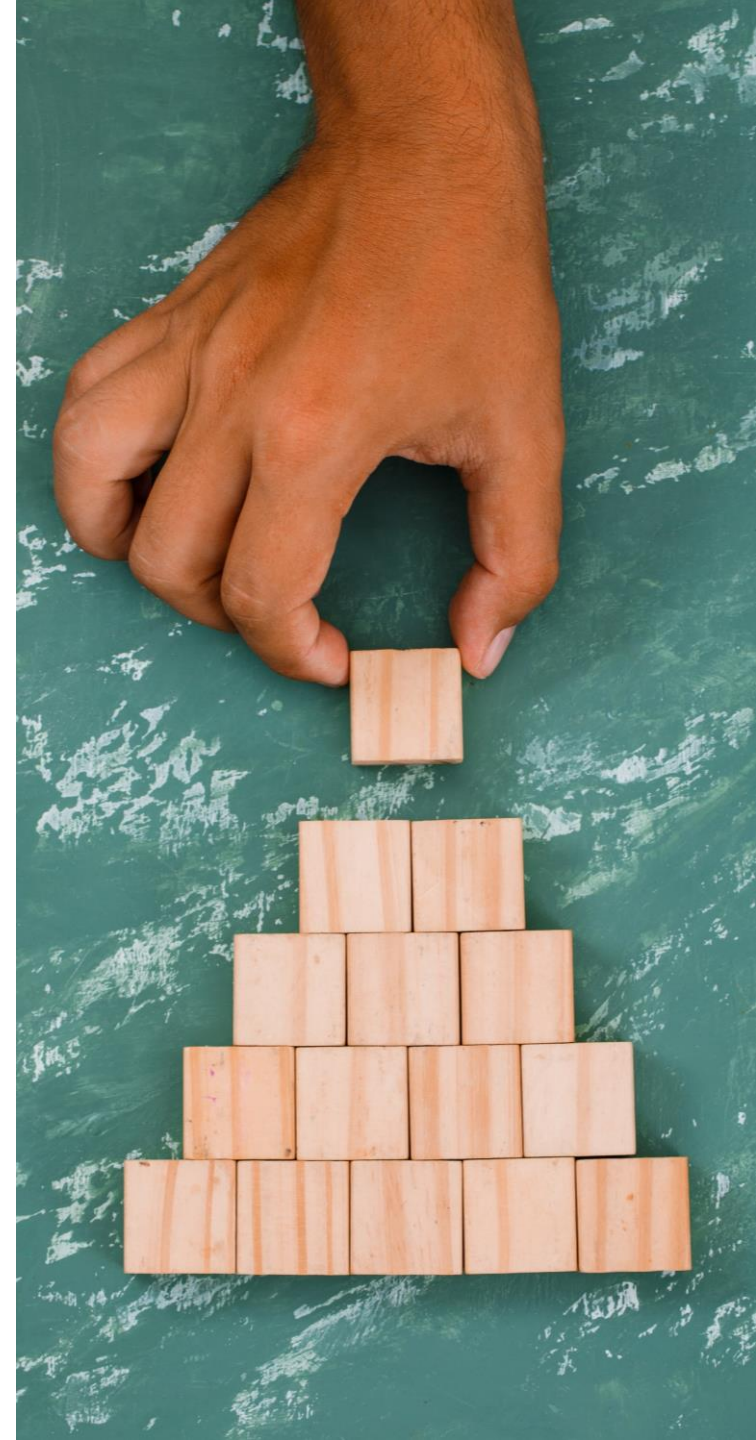
BACKGROUND AND METHODOLOGY



Background

Ipsos conducted a study for ATB Financial among financial decision-makers across Alberta and Canada with companies earning \$10 million or more in revenue per year.

The purpose of this study was to establish a baseline of “what’s on the minds” of Canadian medium and large-sized business leaders.



Methodology



METHODOLOGY

- These are the findings from the ATB Financial Survey of Business Leaders. For this study, 150 interviews were conducted online in March and April 2023.
- As this was not a representative sample, no weighting was applied to the results, and therefore no credibility interval (margin of error) can be applied.
- In order to better understand the economic outlook of businesses based in Alberta, the province was oversampled with 30 of the 150 responses coming from Alberta.

Interpreting the Results

- Subgroup differences between Alberta and the Rest of Canada are presented on each slide.
- Please note that some totals in this report may not add up due to their component parts being rounded.

EXECUTIVE SUMMARY



Key Findings

- Canadian businesses are optimistic overall about the state of the Canadian economy. Businesses in Alberta are more optimistic about the Canadian economy overall than the rest of Canada.
- Alberta businesses report they are facing a tighter labour market than the rest of the country, with firms casting a wider net to find qualified potential hires or reducing the necessary qualifications to find new hires in existing areas.
- Businesses based in Alberta are more likely to use customer loyalty/retention as a measure of business success. As they are slightly less likely to increase prices and are willing to accept lower profit margins, they face lost revenue, which may hurt them in the short term. However, the focus on customer retention may pay off in the long run as they maintain a loyal customer base who will continue purchasing from them as inflation begins to cool instead of looking elsewhere.
- While common in Rest of Canada, Albertan businesses are less likely to have moderate term (3-5 year) business plans.
- ESG and DEI have become more prominent concerns for businesses across the country, with ESG challenges the most cited business concern. Alberta based businesses believe they are ahead of the curve on issues like ESG and DEI.



PRIORITIES AND WORRIES

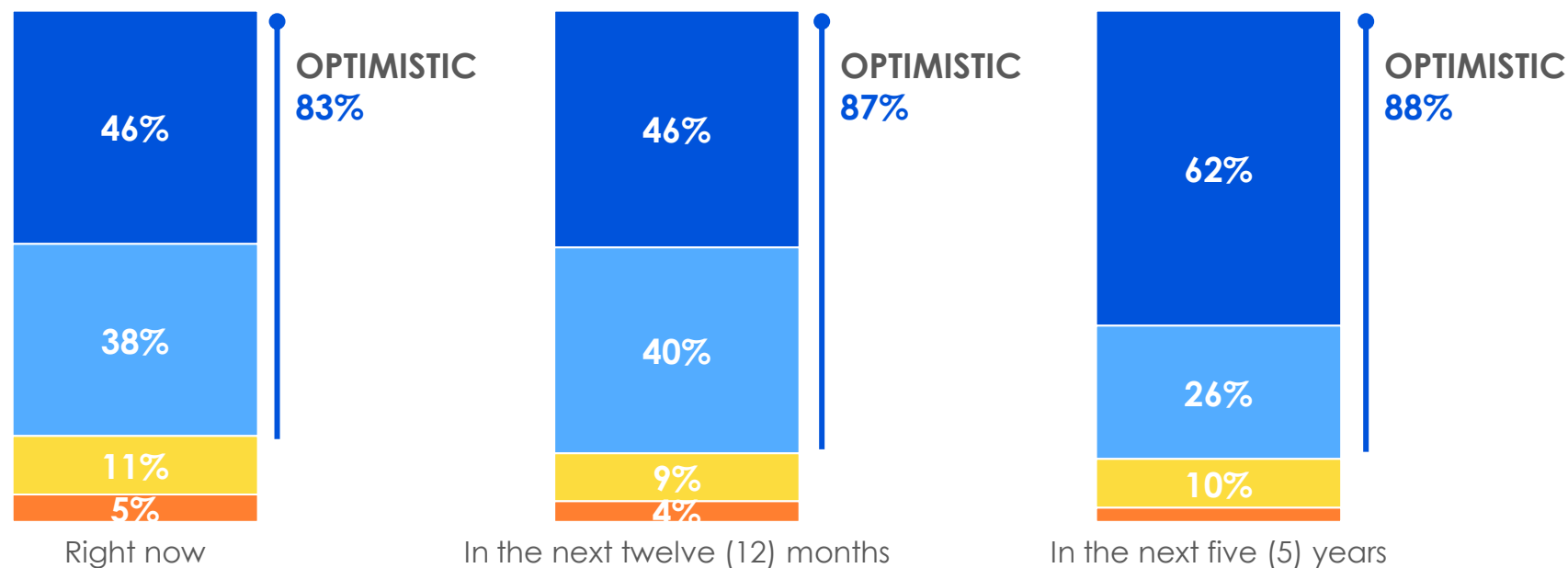


Optimism for the economy higher in the long term

Overall, Canadian businesses are more optimistic about the business environment 5 years from now than they are right now. Optimism grows steadily the further out they look. Albertan businesses are more bullish in the short term, but less optimistic than those in the Rest of Canada when it comes to the economic outlook 5 years from now, especially on the "very optimistic" measure.

ECONOMIC OUTLOOK FOR CANADIAN BUSINESSES

- VERY OPTIMISTIC
- SOMEWHAT OPTIMISTIC
- SOMEWHAT CONCERNED
- VERY CONCERNED



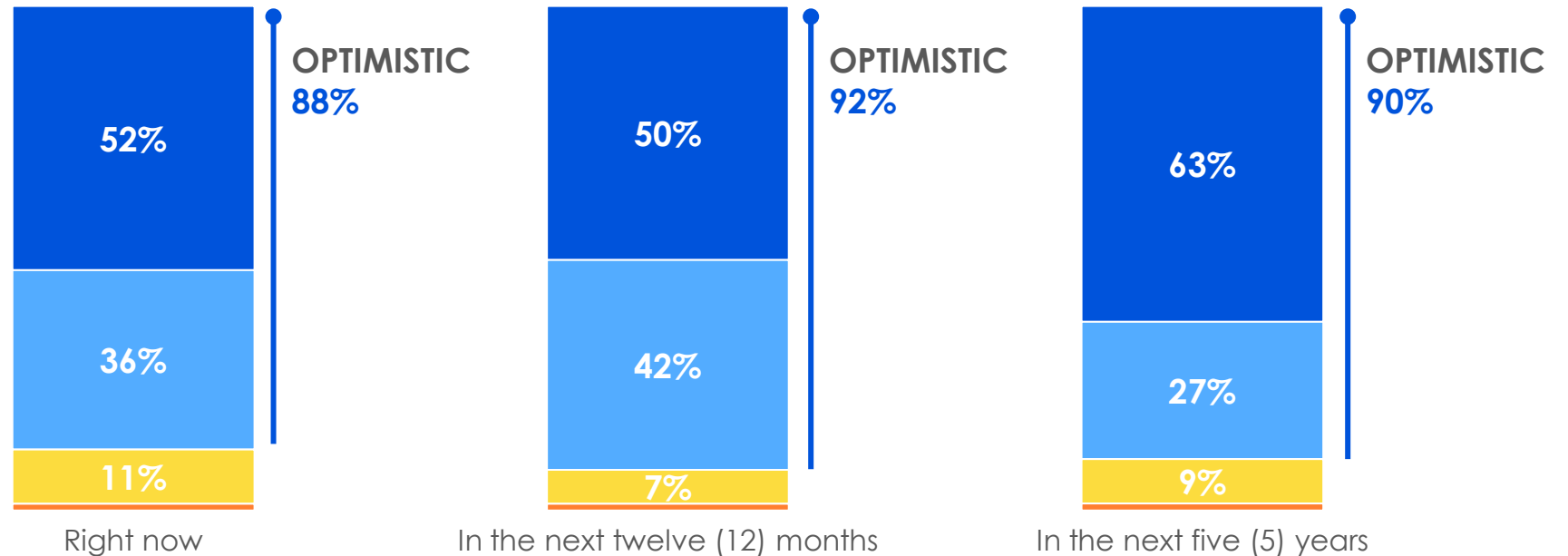
	Right now		In the next twelve (12) months		In the next five (5) years	
	(T2B)	(B2B)	(T2B)	(B2B)	(T2B)	(B2B)
ALBERTA	90%	10%	87%	13%	82%	18%
REST OF CANADA	82%	18%	87%	13%	89%	11%

Overall, most businesses are optimistic about their performance

Nine-in-ten are optimistic about their business performance right now (88%), in the next year (92%) and in the next five years (90%). As with the overall measure, optimism increases mostly in terms of those who are "very optimistic." Businesses in Alberta are less likely to be optimistic than those headquartered in the rest of Canada in the long run, which is in line with their economic outlook. However, they are more optimistic their business performance in the short term.

