PUBLIC POLL FINDINGS AND METHODOLOGY

Ipsos What the Future: Manufacturing Survey

Topline Findings

New York, January 26, 2024 — *These are the findings of an Ipsos poll conducted between November 15 – 16, 2023, for the [What the Future: Manufacturing issue](). For this survey, a sample of 1,120 adults age 18+ from the continental U.S., Alaska, and Hawaii was interviewed online in English. The poll has a credibility interval of plus or minus 3.6 percentage points for all respondents.*

For full results, please refer to the following annotated questionnaire:

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Full Annotated Questionnaire

1. When choosing which brands to purchase products from, which of the following factors are most important in your decision for *consumable or small purchases like clothing, packaged goods, etc.*? Select up to three.

	Total (N=1,120)
I trust the quality of the brand	42%
It is made from quality materials	36%
There is a sale or promotion	31%
It is a brand that I have already used in the past	30%
It receives good product reviews	28%
The brand is made in the U.S.	21%
It is the cheapest or most affordable	18%
A recommendation from friends/family	16%
It is sustainable or a better product for the environment	9%
The brand is aligned with my values	9%
The brand tries to make a positive impact on society	6%
The brand is popular or “in fashion”	5%
The manufacturer/brand is Black-owned, women-owned, veteran-owned, locally owned, etc.	5%
The brand is a luxury or high-end name	5%
None of the above	4%

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2. When choosing which brands to purchase products from, which of the following factors are most important in your decision for *large purchases like major appliances, vehicles, etc.*? Select up to three.

	Total
I trust the quality of the brand	46%
It receives good product reviews	35%
It is made from quality materials	30%
There is a sale or promotion	29%
It is a brand that I have already used in the past	24%
The brand is made in the U.S.	18%
A recommendation from friends/family	15%
It is the cheapest or most affordable	13%
The product has a built-in extended warranty	13%
I can repair it, or have it repaired, over time	11%
It is sustainable or a better product for the environment	8%
The brand is aligned with my values	7%
The brand tries to make a positive impact on society	6%
The brand is a luxury or high-end name	5%
The brand is popular or "in fashion"	3%
The manufacturer/brand is Black-owned, women-owned, veteran-owned, locally owned, etc.	2%
None of the above	3%

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3. How likely, if at all, are you to pay more for a major purchase (i.e., major appliance, vehicle) if…

Total Likely Summary

	Total
I trust the quality of the brand	90%
It is made from quality materials	88%
It is a brand that I have already used in the past	87%
It receives good product reviews	86%
There is a special or promotion	83%
The product has a built-in extended warranty	82%
The brand is made in the U.S.	79%
It is recommended by friends/family	78%
I can repair it, or have it repaired, over time	78%
The brand is aligned with my values	70%
It is sustainable or better for the environment	66%
The brand tries to make a positive impact on society	65%
It is the cheapest or most affordable	62%
The manufacturer/brand is Black-owned, women-owned, veteran-owned, locally owned, etc.	53%
The brand is a luxury or high-end name	46%
The brand is popular or "in fashion"	39%

a. There is a special or promotion

	Total
Very likely	28%
Somewhat likely	55%
Not very likely	12%
Not at all likely	5%
Likely (Net)	*83%*
Not Likely (Net)	*17%*

b. It is the cheapest or most affordable

	Total
Very likely	20%
Somewhat likely	42%
Not very likely	27%
Not at all likely	11%
Likely (Net)	*62%*
Not Likely (Net)	*38%*

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3. How likely, if at all, are you to pay more for a major purchase (i.e., major appliance, vehicle) if… *(Continued)*

c. It is recommended by friends/family

	Total
Very likely	20%
Somewhat likely	58%
Not very likely	16%
Not at all likely	6%
Likely (Net)	*78%*
Not Likely (Net)	*22%*

d. The brand is popular or “in fashion”

	Total
Very likely	11%
Somewhat likely	28%
Not very likely	39%
Not at all likely	22%
Likely (Net)	*39%*
Not Likely (Net)	*61%*

e. The brand is made in the U.S.

	Total
Very likely	26%
Somewhat likely	53%
Not very likely	15%
Not at all likely	7%
Likely (Net)	*79%*
Not Likely (Net)	*21%*

f. The manufacturer/brand is Black-owned, women-owned, veteran-owned, locally owned, etc.

