#### **Ipsos Global @dvisor**

Citizens in 24 Countries Assess Engagement in International Affairs for a Global Perspective

### **WORLD AFFAIRS**

DR. DARRELL BRICKER Chief Executive Officer, Ipsos Global Public Affairs October, 2017

O 2017 Ipsos. All rights reserved. Contains Ipsos' Confidential and Proprietary information and may not be disclosed or reproduced without the prior written consent of Ipsos.



### Methodology

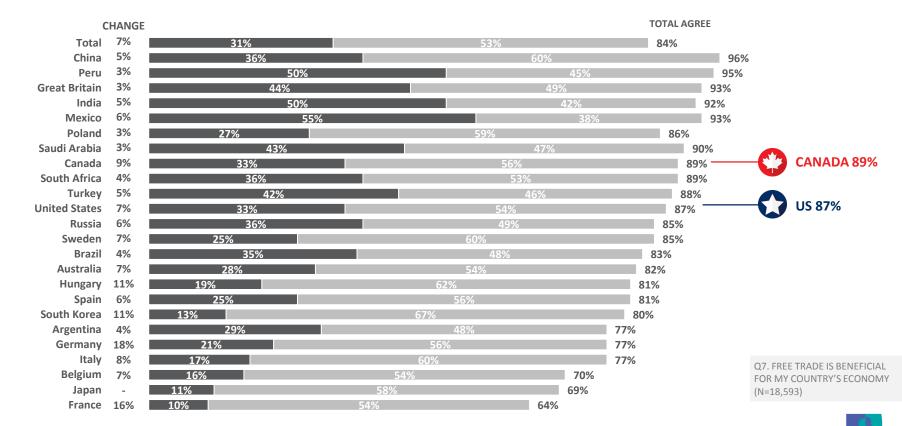
- These are the findings of the Global @dvisor Wave 101 (G@101), an Ipsos survey conducted between September 22nd and October 6th, 2017.
- The survey instrument is conducted monthly in 24 countries around the world via the Ipsos Online Panel system. The countries
  reporting herein are Argentina, Australia, Belgium, Brazil, Canada, China, France, Great Britain, Germany, Hungary, India, Italy,
  Japan, Mexico, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, Spain, Sweden, Turkey and the United States of
  America.
- For the results of the survey presented herein, an international sample of 18,594 adults aged 18-64 in the US and Canada, and age 16-64 in all other countries, were interviewed. Approximately 1000+ individuals participated on a country by country basis via the Ipsos Online Panel with the exception of Argentina, Belgium, Hungary, India, Mexico, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, Sweden and Turkey, where each have a sample approximately 500+.
- Weighting was then employed to balance demographics and ensure that the sample's composition reflects that of the adult population according to the most recent country Census data, and to provide results intended to approximate the sample universe. A survey with an unweighted probability sample of this size and a 100% response rate would have an estimated margin of error of +/-3.1 percentage points for a sample of 1,000 and an estimated margin of error of +/- 4.5 percentage points 19 times out of 20 per country of what the results would have been had the entire population of adults in that country had been polled. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error, and measurement error.

# FREE TRADE

#### Free trade is beneficial for my country's economy

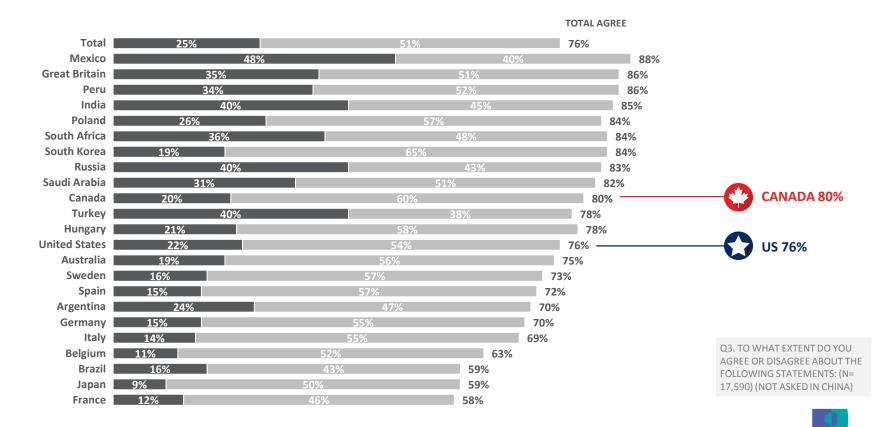
4

TOP2BOX (AGREE VERY MUCH/ AGREE SOMEWHAT)



