



January 2017

Global @dvisor: Power to the People? Part 2

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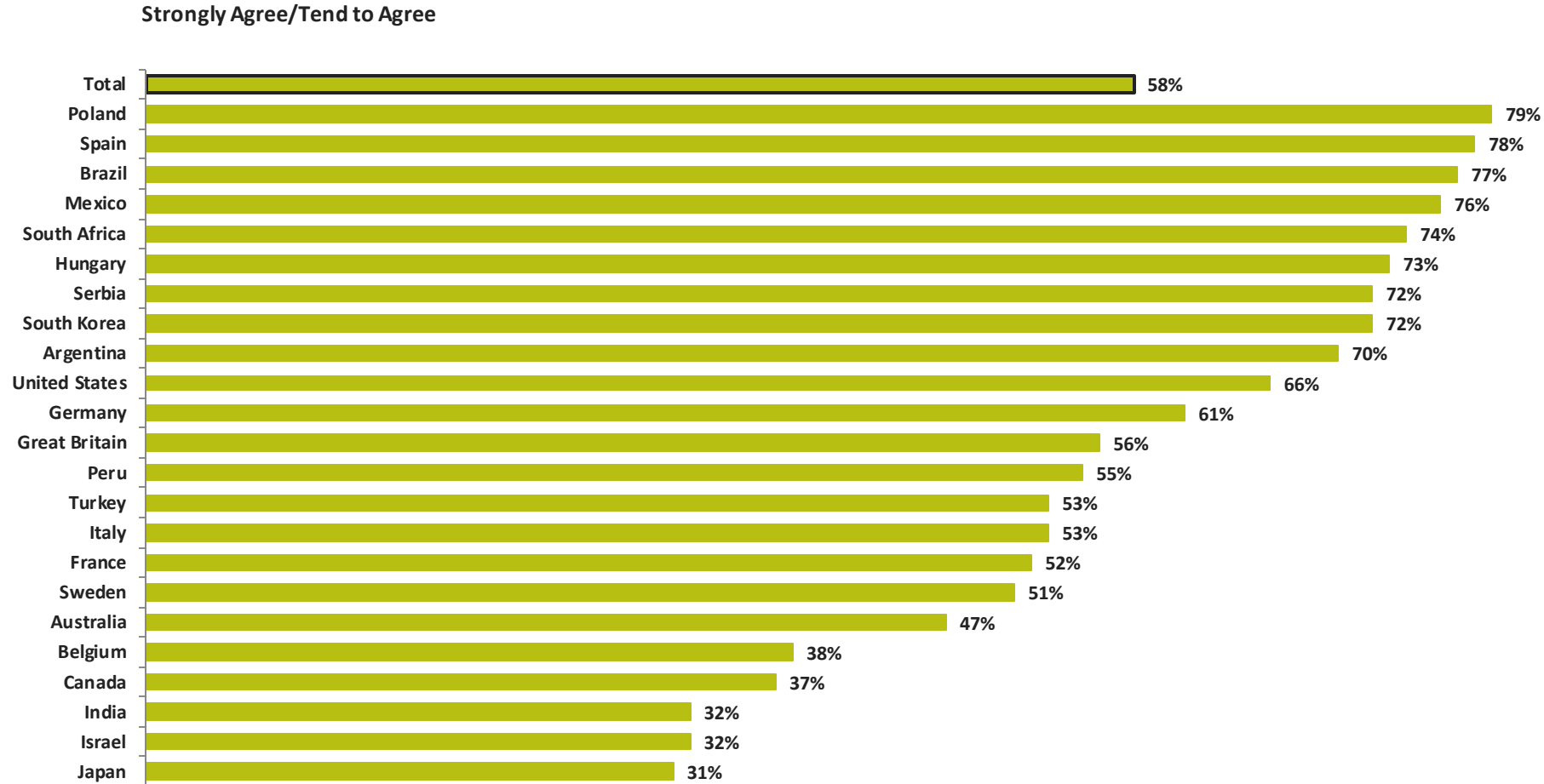
Exclusionism



SOCIETY IS BROKEN AND CONFIDENCE IN INSTITUTIONS

GLOBAL @DVISOR: POWER TO THE PEOPLE?

Most feel society is broken (especially Poland, Spain, Brazil and Mexico)...



Q5 To what extent, if at all, do you agree or disagree with the following statements – “Society is broken”

GLOBAL @DVISOR: POWER TO THE PEOPLE?

How much confidence, if any, do you have in the each of the following...

International Institutions



Banks



The Justice System, including the courts



Big Companies



The Media



The Government



Political parties



COMPLETE CONFIDENCE

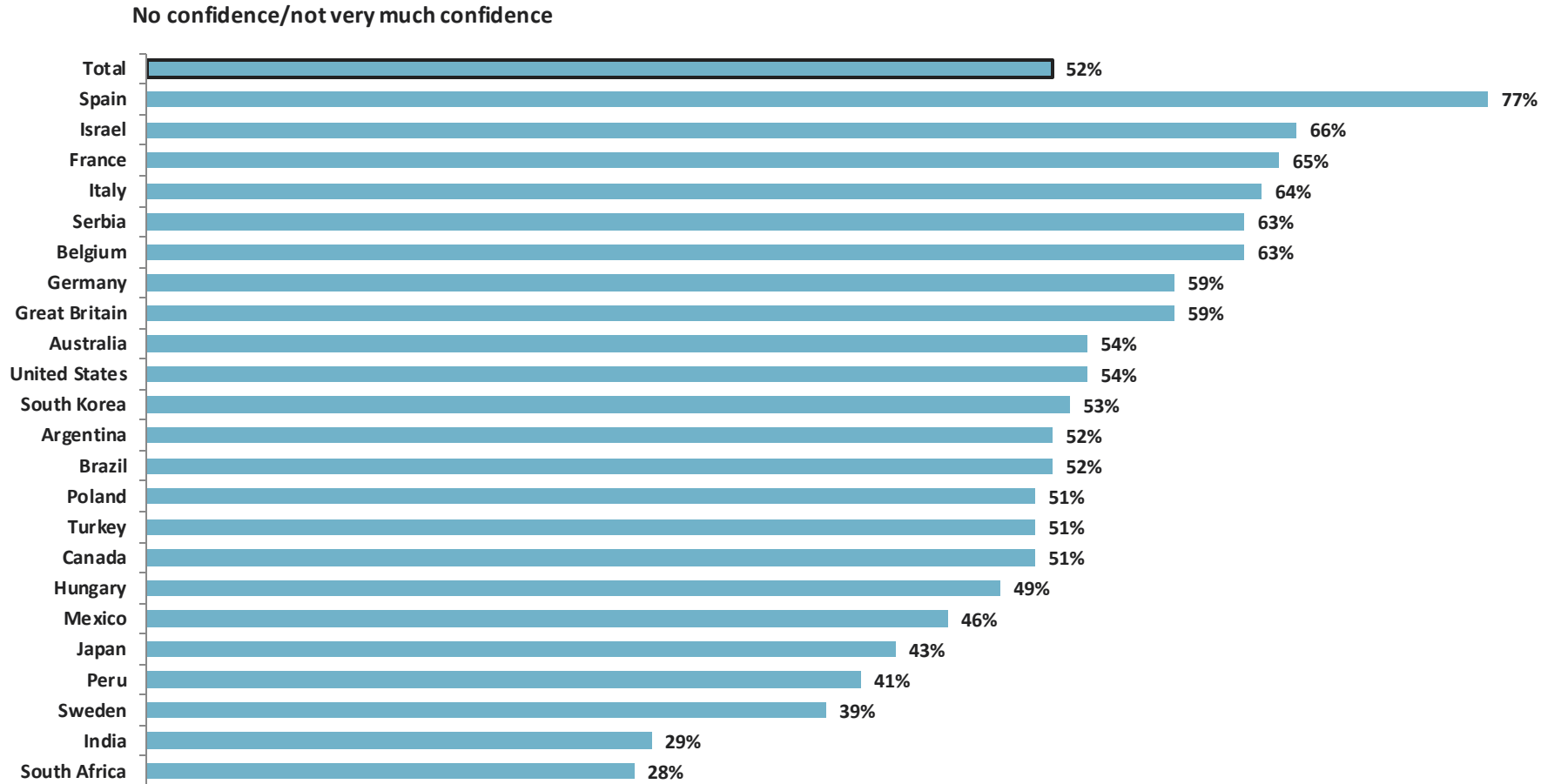
FAIR AMOUNT OF CONFIDENT

NOT VERY MUCH CONFIDENCE

NO CONFIDENCE AT ALL

GLOBAL @DVISOR: POWER TO THE PEOPLE?

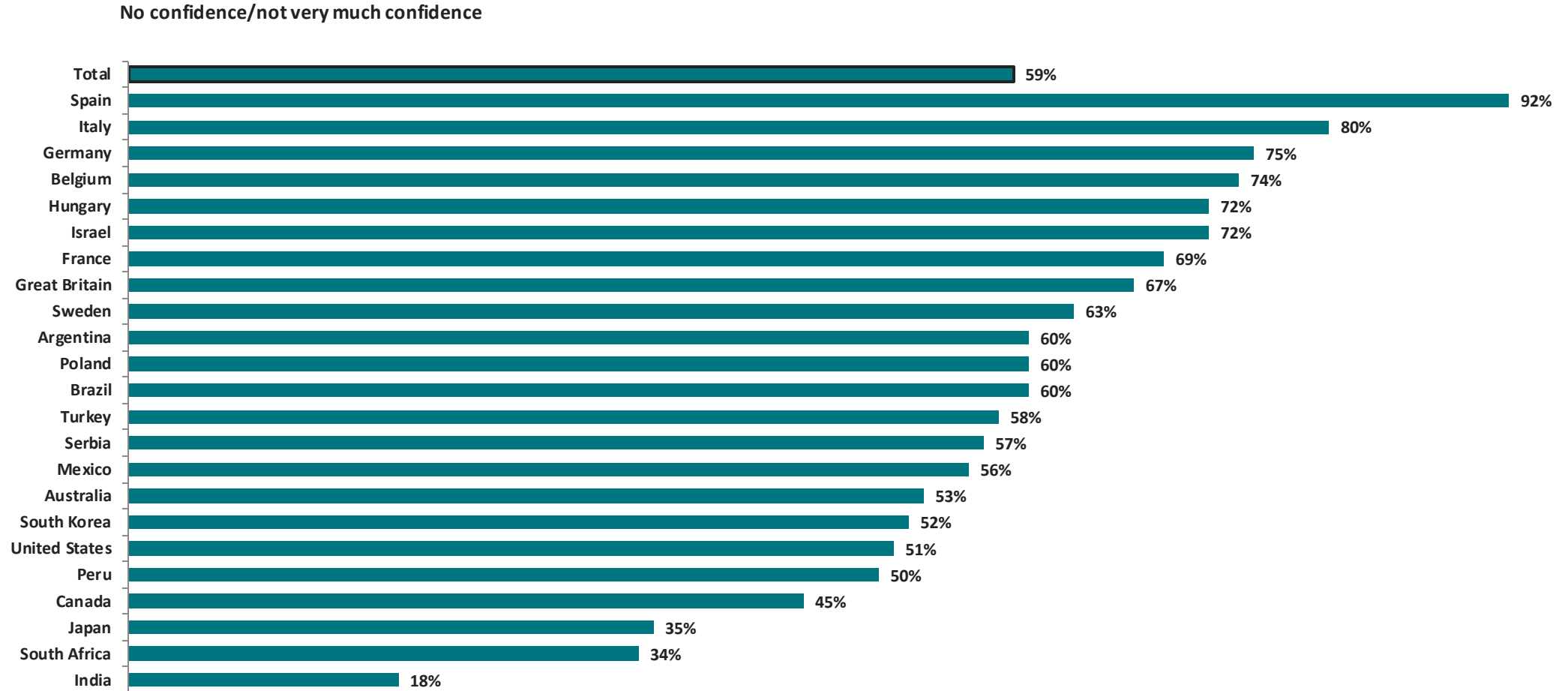
Spain has the least confidence in International Institutions, as do many other Europeans – and Israel



Q11 How much confidence, if any, do you have in the each of the following? International Institutions

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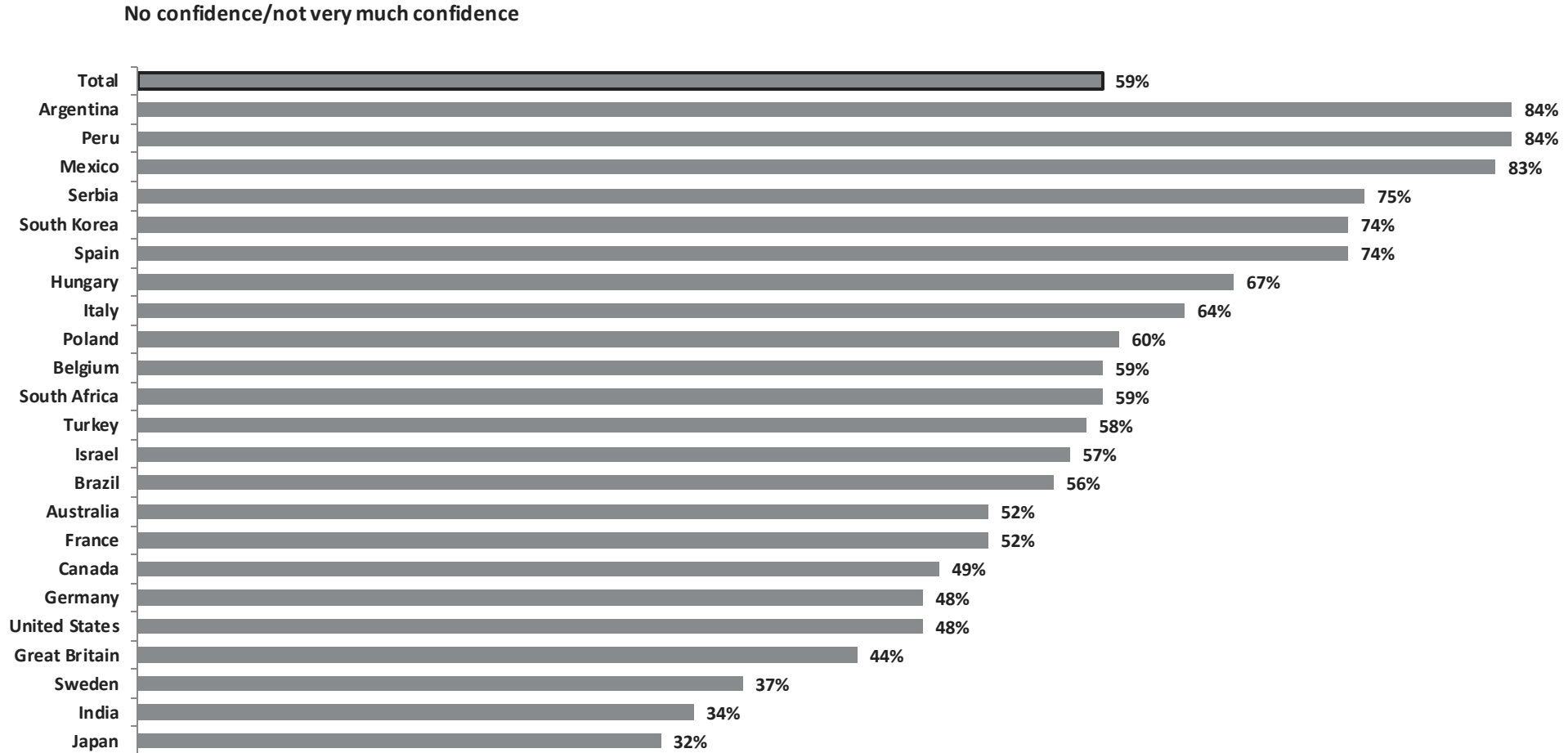
Spain and Italy have the least confidence in their banks



Q11 How much confidence, if any, do you have in the each of the following? Banks

GLOBAL @DVISOR: POWER TO THE PEOPLE?

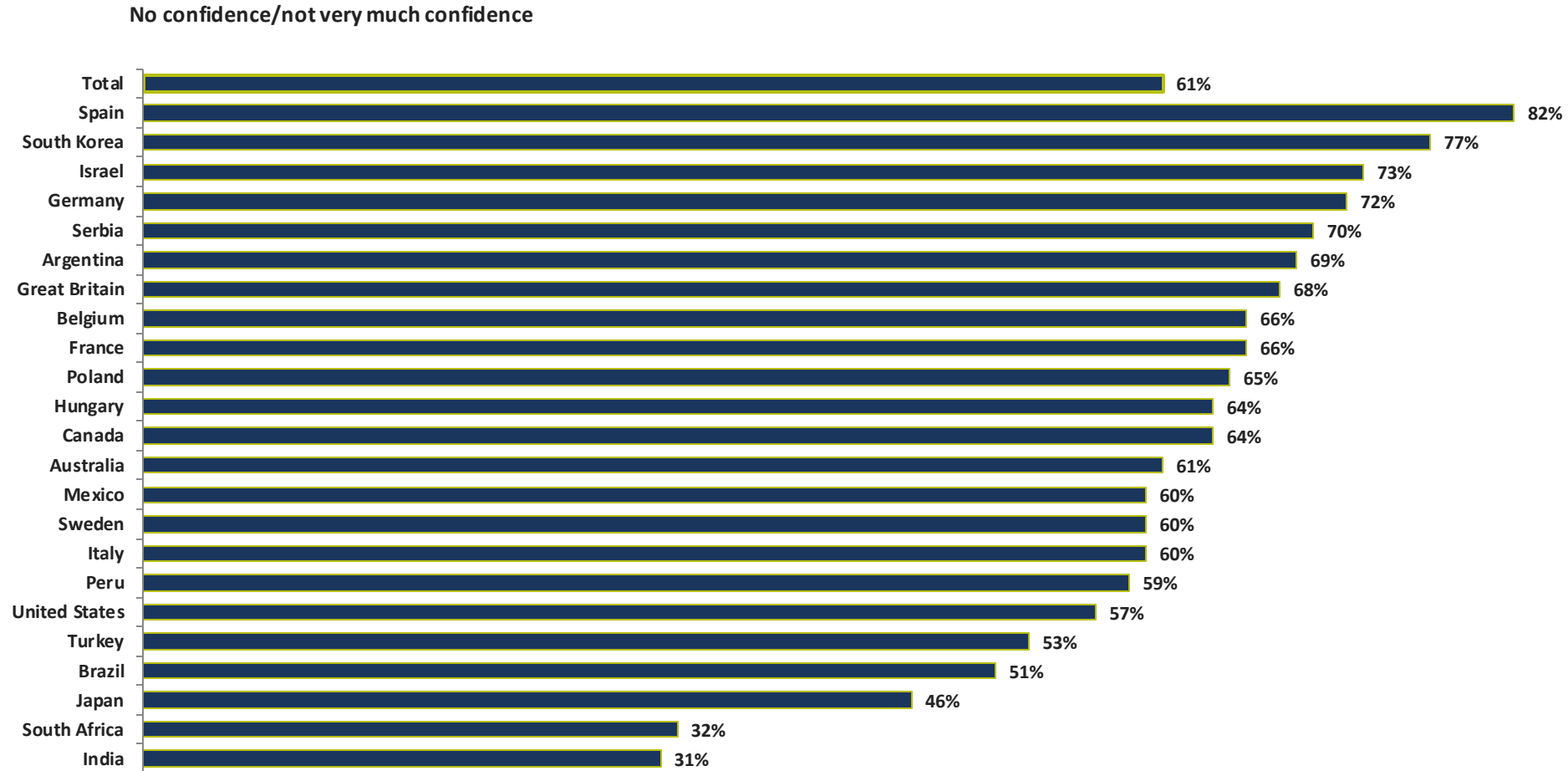
Confidence is marginally higher for the justice system, but very low in LATAM



Q11 How much confidence, if any, do you have in the each of the following? The justice system including the courts

GLOBAL @DVISOR: POWER TO THE PEOPLE?