	Total
Very likely	12%
Somewhat likely	41%
Not very likely	30%
Not at all likely	17%
Likely (Net)	*53%*
Not Likely (Net)	*47%*

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3. How likely, if at all, are you to pay more for a major purchase (i.e., major appliance, vehicle) if… *(Continued)*

g. It is a brand that I have already used in the past

	Total
Very likely	34%
Somewhat likely	53%
Not very likely	10%
Not at all likely	3%
Likely (Net)	*87%*
Not Likely (Net)	*13%*

h. I trust the quality of the brand

	Total
Very likely	41%
Somewhat likely	49%
Not very likely	7%
Not at all likely	3%
Likely (Net)	*90%*
Not Likely (Net)	*10%*

i. The brand is a luxury or high-end name

	Total
Very likely	14%
Somewhat likely	32%
Not very likely	35%
Not at all likely	19%
Likely (Net)	*46%*
Not Likely (Net)	*54%*

j. It is made from quality materials

	Total
Very likely	39%
Somewhat likely	49%
Not very likely	9%
Not at all likely	3%
Likely (Net)	*88%*
Not Likely (Net)	*12%*

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3. How likely, if at all, are you to pay more for a major purchase (i.e., major appliance, vehicle) if… *(Continued)*

k. It receives good product reviews

	Total
Very likely	31%
Somewhat likely	55%
Not very likely	9%
Not at all likely	5%
Likely (Net)	*86%*
Not Likely (Net)	*14%*

l. It is sustainable or better for the environment

	Total
Very likely	17%
Somewhat likely	49%
Not very likely	23%
Not at all likely	11%
Likely (Net)	*66%*
Not Likely (Net)	*34%*

m. The brand is aligned with my values

	Total
Very likely	18%
Somewhat likely	52%
Not very likely	21%
Not at all likely	9%
Likely (Net)	*70%*
Not Likely (Net)	*30%*

n. The brand tries to make a positive impact on society

	Total
Very likely	17%
Somewhat likely	48%
Not very likely	24%
Not at all likely	11%
Likely (Net)	*65%*
Not Likely (Net)	*35%*

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3. How likely, if at all, are you to pay more for a major purchase (i.e., major appliance, vehicle) if… *(Continued)*

   o. The product has a built-in extended warranty

	Total
Very likely	26%
Somewhat likely	55%
Not very likely	14%
Not at all likely	5%
Likely (Net)	*82%*
Not Likely (Net)	*18%*

   p. I can repair it, or have it repaired, over time

	Total
Very likely	25%
Somewhat likely	53%
Not very likely	17%
Not at all likely	5%
Likely (Net)	*78%*
Not Likely (Net)	*22%*

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PUBLIC POLL FINDINGS AND METHODOLOGY

4. How likely, if at all, are you to pay more for a consumable or small purchase if…

Total Likely Summary

	Total
I trust the quality of the brand	89%
It is made from quality materials	89%
It is a brand that I have already used in the past	87%
It receives good product reviews	86%
There is a special or promotion	84%
It is recommended by friends/family	80%
The brand is made in the U.S.	77%
The brand is aligned with my values	72%
It is sustainable or better for the environment	66%
The brand tries to make a positive impact on society	65%
It is the cheapest or most affordable	63%
The manufacturer/brand is Black-owned, women-owned, veteran-owned, locally owned, etc.	54%
The brand is a luxury or high-end name	45%
The brand is popular or "in fashion"	40%

a. There is a special or promotion

	Total
Very likely	30%
Somewhat likely	54%
Not very likely	12%
Not at all likely	5%
Likely (Net)	*84%*
Not Likely (Net)	*16%*

b. It is the cheapest or most affordable

	Total
Very likely	20%
Somewhat likely	43%
Not very likely	27%
Not at all likely	9%
Likely (Net)	*63%*
Not Likely (Net)	*37%*

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4. How likely, if at all, are you to pay more for a consumable or small purchase if… *(Continued)*

c. It is recommended by friends/family

	Total
Very likely	23%
Somewhat likely	57%
Not very likely	14%
Not at all likely	6%
Likely (Net)	*80%*
Not Likely (Net)	*20%*

d. The brand is popular or “in fashion”

	Total
Very likely	10%
Somewhat likely	30%
Not very likely	38%
Not at all likely	22%
Likely (Net)	*40%*
Not Likely (Net)	*60%*

e. The brand is made in the U.S.