BUSINESS PERFORMANCE OUTLOOK

- VERY OPTIMISTIC
- SOMEWHAT OPTIMISTIC
- SOMEWHAT CONCERNED
- VERY CONCERNED



		Right now	In the next twelve (12) months	In the next five (5) years
ALBERTA	(T2B)	93%	100%	86%
	(B2B)	7%	-	14%
REST OF CANADA	(T2B)	87%	90%	91%
	(B2B)	13%	10%	9%

*Data labels <3% not shown

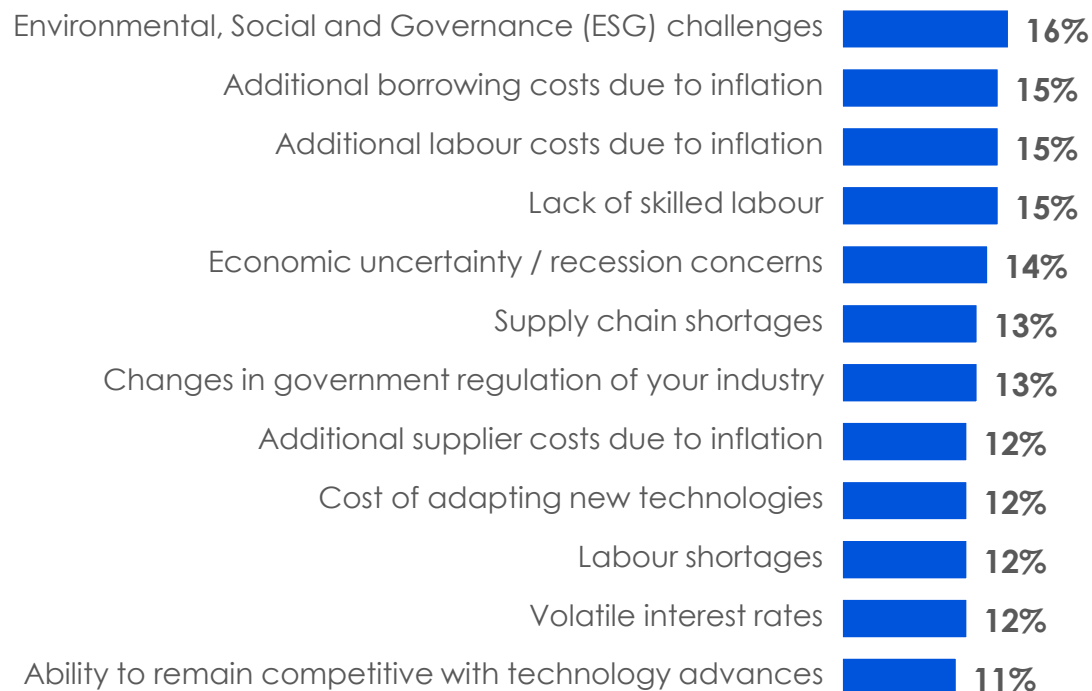
Base: All respondents (n=149) , Alberta (n=30), Rest of Canada (n=119); In the next five (5) years, All respondents (n=147), Alberta (n=29), Rest of Canada (n=118)

P2. Thinking specifically about your business overall health, how optimistic or pessimistic are you about your business performance right now, in the next 12 months and in the next 5 years?

Currently ESG challenges and rising costs top issues facing businesses

Sixteen percent (16%) cited ESG challenges as the biggest challenge facing their business right now. Additional borrowing and labour costs due to inflation were both mentioned 15% of the time along with lack of skilled labour. Economic uncertainty rounded out the top three with 14% of mentions. In Alberta, ESG challenges and labour shortages are of more concern with both being cited by 20% of businesses based there compared to just 15% and 10% of businesses in the Rest of Canada respectively.

BIGGEST BUSINESS CHALLENGES



	ALBERTA	RoC
Environmental, Social and Governance (ESG) challenges	20%	15%
Additional borrowing costs due to inflation	10%	17%
Additional labour costs due to inflation	17%	14%
Lack of skilled labour	13%	15%
Economic uncertainty / recession concerns	7%	16%
Supply chain shortages	13%	13%
Changes in government regulation of your industry	10%	13%
Additional supplier costs due to inflation	10%	13%
Cost of adapting new technologies	7%	13%
Labour shortages	20%	10%
Volatile interest rates	13%	12%
Ability to remain competitive with technology advances	17%	10%

Accessing international or domestic markets least important issues

The issues mentioned least had to do with market access, “profit-taking” and data leaks. Decreasing public confidence in business is significantly more of an issue for Albertan businesses than those in the rest of Canada with 20% of Albertan businesses listing it as an issue compared to only 6% of businesses in the rest of Canada.

BIGGEST BUSINESS CHALLENGES (CONT.)

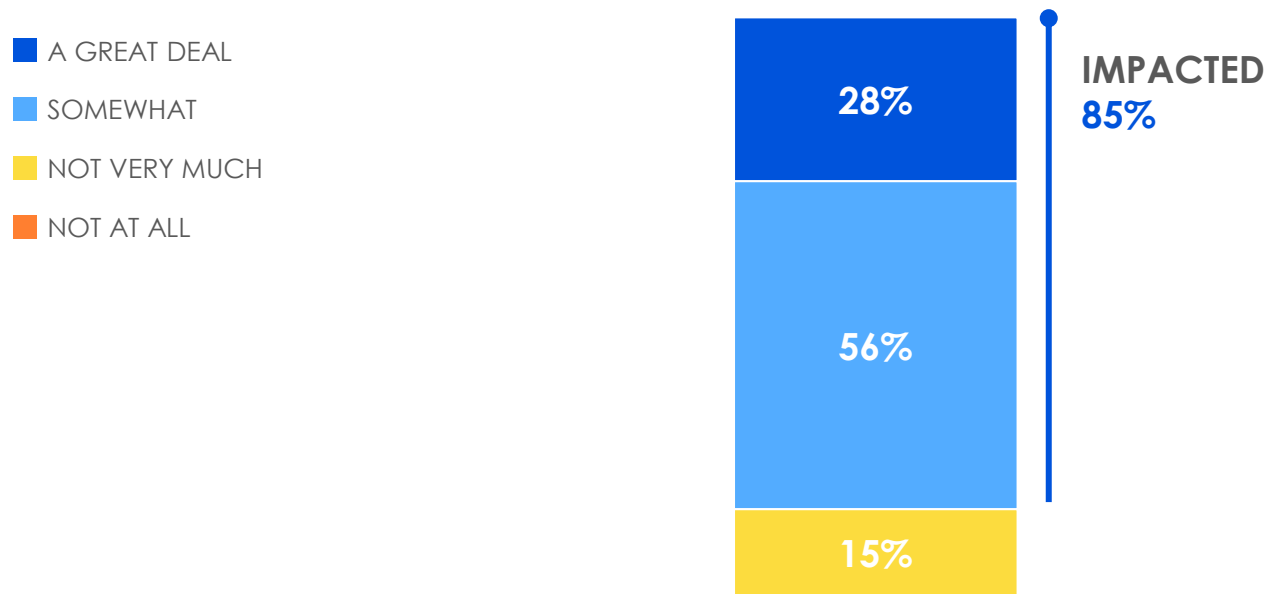


	ALBERTA	RoC
	20%	9%
	23%	8%
	17%	9%
	3%	13%
	10%	10%
	20%	6%
	7%	8%
	10%	8%
	7%	8%
	3%	7%
	-	1%
	7%	3%

Interest rate hikes have broadly impacted confidence in the economy

Most (85%) respondents agree that interest rate hikes have had an impact on their confidence in the economy. Three-in-ten (28%) say that the rate have impacted their confidence in the economy a great deal, while over half (56%) say that rate hikes have somewhat impacted their confidence in the economy. Interest rates appear to have impacted the confidence of businesses in the economy more in the Rest of Canada (88%) than Alberta (70%).

IMPACT OF INTERST RATES ON ECONOMIC CONFIDENCE

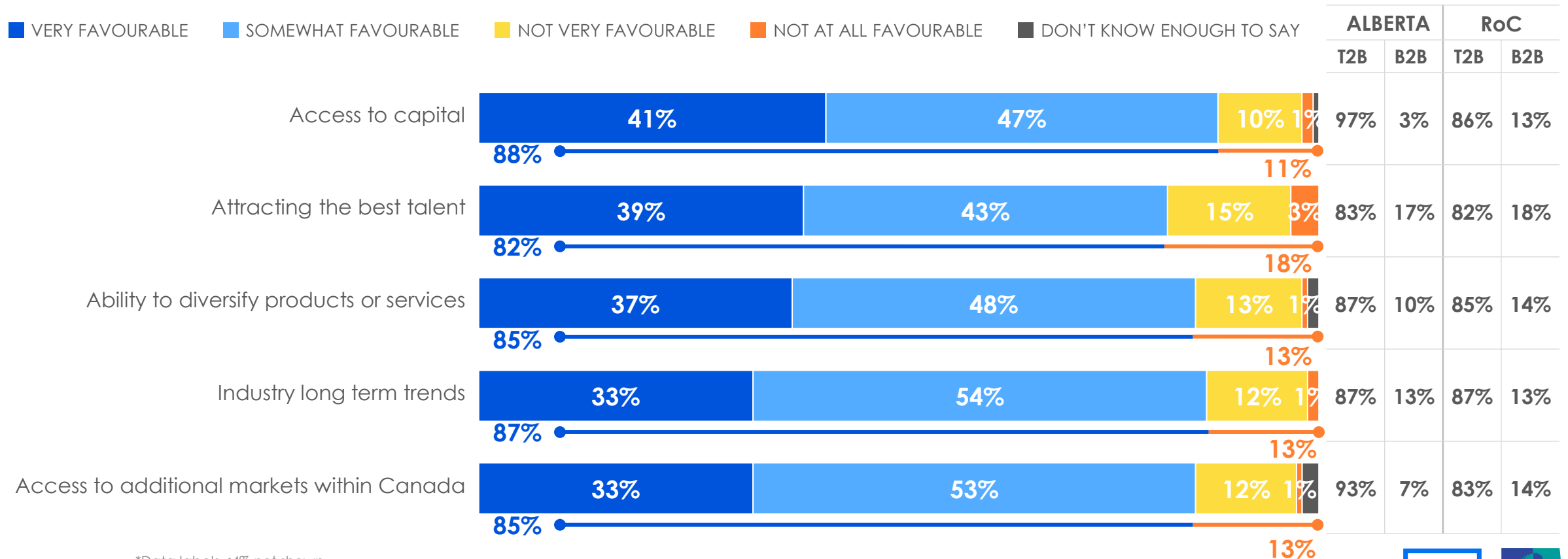


ALBERTA	(T2B)	70%
	(B2B)	30%
REST OF CANADA	(T2B)	88%
	(B2B)	12%

Access to capital is helping drive value creation for businesses

Four-in-ten (41%) very favourable conditions for accessing capital is helping businesses create financial value especially for those based in Alberta where nearly all (97%) cite the conditions to access capital as favourable. Alberta based businesses also see their access to additional Canadian markets as more favourable in helping them create financial value for stakeholders than business based in the Rest of Canada.