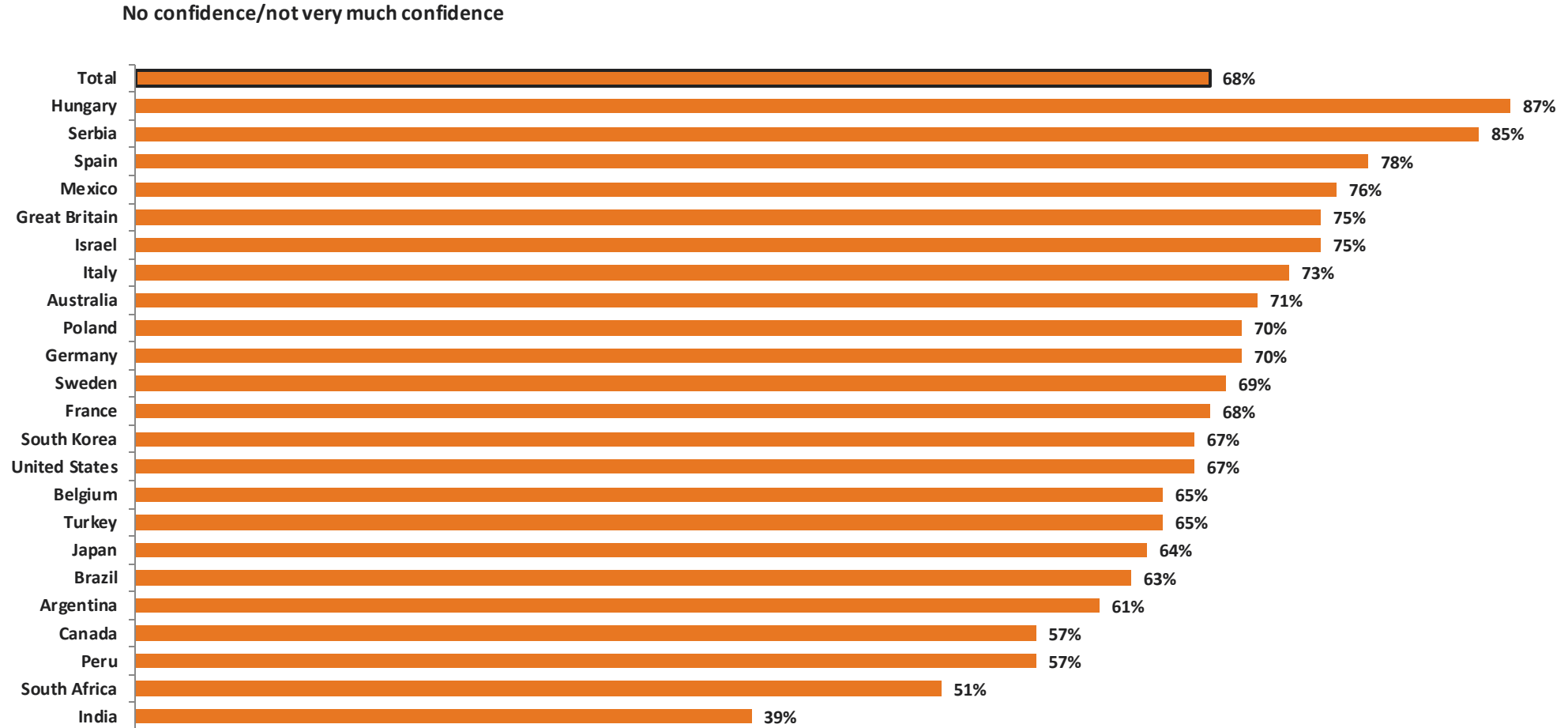
Most lack confidence in big companies



Q11 How much confidence, if any, do you have in the each of the following? Big Companies

GLOBAL @DVISOR: POWER TO THE PEOPLE?

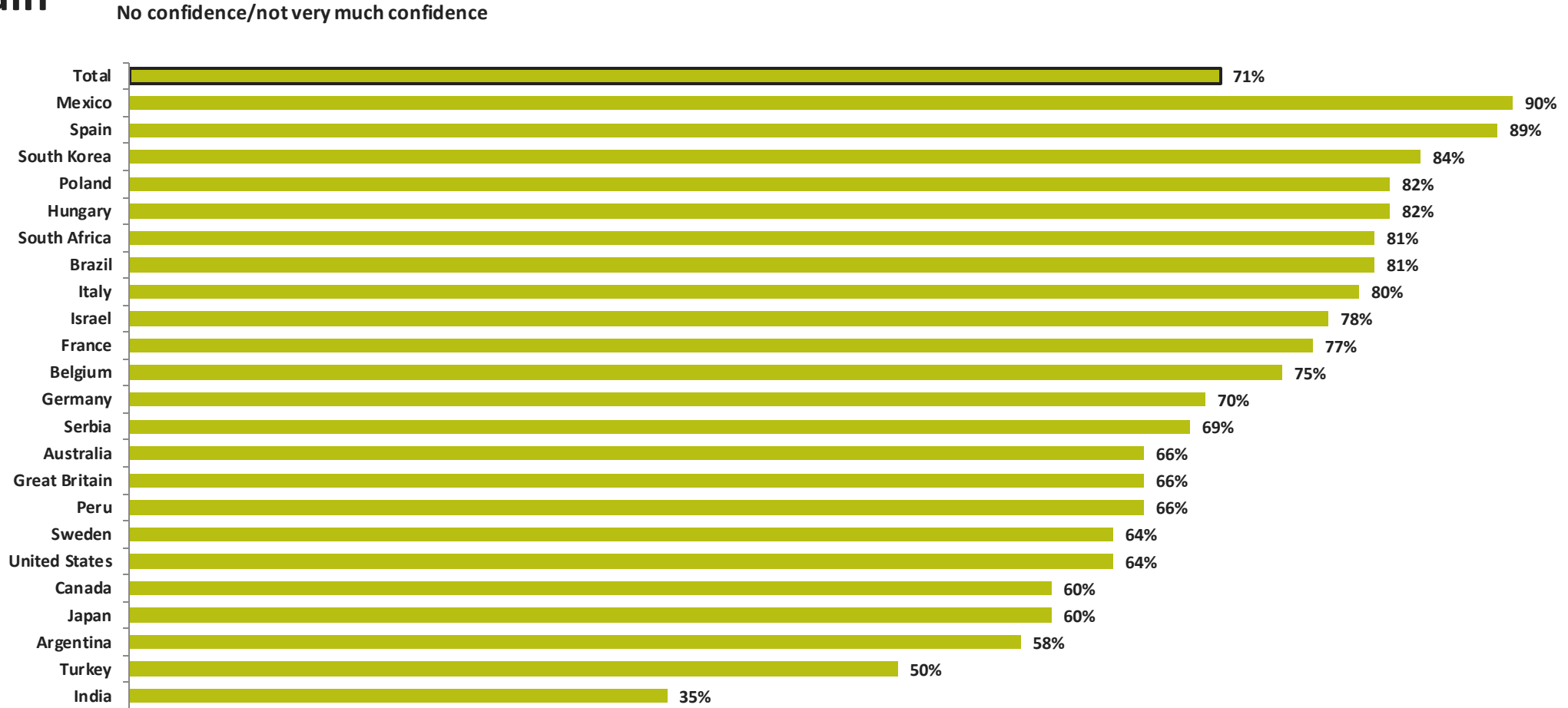
Two in three lack confidence in their media



Q11 How much confidence, if any, do you have in the each of the following? The media

GLOBAL @DVISOR: POWER TO THE PEOPLE?

Most countries are not confident about their government – especially negative in Mexico and Spain



Q11 How much confidence, if any, do you have in the each of the following? The Government

GLOBAL @DVISOR: POWER TO THE PEOPLE?

Of all institutions, countries have the least confidence in their political parties



Q11 How much confidence, if any, do you have in the each of the following? Political parties



NATIVISM

GAME CHANGERS



Attitudes are divided on immigration – but most countries are against uncontrolled immigration

When jobs are scarce, employers should prioritise hiring people of this country over immigrants



Immigrants take important social services away from real [nationality]



Immigrants take jobs away from real [nationality]



These days I feel like a stranger in my own country



[Country] would be stronger if we stopped immigration

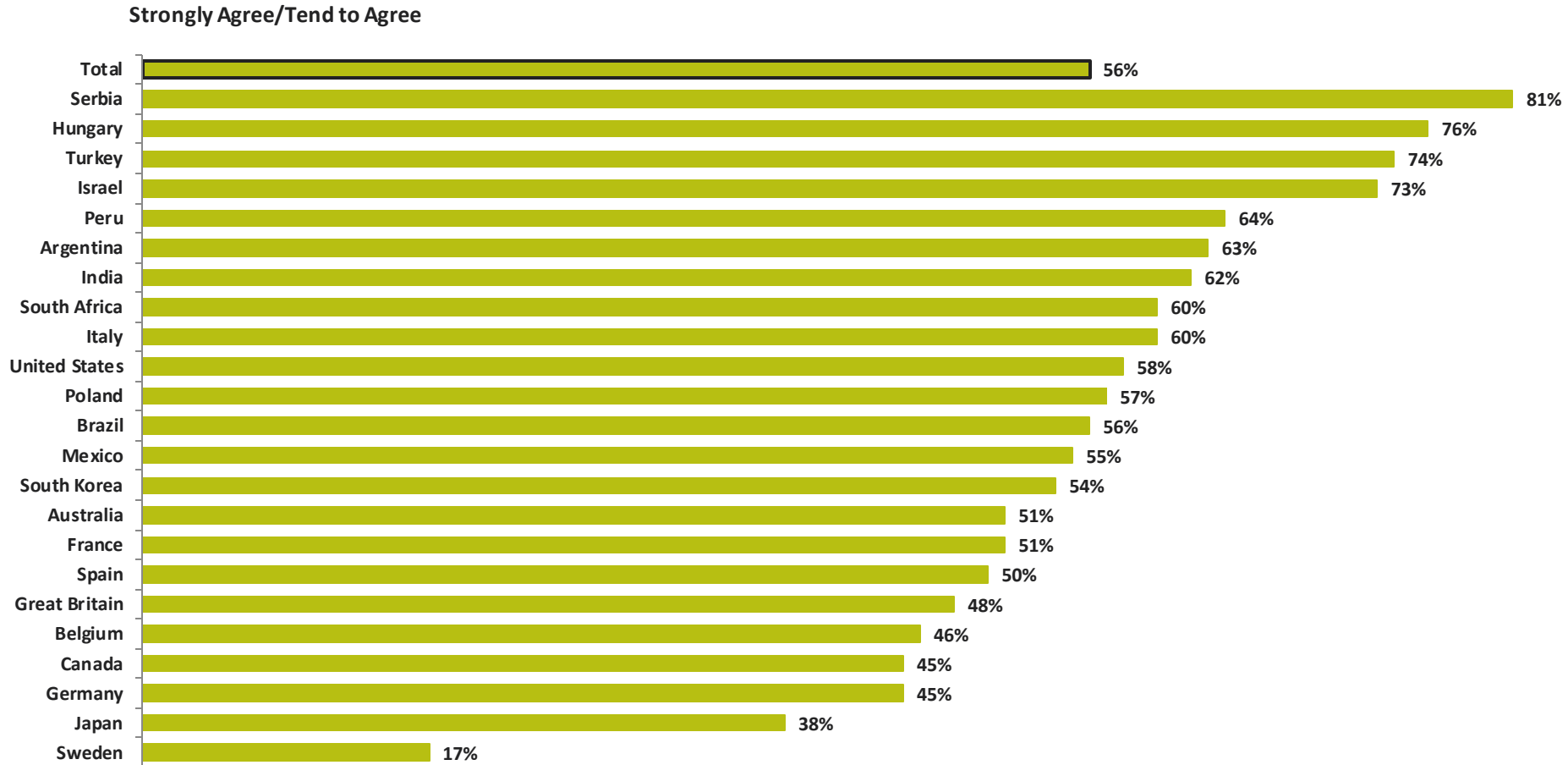


[Country] would be better off if we let in all immigrants who wanted to come here



GLOBAL @DVISOR: POWER TO THE PEOPLE?

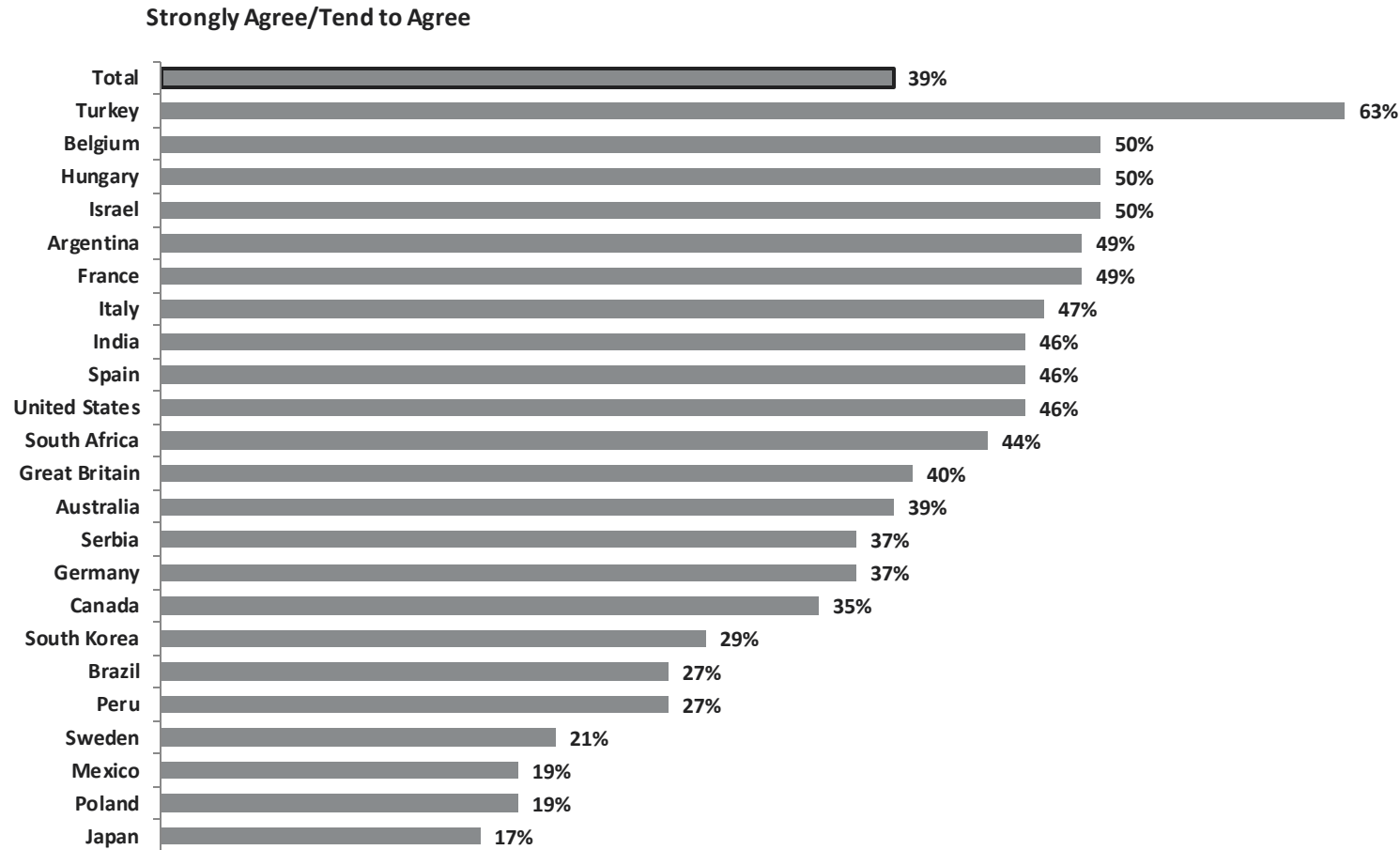
Just over half think employers should prioritize hiring locals over immigrants – especially in Serbia, Hungary, Turkey and Israel



Q9 When jobs are scarce, employers should prioritize hiring people of this country over immigrants

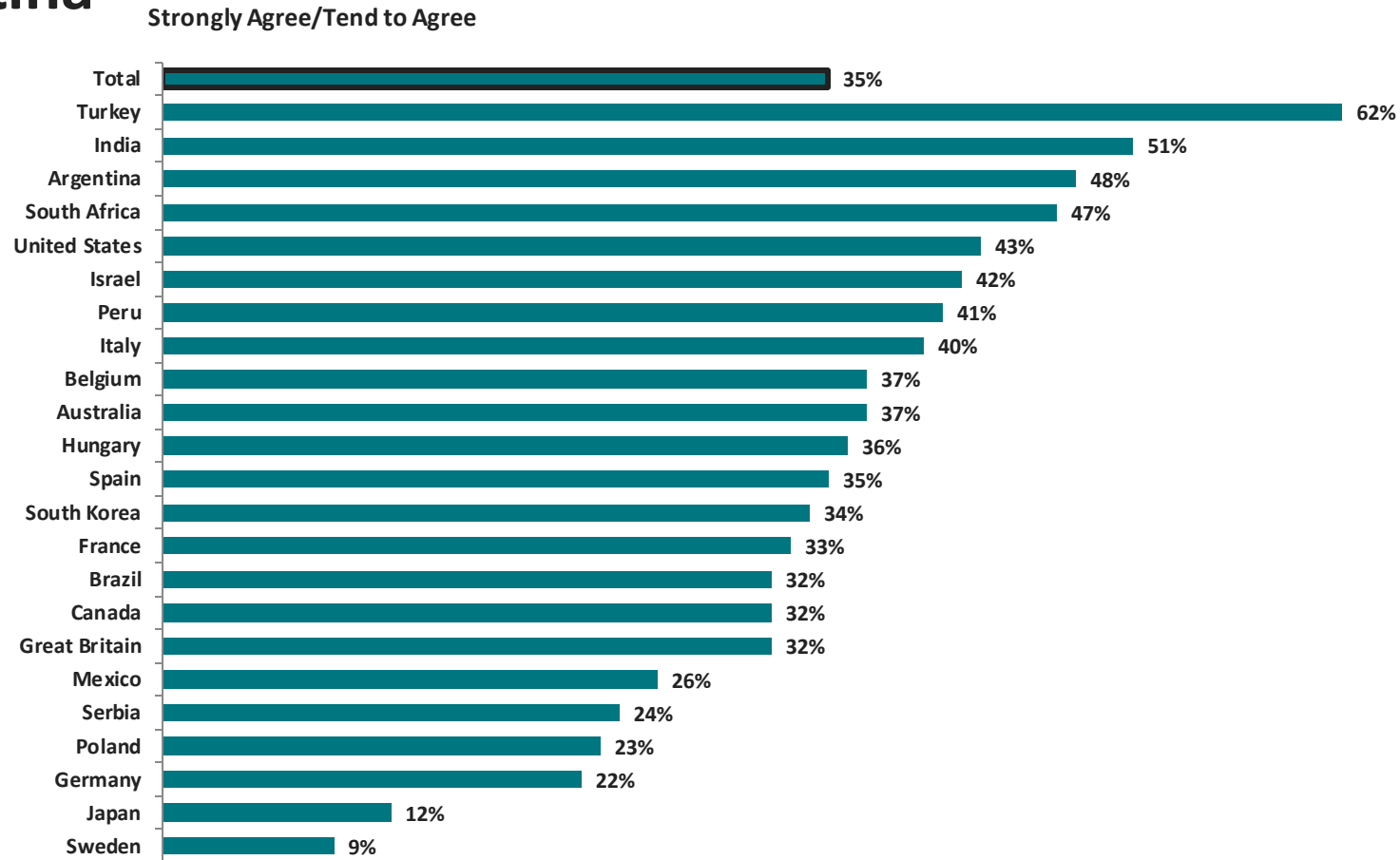
GLOBAL @DVISOR: POWER TO THE PEOPLE?