### My country's government should be doing what it can to increase free trade with the rest of the world

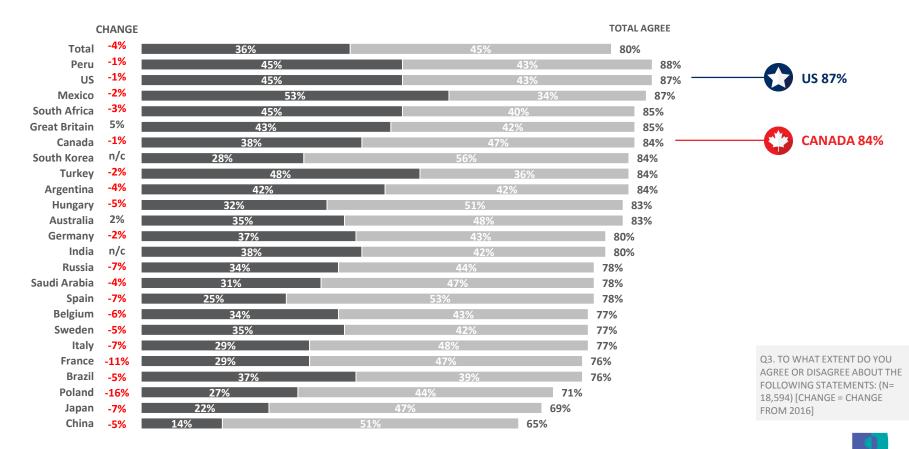
STRONGLY AGREE SOMEWHAT AGREE



# GLOBAL THREATS ASSESSMENT

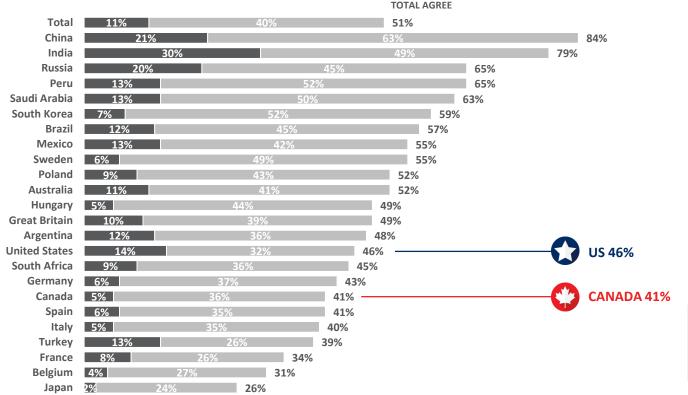


#### Over the last year the world became more dangerous.



### When you really think about it, more things are getting better in the world these days than are getting worse

STRONGLY AGREE SOMEWHAT AGREE



Q3. TO WHAT EXTENT DO YOU AGREE OR DISAGREE ABOUT THE FOLLOWING STATEMENTS: (N= 18,594) [CHANGE = CHANGE FROM 2016]

#### **Global Threat Assessment**

TOP2BOX (VERY REAL THREAT/ SOMEWHAT REAL THREAT)

2016	i	ie Fron 2014				
1%	2%	10%	n/a	Being hacked for fraudulent or espionage purposes	74% 73% 72% 64% N/A N/A N/A	
1%	3%	17%	29%	Terrorist Attack in Your Country	72% 71% 69% 55% 56% 56% 54% 43%	
5%	7%	14%	27%	Nuclear/Chemical Attack in the World	71% 66% 57% 67% 59% 57%	
4%	5%	9%	8%	Major Natural Disaster in Your Country	63% 59% 58% 54% 56% 57% 54% 55%	1A. HOW REAL DO THREAT IS OF ANY FOLLOWING HAPP NEXT TWELVE MOI (SELECT ONE FOR E RESPONDENTS: 20

OCT 2013

OCT 2017

OCT 2016

OCT 2015

A. HOW REAL DO YOU FEEL THE HREAT IS OF ANY OF THE OLLOWING HAPPENING IN THE EXT TWELVE MONTHS? SELECT ONE FOR EACH) BASE ALL ESPONDENTS: 2017 (N=18,594)

#### **Global Threat Assessment...** continued

TOP2BOX (VERY REAL THREAT/ SOMEWHAT REAL THREAT)

2016		E FRON 2014			
1%	2%	12%	n/a	The personal safety and security for you or your family members being violated	62% 61% 60% 50% 56% 55%
n/c	n/c	9%	n/a	A violent conflict breaking out between ethnic or minority groups in your country	60% 60% 60% 51% 54% 54% N/A N/A
-1%	-1%	2%	22%	Your Country Entering Armed Conflict with Another Country	53% 54% 54% 51% 44% 43% 41%
2%	1%	-6%	14%	Major Health Epidemic in Your Country	53% 51% 52% 59% 46% 44% 35% 39%

1A. HOW REAL DO YOU FEEL THE THREAT IS OF ANY OF THE FOLLOWING HAPPENING IN THE NEXT TWELVE MONTHS? (SELECT ONE FOR EACH) BASE ALL RESPONDENTS: 2017 (N=18,594)

A Global @dvisory – 10/2017 – WORLD AFFAIRS |psos 10



#### **Global Threat Assessment**

TOP BOX (VERY REAL THREAT)

		E FRON 2014	/ 2010			OCT 2014 OCT 2013 SEPT 2012 MAY 2011
1%	5%	12%	16%	Terrorist Attack in Your Country	31% 30% 26% 19% 19% 12% 18% 15%	AUG 2010
n/c	2%	5%	n/a	Being hacked for fraudulent or espionage purposes	28% 28% 26% 23% 20% N/A N/A	
2%	5%	7%	15%	Nuclear/Chemical Attack in the World	27% 25% 22% 20% 24% 13% 19% 12%	
2%	3%	5%	6%	Major Natural Disaster in Your Country	23% 21% 20% 18% 14% 16% 18% 17%	1A. HOW REAL DO YOU FEEL THE THREAT IS OF ANY OF THE FOLLOWING HAPPENING IN THE NEXT TWELVE MONTHS? (SELECT ONE FOR EACH) BASE ALL RESPONDENTS: 2017 (N=18,594)

