

Q4 2022 PACE Survey

Change in Financial Status

Thinking about your current financial status within the last 3 months, which of the following statements describes you best?

- My financial status has significantly deteriorated
- My financial status has moderately deteriorated
- My financial status is stable
- My financial status has moderately improved
- My financial status has significantly improved

Perceived Price Increase

In which of the following categories have you perceived higher price increases? *Americas*

In which of the following categories have you noticed a price increase recently? *EMEA / APAC*

- Automobile
- Grocery shopping
- Clothes shopping
- Entertainment subscriptions (e.g. Netflix, Spotify, Amazon etc.)
- Utility bills (e.g. electricity, water, gas)
- Hobbies and activities (e.g. gym membership and clubs)
- Takeaways
- Going out to eat
- Mobile phone bill / costs
- Broadband bills
- Travel costs (e.g. car fuel, train tickets, public transport etc.)
- Domestic holidays
- Holidays abroad
- Leisure activities (e.g. pub cinema, theatre etc.)
- Children.family activities (e.g. school trips, swimming/music lessons, clubs etc)
- Mortgage payments
- Insurance
- Electronics
- Healthcare
- Beauty and grooming

Cut Back on Spending

On which of the following categories have you cut back, to reduce spending? *Americas*

*Appears in both the mobile and main survey; **Appears in the brand & media module recontact survey

On which of the following categories are you planning to cut back in the next 3 months, to reduce spending?
Americas

Which of the following categories have you cut back, or planning to cut back in the next three months? *EMEA / APAC*

- Automobile
- Grocery shopping
- Clothes shopping
- Entertainment subscriptions (e.g. Netflix, Spotify, Amazon etc.)
- Utility bills (e.g. electricity, water, gas)
- Hobbies and activities (e.g. gym membership and clubs)
- Takeaways
- Going out to eat
- Mobile phone bill / cots
- Broadband bills
- Travel costs (e.g. car fuel, train tickets, public transport etc.)
- Domestic holidays
- Holidays abroad
- Leisure activities (e.g. pub cinema, theatre etc.)
- Children/family activities (e.g. school trips, swimming/music lessons, clubs etc)
- Mortgage payments
- Insurance
- Electronics
- Healthcare
- Beauty and grooming

Promo Type Preference: EMEA / APAC

Thinking about promos/offers, which of the following types do you prefer, per category? *EMEA / APAC*

Buy one, get one free, Flat discount (a % of discount on the initial price), Raffles (tickets in exchange for the chance to win a prize), Cash back, Rewards (free items / discount vouchers of other products / services, or additional loyalty points from the same brand / other brands)

- Alcohol
- Groceries
- Household products
- Personal care products
- Clothing
- Entertainment products
- Medicine/healthcare products

Promo Type Preference: Americas

Thinking about promos/offers, which of the following types do you prefer? *Americas*

- Buy one, get one free
- Flat discount (a % of discount on the initial price)

*Appears in both the mobile and main survey; **Appears in the brand & media module recontact survey

- Raffles (tickets in exchange for the chance to win a prize)
- Cash back
- Rewards (free items / discount vouchers of other products / services, or additional loyalty points from the same brand / other brands)

Shopping Attitudes

To what extent do you agree / disagree with the statements below?

Strongly disagree, somewhat disagree, neither agree nor disagree, somewhat agree, strongly agree

- I am now opting for cheaper brands than before to reduce costs
- I have reduced my purchases of branded products and am switching more to store-brand/generic products

Brand Contribution: Preferred CSR Actions

Below you can find different areas brands could engage with to help with the current increase of the costs of living. Which of the following do you consider the most valuable? *EMEA / APAC*

- Organize free community events
- Provide food donations to food banks / people in need
- Provide monetary donations to local charities
- Sponsor school meals for pupils in need
- Provide monetary donations to international charities
- Seek out renewable energy to reduce production costs
- Support developing countries to reduce their food crisis
- Offer work placements to help people improve their career changes

Emotions Around Global Inflationary Changes

Which of the following statements describe best your emotional status, thinking about the current inflationary changes in the world? *EMEA / APAC*

- I don't feel that the changes will really affect me and my close ones
- I think that the inflation will be short term, and normality will be restored soon
- I fear that my living standards are going to change significantly
- The uncertainty and constant changes make me feel constantly stressed about my future
- I feel panic and don't know how to respond to the changes around me
- I feel that I need to make small changes for now, and see how things develop in the future
- I feel that I have to prepare proactively and adjust my finances to the current reality
- I am worried about the social impact the financial changes will have on my country
- I am worried about the financial imbalance the situation will bring in the society, at a broader level

Future Life Events

Do you expect any of these things happening to you within the next 6 months? *EMEA / APAC*

- Start dating
- Get engaged
- Get married

*Appears in both the mobile and main survey; **Appears in the brand & media module recontact survey

- Have a child
- Get a new pet
- Have a child move away from home
- Have a child graduate from college
- Have a child get married
- Quit my current job
- Retire from my job
- Birth of a grandchild
- Have a major medical procedure / treatment

Media Usage Motivation

For what reasons do you use the following? *Americas*

Gaming, Social networks, Live TV (linear channels), Video streaming services (movies / series), Other online video content, Podcasts, Radio shows, Music streaming services, Online press, Printed press

- To be entertained
- To find enjoyable content
- To find funny content
- To find information about new products
- To find content around a specific event (e.g. sports game, festival)
- To give me something to talk about
- To keep me company
- To keep me up-to-date with the world
- To learn new things
- To relax and unwind
- To socialize
- To stop myself from being bored