Europeans tend to be more worried about immigration's impact on social/public services (Turkey most worried overall)



Q9 Immigrants take important social services away from real [nationality]

Concern about immigration's impact on jobs highest in Turkey, India and Argentina

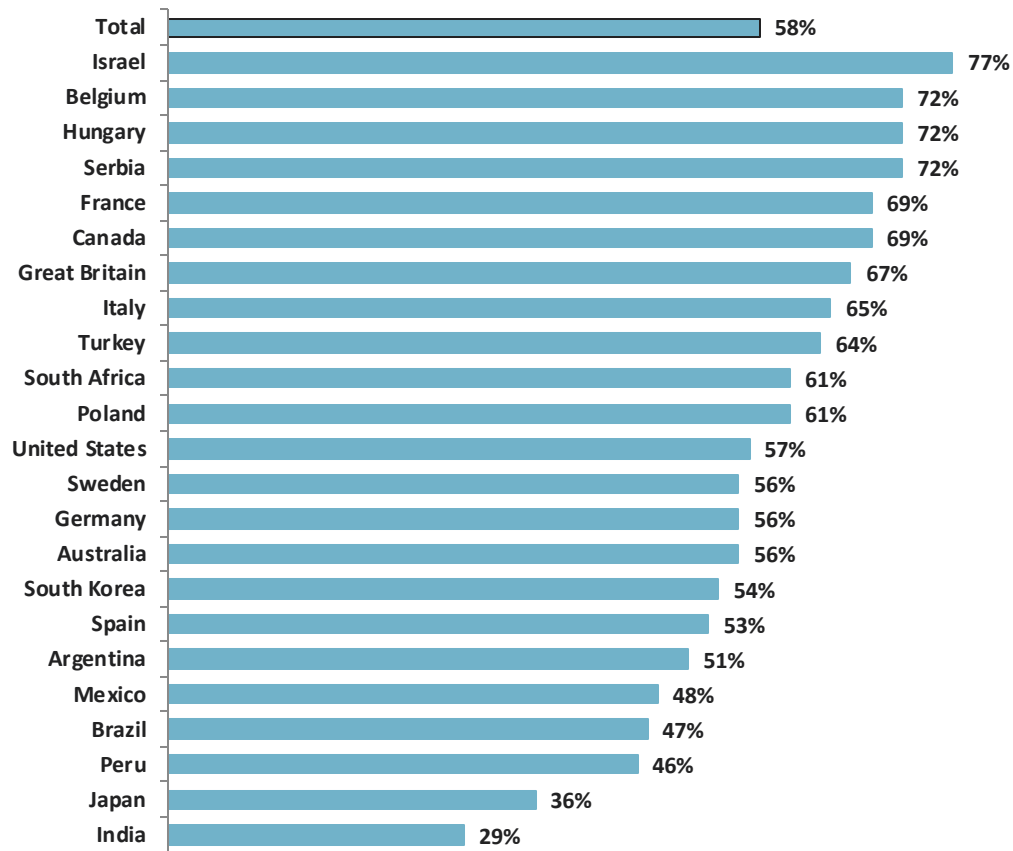


Q9 Immigrants take jobs away from real [nationality]

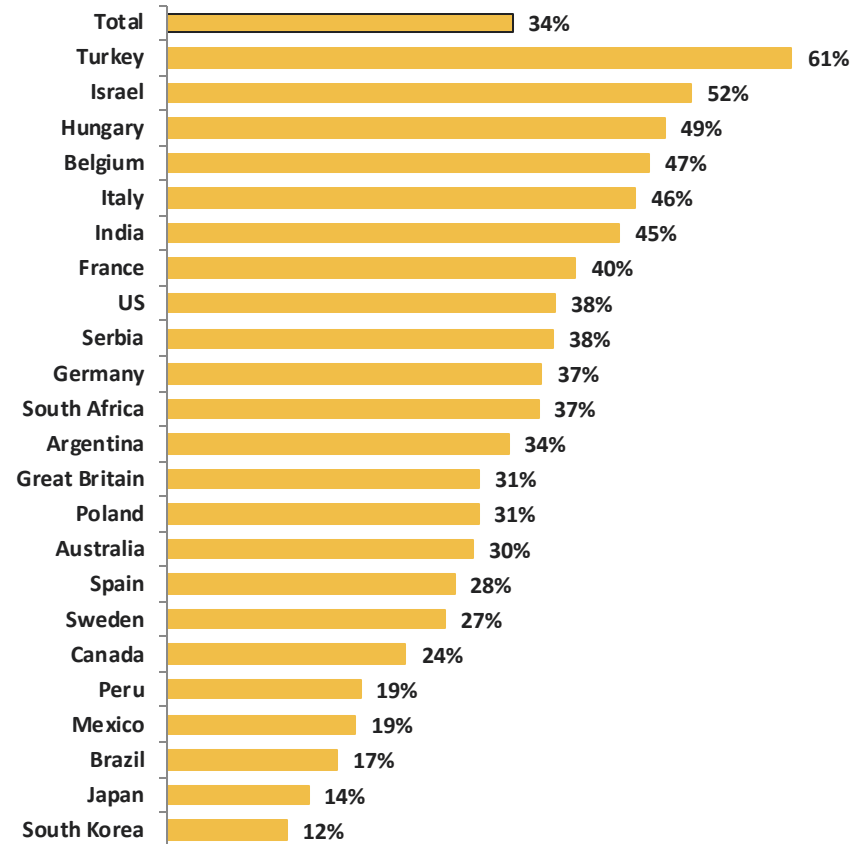
GLOBAL @DVISOR: POWER TO THE PEOPLE?

Most countries are against uncontrolled immigration, but people are split on whether immigration should be stopped – highest in Turkey, Israel, Hungary, Belgium and Italy

Strongly/Somewhat disagree



Strongly/Somewhat agree

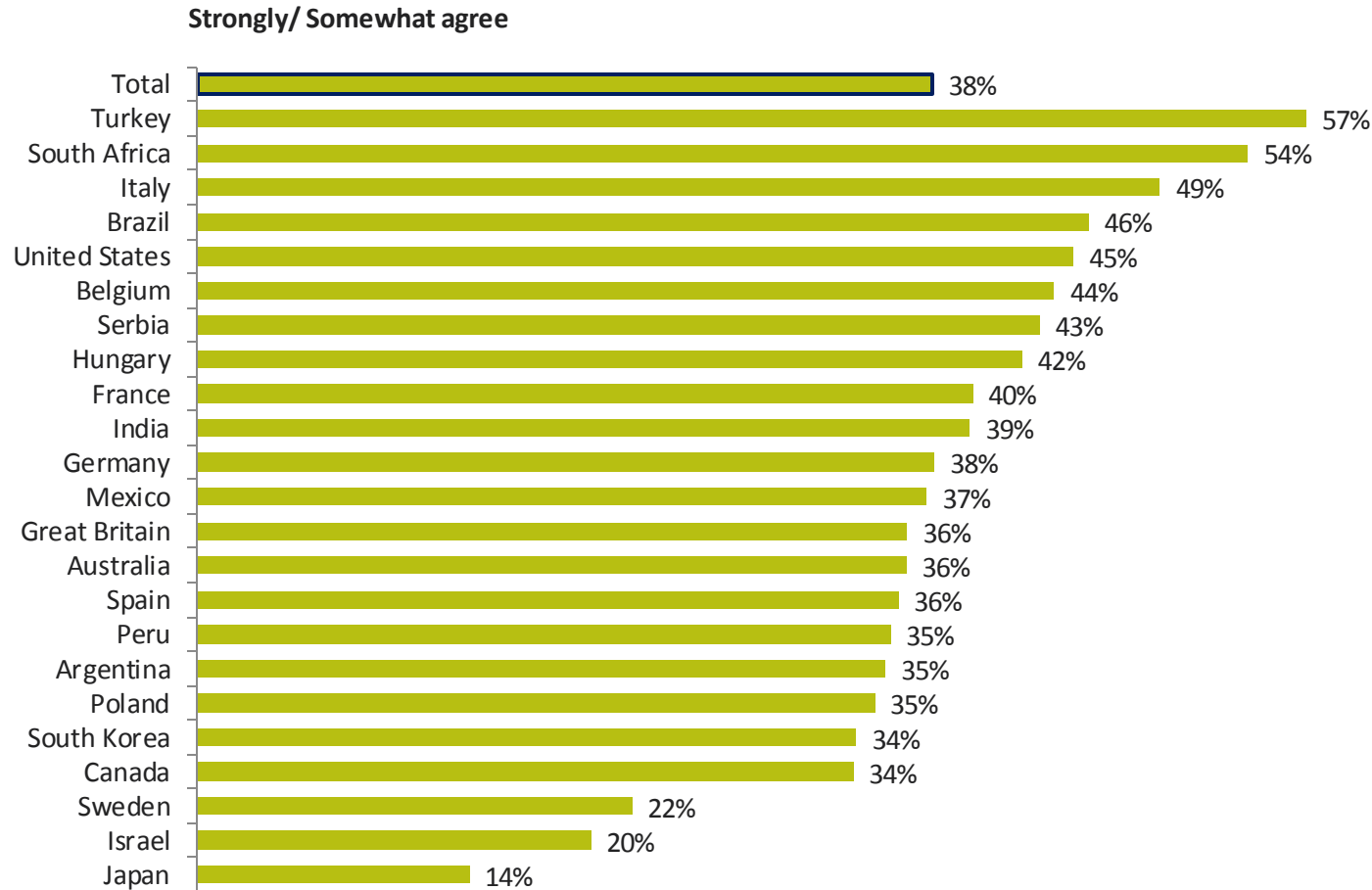


Q9 [Country] would be better off if we let in all immigrants who wanted to come here

Q9 [Country] would be stronger if we stopped immigration

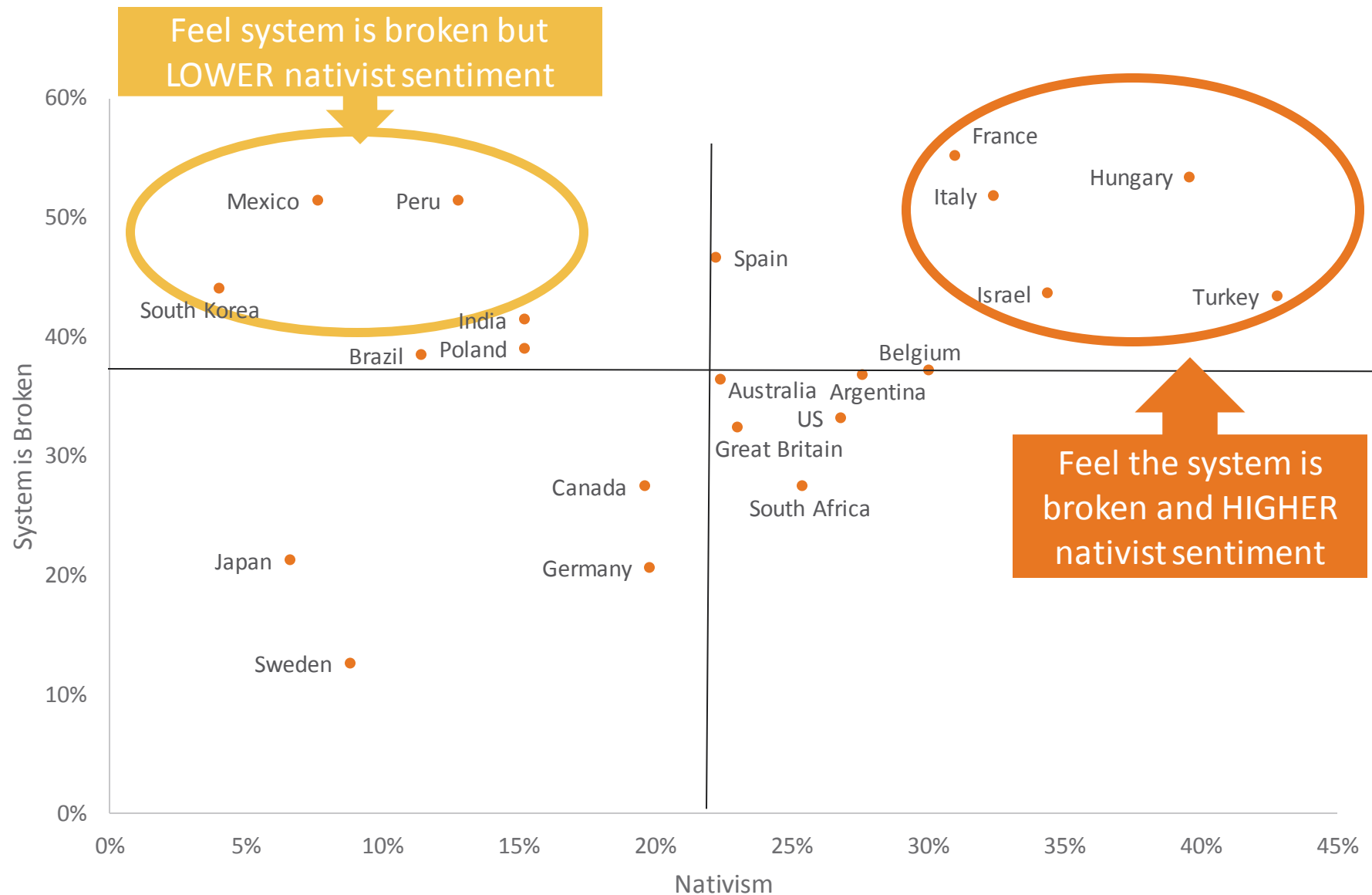
GLOBAL @DVISOR: POWER TO THE PEOPLE?

Overall people are split on whether or not they feel a stranger in their own country. High in Turkey, South Africa and Brazil, and amongst Western countries most prevalent in Italy, Belgium and the US



Q14_1. Do you agree or disagree with the following statements? - These days I feel like a stranger in my own country

Nativism vs. System is Broken: Categorizing Countries





SUPPORT FOR 'POPULIST' MEASURES

GLOBAL @DVISOR: POWER TO THE PEOPLE?

Generally the balance of opinion is in favour of 'populist' measures – though more so for controlling the price of foodstuffs than nationalizing natural resources

The government should control the price of the Basic Foodstuffs (Staples)



[Country] should stop terrorism at all costs even if that means ignoring people's civil liberties



[Country] should prioritize hiring [nationalities] over foreigners even if that means slower job growth



The government should nationalize natural resources even if this means slower job growth