	Total
Very likely	26%
Somewhat likely	51%
Not very likely	17%
Not at all likely	6%
Likely (Net)	*77%*
Not Likely (Net)	*23%*

f. The manufacturer/brand is Black-owned, women-owned, veteran-owned, locally owned, etc.

	Total
Very likely	12%
Somewhat likely	41%
Not very likely	29%
Not at all likely	17%
Likely (Net)	*54%*
Not Likely (Net)	*46%*

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4. How likely, if at all, are you to pay more for a consumable or small purchase if… *(Continued)*

g. It is a brand that I have already used in the past

	Total
Very likely	37%
Somewhat likely	49%
Not very likely	10%
Not at all likely	3%
Likely (Net)	*87%*
Not Likely (Net)	*13%*

h. I trust the quality of the brand

	Total
Very likely	44%
Somewhat likely	46%
Not very likely	8%
Not at all likely	3%
Likely (Net)	*89%*
Not Likely (Net)	*11%*

i. The brand is a luxury or high-end name

	Total
Very likely	11%
Somewhat likely	34%
Not very likely	34%
Not at all likely	21%
Likely (Net)	*45%*
Not Likely (Net)	*55%*

j. It is made from quality materials

	Total
Very likely	39%
Somewhat likely	49%
Not very likely	8%
Not at all likely	4%
Likely (Net)	*89%*
Not Likely (Net)	*11%*

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4. How likely, if at all, are you to pay more for a consumable or small purchase if… *(Continued)*

k. It receives good product reviews

	Total
Very likely	33%
Somewhat likely	53%
Not very likely	10%
Not at all likely	4%
Likely (Net)	*86%*
Not Likely (Net)	*14%*

l. It is sustainable or better for the environment

	Total
Very likely	18%
Somewhat likely	48%
Not very likely	23%
Not at all likely	11%
Likely (Net)	*66%*
Not Likely (Net)	*34%*

m. The brand is aligned with my values

	Total
Very likely	19%
Somewhat likely	53%
Not very likely	19%
Not at all likely	8%
Likely (Net)	*72%*
Not Likely (Net)	*28%*

n. The brand tries to make a positive impact on society

	Total
Very likely	17%
Somewhat likely	48%
Not very likely	24%
Not at all likely	11%
Likely (Net)	*65%*
Not Likely (Net)	*35%*

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5. The following topics are related to innovation in manufacturing. When thinking of these developments, do you feel they are happening too fast, too slow or at the right pace?

a. Manufacturing jobs moving to other countries

	Total
Too slow	5%
The right pace	24%
Too fast	53%
Don't know	18%

b. 3D printers available for home use to make your own goods

	Total
Too slow	14%
The right pace	46%
Too fast	16%
Don't know	23%

c. Small businesses starting up in the U.S. for manufacturing

	Total
Too slow	39%
The right pace	39%
Too fast	7%
Don't know	15%

d. Automation of jobs and tasks with AI technology

	Total
Too slow	7%
The right pace	31%
Too fast	48%
Don't know	14%

e. Automation of jobs and tasks with robotics

	Total
Too slow	7%
The right pace	38%
Too fast	40%
Don't know	15%

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PUBLIC POLL FINDINGS AND METHODOLOGY

5. The following topics are related to innovation in manufacturing. When thinking of these developments, do you feel they are happening too fast, too slow or at the right pace? *(Continued)*

    f. Custom or on-demand manufacturing techniques

	Total
Too slow	14%
The right pace	49%
Too fast	12%
Don't know	25%

6. Have you ever done any of the following?

Total Yes Summary

	Total
Searched for a lower cost version of the same item	81%
Returned a product to a store when it broke or didn't meet my expectations	78%
Returned a product from an online purchase when it broke or didn't meet my expectations	72%
Kept or sold a product when it didn't meet my expectations because it cost too much to return it	50%
Gone on a factory tour of a product I've bought	24%

a. Gone on a factory tour of a product I've bought

	Total
Yes	24%
No	76%

b. Searched for a lower cost version of the same item

	Total
Yes	81%
No	19%

c. Returned a product to a store when it broke or didn't meet my expectations

	Total
Yes	78%
No	22%

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6. Have you ever done any of the following?

   d. Returned a product from an online purchase when it broke or didn't meet my expectations

	Total
Yes	72%
No	28%

   e. Kept or sold a product when it didn't meet my expectations because it cost too much to return it

	Total
Yes	50%
No	50%

7. Thinking about the next five to ten years, do you think the following will get better, worse, or stay the same?

Total Get Better Summary

	Total
The ability to make things at home with 3D printers and other technology	47%
The pay of workers in the U.S.	35%
The sustainability of the products I buy	32%
The treatment of workers in the U.S.	27%
Access to affordable U.S.-made products	26%
The quality of products I buy	24%
The pay of workers in other countries	23%
The treatment of workers in other countries	20%
The price of products I buy	15%

   a. Access to affordable U.S.-made products

	Total
Get better	26%
Stay the same	40%
Get worse	34%

   b. The treatment of workers in the U.S.