OCT 2017 OCT 2016 OCT 2015 OCT 2014 OCT 2013 SEPT 2012 MAY 2011 AUG 2010

#### **Global Threat Assessment...** continued

TOP BOX (VERY REAL THREAT)

	CHANG		/ 2010			
n/c	-1%	3%	n/a	A violent conflict breaking out between ethnic or minority groups in your country	21% 21% 22% 18% 19% 19% N/A N/A	
n/c	1%	3%	n/a	The personal safety and security for you or your family members being violated	21% 21% 20% 18% 20%	
-1%	n/c	-2%	7%	Your Country Entering Armed Conflict with Another Country	17% 18% 17% 19% 14% 10% 13% 10%	
1%	1%	-4%	7%	Major Health Epidemic in Your Country	17% 16% 16% 21% 14% 9% 9% 10%	1A. THI FOI (SE RES

1A. HOW REAL DO YOU FEEL THE THREAT IS OF ANY OF THE FOLLOWING HAPPENING IN THE NEXT TWELVE MONTHS? (SELECT ONE FOR EACH) BASE ALL RESPONDENTS: 2017 (N=18,594)

OCT 2017

OCT 2016

OCT 2015 OCT 2014 OCT 2013 SEPT 2012 MAY 2011 AUG 2010 Canada Threat Assessment

CHANGE FROM 2016 2015 2014 2010			OCT 2014 OCT 2013 SEPT 2012 MAY 2011
1% 6% 20% n/a	Being hacked for fraudulent or espionage purposes	77% 76% 71% 57% 67%	AUG 2010
10% 5% 27% 40%	Terrorist Attach in Your Country	76% 66% 61% 48% 48% 39% 30%	
10% 12% 24% 36%	Nuclear/Chemical Attack in the World	51% 51% 59% 54%	
n/c 1% 17% 16%	Major Natural Disaster in Your Country	59% 59% 58% 42% 57% 48% 52% 43%	1A. HOW REAL DO YOU FEEL THE THREAT IS OF ANY OF THE FOLLOWING HAPPENING IN THE NEXT TWELVE MONTHS? (SELECT ONE FOR EACH) BASE ALL RESPONDENTS: 2017 (N=18,594)





		E FRON 2014				OCT 2013 SEPT 2012 MAY 2011
9%	-2%	27%	n/a	A violent conflict breaking out between ethnic or minority groups in your country	56% 47% 49% 29% 38%	AUG 2010
4%	-4%	n/c	18%	Your Country Entering Armed Conflict with Another Country	50% 46% 50% 62% 43% 45% 32%	
-2%	-2%	-14%	14%	Major Health Epidemic in Your Country	48% 50% 50% 62% 44% 32% 34%	
2%	4%	17%	n/a	The personal safety and security for you or your family members being violated	48% 46% 44% 31% 39% N/A N/A	1A. HOW REAL DO YOU FEEL THE THREAT IS OF ANY OF THE FOLLOWING HAPPENING IN THE NEXT TWELVE MONTHS? (SELECT ONE FOR EACH) BASE ALL RESPONDENTS: 2017 (N=18,594)

OCT 2017 OCT 2016 OCT 2015 OCT 2014 OCT 2013 SEPT 2012 MAY 2011 AUG 2010



	i	E FRON 2014	Л 2010			OCT 2013 SEPT 2012 MAY 2011
-1%	9%	15%	19%	Terrorist Attack in Your Country	90% 91% 81% 75% 85% 76% 79% 71%	AUG 2010
5%	5%	15%	16%	Major Natural Disaster in Your Country	90% 85% 75% 84% 84% 84% 82% 74%	
1%	3%	13%	n/a	Being hacked for fraudulent or espionage purposes	88% 87% 85% 75% 82% N/A N/A	
1%	6%	5%	12%	Your Country Entering Armed Conflict with Another Country	87% 86% 81% 82% 82% 82% 82% 83% 75%	1A. HOW REAL DO YOU FEEL THE THREAT IS OF ANY OF THE FOLLOWING HAPPENING IN THE NEXT TWELVE MONTHS? (SELECT ONE FOR EACH) BASE ALL RESPONDENTS: 2017 (N=18,594)

OCT 2017 OCT 2016 OCT 2015 OCT 2014 OCT 2013 SEPT 2012 MAY 2011 AUG 2010

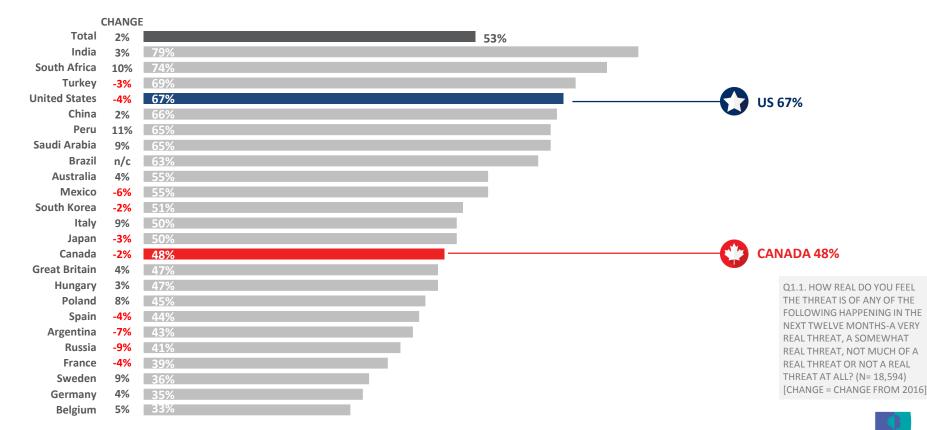
A Global @dvisory – 10/2017 – WORLD AFFAIRS |psos 15