STRONGLY AGREE

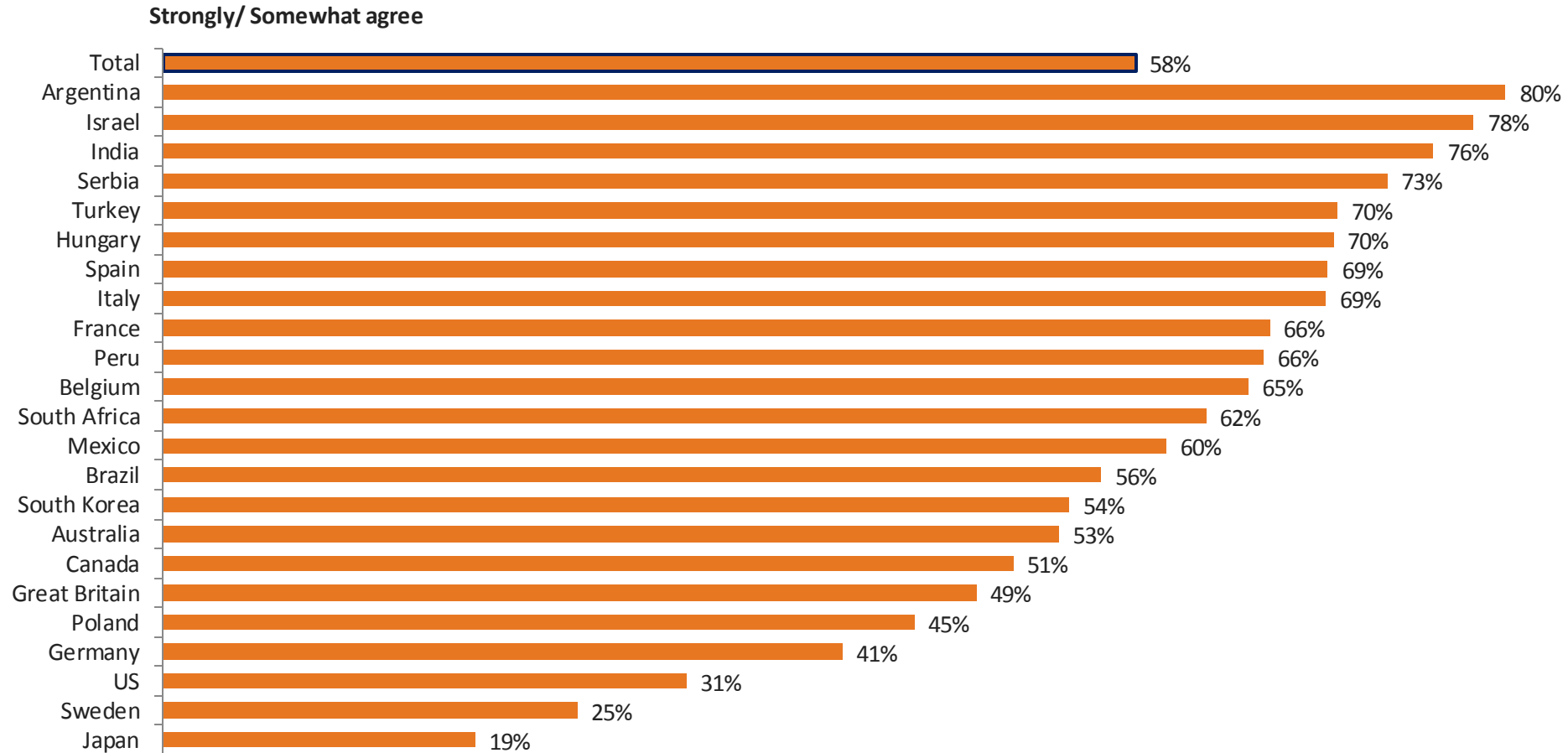
TEND TO AGREE

TEND TO DISAGREE

STRONGLY DISAGREE

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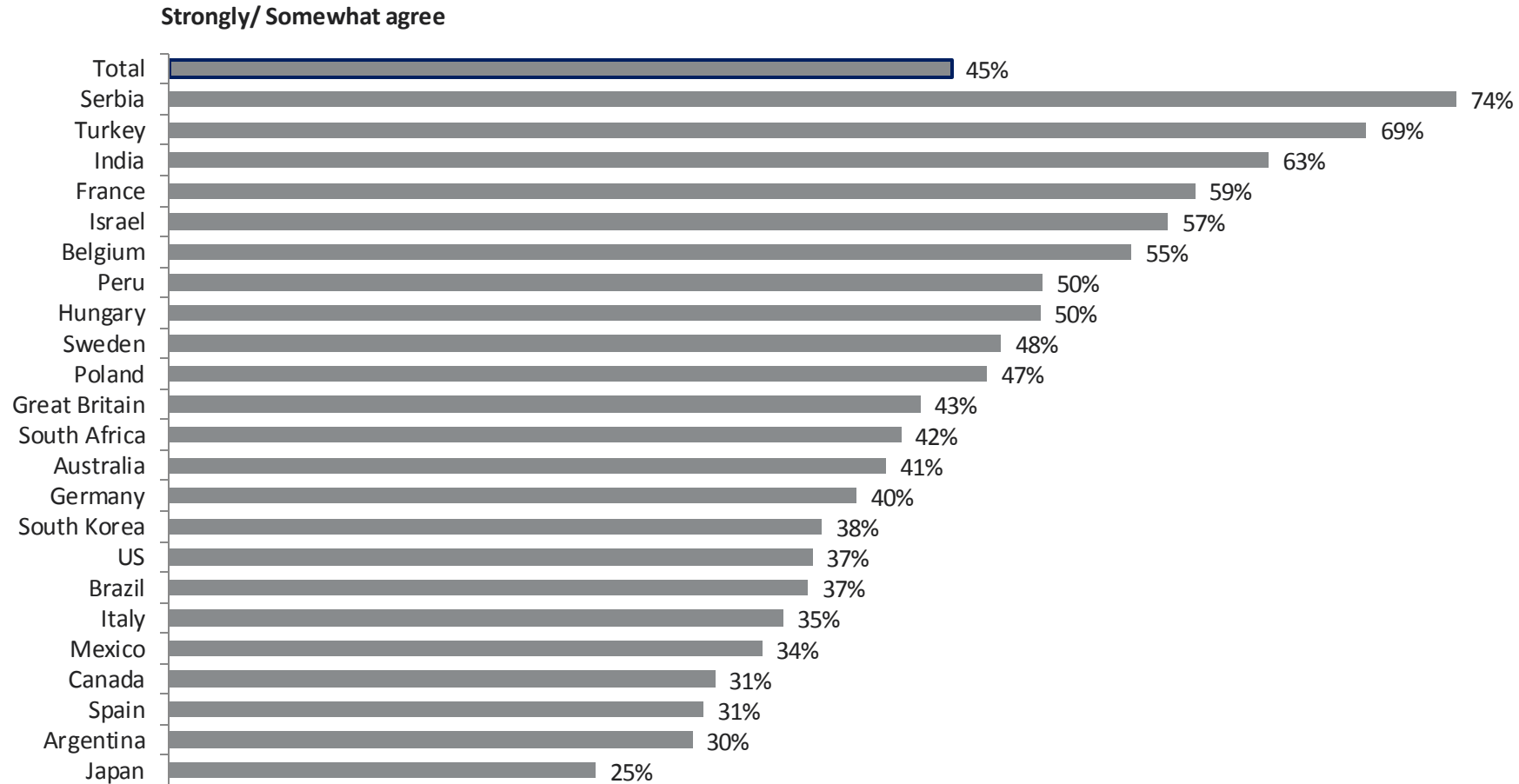
Majority in favour of controlling price of foodstuffs – support tends to be higher in emerging economies, but is also high in France, Israel, Italy and Spain



Q14_2. Do you agree or disagree with the following statements? - The government should control the price of the Basic Foodstuffs (Staples)

GLOBAL @DVISOR: POWER TO THE PEOPLE?

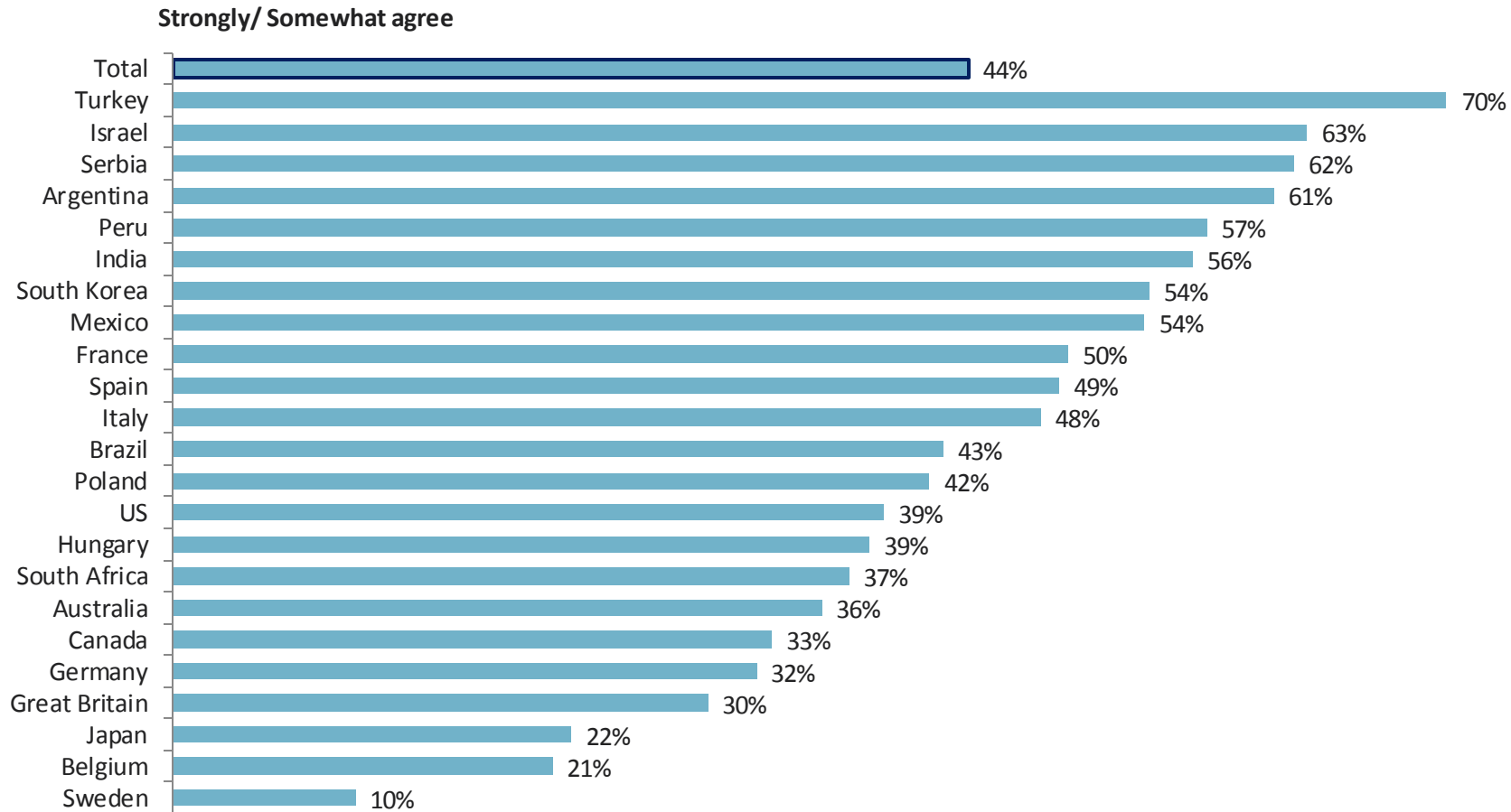
Countries with recent experience of terrorism are likely to prioritise stopping terrorism over protecting civil rights (such as Turkey, France, India, Israel and Belgium), also high in Serbia



Q14_4. Do you agree or disagree with the following statements? - ... should stop terrorism at all costs even if that means ignoring people's civil rights

GLOBAL @DVISOR: POWER TO THE PEOPLE?

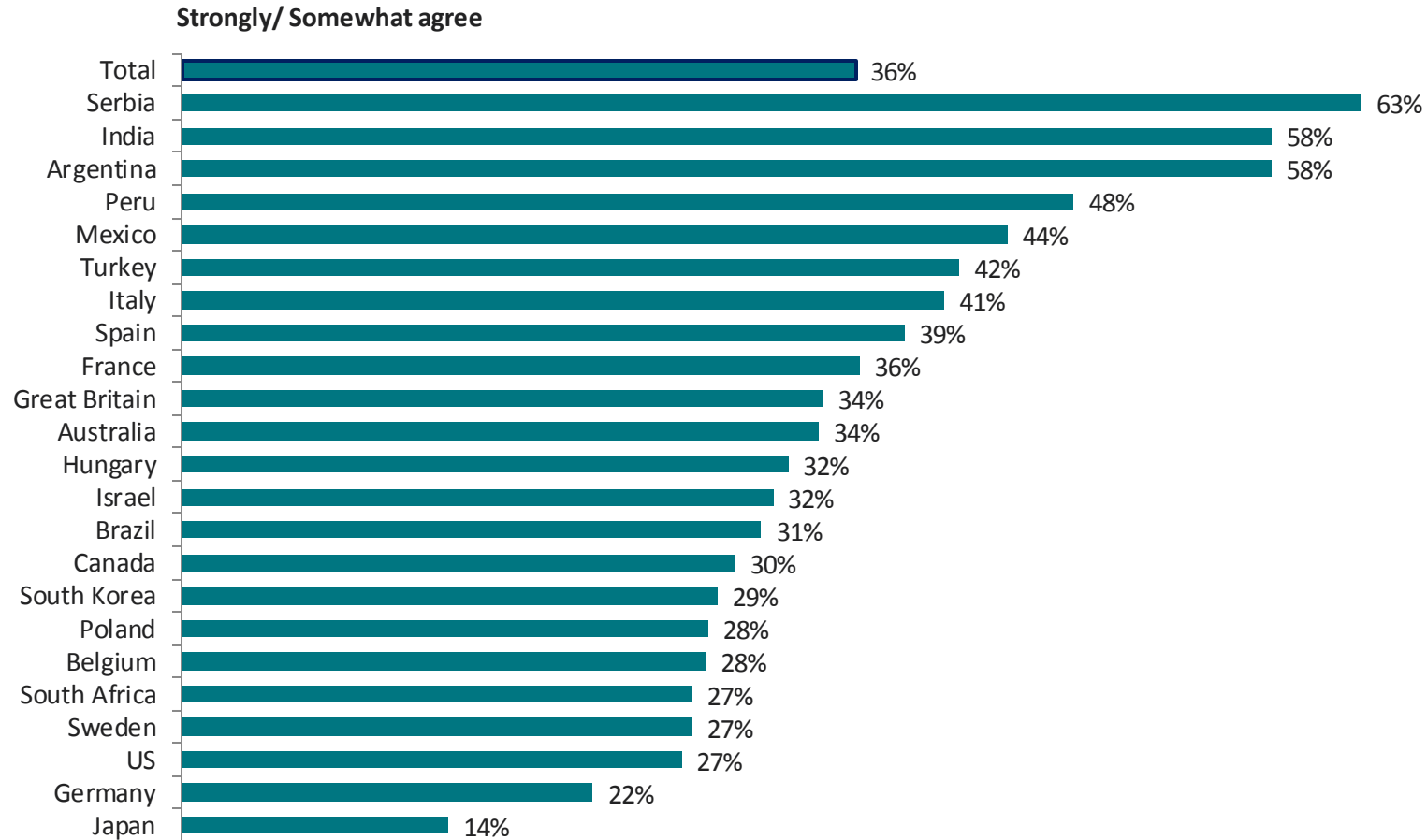
Support for prioritising jobs for national citizens is especially high in Turkey, Israel, Serbia, LATAM, and India



Q14_3. Do you agree or disagree with the following statements? - ... should prioritize hiring [nationalities] over foreigners even if that means slower job growth

GLOBAL @DVISOR: POWER TO THE PEOPLE?

Highest support for nationalising natural resources in emerging economies



Q14_5. Do you agree or disagree with the following statements? - The government should nationalize natural resources even if this means slower job growth



VOTING BEHAVIOUR

GLOBAL @DVISOR: POWER TO THE PEOPLE?

So-called “populist” positions more attractive than unattractive – especially ‘standing up for the common people against the elite’, but also a party that prioritises nationals over immigrants – and radical change more popular than status quo. But a number of ‘pluralist’ positions are just as popular, like listening to alternative points of view/experts, or being prepared to make compromise.

A political party or leader that listens to alternative points of view



A political party or leader that stands up for common people against the elite



A political party or leader that listens to what experts say is best for the country



A political party or leader that is prepared to make compromises



A political party or leader that stands up for the rights of minorities



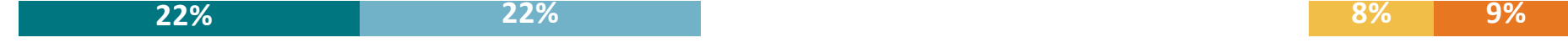
A political party with a leader who says what he/she thinks, even if it offends others



A political party or leader that wants to radically change the status quo



A political party or leader that prioritises people born in [country] over immigrants



A political party or leader that wants to attract more foreign companies and workers to [country]



A political party or leader that has been in power before



Q. Would each of the following make you more or less likely to vote for a political party or leader, or would it make no difference?

MUCH MORE LIKELY

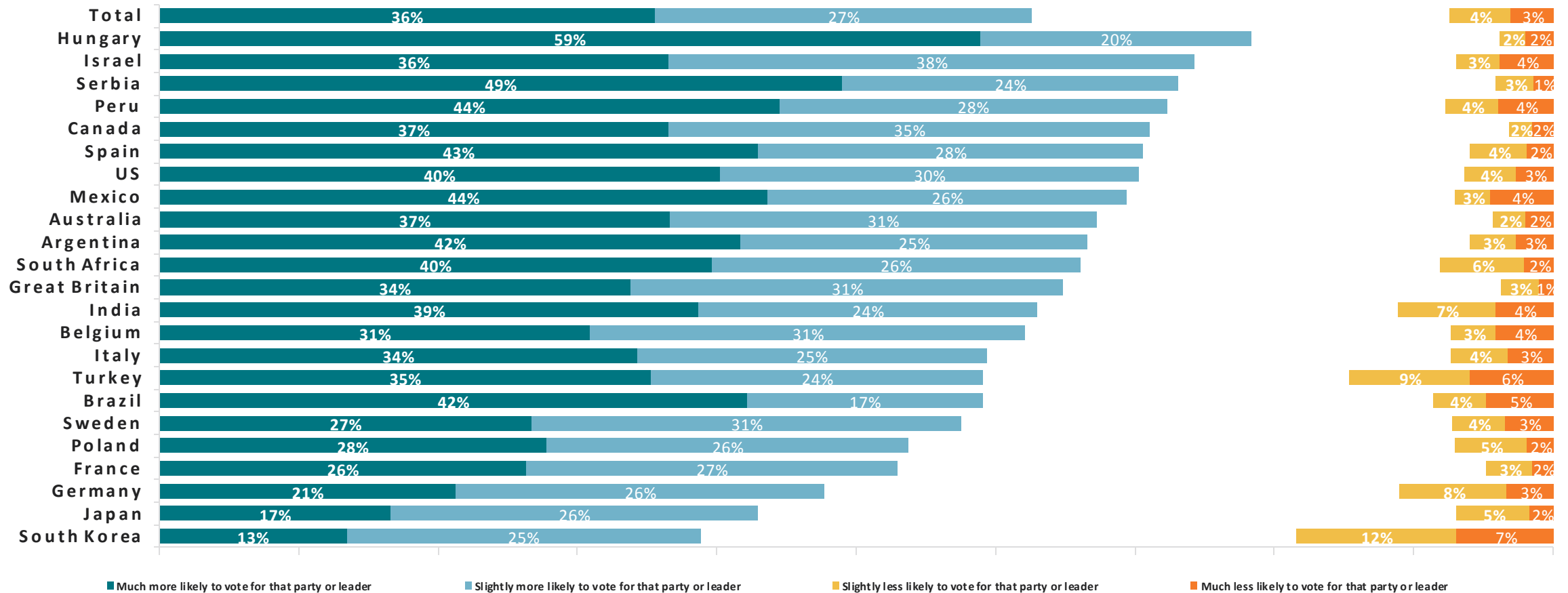
SOMEWHAT MORE LIKELY

SOMEWHAT LESS LIKELY

MUCH LESS LIKELY

GLOBAL @DVISOR: POWER TO THE PEOPLE?

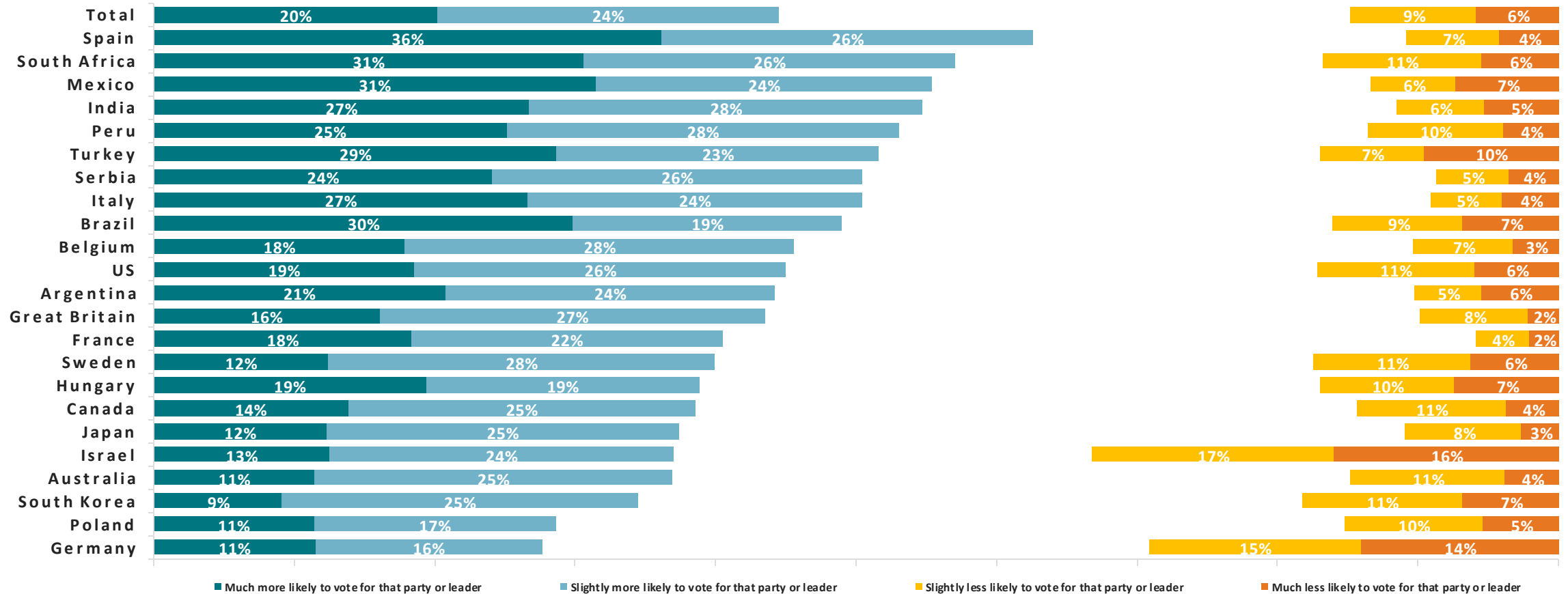
On average a high proportion of people is more likely to vote for a political party or leader that stands up for common people against the elite



Q19_1. I'd now like you to think about what is important and what is not important to you when deciding what party to vote for. Would each of the following make you more or less likely to vote for a political party or leader, or would it make no difference? - A political party or leader that stands up for common people against the elite?