	Total
Get better	27%
Stay the same	48%
Get worse	25%

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7. Thinking about the next five to ten years, do you think the following will get better, worse, or stay the same? *(Continued)*

c. The pay of workers in the U.S.

	Total
Get better	35%
Stay the same	39%
Get worse	27%

d. The treatment of workers in other countries

	Total
Get better	20%
Stay the same	53%
Get worse	27%

e. The pay of workers in other countries

	Total
Get better	23%
Stay the same	54%
Get worse	23%

f. The ability to make things at home with 3D printers and other technology

	Total
Get better	47%
Stay the same	45%
Get worse	8%

g. The quality of products I buy

	Total
Get better	24%
Stay the same	46%
Get worse	30%

h. The price of products I buy

	Total
Get better	15%
Stay the same	26%
Get worse	58%

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7. Thinking about the next five to ten years, do you think the following will get better, worse, or stay the same? *(Continued)*

   i. The sustainability of the products I buy

	Total
Get better	32%
Stay the same	49%
Get worse	19%

8. For each of the following pairs of statements, please select the one that comes closest to your view, even if neither statement is exactly right.

	Total
I would rather pay more for a product that will last longer	79%
I would rather pay less for a product now, even if I may need to replace it soon	21%

	Total
When I'm buying a product, I choose high quality over low price	66%
When I'm buying a product, I choose low price over high quality	34%

	Total
I care about where the products I buy were made	61%
I don't care about where the products I buy were made	39%

	Total
I prefer to buy products made in America even if it costs more	56%
Choosing a lower-priced product is a top priority for me	44%

	Total
I care about how the products I buy were made	64%
I don't care about how the products I buy were made	36%

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8. For each of the following pairs of statements, please select the one that comes closest to your view, even if neither statement is exactly right. *(Continued)*

	Total
Choosing a lower-priced product is a top priority for me	51%
I prefer to buy products made sustainably even if it costs more	49%

	Total
I prefer to buy products made with fair labor even if it costs more	50%
Choosing a lower-priced product is a top priority for me	50%

9. Thinking about each of the following future scenarios, do you want them to happen, or not?

Total Yes Summary

	Total
I can recycle things I buy more effectively	80%
I can fix (or have fixed) products I buy rather than having to replace them	78%
More goods and products are made in the U.S.	76%
U.S. manufacturing jobs pay a living wage	75%
It is easier to afford products made in the U.S.	72%
Regulation leads to higher quality products from overseas	71%
We have a more global economy with products made overseas	59%
Other nations pay higher wages to their workers	59%
I can make more things at my home with 3D printers and other new technologies	51%

a. More goods and products are made in the U.S.

	Total
Yes	76%
No	24%

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9. Thinking about each of the following future scenarios, do you want them to happen, or not? *(Continued)*

b. We have a more global economy with products made overseas

	Total
Yes	59%
No	41%

c. Regulation leads to higher quality products from overseas

	Total
Yes	71%
No	29%

d. It is easier to afford products made in the U.S.

	Total
Yes	72%
No	28%

e. Other nations pay higher wages to their workers

	Total
Yes	59%
No	41%

f. I can make more things at my home with 3D printers and other new technologies

	Total
Yes	51%
No	49%

g. U.S. manufacturing jobs pay a living wage

	Total
Yes	75%
No	25%

h. I can recycle things I buy more effectively

	Total
Yes	80%
No	20%

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9. Thinking about each of the following future scenarios, do you want them to happen, or not? *(Continued)*

    i. I can fix (or have fixed) products I buy rather than having to replace them

	Total
Yes	78%
No	22%

10. Thinking again about the following future scenarios, how likely, if at all, are they to actually happen?

Total Likely Summary

	Total
I can recycle things I buy more effectively	73%
U.S. manufacturing jobs pay a living wage	69%
We have a more global economy with products made overseas	68%
More goods and products are made in the U.S.	64%
I can fix (or have fixed) products I buy rather than having to replace them	62%
I can make more things at my home with 3D printers and other new technologies	58%
Regulation leads to higher quality products from overseas	54%
It is easier to afford products made in the U.S.	52%
Other nations pay higher wages to their workers	43%

a. More goods and products are made in the U.S.