OPPORTUNITIES TO CREATE VALUE



*Data labels <4% not shown

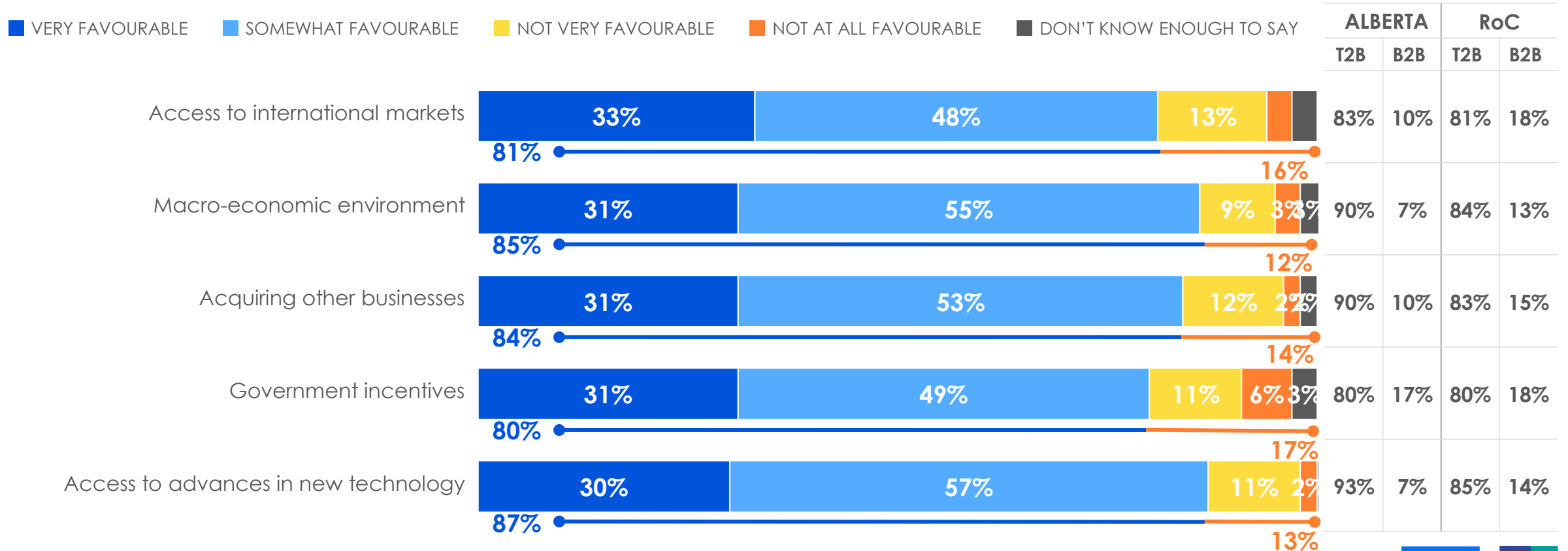
Base: All respondents (n=150) , Alberta (n=30), Rest of Canada (n=120)

P5. How favourable or unfavourable are the following right now when it comes to your business's ability to create financial value for customers and shareholders?

Access to capital is helping drive value creation for businesses (Cont.)

Three-in-ten (30%) of businesses say that the conditions for accessing new technology are very favourable to help create value. However, those in Alberta believe that accessing technological advances is helping more with creating value for stakeholders (93% vs. 85% of Rest of Canada).

OPPORTUNITIES TO CREATE VALUE (CONT.)



*Data labels <4% not shown

Base: All respondents (n=150) , Alberta (n=30), Rest of Canada (n=120)

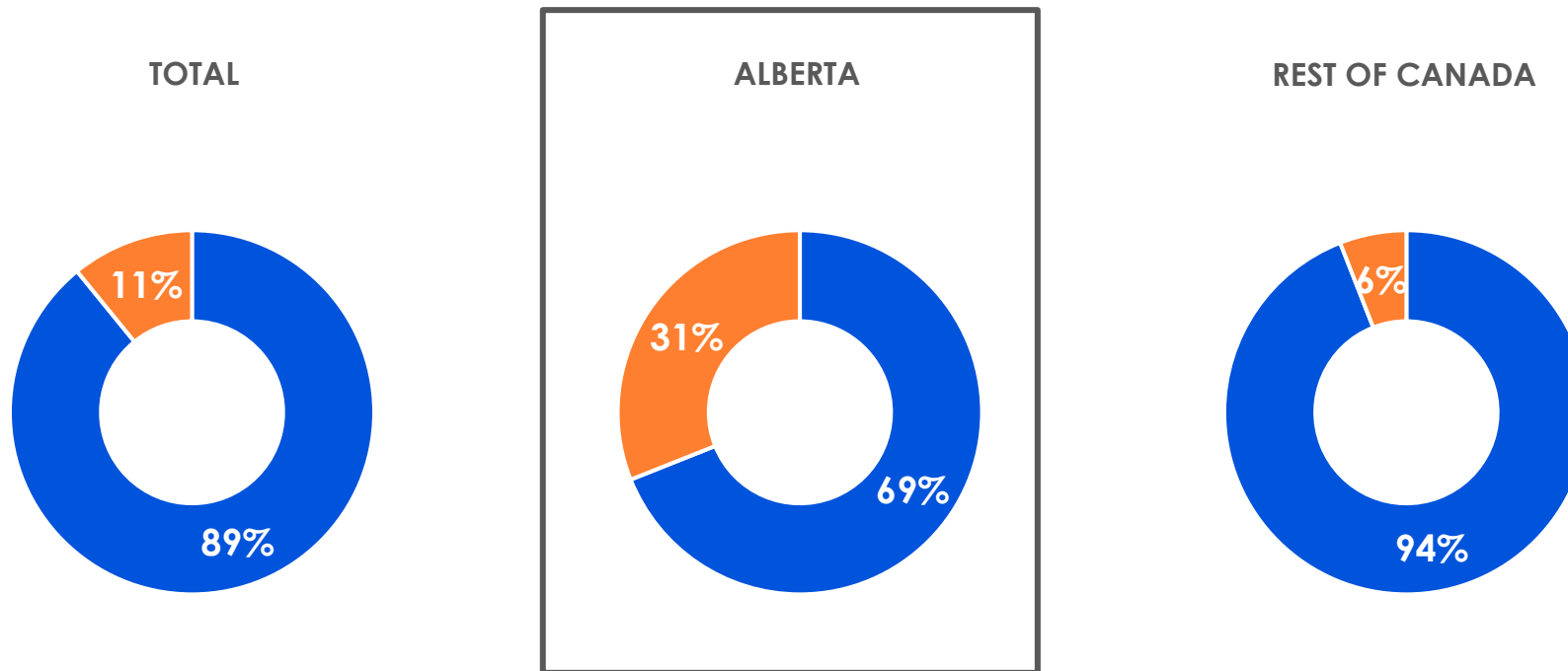
P5. How favourable or unfavourable are the following right now when it comes to your business's ability to create financial value for customers and shareholders?

Nine-in-ten Canadian businesses operating with a three to five year business strategy

Almost all of the businesses surveyed (90%) have a three to five year business strategy with them being significantly more common amongst businesses in the Rest of Canada compared to Alberta.

USE OF A BUSINESS STRATEGY

- YES
- NO

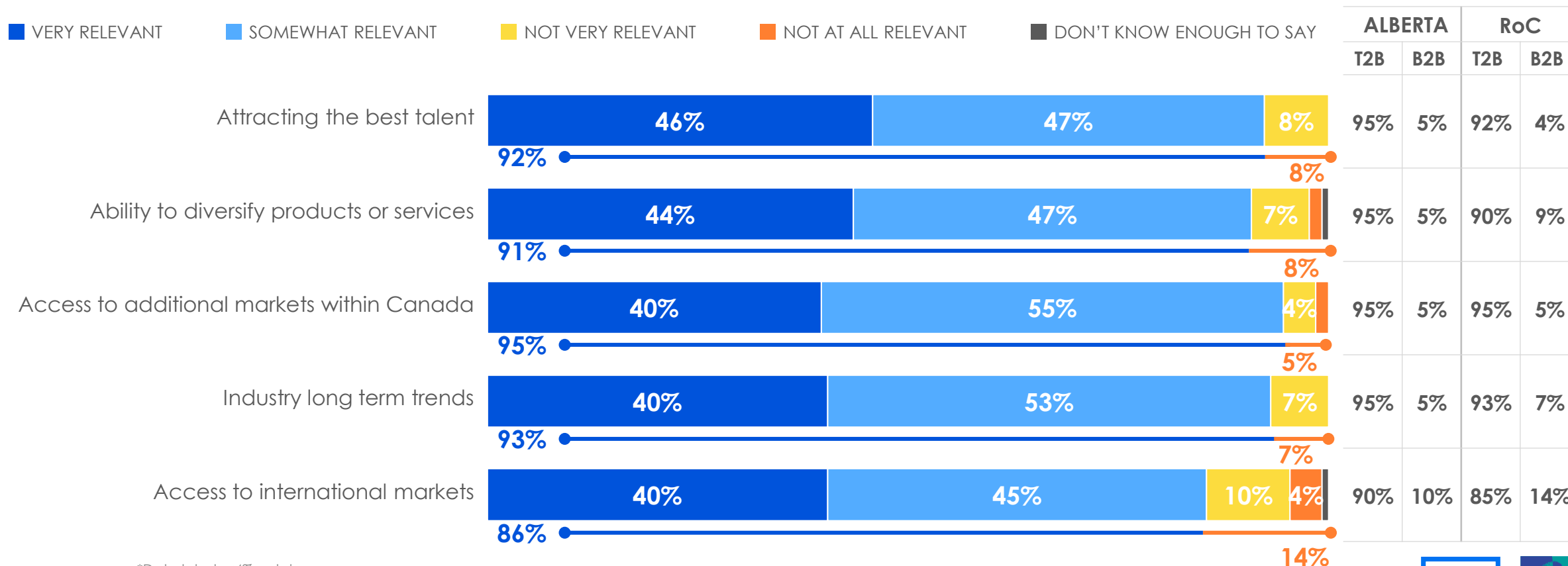


Much lower than Rest of Canada

Attracting top talent is a major concern in business plans nationwide

Nearly half (46%) of businesses cite attracting the best talent as very relevant to successfully implementing their business plan followed closely by their ability to diversify products or services (44%). In Alberta, diversification and access to international markets are slightly more relevant to success than in the Rest of the Country.

FACTORS CONSIDERED IN BUSINESS PLAN

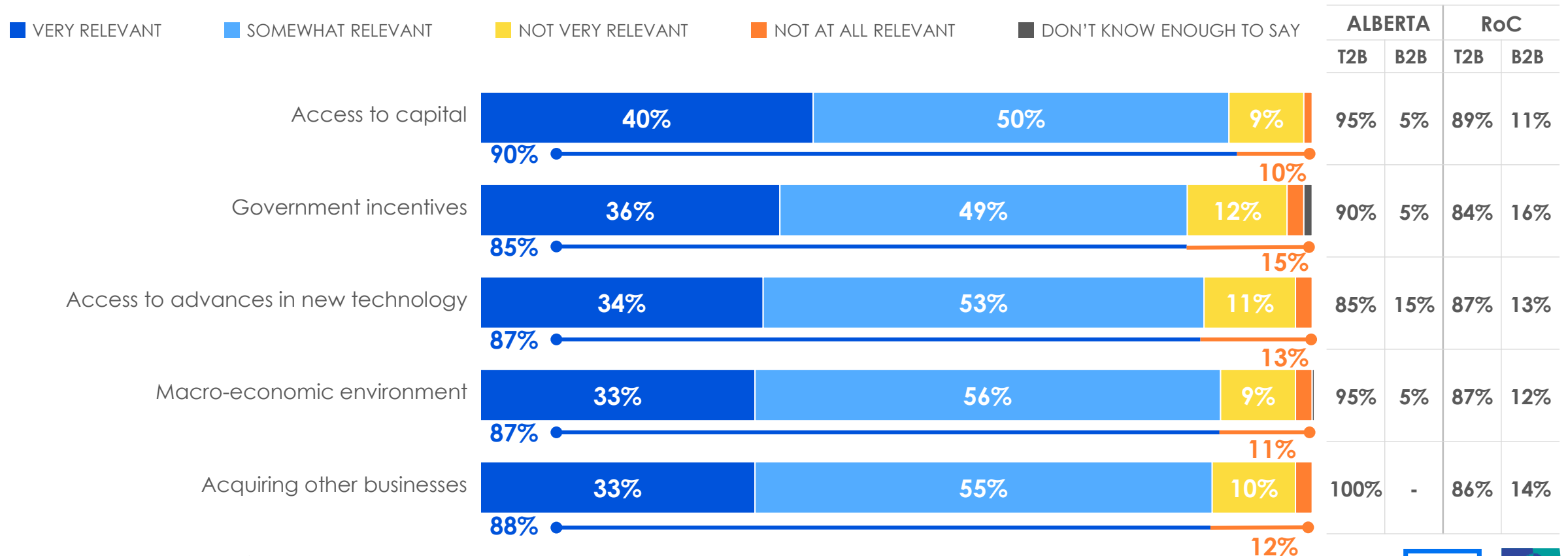


*Data labels <4% not shown
 Base: Those whose business currently have not a three to five (3-5) year business strategy (n=131), Alberta (n=20), Rest of Canada (n=111)
 P7. How relevant are the following activities to successfully implementing your current three to five (3-5) year business strategy?