GLOBAL @DVISOR: POWER TO THE PEOPLE?

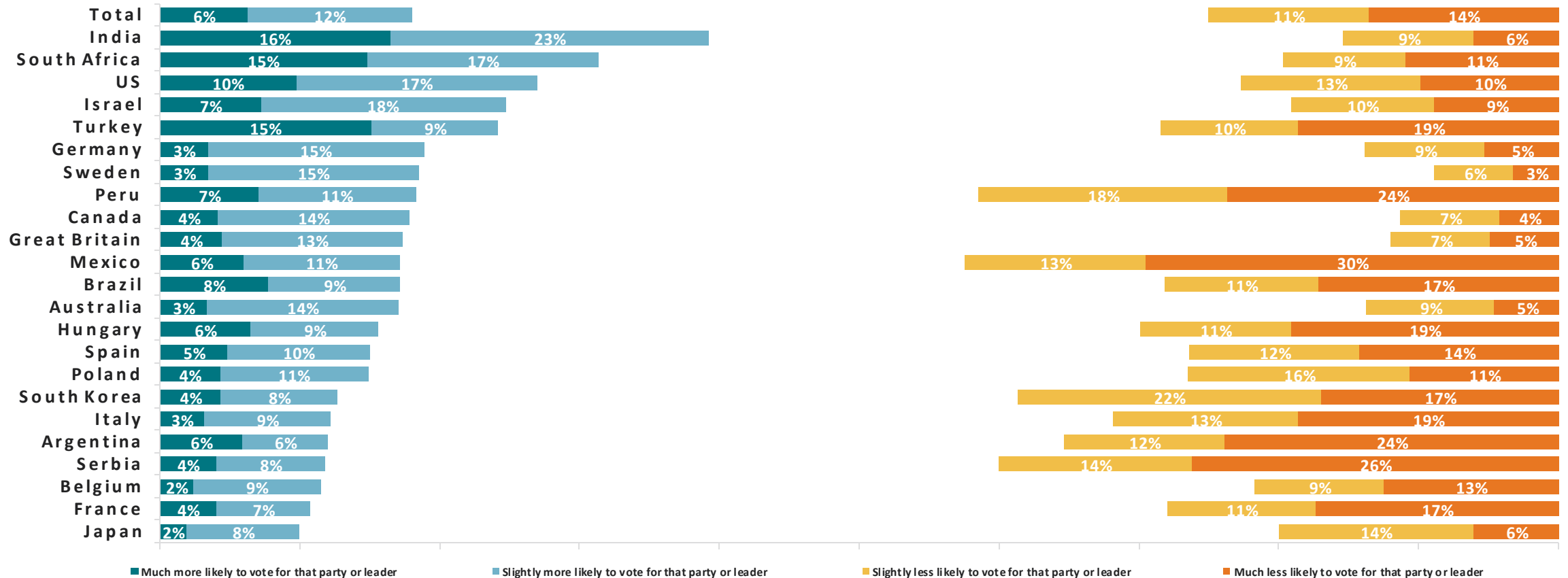
Just under half attracted by radically changing the status quo, especially high in Spain



Q19_2. I'd now like you to think about what is important and what is not important to you when deciding what party to vote for. Would each of the following make you more or less likely to vote for a political party or leader, or would it make no difference? - A political party or leader that wants to radically change the status quo?

GLOBAL @DVISOR: POWER TO THE PEOPLE?

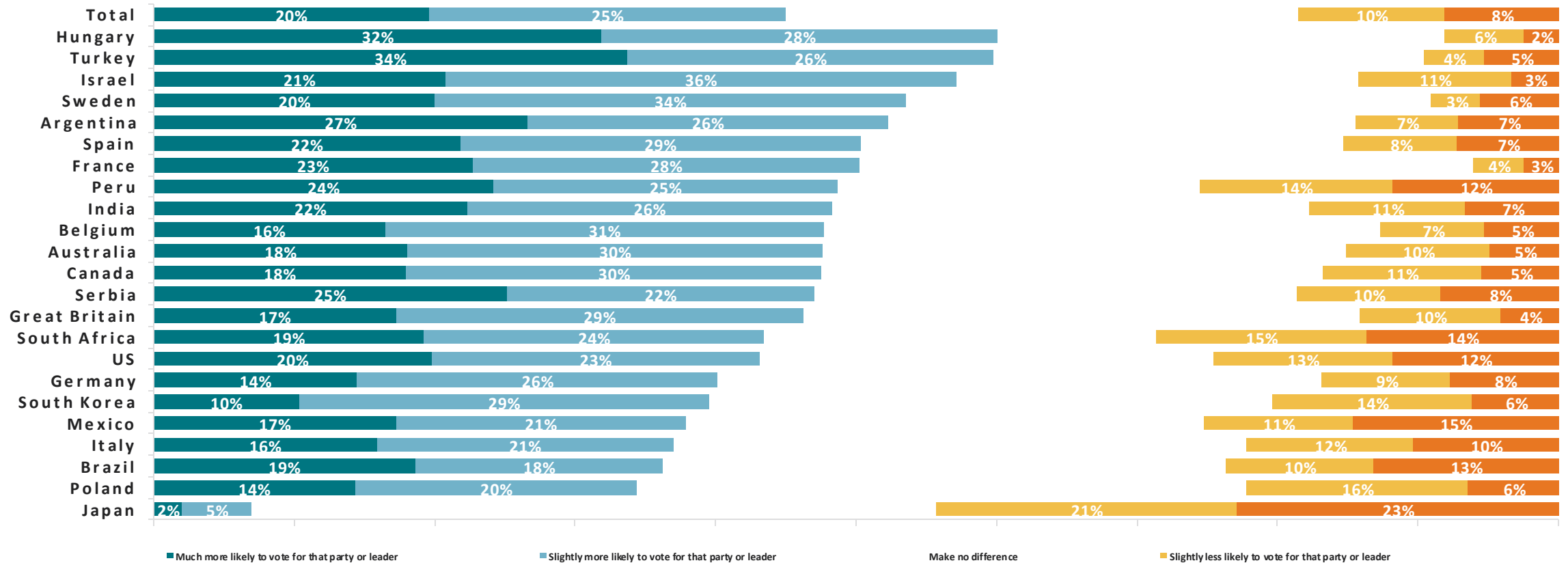
People are likely to say that the fact that a party or leader has been in power before has less influence on their voting behavior – but more of a turn-off in LATAM



Q19_3. I'd now like you to think about what is important and what is not important to you when deciding what party to vote for. Would each of the following make you more or less likely to vote for a political party or leader, or would it make no difference? - A political party or leader that has been in power before

GLOBAL @DVISOR: POWER TO THE PEOPLE?

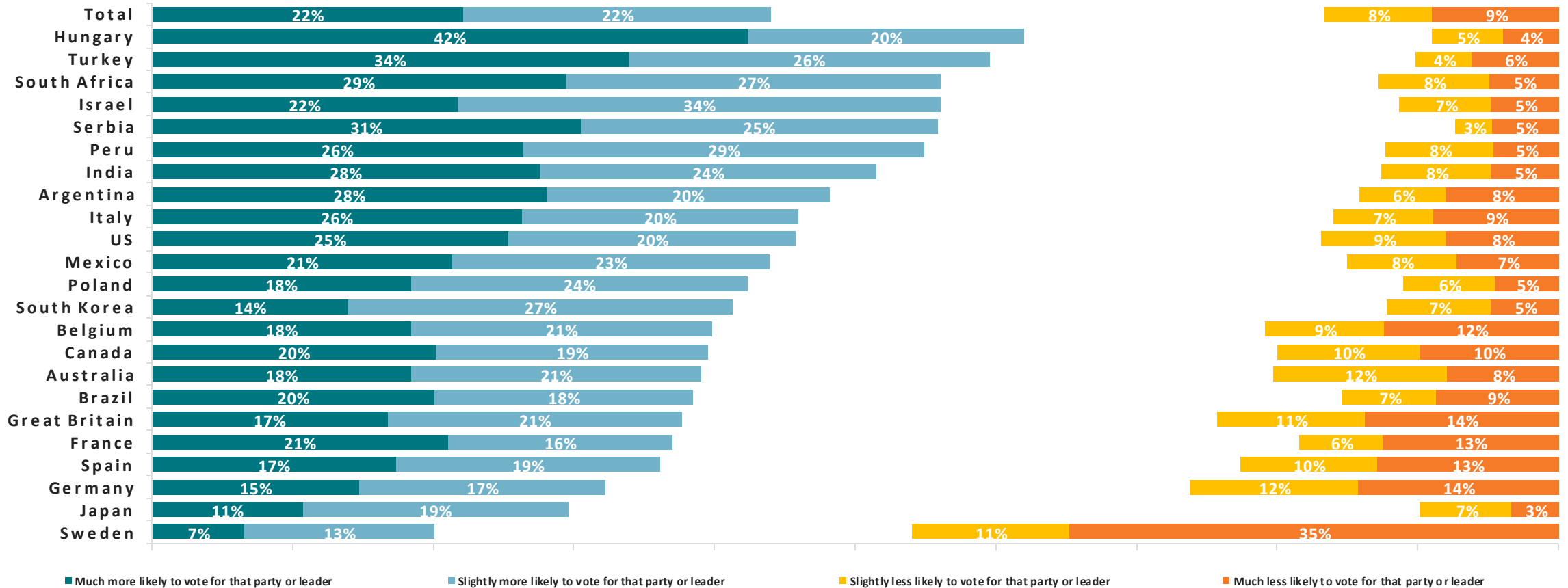
On average close to half of people is more likely to vote for a political leader who says what he/she thinks, even if it offends others – especially Hungary and Turkey



Q19_4. I'd now like you to think about what is important and what is not important to you when deciding what party to vote for. Would each of the following make you more or less likely to vote for a political party or leader, or would it make no difference? - A political party with a leader who says what he/she thinks, even if it offends others

GLOBAL @DVISOR: POWER TO THE PEOPLE?

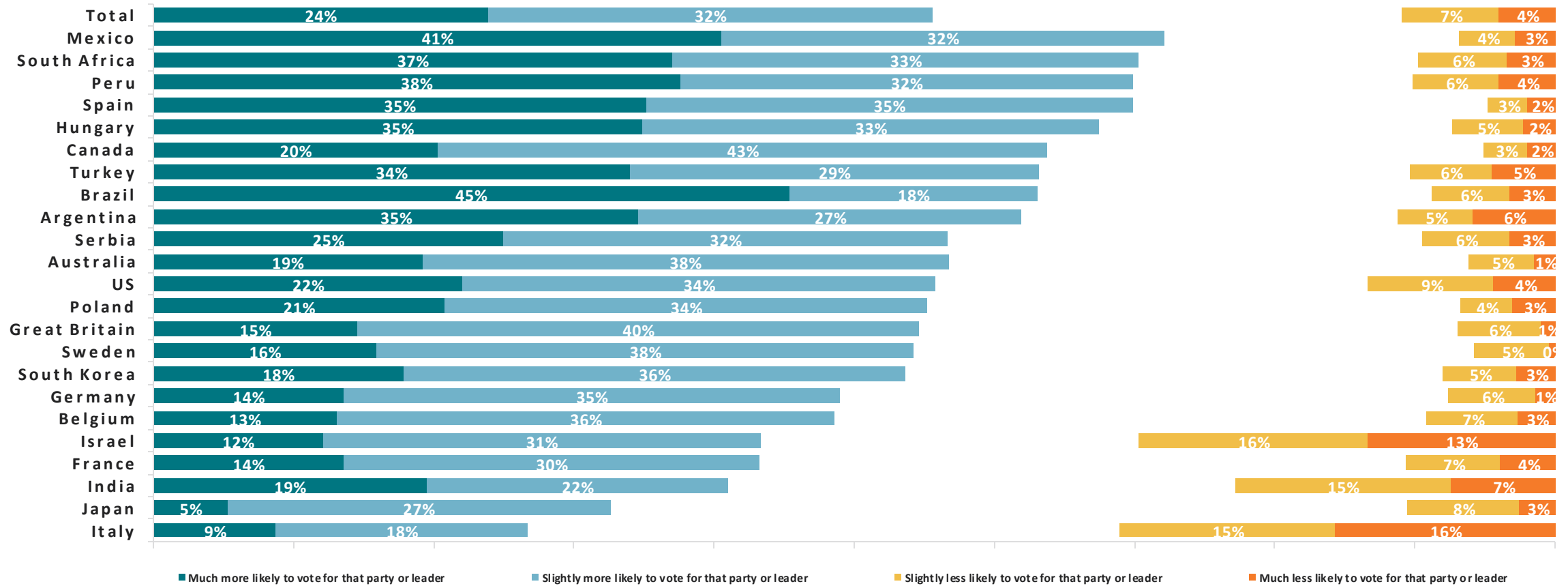
On average just under half attracted by a political party or leader that prioritises people born in own country – again Hungary and Turkey top



Q19_5. I'd now like you to think about what is important and what is not important to you when deciding what party to vote for. Would each of the following make you more or less likely to vote for a political party or leader, or would it make no difference? - A political party or leader that prioritises people born in ... over immigrants

GLOBAL @DVISOR: POWER TO THE PEOPLE?

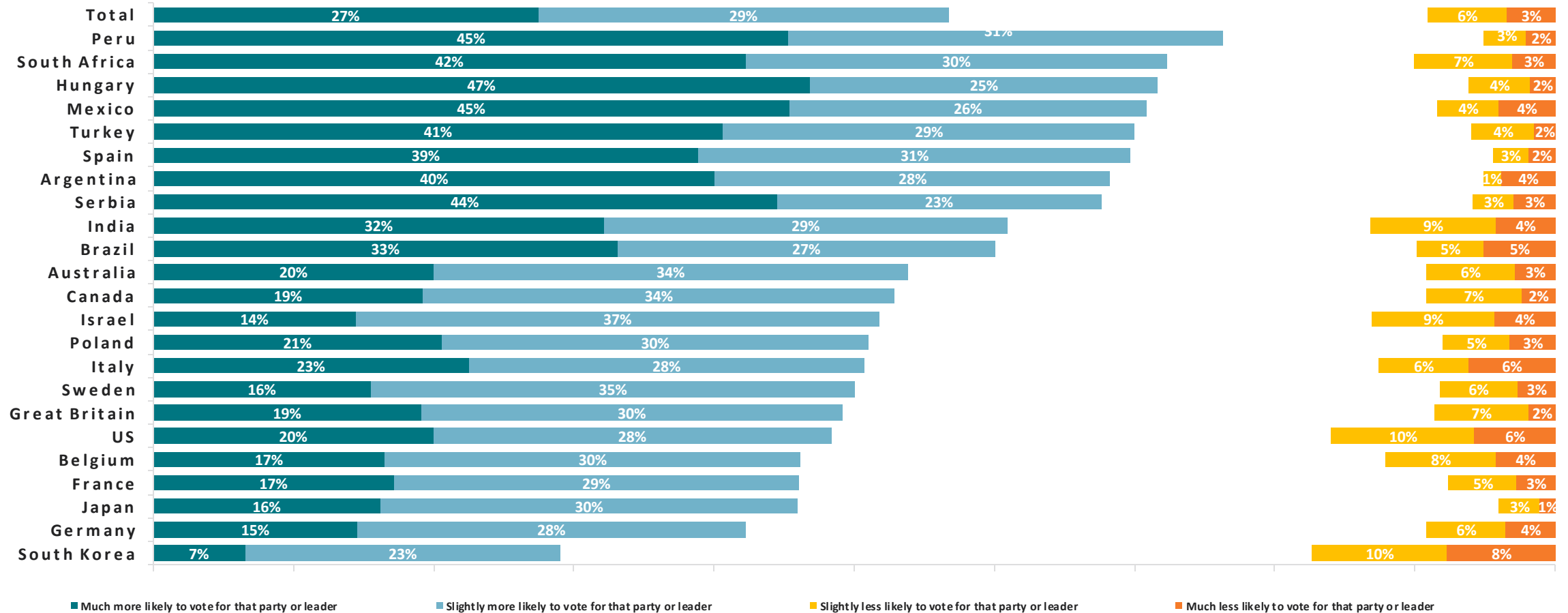
On average people are more likely to vote for a political party or leader that is prepared to make compromises – but less so in Italy and Israel



Q19_6. I'd now like you to think about what is important and what is not important to you when deciding what party to vote for. Would each of the following make you more or less likely to vote for a political party or leader, or would it make no difference? - A political party or leader that is prepared to make compromises

GLOBAL @DVISOR: POWER TO THE PEOPLE?

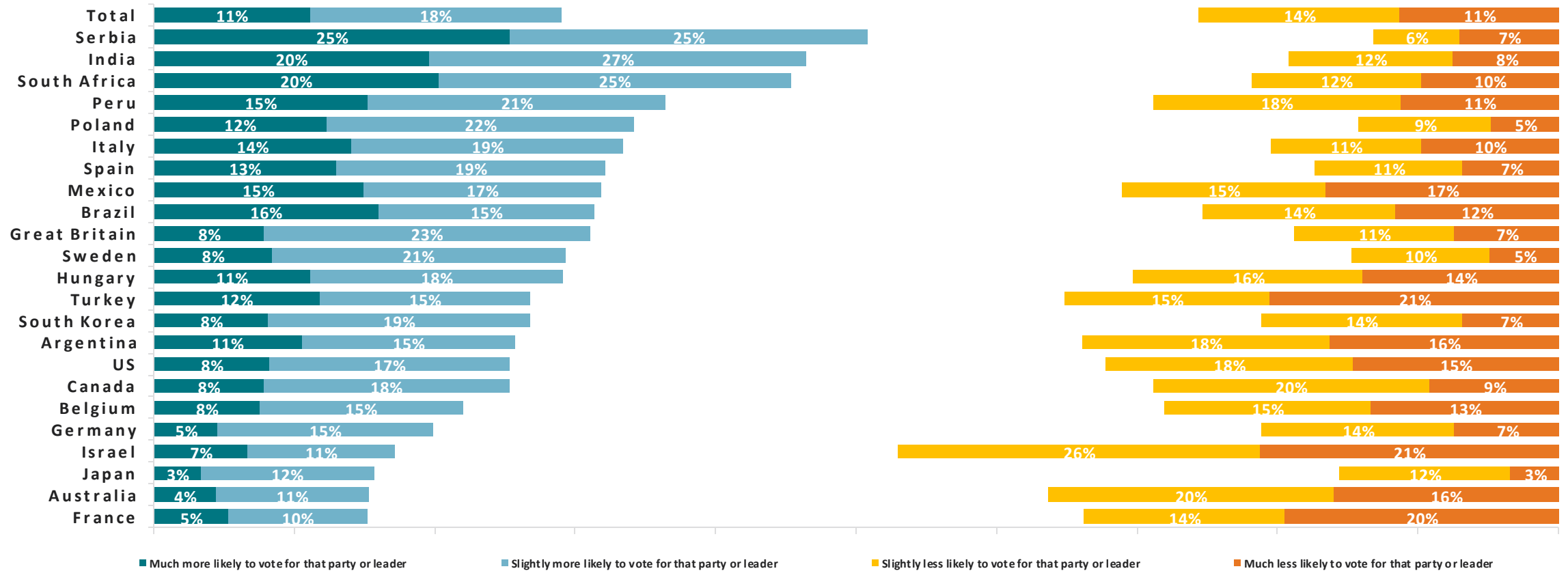
A political party or leader that listens to what experts say is best for the country is more likely to receive support across countries – but less so in richer countries



Q19_7. I'd now like you to think about what is important and what is not important to you when deciding what party to vote for. Would each of the following make you more or less likely to vote for a political party or leader, or would it make no difference? - A political party or leader that listens to what experts say is best for the country

GLOBAL @DVISOR: POWER TO THE PEOPLE?