	Total
Very likely	14%
Somewhat likely	50%
Not very likely	31%
Not at all likely	5%
Likely (Net)	*64%*
Not Likely (Net)	*36%*

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10. Thinking again about the following future scenarios, how likely, if at all, are they to actually happen? *(Continued)*

b. We have a more global economy with products made overseas

	Total
Very likely	19%
Somewhat likely	49%
Not very likely	27%
Not at all likely	5%
Likely (Net)	*68%*
Not Likely (Net)	*32%*

c. Regulation leads to higher quality products from overseas

	Total
Very likely	14%
Somewhat likely	40%
Not very likely	37%
Not at all likely	10%
Likely (Net)	*54%*
Not Likely (Net)	*46%*

d. It is easier to afford products made in the U.S.

	Total
Very likely	13%
Somewhat likely	39%
Not very likely	39%
Not at all likely	9%
Likely (Net)	*52%*
Not Likely (Net)	*48%*

e. Other nations pay higher wages to their workers

	Total
Very likely	11%
Somewhat likely	31%
Not very likely	44%
Not at all likely	13%
Likely (Net)	*43%*
Not Likely (Net)	*57%*

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10. Thinking again about the following future scenarios, how likely, if at all, are they to actually happen? *(Continued)*

f. I can make more things at my home with 3D printers and other new technologies

	Total
Very likely	15%
Somewhat likely	44%
Not very likely	30%
Not at all likely	12%
Likely (Net)	*58%*
Not Likely (Net)	*42%*

g. U.S. manufacturing jobs pay a living wage

	Total
Very likely	16%
Somewhat likely	53%
Not very likely	24%
Not at all likely	7%
Likely (Net)	*69%*
Not Likely (Net)	*31%*

h. I can recycle things I buy more effectively

	Total
Very likely	19%
Somewhat likely	55%
Not very likely	22%
Not at all likely	5%
Likely (Net)	*73%*
Not Likely (Net)	*27%*

i. I can fix (or have fixed) products I buy rather than having to replace them

	Total
Very likely	17%
Somewhat likely	46%
Not very likely	31%
Not at all likely	7%
Likely (Net)	*62%*
Not Likely (Net)	*38%*

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About the Study

These are some of the findings of an Ipsos poll conducted between November 15 – 16, 2023. For this survey, a sample of 1,120 adults age 18+ from the continental U.S., Alaska, and Hawaii was interviewed online in English.

The sample was randomly drawn from Ipsos' online panel, partner online panel sources, and "river" sampling and does not rely on a population frame in the traditional sense. Ipsos uses fixed sample targets, unique to each study, in drawing a sample. After a sample has been obtained from the Ipsos panel, Ipsos calibrates respondent characteristics to be representative of the U.S. Population using standard procedures such as raking-ratio adjustments. The source of these population targets is U.S. Census 2021 American Community Survey data. The sample drawn for this study reflects fixed sample targets on demographics. Post-hoc weights were made to the population characteristics on gender, age, race/ethnicity, region, and education.

Statistical margins of error are not applicable to online non-probability polls. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error and measurement error. Where figures do not sum to 100, this is due to the effects of rounding. The precision of Ipsos online polls is measured using a credibility interval. In this case, the poll has a credibility interval of plus or minus 3.6 percentage points for all respondents. Ipsos calculates a design effect (DEFF) for each study based on the variation of the weights, following the formula of Kish (1965). This study had a credibility interval adjusted for design effect of the following (n=1,120, DEFF=1.5, adjusted Confidence Interval=+/-5.1 percentage points).

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PUBLIC POLL FINDINGS AND METHODOLOGY

About Ipsos

Ipsos is one of the largest market research and polling companies globally, operating in 90 markets and employing over 18,000 people.

Our passionately curious research professionals, analysts and scientists have built unique multi-specialist capabilities that provide true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. We serve more than 5000 clients across the world with 75 business solutions.

Founded in France in 1975, Ipsos has been 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).

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