Attracting top talent is a major concern in business plans nationwide (Cont.)

Acquiring other businesses isn't a key activity to successful business plan implementation overall, but it is key for businesses based in Alberta significantly more than the rest of the country. Overall, government incentives are the least relevant, however, Alberta based businesses consider them more relevant than business based elsewhere.

FACTORS CONSIDERED IN BUSINESS PLAN (CONT.)



*Data labels <4% not shown
 Base: Those whose business currently have not a three to five (3-5) year business strategy (n=131), Alberta (n=20), Rest of Canada (n=111)
 P7. How relevant are the following activities to successfully implementing your current three to five (3-5) year business strategy?

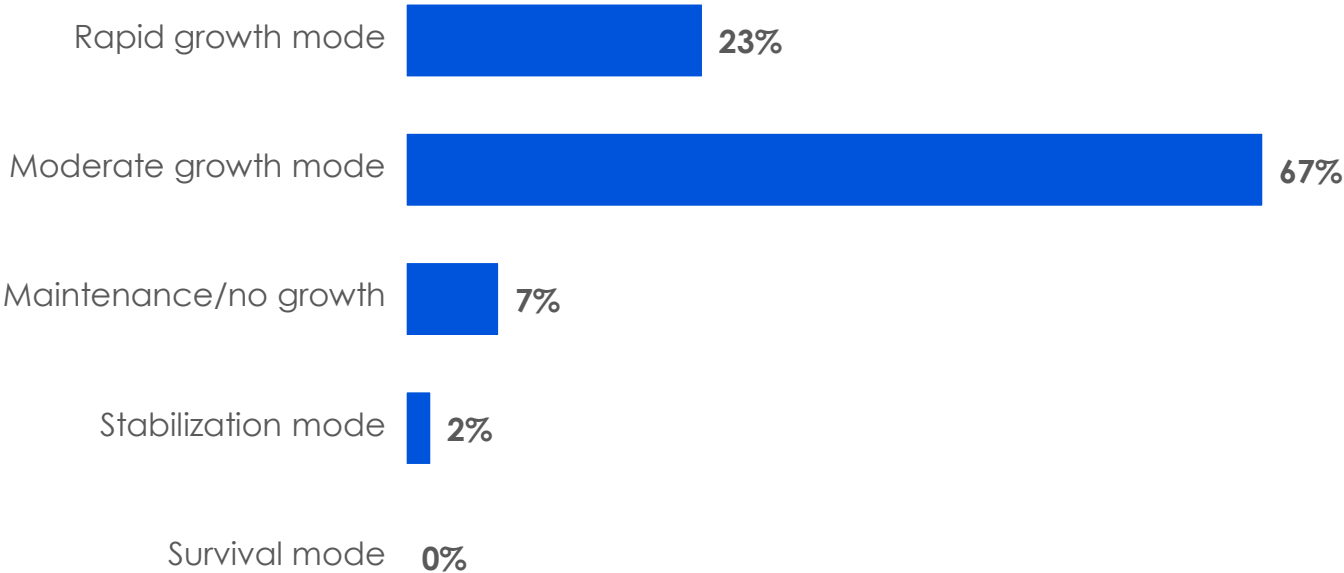
FIRM/BUSINESS PERFORMANCE



Most businesses across the country in growth mode

Nine-in-ten (91%) of businesses nationwide are in growth mode of some form with two-thirds (67%) in moderate growth mode and 23% in rapid growth mode.

CURRENT STATE OF BUSINESS

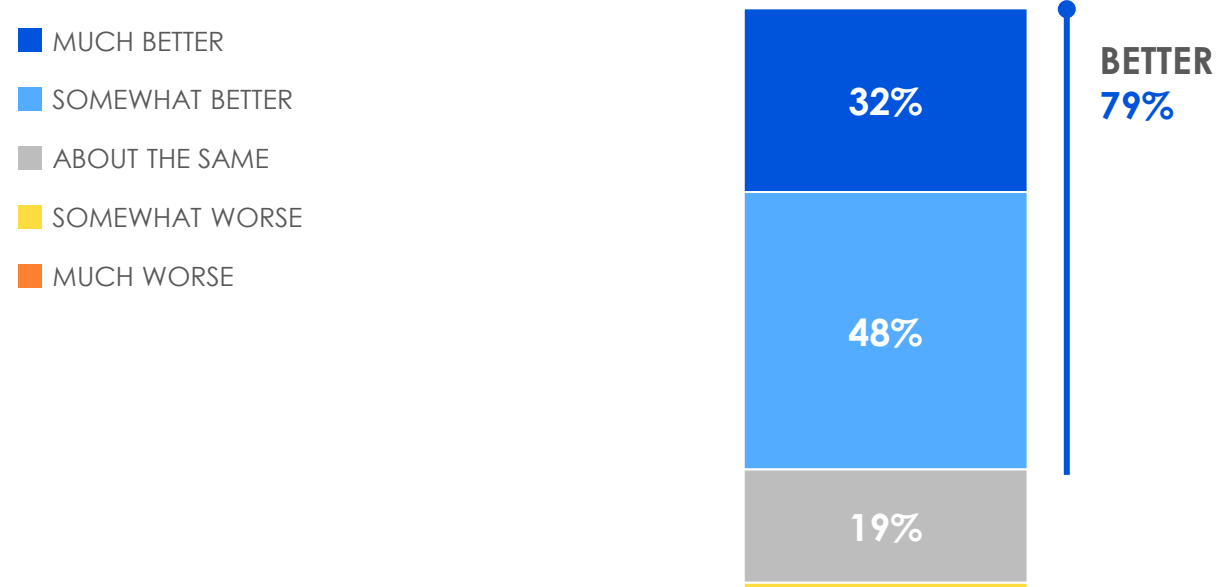


	ALBERTA	RoC
Rapid growth mode	23%	23%
Moderate growth mode	70%	67%
Maintenance/no growth	7%	8%
Stabilization mode	-	3%
Survival mode	-	-

Most believe their business is outperforming others in their industry

Most (79%) say that compared to other businesses in their industry, their business is doing better. While half (48%) only say they're doing somewhat better, a third (32%) believe they're doing much better.

RELATIVE BUSINESS PERFORMANCE



ALBERTA	(T2B)	80%
	(B2B)	3%
REST OF CANADA	(T2B)	79%
	(B2B)	1%

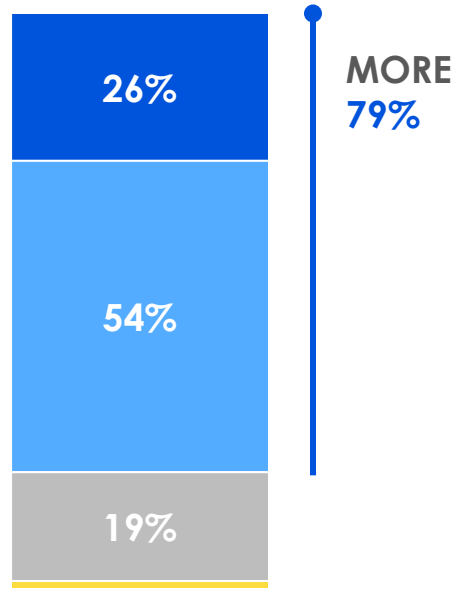
21 – © Ipsos
 *Data labels <3% not shown
 Base: All respondents (n=149) , Alberta (n=30), Rest of Canada (n=119)
 F2. Overall, compared to other businesses in your industry, do you think your business is doing.

Profits grew in 2022 and are expected to keep growing through 2023

Eight-in-ten (79%) businesses reported increased profits in 2022 compared to 2021 and three-quarters (76%) expect higher profits in 2023. Businesses in Alberta are more likely to project higher profits for 2023, 9 points higher than the rest of the country. Those in the professional services industries were the most likely to report higher profits in 2022 and project higher profits for 2023 than those in other sectors of the economy.

ANNUAL PROFIT CHANGE FROM 2021

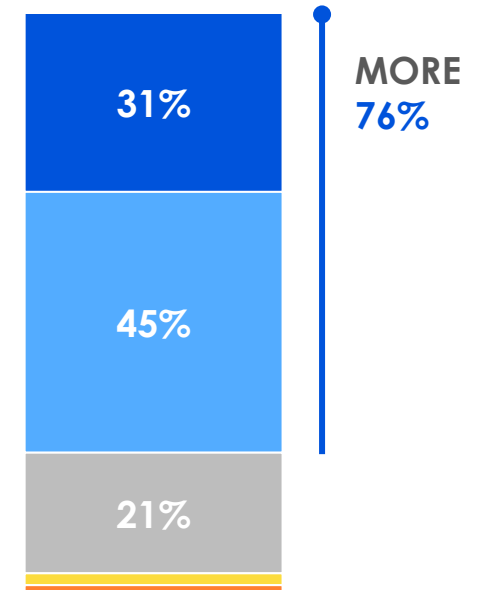
- SIGNIFICANTLY MORE
- SOMEWHAT MORE
- MORE OR LESS THE SAME
- SOMEWHAT LESS
- SIGNIFICANTLY LESS



ALBERTA	(T2B)	77%
	(B2B)	3%
REST OF CANADA	(T2B)	80%
	(B2B)	2%

PROJECTED ANNUAL PROFIT CHANGE FOR 2023

- SIGNIFICANTLY MORE
- SOMEWHAT MORE
- MORE OR LESS THE SAME
- SOMEWHAT LESS
- SIGNIFICANTLY LESS



ALBERTA	(T2B)	83%
	(B2B)	3%
REST OF CANADA	(T2B)	74%
	(B2B)	3%

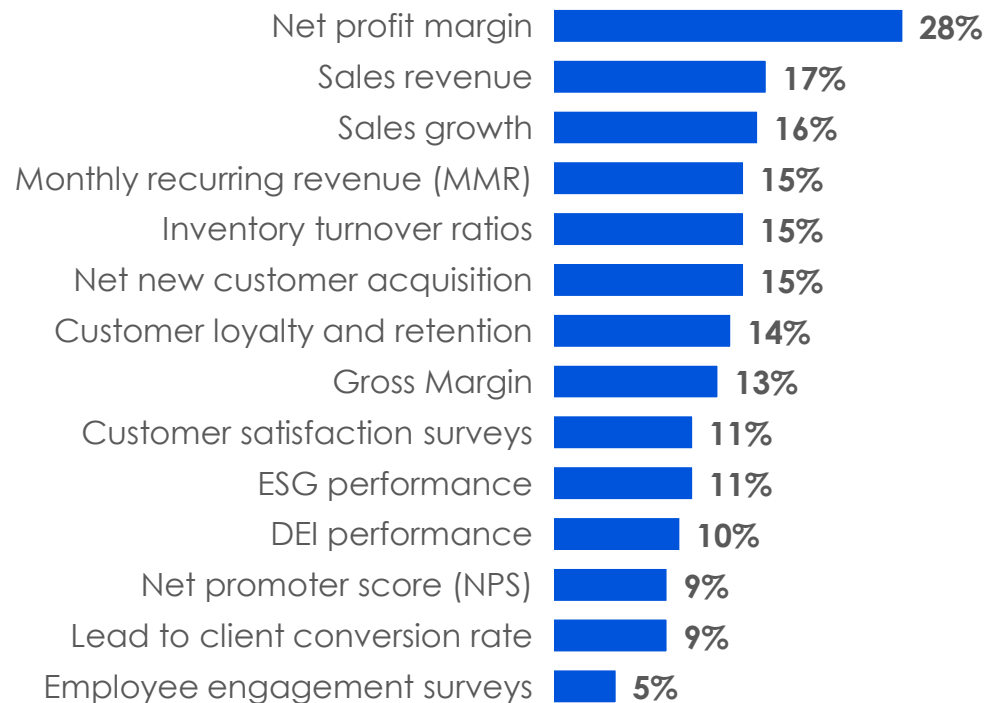
*Data labels <3% not shown
 Base: All respondents (n=149) , Alberta (n=30), Rest of Canada (n=119)
 F3. Over the past 12 months, (that is, during the entire year of 2022) did your business realize more or less profit than it did over the 12 months previous (the entire year of 2021)?