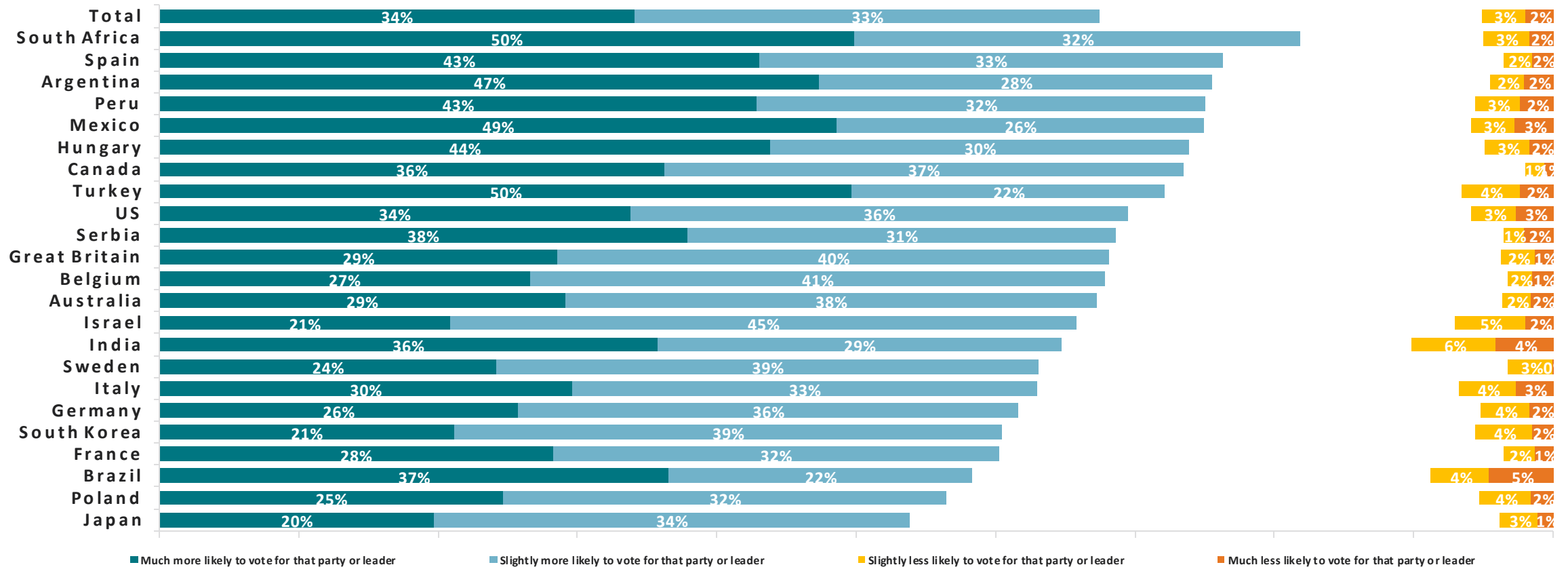
A political party or leader that wants to attract more foreign companies and workers to the country would divide support



Q19_8. I'd now like you to think about what is important and what is not important to you when deciding what party to vote for. Would each of the following make you more or less likely to vote for a political party or leader, or would it make no difference? - A political party or leader that wants to attract more foreign companies and workers to [country]

GLOBAL @DVISOR: POWER TO THE PEOPLE?

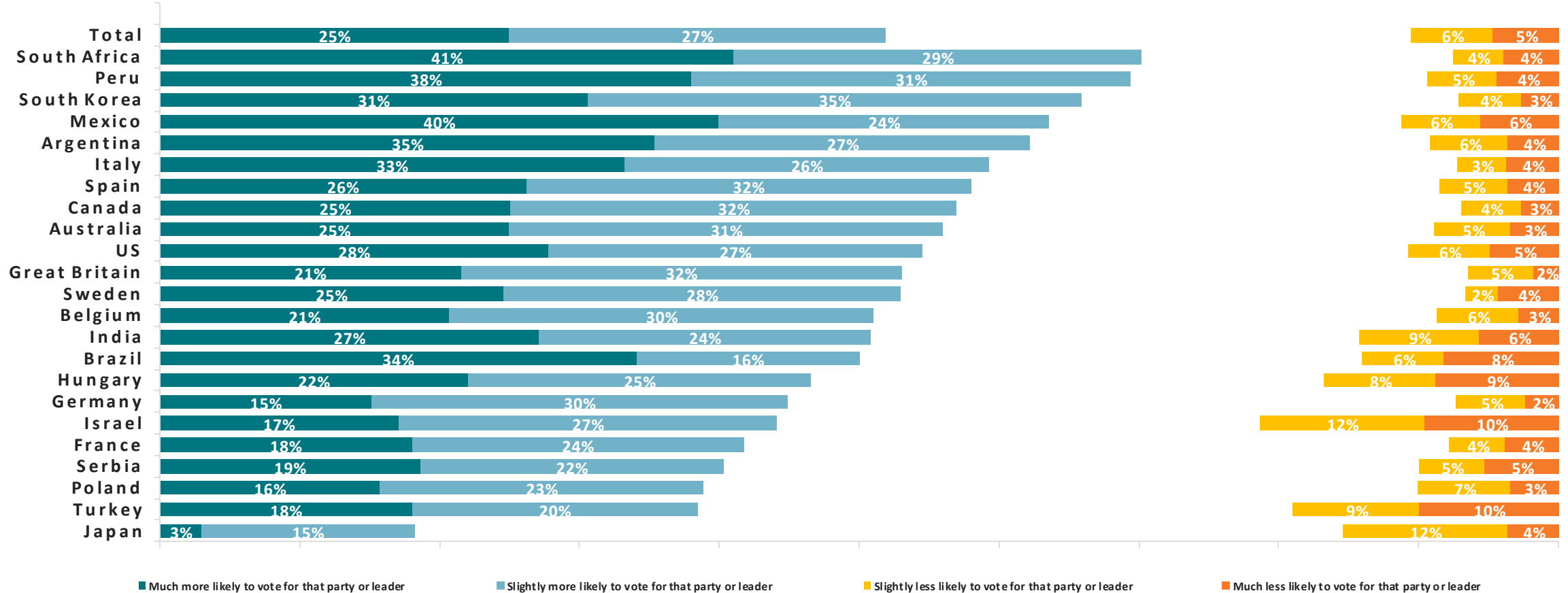
Across countries, people are more likely to vote for a political party or leader that listens to alternative points of view



Q19_9. I'd now like you to think about what is important and what is not important to you when deciding what party to vote for. Would each of the following make you more or less likely to vote for a political party or leader, or would it make no difference? - A political party or leader that listens to alternative points of view

GLOBAL @DVISOR: POWER TO THE PEOPLE?

On balance people are more likely to vote for a political party or leader that stands up for the rights of minorities



Q19_10. I'd now like you to think about what is important and what is not important to you when deciding what party to vote for. Would each of the following make you more or less likely to vote for a political party or leader, or would it make no difference? - A political party or leader that stands up for the rights of minorities



PART 1: IS THE SYSTEM BROKEN?

(PREVIOUSLY RELEASED)

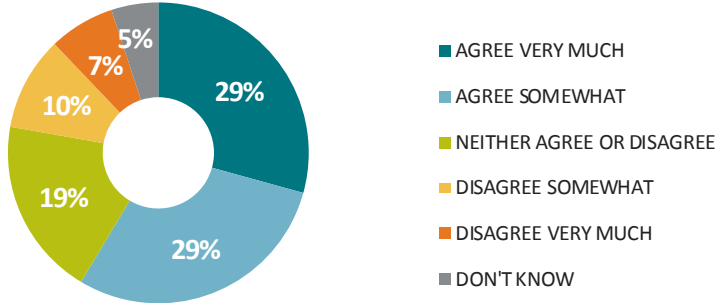


COUNTRY IN DECLINE

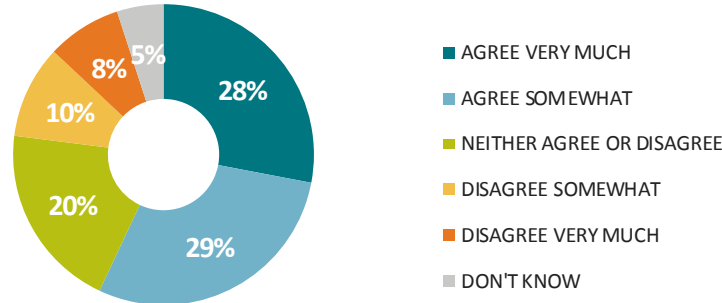
GLOBAL @DVISOR: POWER TO THE PEOPLE?

Overall, there is a sense that society is broken and that their country is in decline (though people tend to be optimistic that this is recoverable). People are also on balance likely to feel that their generation has had a worse life than their parents and are even more pessimistic for the future prospects for today's youth.

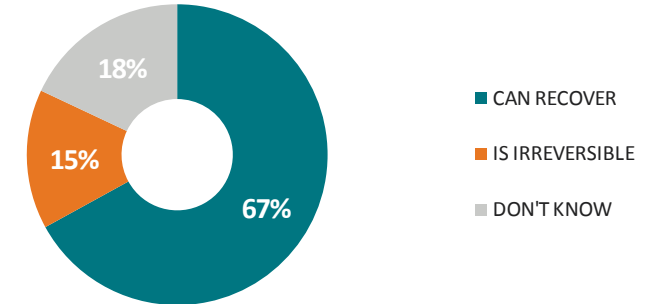
"...society is broken"



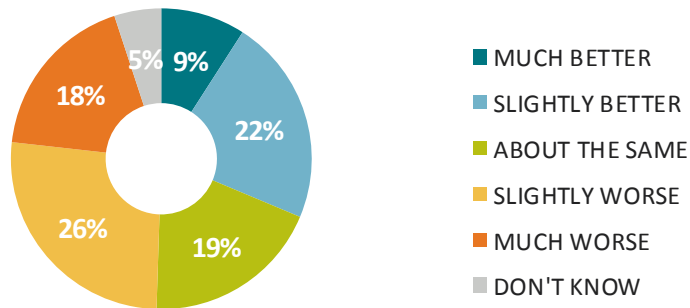
"...is in decline"



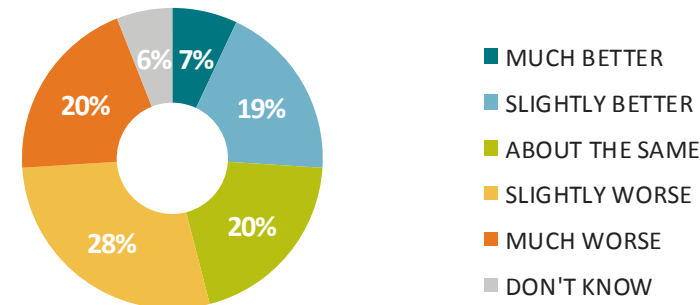
*"Do you think [country] can recover from its decline or is it irreversible"**



"To what extent, if at all, do you feel that your generation will have had a better or worse life than your parents' generation, or will it have been the same?"

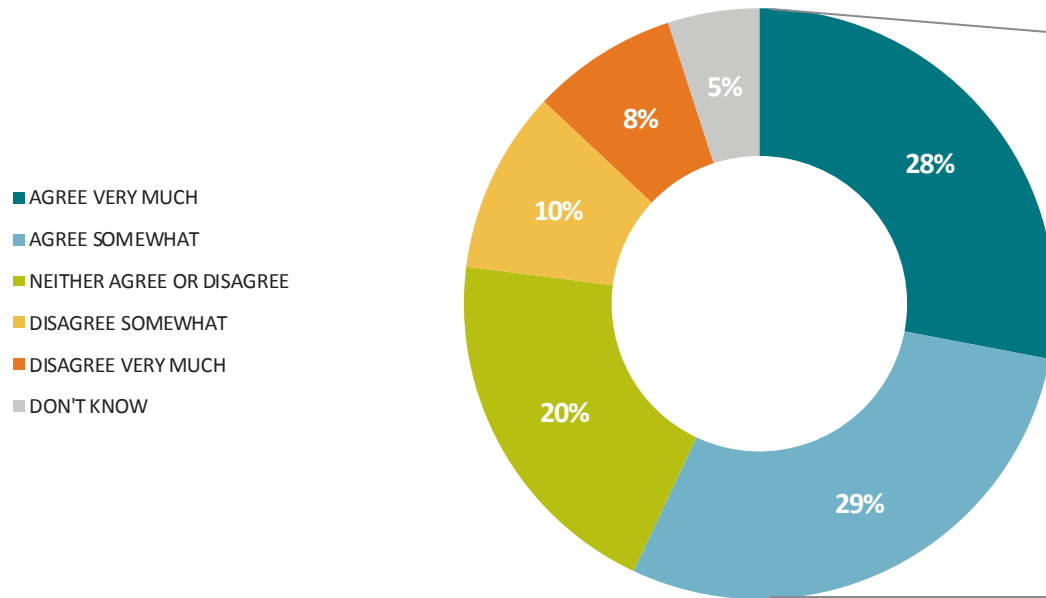


"And to what extent, if at all, do you feel that today's youth will have had a better or worse life than their parents' generation, or will it have been about the same?"

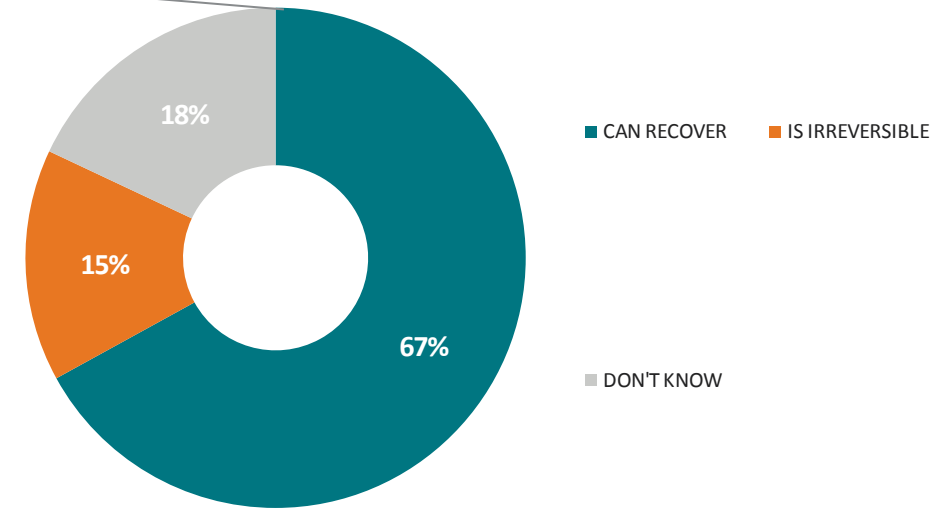


Over half think their country is in decline (although not yet irreversible)

"...is in decline"



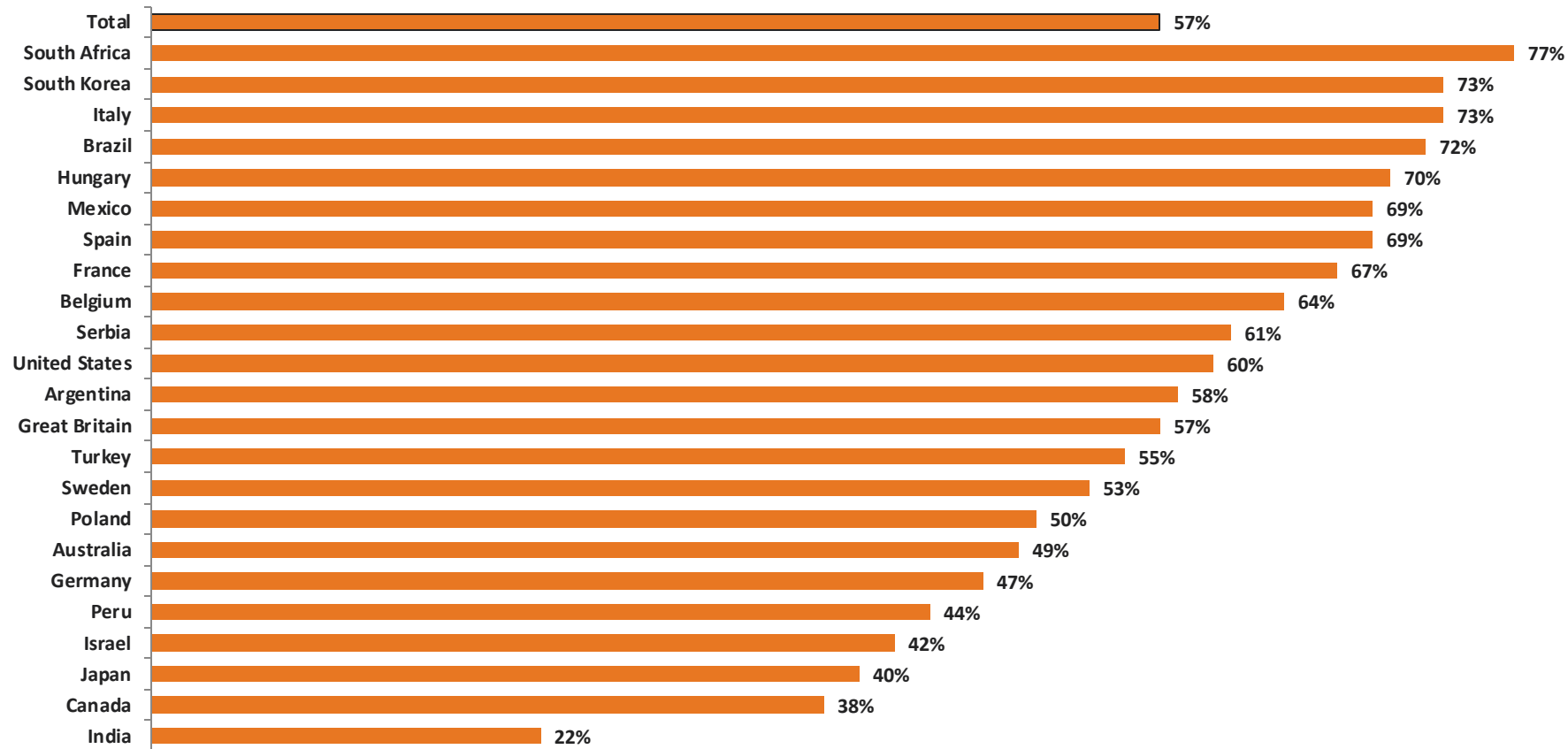
*"Do you think [country] can recover from its decline or is it irreversible"**



GLOBAL @DVISOR: POWER TO THE PEOPLE?

Majority in 14 nations think their country is in decline – especially South Africa, South Korea, Italy and Brazil....