#### **United States Threat Assessment...** *continued* TOP2BOX (VERY REAL THREAT/ SOMEWHAT REAL THREAT)

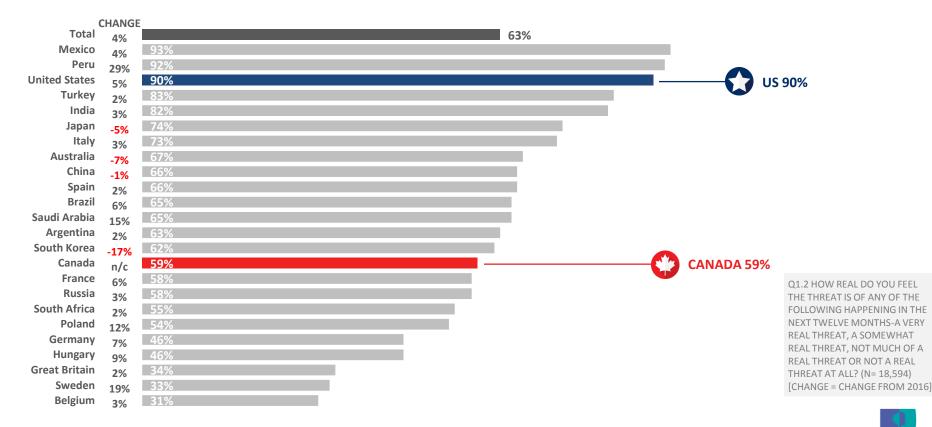
	CHANG 2015					OCT 2014 OCT 2013 SEPT 2012 MAY 2011
6%	12%	23%	26%	Nuclear/Chemical Attack in the World	84% 78% 61% 80% 72% 62% 58%	AUG 2010
-3%	8%	25%	n/a	A violent conflict breaking out between ethnic or minority groups in your country	82% 85% 74% 57% 55%	
-2%	4%	18%	n/a	The personal safety and security for you or your family members being violated	70% 72% 66% 52% 66%	
-4%	3%	-7%	21%	Major Health Epidemic in Your Country	67% 71% 64% 64% 63% 38% 46%	1A. HOW REAL DO YOU FEEL THE THREAT IS OF ANY OF THE FOLLOWING HAPPENING IN THE NEXT TWELVE MONTHS? (SELECT ONE FOR EACH) BASE ALL RESPONDENTS: 2017 (N=18,594)



#### A major health epidemic breaking out in your country



#### A major natural disaster occurring in your country



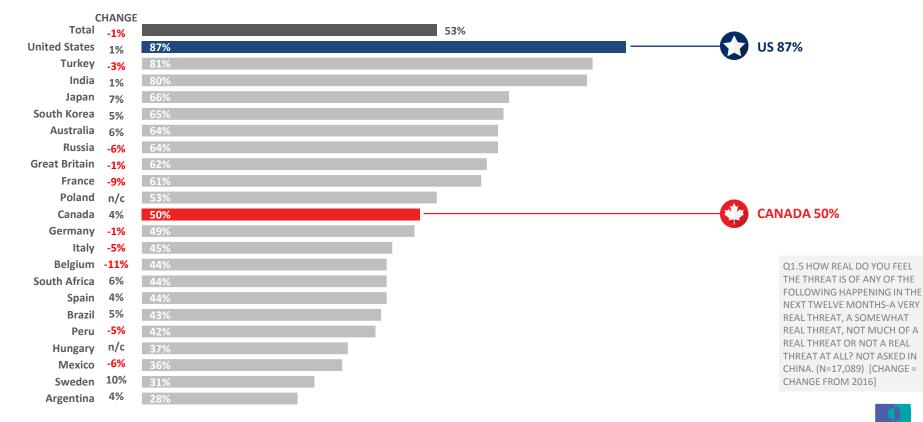
#### A terrorist attack taking place in your country

(	HANGE			
Total	1%		72%	
Great Britain	3%	91%		
France	2%	90%		
United States	-1%	90%	-	US 90%
Spain	3%	89%		•
Belgium	-4%	88%		
Germany	n/	86%		
India	n/c	85%		
Australia	2%	82%		
Turkey	-8%	82%		
Russia	-4%	81%		
Sweden	9%	77%		
Canada	10%	76%		
Italy	-2%	76%		
Peru	26%	76%		Q1.3 HOW REAL DO YOU FEEL
Japan	- <b>2%</b>	62%		THE THREAT IS OF ANY OF THE
South Korea	2%	56%		FOLLOWING HAPPENING IN THE NEXT TWELVE MONTHS-A VERY
Hungary	-12%	54%		REAL THREAT, A SOMEWHAT
South Africa	1%	54%		REAL THREAT, NOT MUCH OF A
Poland	-8%	53%		REAL THREAT OR NOT A REAL
Brazil	4%	50%		THREAT AT ALL? NOT ASKED IN CHINA. (N= 17,089) [CHANGE =
Mexico	-5%	42%		CHANGE FROM 2016]
Argentina	-3%	41%		