*Data labels <3% not shown
 Base: All respondents (n=149) , Alberta (n=30), Rest of Canada (n=119)
 F4. Over the next 12 months, (that is, during the entire year of 2023) do you expect your business to realize more or less profit than it did over the 12 months previous?

Net profit margin the most common metric to measure success

More than a quarter (28%) of respondents consider net profit margin the best indicator of success. Sales revenue (17%) and sales growth (16%) round out the top three. Though businesses are becoming more concerned about ESG and DEI, ESG and DEI performance are not considered to be good metric of success being mentioned by 11% and 10% of businesses, respectively. Albertan businesses consider customer loyalty/retention a better indicator of success than those in the Rest of Canada (23% vs. 12%).

BUSINESS SUCCESS/PERFORMANCE METRICS



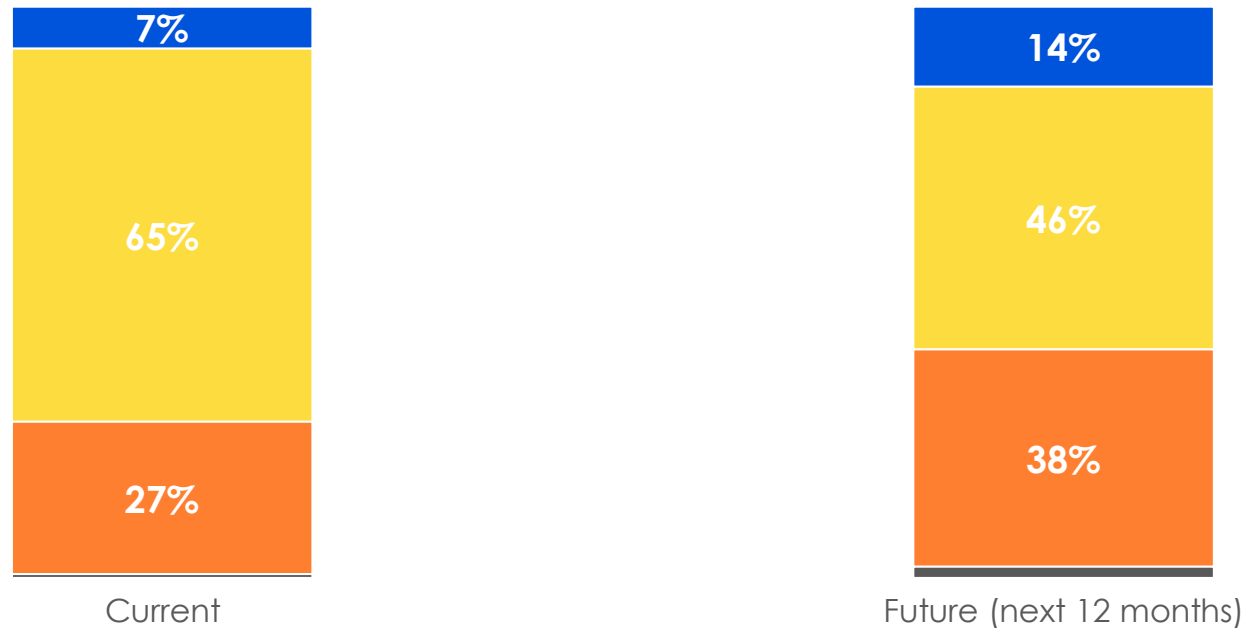
	ALBERTA	RoC
Net profit margin	13%	31%
Sales revenue	20%	16%
Sales growth	10%	18%
Monthly recurring revenue (MMR)	10%	17%
Inventory turnover ratios	20%	13%
Net new customer acquisition	17%	14%
Customer loyalty and retention	23%	12%
Gross Margin	7%	15%
Customer satisfaction surveys	17%	10%
ESG performance	10%	11%
DEI performance	17%	8%
Net promoter score (NPS)	3%	11%
Lead to client conversion rate	13%	8%
Employee engagement surveys	7%	4%

Difficulty meeting increased demand an issue for most

Most (73%) businesses say that they would have some or significant difficulty (65%/7%) to meet a current increase in demand. While 60% say they would still have difficulty meeting increased demand over the next twelve months, the amount who say they would face significant difficulty increased 7 points to 14% of respondents. However, more businesses think that they wouldn't have any difficulty twelve months from now.

ABILITY TO MEET INCREASED DEMAND

- SIGNIFICANT DIFFICULTY
- SOME DIFFICULTY
- NO DIFFICULTY AT ALL
- DON'T KNOW ENOUGH TO SAY

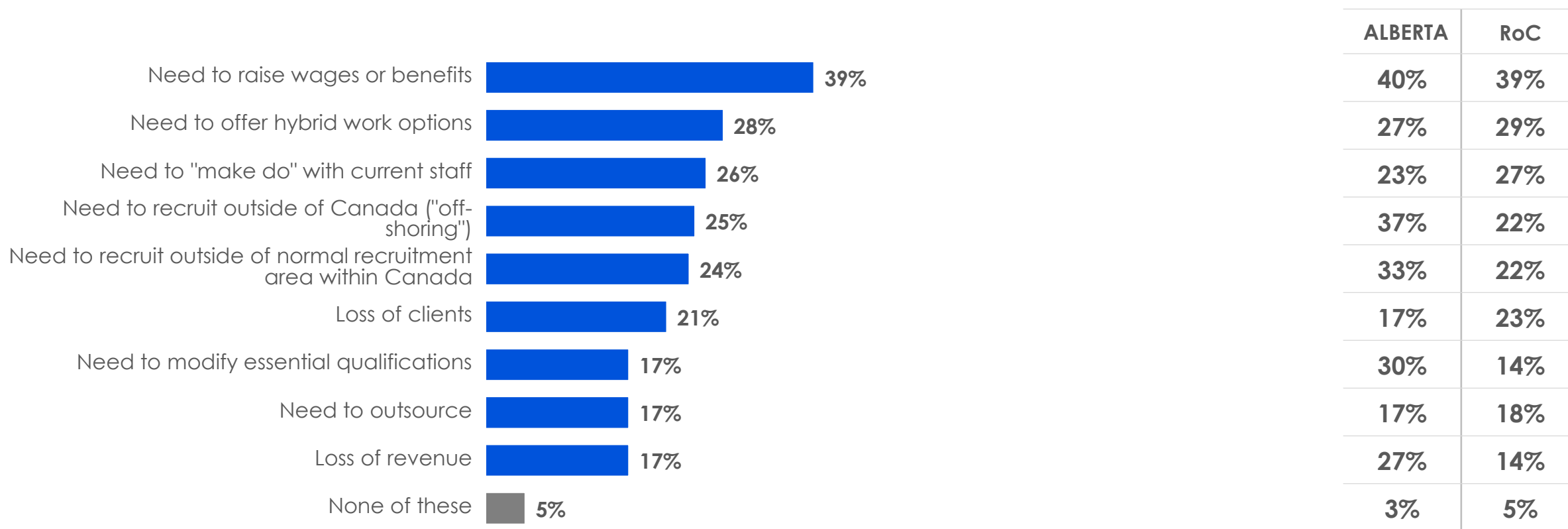


	Current		Future (next 12 months)	
	(T2B)	(B2B)	(T2B)	(B2B)
ALBERTA	77%	23%	63%	33%
REST OF CANADA	72%	28%	59%	39%

Labour shortages have caused increased wages and benefits

Four-in-ten (39%) businesses say they need to raise wages or benefits to cope with labour shortages and three-in-ten (28%) are offering hybrid work options. Albertan businesses are more likely to modify essential qualifications in order to find new employees and recruit from either outside their normal area within Canada or outside the country completely, indicating a tighter labour market in the province than the Rest of Canada.

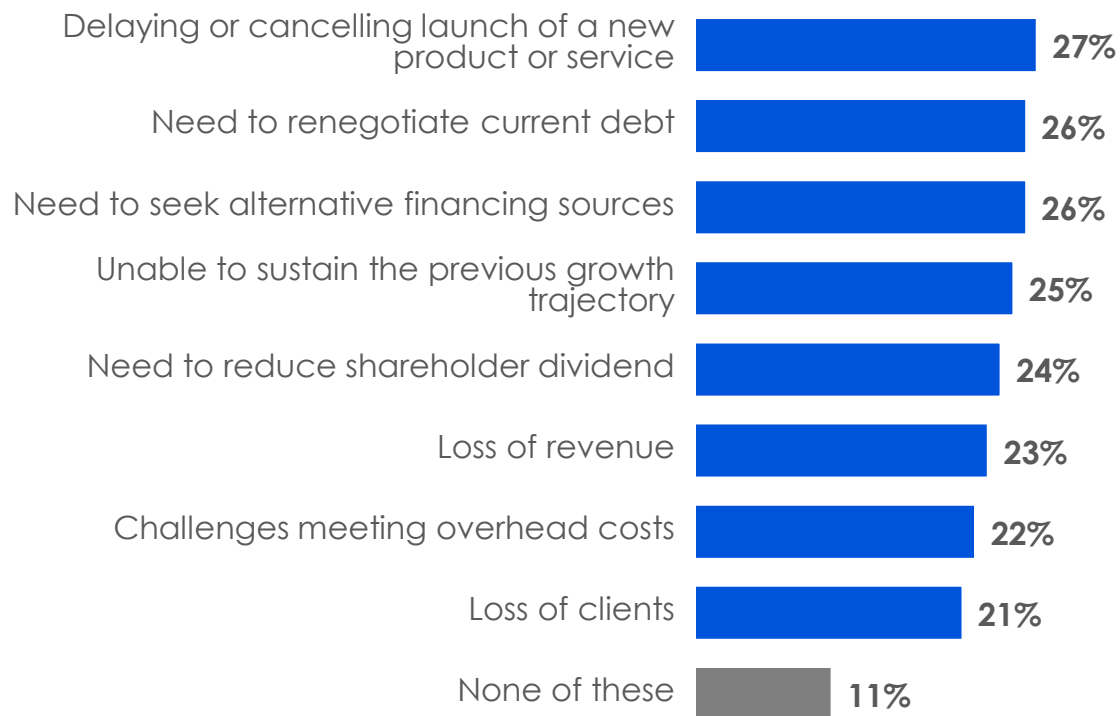
EFFECTS OF LABOUR SHORTAGES



Lack of access to capital make some delay or cancel new products

The most common impact of lack of access to capital, reported by 27% of respondents, is delaying or cancelling the launch of a new product or service. A quarter (26%) say that they either need to renegotiate their current debt or seek alternative financing solutions. In Alberta, businesses report more that they are unable to sustain their previous growth trajectory (37% vs. 22%) and need to reduce shareholder dividends as an impact of lack of access to capital (37% vs. 21% in RoC) indicating possible cash flow issues.