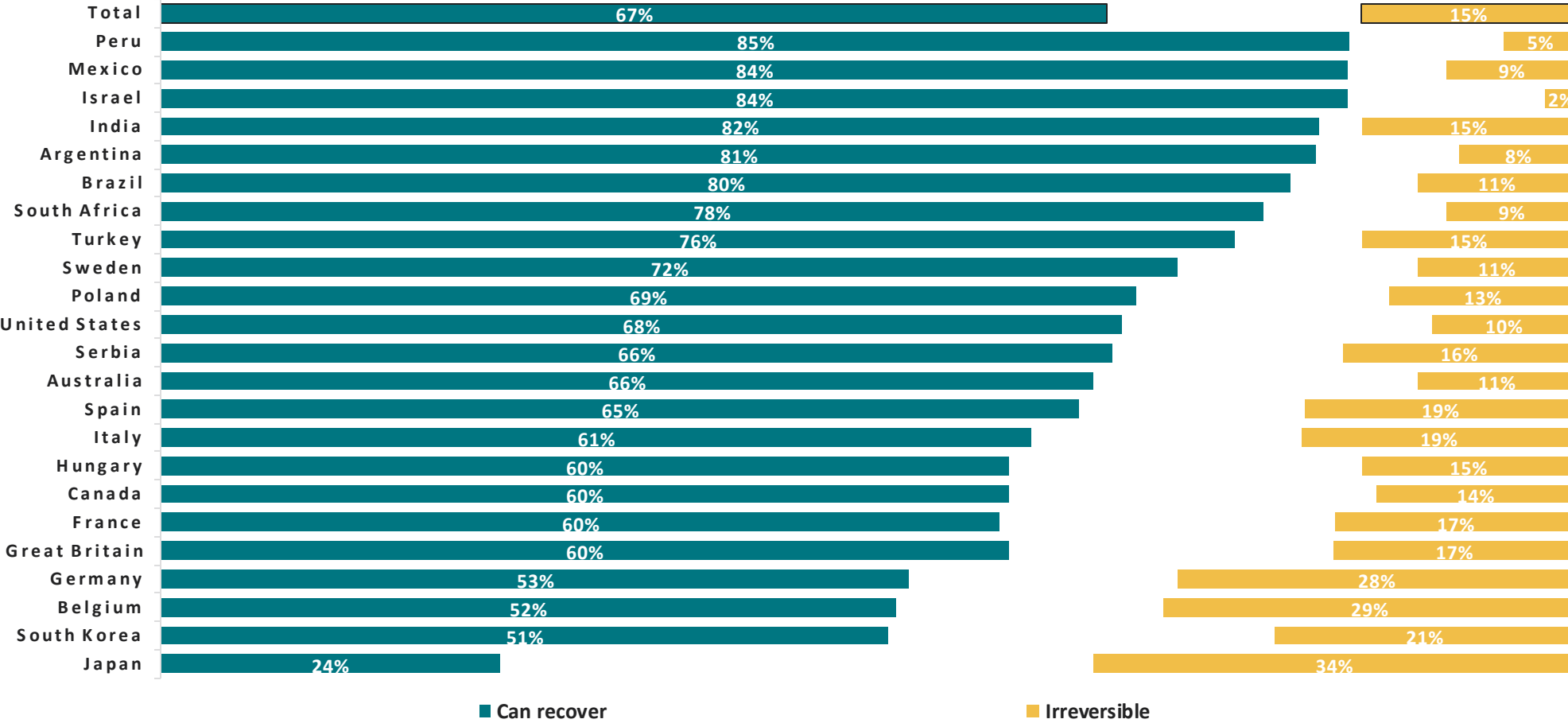
Strongly Agree/Tend to Agree



Q5 To what extent, if at all, do you agree or disagree with the following statements – “Your country is in decline”

GLOBAL @DVISOR: POWER TO THE PEOPLE?

...But are optimistic that it can recover (although less so in Japan, Belgium and Germany)

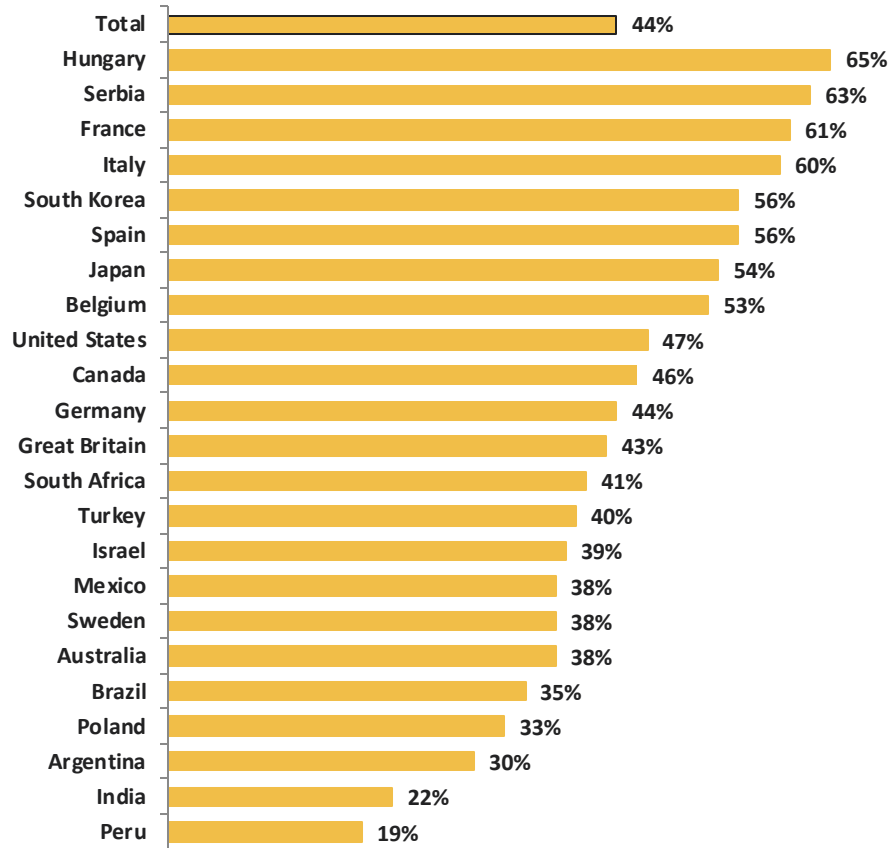


Q6 And do you think [country] can recover from its decline or is it irreversible ?

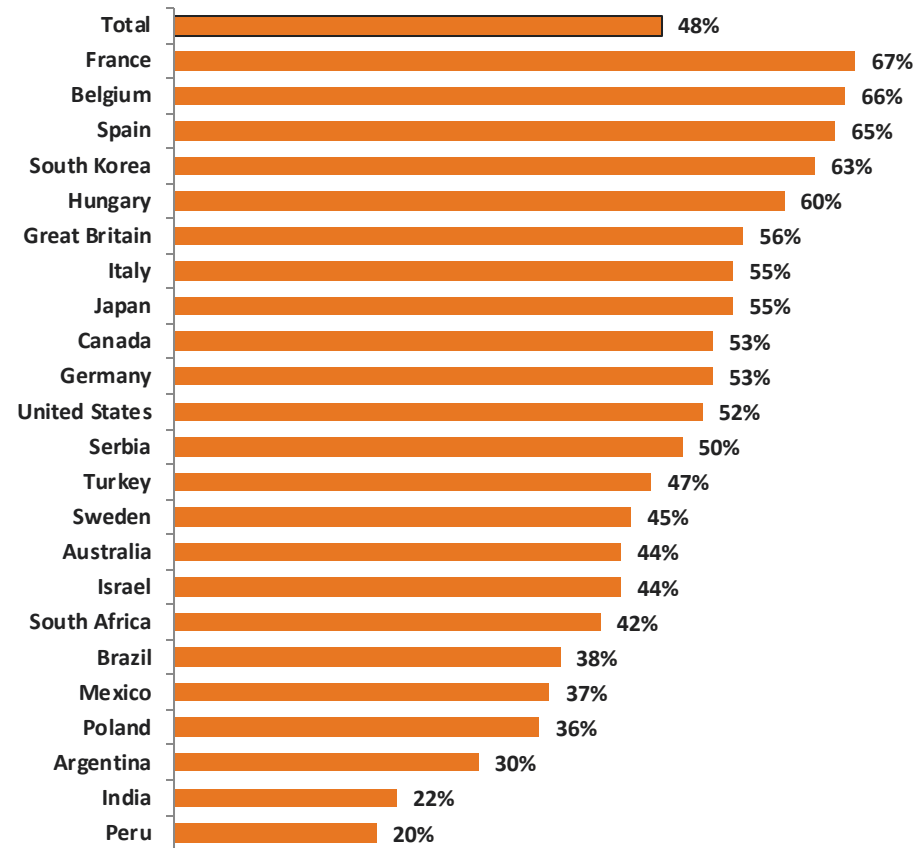
GLOBAL @DVISOR: POWER TO THE PEOPLE?

And there is significant pessimism for current and future generations in France, Belgium, Hungary, South Korea, Italy and Spain

Slightly/Much worse



Slightly/Much worse



Q7 To what extent, if at all, do you feel that your generation will have had a better or worse life than your parents' generation, or will it have been the same?

Q8 And to what extent, if at all, do you feel that today's youth will have had a better or worse life than their parents' generation, or will it have been about the same?



SYSTEM IS BROKEN

GLOBAL @DVISOR: POWER TO THE PEOPLE?

Strong feeling in many countries that the people in charge don't care about 'people like me', and instead favour rich and powerful.

The [country's] economy is rigged to advantage the rich and powerful



[Country] needs a strong leader to take the country back from the rich and powerful



Traditional parties and politicians don't care about people like me



Politicians should be able to say what's on their minds regardless of what anyone else thinks about their views



Experts in this country don't understand the lives of people like me



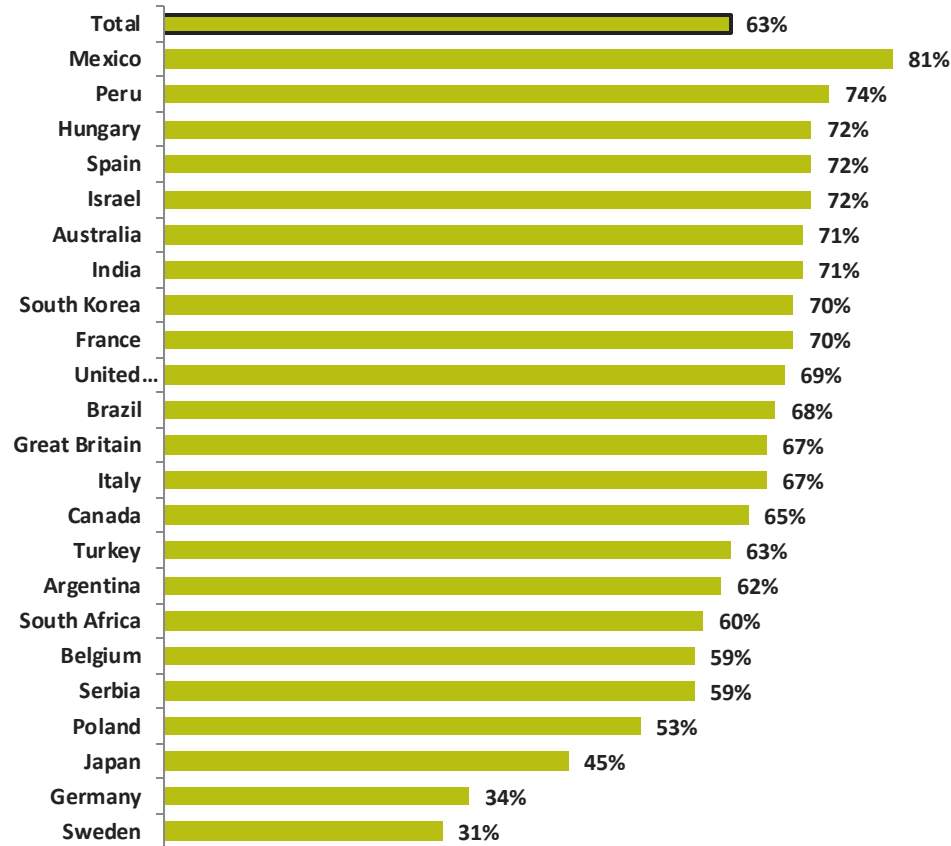
To fix [country], we need a strong leader willing to break the rules



GLOBAL @DVISOR: POWER TO THE PEOPLE?

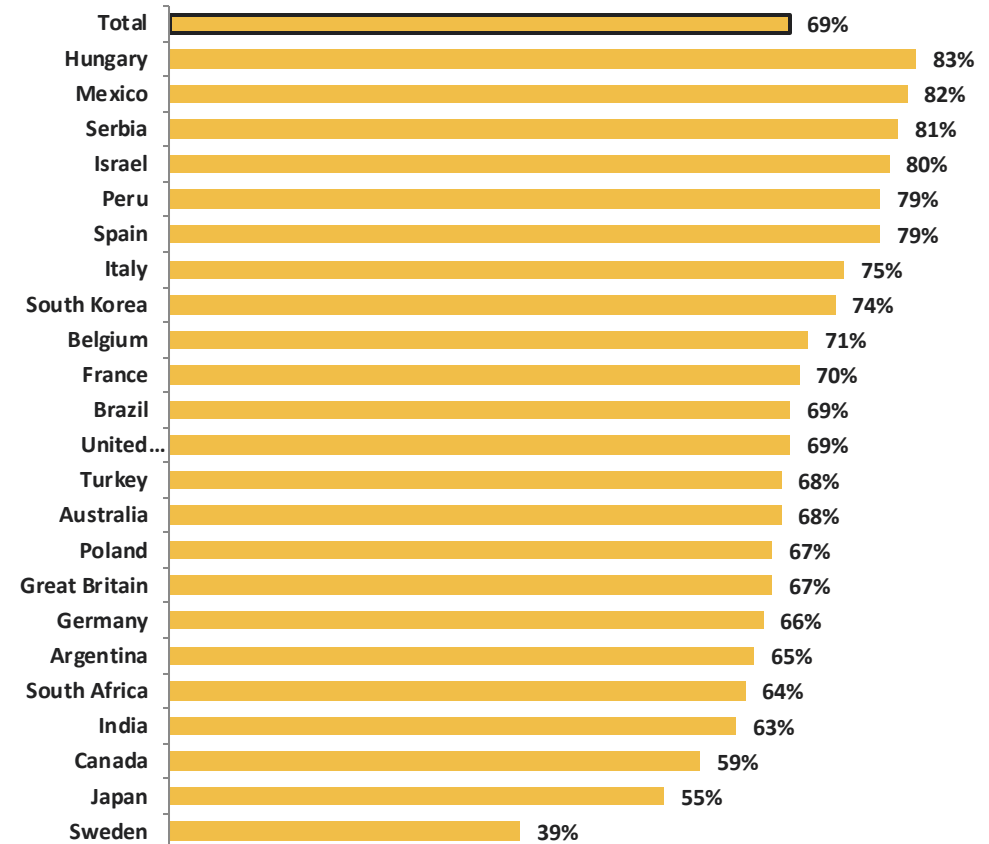
Most feel the system favours the rich and powerful – especially Mexico, Peru, Hungary, Israel and Spain

Strongly Agree/Tend to Agree



Q10 [Country] needs a strong leader to take the country back from the rich and powerful

Strongly Agree/Tend to Agree

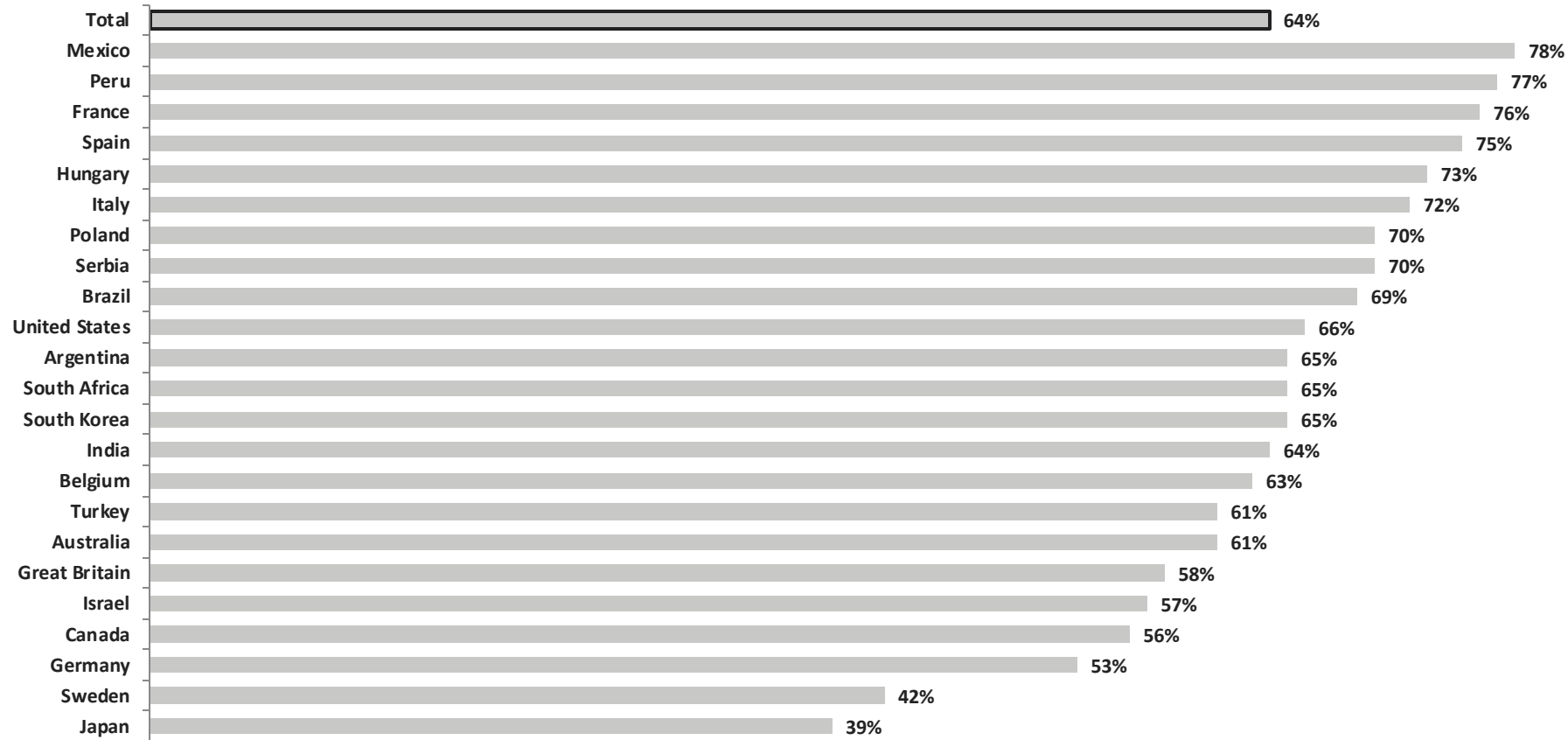


Q10 The [country's] economy is rigged to advantage the rich and powerful

GLOBAL @DVISOR: POWER TO THE PEOPLE?