#### A nuclear, biological or chemical attack taking place somewhere in the world

	CHANGE				
Total	5%		71%		
United States	6%	84%		 US US	84%
Turkey	-1%	83%			
India	4%	81%			
Mexico	1%	81%			
Australia	8%	79%			
Great Britain	7%	76%			
Spain	-1%	76%			
Canada	10%	75%	_	CA	NADA 75%
Hungary	9%	75%			
Argentina	5%	74%			
Germany	9%	72%			
Peru	18%	72%			
Saudi Arabia	10%	70%			
Sweden	4%	70%			
Italy		69%			
Brazil	8%	68%			Q1.6. HOW REAL DO YOU FEEL
Japan		68%			THE THREAT IS OF ANY OF THE FOLLOWING HAPPENING IN THE
South Africa	-3%	68%			NEXT TWELVE MONTHS-A VERY
Belgium		65%			REAL THREAT, A SOMEWHAT
China	1%	65%			REAL THREAT, NOT MUCH OF A
South Korea	1%	64%			REAL THREAT OR NOT A REAL
France	6%	62%			THREAT AT ALL? (N= 18,594) [CHANGE = CHANGE FROM 2016]
Poland	2%	60%			[CHANGE - CHANGE FROM 2016]
Russia	-2%	52%			

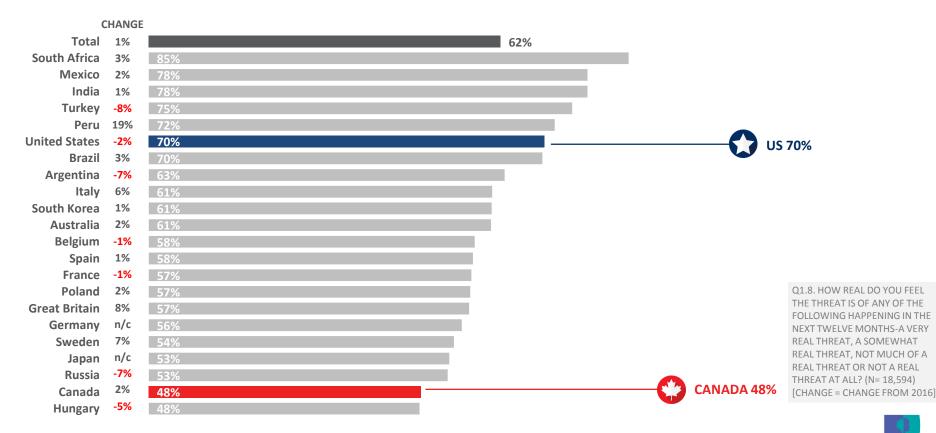
#### Your country being involved in an armed conflict with another nation



#### Being hacked for fraudulent or espionage purposes

	HANGE	E			
Total	1%		74%		
United States	1%	88%		— US 88%	
India	3%	84%			
South Korea	2%	82%			
Spain	4%	82%			
France	n/c	81%			
Turkey	-7%	81%			
Great Britain	2%	80%			
South Africa	n/c	79%			
Australia	-1%	78%			
Sweden	2%	78%			
Canada	1%	77%			
Mexico	- <b>2%</b>	77%			
Belgium	-1%	73%			
Germany	-4%	73%			
Peru	17%	71%			
Brazil	1%	70%		Q1.8. HOW REAL DO YOU	J FEEL
China	2%	70%		THE THREAT IS OF ANY O	
Saudi Arabia	6%	70%		FOLLOWING HAPPENING NEXT TWELVE MONTHS-	
Poland	4%	68%		REAL THREAT, A SOMEW	
Argentina	-2%	67%		REAL THREAT, NOT MUC	
Italy	-1%	67%		REAL THREAT OR NOT A I	
Russia	-6%	67%		THREAT AT ALL? (N= 18,5	,
Japan	n/c	61%		[CHANGE = CHANGE FRO	M 2016]
Hungary	6%	52%		_	P

#### The personal safety and security for you and your family members being violated



#### A violent conflict breaking out between ethnic or minority groups in your country

C	CHANGE	E		
Total	n/c		60%	
<b>United States</b>	-3%	82%	-	US 82%
South Africa	n/c	81%		
India	1%	80%		
Turkey	<b>-2%</b>	76%		
Hungary	-6%	68%		
Spain	14%	67%		
Mexico	-6%	65%		
Brazil	11%	63%		
Great Britain	2%	63%		
Australia	-5%	62%		
Germany	-7%	59%		
France	-5%	58%		
Sweden	-2%	56%		
Canada	9%	56%		
Peru	-1%	56%		Q1.8. HOW REAL DO YOU FEEL THE THREAT IS OF ANY OF THE
Russia	-4%	53%		FOLLOWING HAPPENING IN THE
Belgium	n/c	52%		NEXT TWELVE MONTHS-A VERY
Argentina	7%	50%		REAL THREAT, A SOMEWHAT
Italy	-5%	48%		REAL THREAT, NOT MUCH OF A REAL THREAT OR NOT A REAL
Japan	n/c	47%		THREAT AT ALL? (N= 18,594)
Poland	-1%	42%		[CHANGE = CHANGE FROM 2016]
South Korea	-4%	41%		