EFFECTS OF LACK OF ACCESS TO CAPITAL

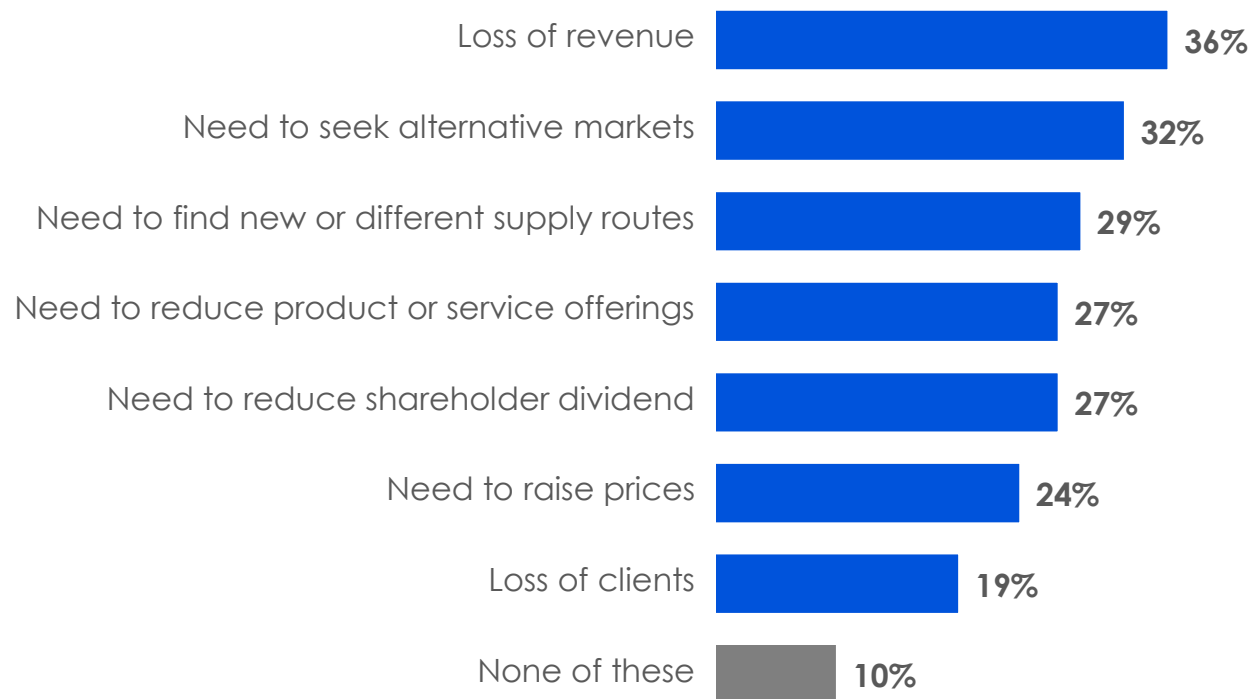


	ALBERTA	RoC
Delaying or cancelling launch of a new product or service	33%	25%
Need to renegotiate current debt	30%	25%
Need to seek alternative financing sources	30%	24%
Unable to sustain the previous growth trajectory	37%	22%
Need to reduce shareholder dividend	37%	21%
Loss of revenue	30%	21%
Challenges meeting overhead costs	17%	24%
Loss of clients	23%	20%
None of these	7%	12%

Lost revenue is the most common result of a lack of market access

Over a third (36%) of businesses say they experienced a loss of revenue due to a lack of market access, with those in Alberta citing this more frequently (45% vs. 33% RoC). The next most often cited impacts are need to seek alternative markets (32%) and need to source new or different supply routes (29%). For businesses based in Alberta, the need to reduce product or service offerings was cited more often as an impact of a lack of market access as they focus more on core markets and less on expansion.

EFFECTS OF LACK OF MARKET ACCESS



	ALBERTA	RoC
Loss of revenue	45%	33%
Need to seek alternative markets	38%	31%
Need to find new or different supply routes	24%	30%
Need to reduce product or service offerings	41%	23%
Need to reduce shareholder dividend	28%	27%
Need to raise prices	24%	24%
Loss of clients	28%	17%
None of these	7%	10%

Rising prices the most common response to rising interest rates

Three-in-ten (32%) businesses are responding to rising interest rates by raising prices. Seeking alternative lending sources (31%) and accepting lower gross margins round out the top three impacts of rising interest rates, which is especially true for Alberta based businesses likely as a result of them being less inclined to increase prices. Albertan businesses are also significantly more affected by credit score downgrades than those based in the Rest of Canada, which makes it harder for them to access needed capital.

EFFECTS OF RISING INTEREST RATES

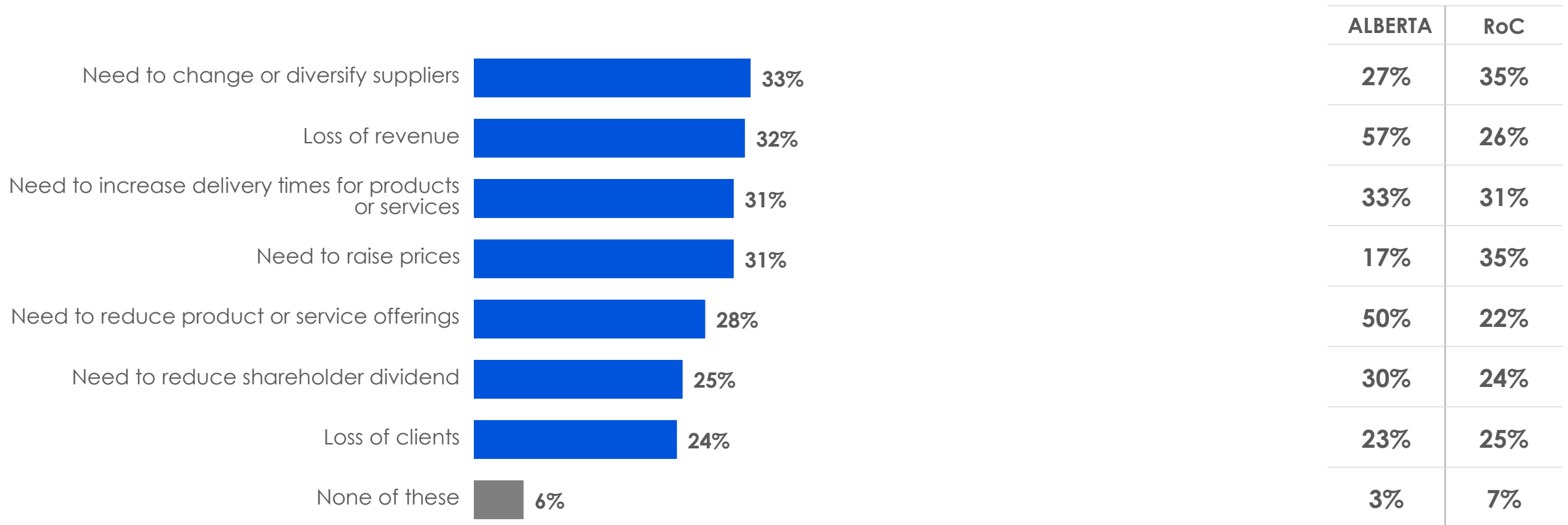


	ALBERTA	RoC
Need to raise prices	23%	34%
Need to seek alternative lending sources	37%	29%
Need to accept lower gross margins to maintain current business	47%	26%
Loss of revenue	37%	21%
Reduced ability to repay current debt	30%	23%
Taking on less debt	13%	25%
Need to reduce shareholder dividend	20%	19%
Reduced credit score	37%	15%
Something else (Please specify)	-	1%
None of these	-	7%

Supply chain issues forcing a re-evaluation of current suppliers

A third (33%) say that supply chain issues caused them to change or diversify their suppliers, while 32% say they lost revenue. Alberta based businesses are hardest hit by lost revenue due to supply chain issues. Half (50%) of Albertan businesses have cut back on their product or service offerings compared to just 22% of those headquartered outside the province. This indicates that businesses based in Alberta face difficulty adapting supply chains and are seeing the impact on their income statements.

EFFECTS OF SUPPLY CHAIN ISSUES

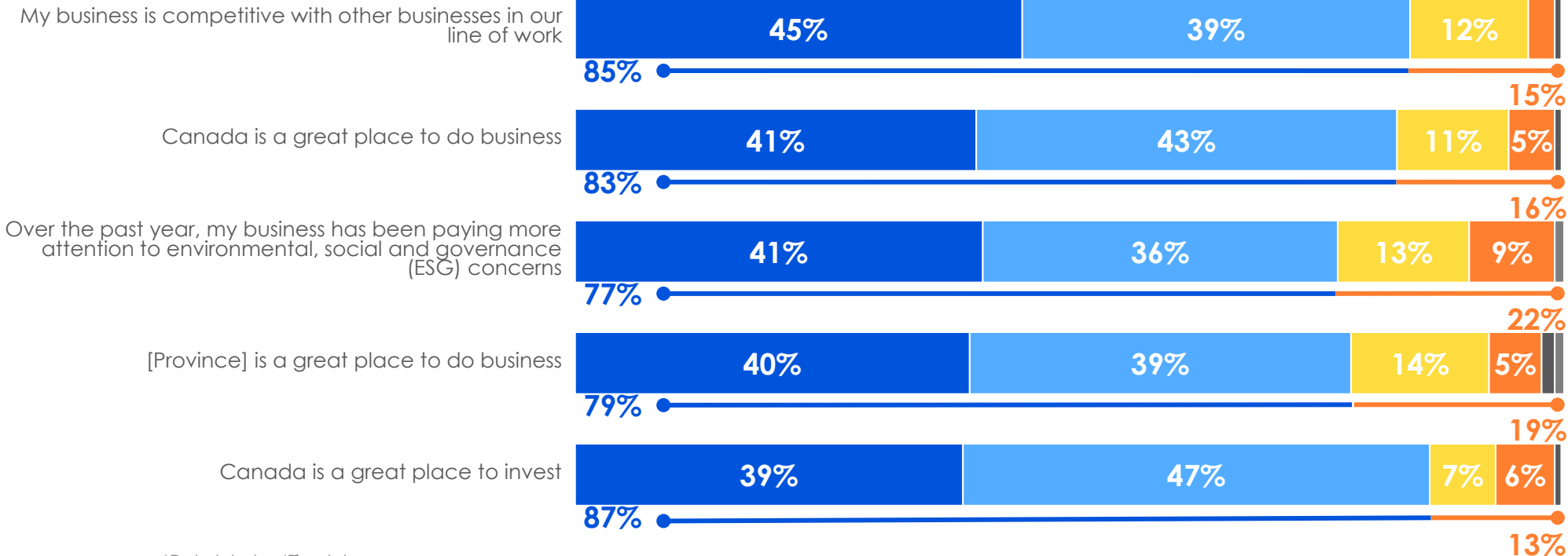


Businesses optimistic about their ability to compete with rivals

Nearly half (45%) of Canadian businesses strongly agree that they are competitive with others in their sector. Albertan businesses are slightly more patriotic being more bullish about Canada's business and economic climate. However, they aren't necessarily more bullish about their own province. Additionally, four-in-ten (41%) indicate that ESG has become a larger concern over the past year, with Albertan businesses slightly more concerned about ESG.