Most people feel politicians don't care about them, especially parts of LATAM and continental Europe

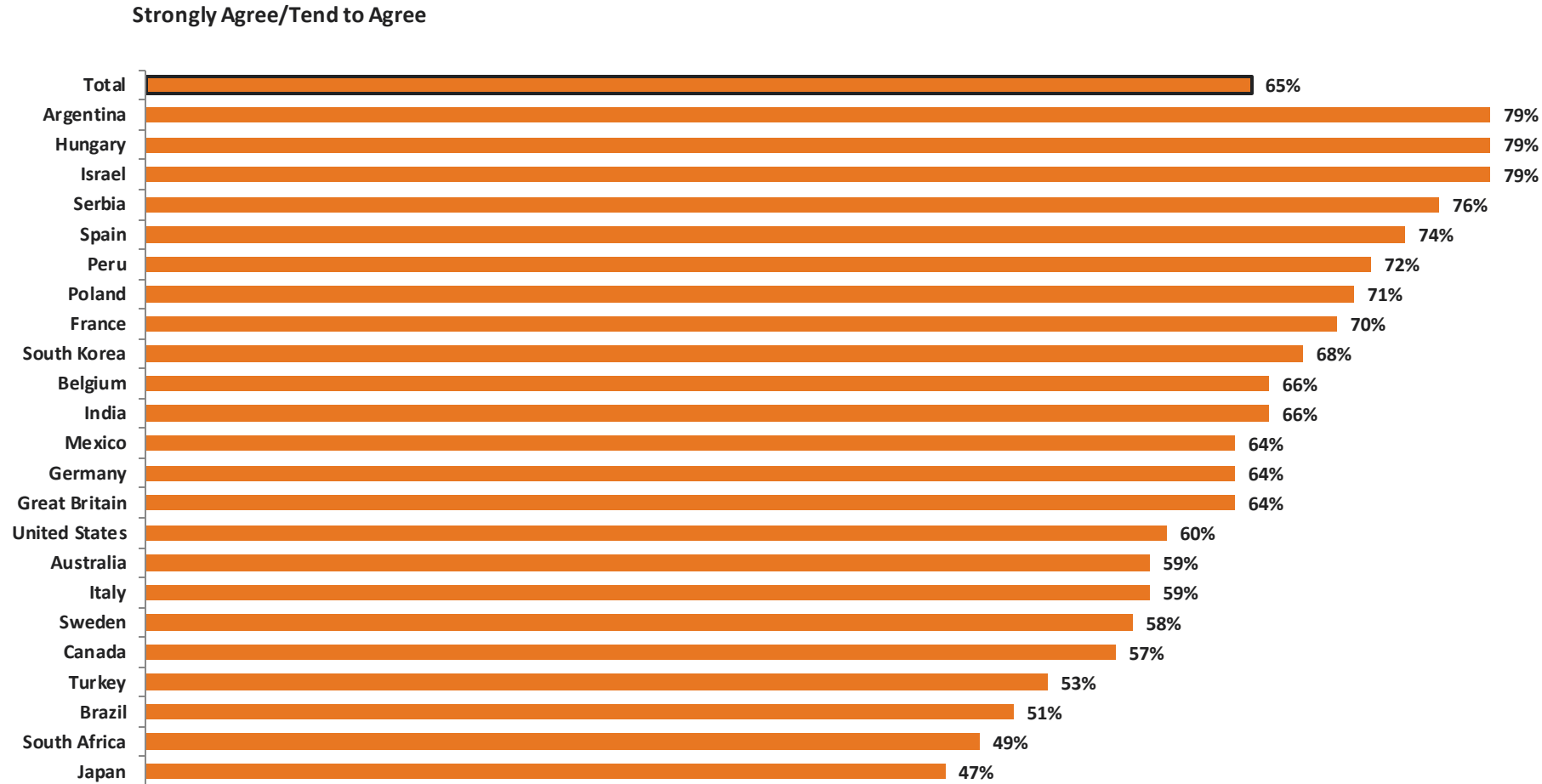
Strongly Agree/Tend to Agree



Q10 Traditional parties and politicians don't care about people like me

GLOBAL @DVISOR: POWER TO THE PEOPLE?

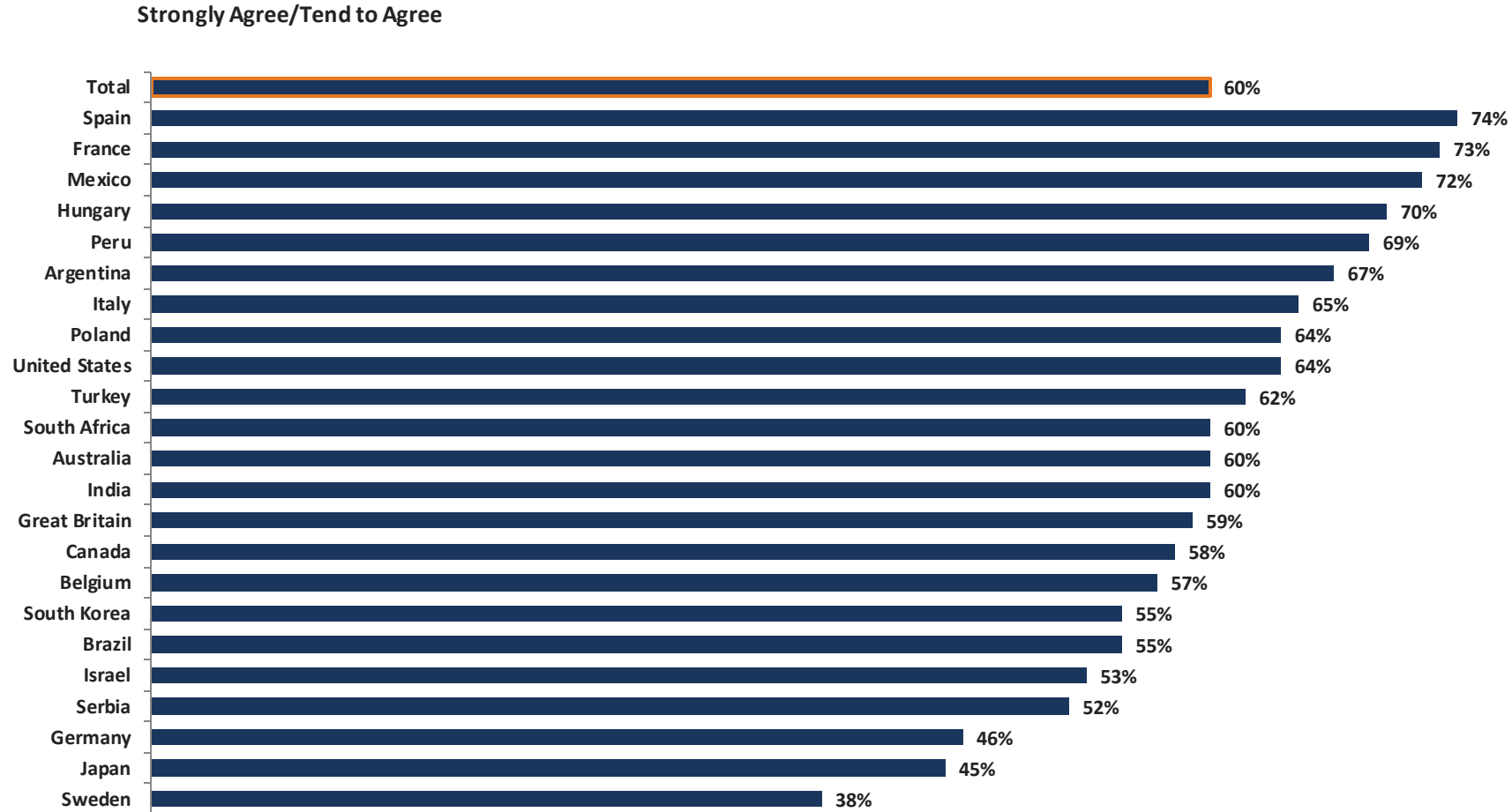
Close to two-thirds on average favour outspoken politicians



Q10 Politicians should be able to say what's on their minds regardless of what anyone else thinks about their views

GLOBAL @DVISOR: POWER TO THE PEOPLE?

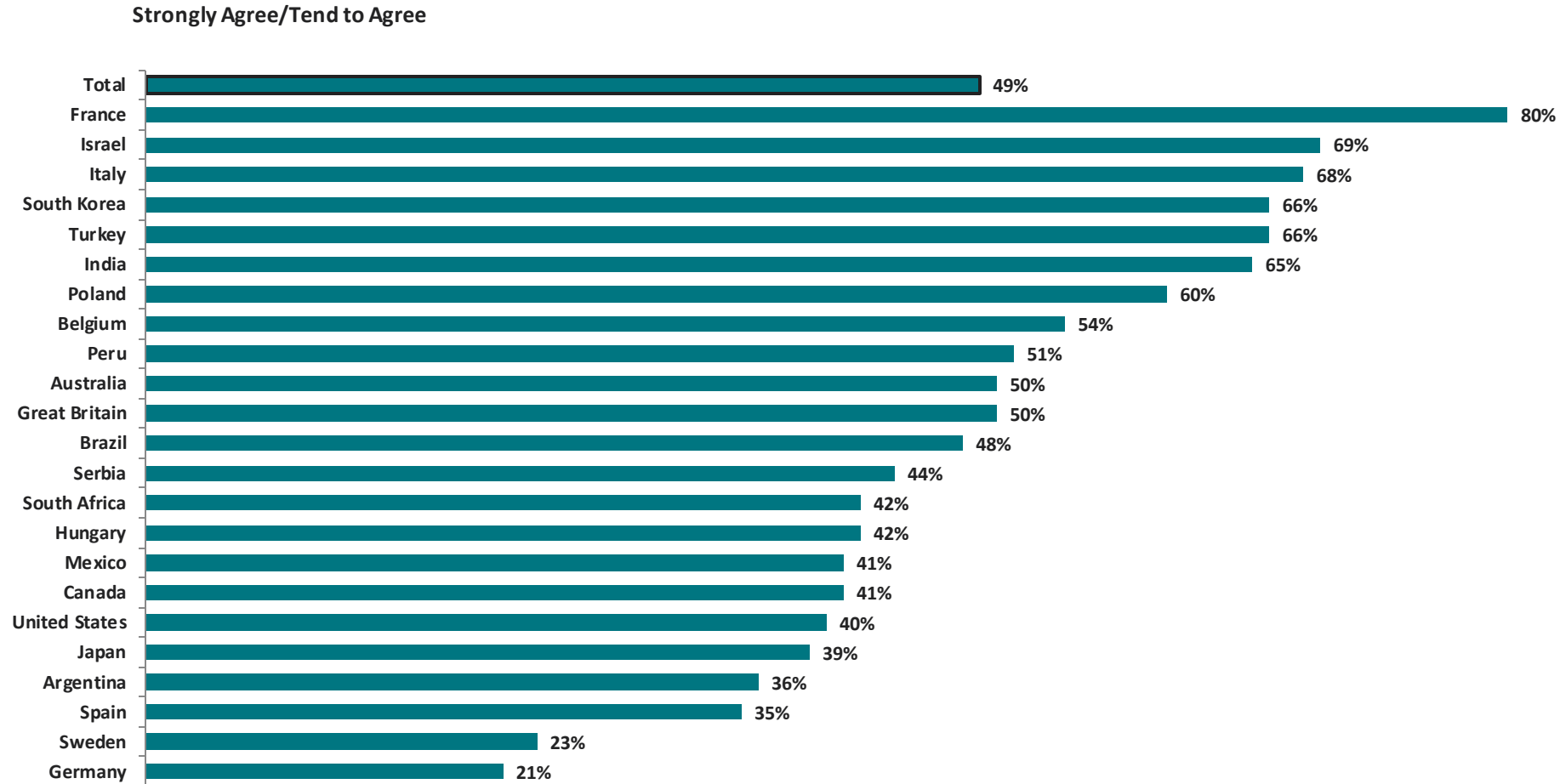
Similarly most people feel misunderstood by experts, especially Spain, France and Mexico



Q10 Experts in this country don't understand the lives of people like me

GLOBAL @DVISOR: POWER TO THE PEOPLE?

Big variation in desire for a strong leader willing to break the rules - especially high in France



Q10 To fix [country], we need a strong leader willing to break the rules



EXCLUSIONISM

GLOBAL @DVISOR: POWER TO THE PEOPLE?

On balance, people are still more likely to feel that opening up their country to foreign business and trade is an opportunity rather than a threat, but across the world people are split on whether their country should protect itself or open up more to the world.

OPENING UP [COUNTRY'S] ECONOMY TO FOREIGN BUSINESSES AND FOREIGN TRADE IS A THREAT TO [YOUR COUNTRY]

BOTH/DON'T KNOW

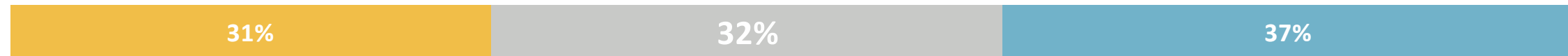
OPENING UP [COUNTRY'S] ECONOMY TO FOREIGN BUSINESSES AND FOREIGN TRADE IS AN OPPORTUNITY FOR [YOUR COUNTRY]



[COUNTRY] NEEDS TO TAKE MORE STEPS TO PROTECT ITSELF FROM TODAY'S WORLD

BOTH/DON'T KNOW

[COUNTRY] NEEDS TO TAKE MORE STEPS TO OPEN ITSELF UP TO TODAY'S WORLD



GLOBAL @DVISOR: POWER TO THE PEOPLE?

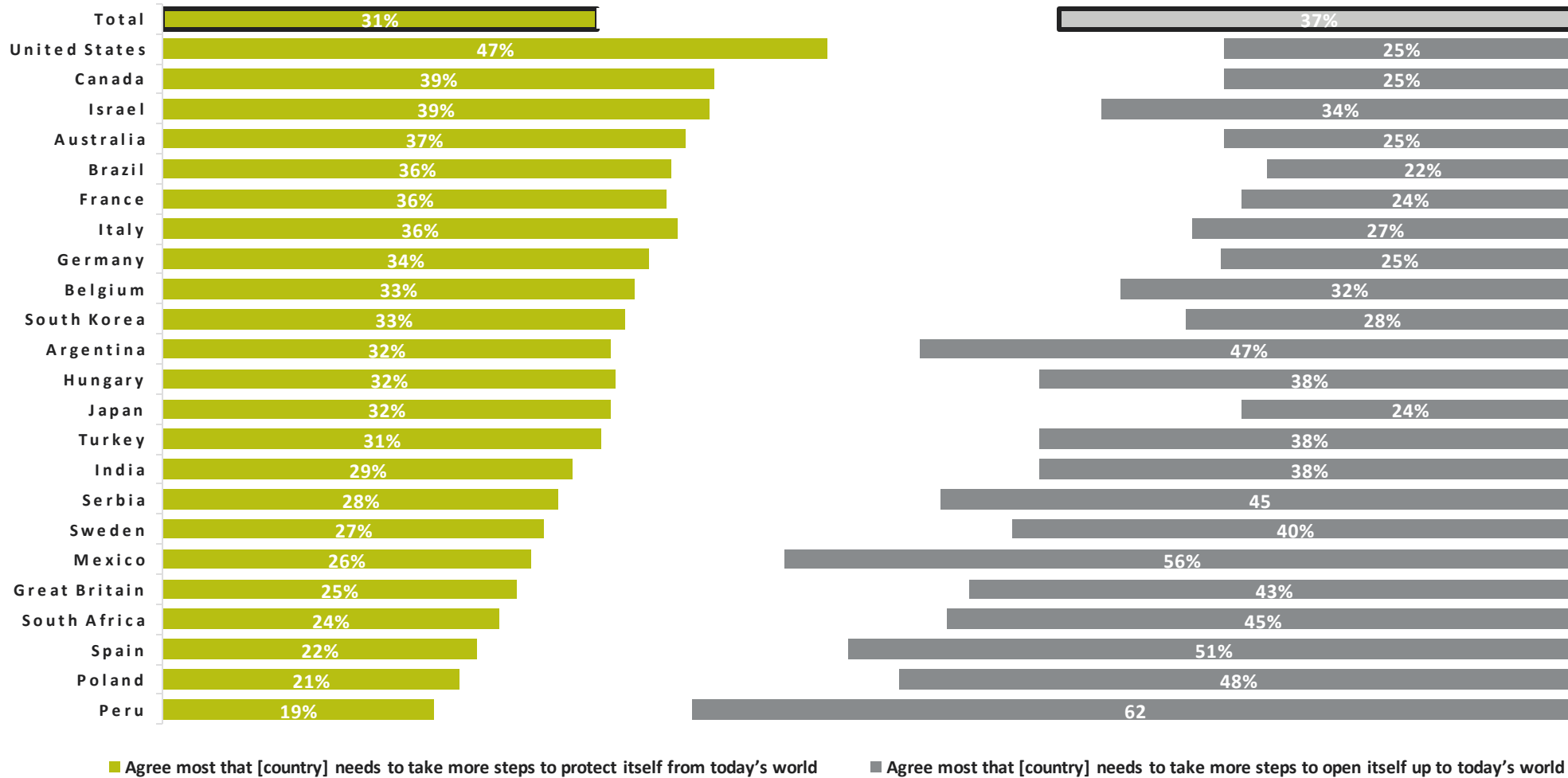
People tend to view globalisation as an opportunity, rather than a threat – but not in Italy and France



■ Opening up [country's] economy to foreign businesses and foreign trade is a threat to [your country]
■ Opening up [country's economy to foreign businesses and foreign trade is an opportunity for [your country]

GLOBAL @DVISOR: POWER TO THE PEOPLE?

Peru, Mexico and Argentina want to open up more to the world – but North Americans more likely to say they should protect themselves from the world



GLOBAL @DVISOR: POWER TO THE PEOPLE?

Methodology

- These are the findings of a Global @dvisor survey into the political mood around the world. In total 16,597 interviews were conducted between October 21 – November 4 among adults aged 18-64 in the US and Canada, and adults aged 16-64 in all other countries.
- The survey was conducted in 23 countries around the world via the Ipsos Online Panel system. The countries reporting herein are Argentina, Australia, Belgium, Brazil, Canada, France, Germany, Great Britain, Hungary, India, Israel, Italy, Japan, Mexico, Peru, Poland, South Africa, South Korea, Serbia, Spain, Sweden, Turkey and the United States of America.
- Between 500 and 1000+ individuals participated on a country by country basis via the Ipsos Online Panel. The sample was 1000+ in Australia, Brazil, Canada, France, Germany, Great Britain, Italy, Japan, Spain and the United States of America. In all other countries the sample was 500+. The precision of Ipsos online polls is calculated using a credibility interval with a poll of 1,000 accurate to +/- 3.5 percentage points and of 500 accurate to +/- 5.0 percentage points. For more information on Ipsos' use of credibility intervals, please visit the Ipsos website.
- In countries where internet penetration is approximately 60% or higher the data output generally reflects the overall population. Of the 23 countries surveyed online, 17 yield results that are balanced to reflect the general population: Argentina, Australia, Belgium, Canada, France, Germany, Hungary, Israel, Italy, Japan, Poland, South Korea, Serbia, Spain, Sweden, Great Britain and the United States. The 6 remaining countries surveyed – Brazil, India, Mexico, Peru, South Africa and Turkey - have lower levels of internet connectivity and reflect online populations that tend to be more urban and have higher education/income than the general population.
- Where results do not sum to 100, this may be due to computer rounding, multiple responses or the exclusion of don't knows or not stated responses.
- Data are weighted to match the profile of the population.

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GAME CHANGERS

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We believe that our work is important. Security, simplicity, speed and substance applies to everything we do.

Through specialisation, we offer our clients a unique depth of knowledge and expertise. Learning from different experiences gives us perspective and inspires us to boldly call things into question, to be creative.

By nurturing a culture of collaboration and curiosity, we attract the highest calibre of people who have the ability and desire to influence and shape the future.

“GAME CHANGERS” - our tagline - summarises our ambition.

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