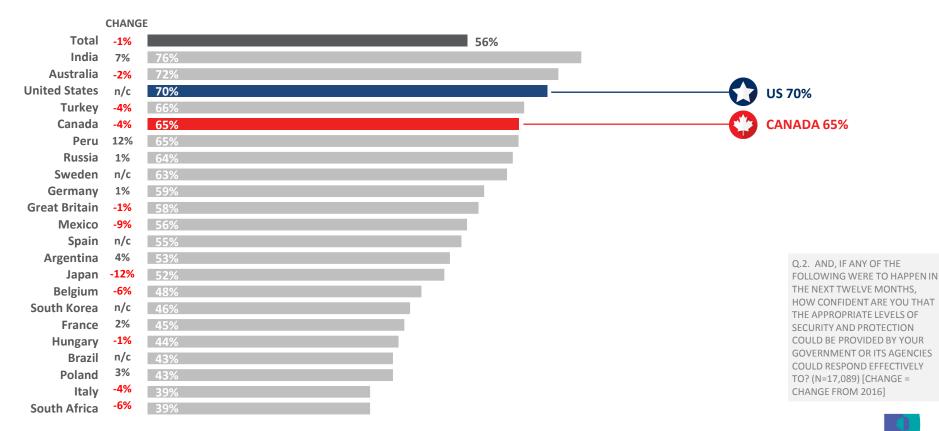
## THREAT CONFIDENCE



#### A major health epidemic breaking out in your country

	CHANG	E		
Total	n/c		53%	
India	n/c	73%		
<b>United States</b>	3%	69%		US 69%
Australia	n/c	65%		
Turkey	- <b>6%</b>	65%		
Canada	-1%	63%		CANADA 63%
Sweden	1%	62%		
Germany	2%	60%		
Russia	-1%	60%		
<b>Great Britain</b>	- <b>2%</b>	59%		
Spain	-1%	53%		
Argentina	3%	51%		
Peru	<b>-2%</b>	51%		
Belgium	3%	50%		Q.2. AND, IF ANY OF THE
France	6%	46%		FOLLOWING WERE TO HAPPEN IN
Italy	3%	46%		THE NEXT TWELVE MONTHS, HOW CONFIDENT ARE YOU THAT
Mexico	1%	46%		THE APPROPRIATE LEVELS OF
Hungary	-3%	43%		SECURITY AND PROTECTION
South Korea	5%	43%		COULD BE PROVIDED BY YOUR
Brazil	-3%	42%		GOVERNMENT OR ITS AGENCIES COULD RESPOND EFFECTIVELY
South Africa	-4%	41%		TO? (N=17,089) [CHANGE =
Poland	4%	40%		CHANGE FROM 2016]
Japan	- <b>6%</b>	36%		

#### A major natural disaster occurring in your country



#### A terrorist attack taking place in your country

	CHANG	E			
Total	n/c		52%		
India	-4%	74%			
Russia	-5%	69%			
United States	n/c	66%		<b>(</b>	US 66%
Australia	n/c	65%			
<b>Great Britain</b>	-1%	63%			
Sweden	12%	63%			
Turkey	-3%	61%			
Canada	-3%	58%		E	CANADA 58%
Spain	n/c	58%			
Germany	2%	53%			
Peru	6%	53%			
South Korea	1%	46%			
Belgium	2%	45%			Q.2. AND, IF ANY OF THE
Argentina	7%	44%			FOLLOWING WERE TO HAPPEN IN
Italy	4%	44%			THE NEXT TWELVE MONTHS, HOW CONFIDENT ARE YOU THAT
Poland	n/c	43%			THE APPROPRIATE LEVELS OF
Hungary	-4%	42%			SECURITY AND PROTECTION
France	4%	41%			COULD BE PROVIDED BY YOUR
Japan	-7%	40%			GOVERNMENT OR ITS AGENCIES COULD RESPOND EFFECTIVELY
Brazil	2%	39%			TO? (N=17,089) [CHANGE =
Mexico	3%	37%			CHANGE FROM 2016]
South Africa	-4%	34%			

#### A violent conflict breaking out between ethnic or minority groups in your country

	CHANG	<u>GE</u>		
Total	n/c		50%	
India	3%	74%		
Russia	n/c	66%		
Australia	1%	64%		
United States	1%	63%		US 63%
Turkey	- <b>6%</b>	62%		
Canada	-1%	59%		CANADA 59%
Great Britain	n/c	58%		
Sweden	10%	53%		
Germany	4%	52%		
Peru	4%	50%		
Spain	n/c	50%		
Argentina	4%	47%		
Hungary	-5%	47%		Q.2. AND, IF ANY OF THE
Brazil	n/c	42%		FOLLOWING WERE TO HAPPEN IN
Belgium	1%	41%		THE NEXT TWELVE MONTHS, HOW CONFIDENT ARE YOU THAT
Italy	2%	41%		THE APPROPRIATE LEVELS OF
Poland	3%	40%		SECURITY AND PROTECTION
South Korea	2%	40%		COULD BE PROVIDED BY YOUR GOVERNMENT OR ITS AGENCIES
Mexico	n/c	39%		COULD RESPOND EFFECTIVELY
France	2%	37%		TO? (N=17,089) [CHANGE =
Japan	-2%	36%		CHANGE FROM 2016]
South Africa	-7%	36%		