ECONOMIC SENTIMENT AND OUTLOOK

■ STRONGLY AGREE
 ■ SOMEWHAT AGREE
 ■ SOMEWHAT DISAGREE
 ■ STRONGLY DISAGREE
 ■ DON'T KNOW ENOUGH TO SAY
 ■ PREFER NOT TO SAY



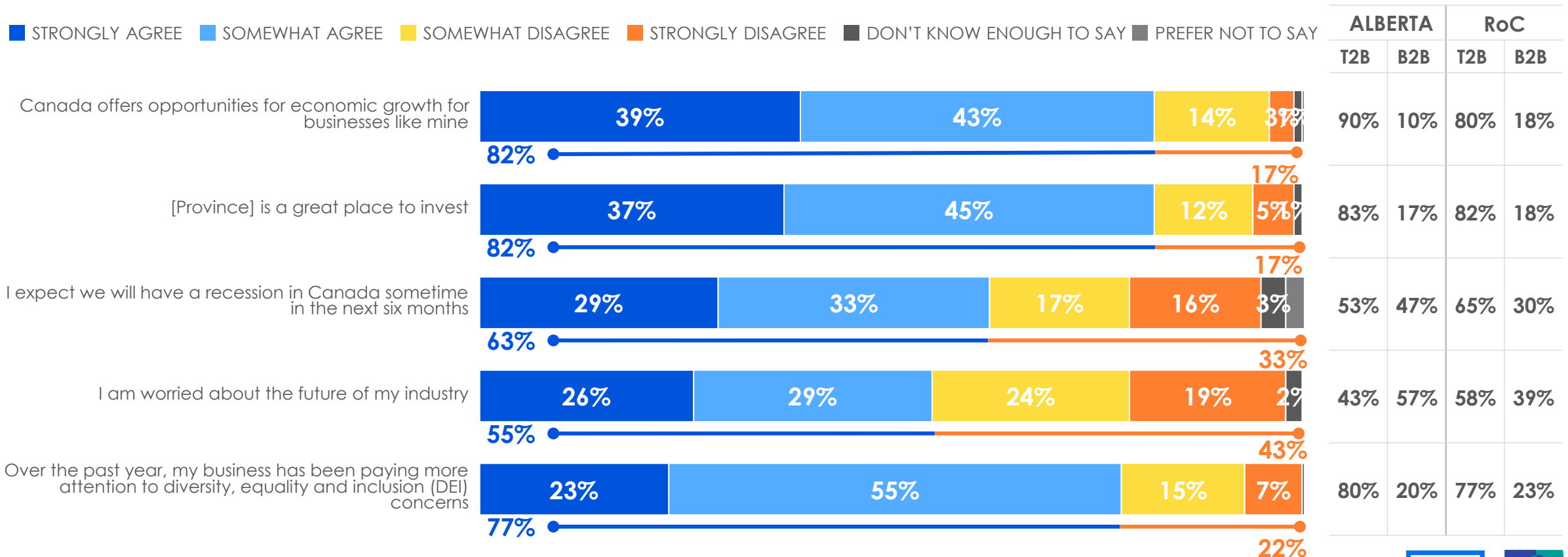
	ALBERTA		RoC	
	T2B	B2B	T2B	B2B
My business is competitive with other businesses in our line of work	87%	13%	84%	15%
Canada is a great place to do business	93%	17%	81%	18%
Over the past year, my business has been paying more attention to environmental, social and governance (ESG) concerns	83%	17%	76%	23%
[Province] is a great place to do business	83%	17%	78%	20%
Canada is a great place to invest	93%	7%	85%	14%

*Data labels <4% not shown
 Base: All respondents (n=150) , Alberta (n=30), Rest of Canada (n=120)
 F12. Do you agree or disagree with the following statements?

Businesses optimistic about their ability to compete with rivals (Cont.)

Overall, Alberta based businesses have a more optimistic economic outlook than those based in the Rest of Canada with fewer seeing a recession coming in the next 6 months (53% vs 65%), fewer worried about the future of their industry (43% vs. 58%), and more believing Canada offers opportunity for their business to grow (90% vs. 10%). Unlike ESG, DEI isn't as important of a concern for Canadian businesses, though three-quarters (77%) agree that they have been paying more attention to it.

ECONOMIC SENTIMENT AND OUTLOOK (CONT.)



ESG AND DEI



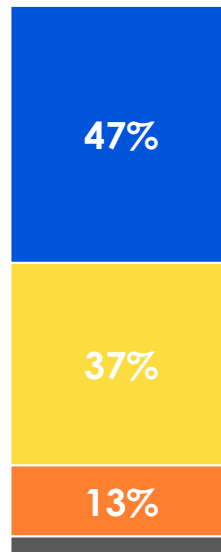
Half of businesses say they're performing better than their peers on ESG

Among respondents who identify as LGBTQS+, Indigenous or BIPOC there is a clear sentiment that their businesses are performing better on ESG with two-thirds (67%) saying they feel this way, especially in Alberta. In general, those in Alberta are slightly more optimistic about their ESG performance with 60% rating their performance better compared to 43% of businesses in the rest of Canada.

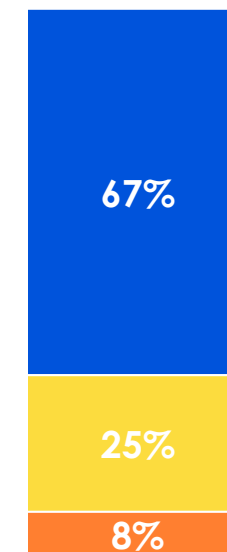
BUSINESS PERFORMANCE ON ESG

- BETTER
- SAME
- WORSE
- DON'T KNOW ENOUGH TO SAY

All Respondents



Marginalized Groups

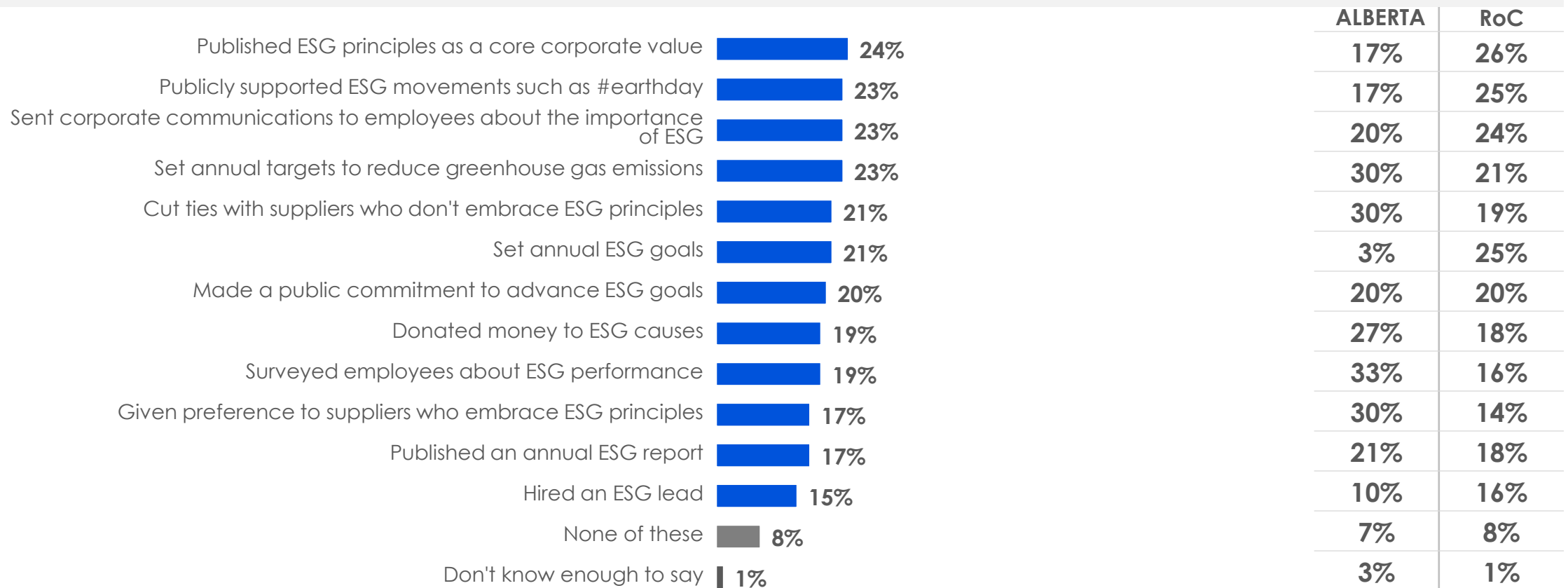


	All Respondents		Marginalized Groups	
	(BETTER)	(WORSE)	(BETTER)	(WORSE)
ALBERTA	60%	13%	85%	8%
REST OF CANADA	43%	13%	62%	9%

Making ESG a core corporate value is the most common method of implementing ESG practices

A quarter (24%) say they have published ESG principles as a core corporate value as a way of acting on ESG. Alberta based businesses are more likely to get employee feedback on ESG performance (33% vs 16% of RoC) and they are also more likely give preference to suppliers who embrace ESG principles (30% vs. 14% of RoC). However, businesses in Alberta are significantly less likely to set annual ESG goals showing that while they are ready to act on ESG they may not want to overcommit to specific targets.

ACTIONS TAKEN TO IMPLEMENT ESG PRACTICES



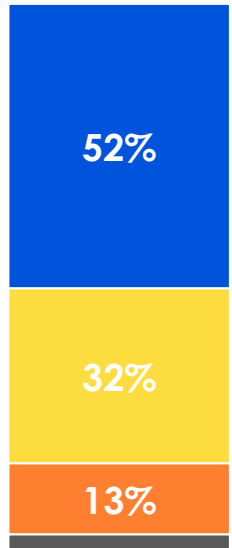
Slight majority of businesses think they are performing well on DEI

Just over half (52%) of respondents say they think their business is performing better on DEI than their peers. This is higher among respondents from marginalized groups where three-quarters (75%) say their businesses perform better on DEI. Alberta based businesses have a more favourable view on their firms' DEI actions than those in the Rest of Canada revealing a trend that those in Alberta feel they are ahead of the curve on emerging areas of corporate social justice concern.

BUSINESS PERFORMANCE ON DEI

- BETTER
- SAME
- WORSE
- DON'T KNOW ENOUGH TO SAY

All Respondents



Marginalized Groups



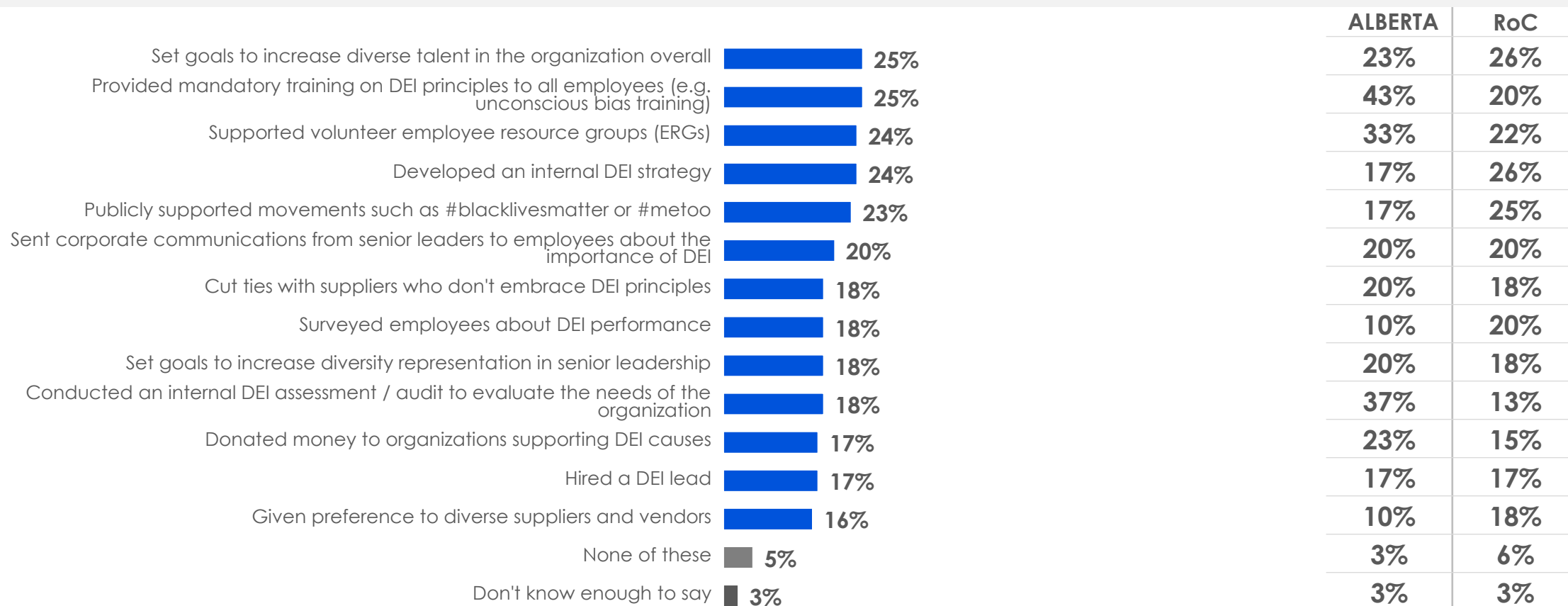
ALBERTA	(BETTER)	63%	85%
	(WORSE)	17%	8%
REST OF CANADA	(BETTER)	49%	72%
	(WORSE)	12%	6%



Diverse hiring and mandatory training are top actions taken on DEI

A quarter (25%) of companies say they've set goals to increase diverse talent in their organizations as well as provided mandatory training on DEI principles to all employees as actions they've taken with respect to DEI over the past year. Mandatory training is more common with Alberta based businesses with four-in-ten (43%) saying they've provided employees with such training.

ACTIONS TAKEN TO IMPLEMENT DEI PRACTICES

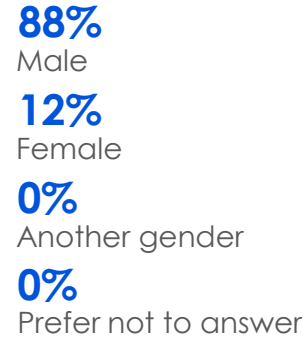
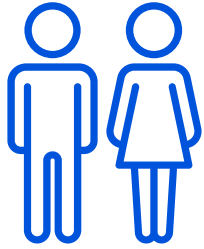


DEMOGRAPHICS

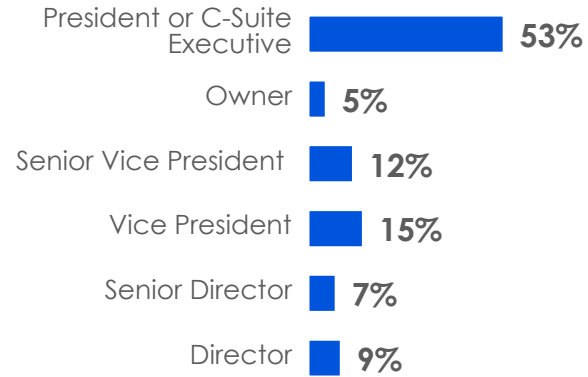
A man in a dark blue suit and striped tie is adjusting his jacket buttons. He is wearing a watch on his left wrist. The background shows a modern building with a staircase.

Respondent Demographics

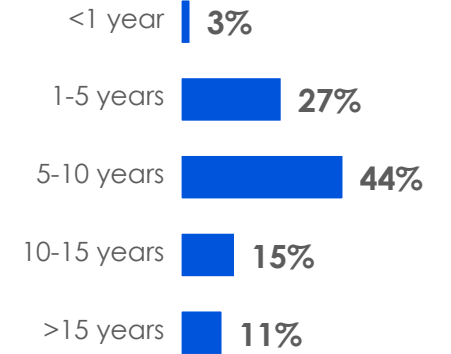
GENDER



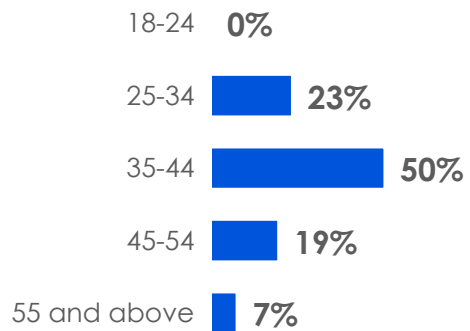
JOB TITLE



CURRENT POSITION PERIOD

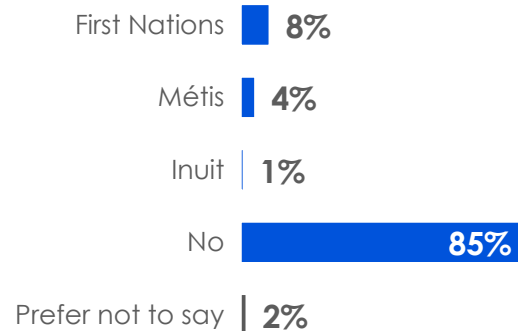


AGE

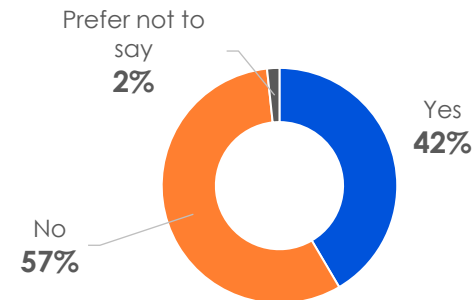


Average age: 41

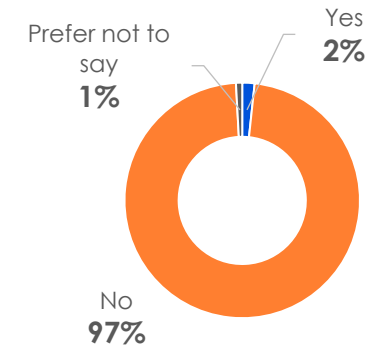
INDIGENOUS PEOPLE



PERSON OF COLOUR

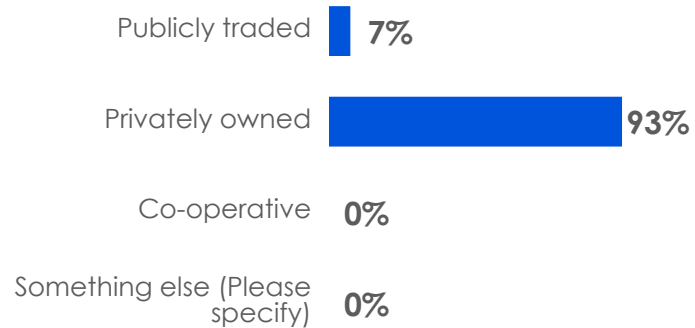


LGBTQ2S+

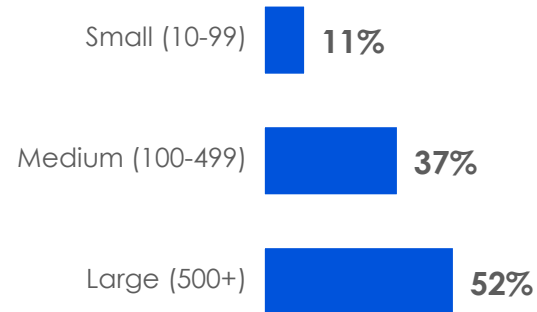


Business Demographics

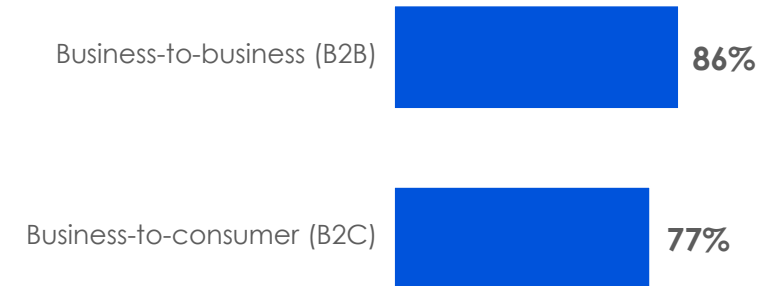
BUSINESS TYPE



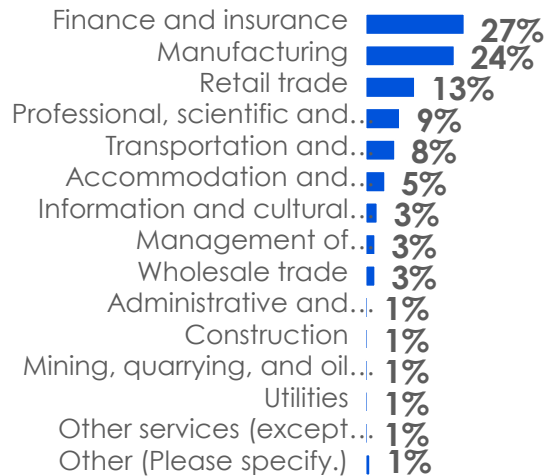
EMPLOYEES NUMBER



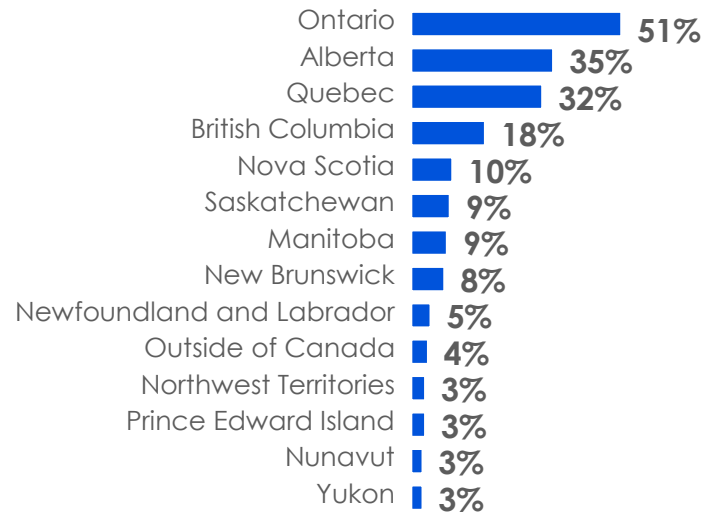
CUSTOMER BASE



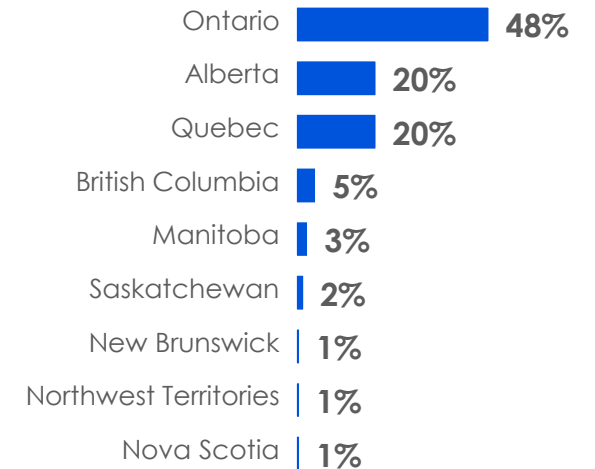
BUSINESS'S PRIMARY SECTOR



WHERE BUSINESS OPERATE



HEAD OFFICE LOCATION



About ATB

With \$58.5 billion in assets, ATB Financial is an Alberta-built financial institution that is a catalyst for economic growth in our province. We got started in 1938 to help Albertans through tough economic times. Today, ATB Financial's more than 5,000 team members love to deliver exceptional experiences to nearly 800,000 clients through our many branches and agencies, our 24-hour Client Care Centre, four entrepreneur centres and our digital banking options. ATB powers possibility for our clients, Alberta and beyond.

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

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Game Changers

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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.

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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.