#### Your country being involved in an armed conflict with another nation

	CHANG	E			
Total	-1%		49%		
India	- <b>3</b> %	75%			
Russia	n/c	72%			
United States	2%	72%	-	 🚺 US 🛛	72%
Turkey	-3%	65%			
Australia	- <b>2%</b>	62%			
<b>Great Britain</b>	3%	60%		~	
Canada	-5%	54%		 CAN	IADA 54%
Germany	2%	51%			
Sweden	6%	51%			
South Korea	4%	49%			
Spain	n/c	49%			
France	4%	45%			
Poland	2%	42%			Q.2. AND, IF ANY OF THE
Belgium	-5%	40%			FOLLOWING WERE TO HAPPEN IN
Japan	- <b>2</b> %	40%			THE NEXT TWELVE MONTHS,
Peru	-8%	40%			HOW CONFIDENT ARE YOU THAT THE APPROPRIATE LEVELS OF
Mexico	3%	38%			SECURITY AND PROTECTION
Argentina	3%	37%			COULD BE PROVIDED BY YOUR
Brazil	2%	37%			GOVERNMENT OR ITS AGENCIES COULD RESPOND EFFECTIVELY
Italy	2%	36%			TO? (N=17,089) [CHANGE =
Hungary	1%	35%			CHANGE FROM 2016]
South Africa	-4%	34%			

#### A nuclear, biological or chemical attack taking place somewhere in the world

	CHANG	E		
Total	1%		46%	
India	n/c	69%		
United States	6%	63%		US 63%
Russia	<b>-2%</b>	59%		
Turkey	-7%	56%		
Australia	5%	54%		
Sweden	6%	53%		
Canada	1%	50%	••••••••••••••••••••••••••••••••••••••	CANADA 50%
<b>Great Britain</b>	1%	48%		
Peru	n/c	47%		
Japan	<b>-2%</b>	45%		
South Korea	4%	44%		
Spain	<b>-2%</b>	43%		
Brazil	5%	42%		Q.2. AND, IF ANY OF THE
Germany	3%	42%		FOLLOWING WERE TO HAPPEN IN
Argentina	1%	41%		THE NEXT TWELVE MONTHS, HOW CONFIDENT ARE YOU THAT
Mexico	1%	40%		THE APPROPRIATE LEVELS OF
Poland	6%	39%		SECURITY AND PROTECTION
France	8%	38%		COULD BE PROVIDED BY YOUR
Hungary	-1%	36%		GOVERNMENT OR ITS AGENCIES COULD RESPOND EFFECTIVELY
Italy	4%	36%		TO? (N=17,089) [CHANGE =
Belgium	1%	32%		CHANGE FROM 2016]
South Africa	-4%	30%		

#### The personal safety and security of you or your family being violated

	CHANG	E		
Total	n/c		49%	
India	1%	74%		
United States	3%	67%		
Australia	3%	66%		
Turkey	<b>-3%</b>	61%		
Great Britain	3%	60%		
Canada	-6%	59%		
Spain	3%	54%		
Peru	5%	53%		
Germany	2%	48%		
Russia	-4%	48%		
Sweden	5%	48%		
Argentina	8%	47%		
Brazil	n/c	45%	1	Q.2. AND, IF ANY OF THE
France	10%	44%		FOLLOWING WERE TO HAPPEN IN
South Korea	-1%	44%		THE NEXT TWELVE MONTHS, HOW CONFIDENT ARE YOU THAT
Mexico	n/c	40%		THE APPROPRIATE LEVELS OF
Poland	3%	39%		SECURITY AND PROTECTION
South Africa	n/c	39%		COULD BE PROVIDED BY YOUR
Belgium	-1%	38%		GOVERNMENT OR ITS AGENCIES COULD RESPOND EFFECTIVELY
Japan	-3%	38%		TO? (N=17,089) [CHANGE =
Hungary	-5%	37%		CHANGE FROM 2016]
Italy	-1%	35%		

#### Hacking into your public, private or personal info system for fraudulent or espionage purposes

	CHANG	βE		
Total	1%		49%	
India	-1%	74%		
Australia	5%	62%		
United States	5%	62%		US 62%
Turkey	-1%	59%		
Canada	1%	57%		- CANADA 57%
Peru	7%	57%		
<b>Great Britain</b>	2%	54%		
Russia	-7%	53%		
South Korea	4%	52%		
Sweden	5%	52%		
Spain	-3%	48%		
Brazil	3%	46%	I	
Argentina	2%	44%		Q.2. AND, IF ANY OF THE
Poland	6%	44%		FOLLOWING WERE TO HAPPEN IN
Germany	6%	42%		THE NEXT TWELVE MONTHS, HOW CONFIDENT ARE YOU THAT
Italy	2%	42%		THE APPROPRIATE LEVELS OF
South Africa	1%	40%		SECURITY AND PROTECTION
Belgium	4%	38%		COULD BE PROVIDED BY YOUR GOVERNMENT OR ITS AGENCIES
Japan	-2%	38%		COULD RESPOND EFFECTIVELY
Hungary	2%	37%		TO? (N=17,089) [CHANGE =
Mexico	-4%	37%		CHANGE FROM 2016]
France	2%	36%		

## GLOBAL GAP BETWEEN PRIORITY OF THREAT AND LEVEL OF PREPARATION

#### **Global Gap Between Priority of Threat and Level of Preparation**

GLOBAL	GAP%*
A nuclear, biological or chemical attack taking place somewhere in the world	-25%
Some person, organization or country hacking into either your public, private or personal information system for fraudulent or espionage purposes	-25%
A terrorist attack taking place in your country	-20%
The personal safety and security of you or your family being violated	-13%
A violent conflict breaking out between ethnic or minority groups in your country	-10%
A major natural disaster occurring in your country	-8%
Your country being involved in an armed conflict with another nation	-4%
A major health epidemic breaking out in your country	0%

\*LEVEL OF PERCEIVED PREPARATION MINUS LEVEL OF CONCERN

#### **Global Gap Between Priority of Threat and Level of Preparation**

CANADA	GAP%*
A nuclear, biological or chemical attack taking place somewhere in the world	-25%
Some person, organization or country hacking into either your public, private or personal information system for fraudulent or espionage purposes	-20%
A terrorist attack taking place in your country	-18%
A violent conflict breaking out between ethnic or minority groups in your country	3%
Your country being involved in an armed conflict with another nation	4%
A major natural disaster occurring in your country	6%
The personal safety and security of you or your family being violated	11%
A major health epidemic breaking out in your country	15%

\*LEVEL OF PERCEIVED PREPARATION MINUS LEVEL OF CONCERN

### **Global Gap Between Priority of Threat and Level of Preparation**

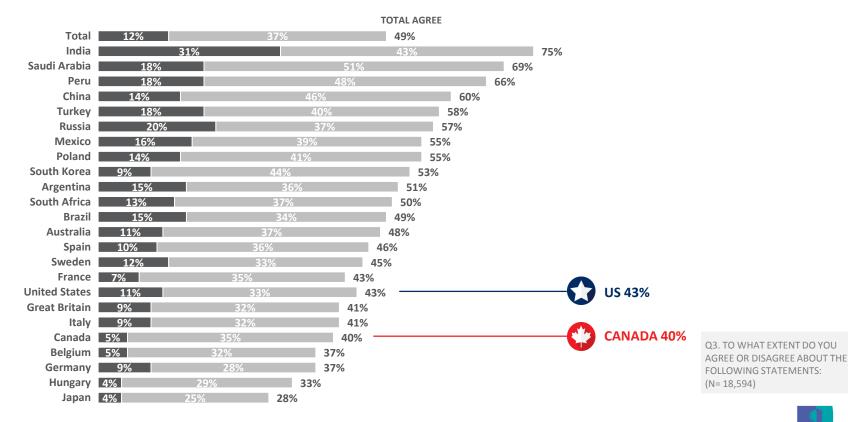
UNITED STATES	GAP%*
Some person, organization or country hacking into either your public, private or personal information system for fraudulent or espionage purposes	-25%
A terrorist attack taking place in your country	-24%
A nuclear, biological or chemical attack taking place somewhere in the world	-21%
A major natural disaster occurring in your country	-20%
A violent conflict breaking out between ethnic or minority groups in your country	-19%
Your country being involved in an armed conflict with another nation	-15%
The personal safety and security of you or your family being violated	-3%
A major health epidemic breaking out in your country	2%

\*LEVEL OF PERCEIVED PREPARATION MINUS LEVEL OF CONCERN

## NUCLEAR PROLIFERATION

## Even though more of the world's countries have nuclear weapons today, it really hasn't increased the likelihood of nuclear war



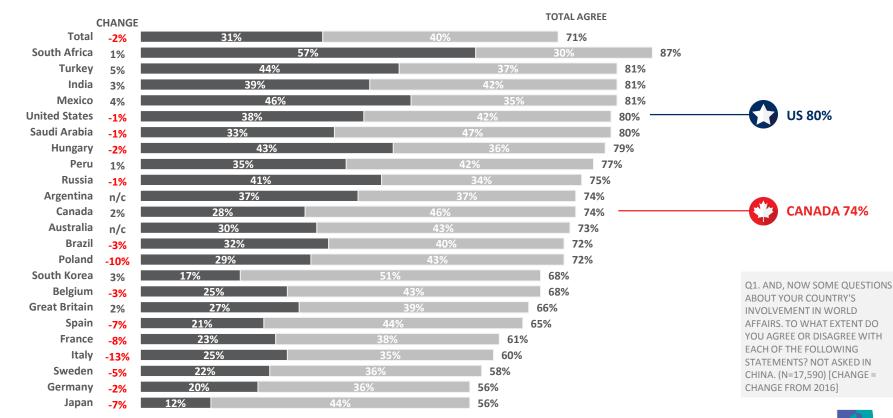


## WILLINGNESS TO ENGAGE IN WORLD AFFAIRS



### Given the difficult economic issues in my country today, my country needs to focus less on the world, and more at home





### Willingness to Engage in World Affairs—Global Summary

TOP2BOX (STRONGLY AGREE/SOMEWHAT AGREE)

	CHANGE		
My country should help parts of the world that are experiencing difficulties such as natural disasters or famines.	n/c	78%	
My country should help the growth of democracy in the world.	-1%	76%	
My country should support economic sanctions against countries that behave badly in the world, or treat their own people badly.	1%	76%	
My country has a responsibility to be a moral leader in the world and set an example for other countries to follow.	1%	72%	Q1. [SU (STRON AGREE) QUESTI
My country has enough common values with the European Union to be able to cooperate on solving many important international problems	4%	72%	COUNT WORLD EXTENT DISAGR FOLLOV

Q1. [SUMMARY - TOP2BOX (STRONGLY AGREE/SOMEWHAT AGREE)] AND, NOW SOME QUESTIONS ABOUT YOUR COUNTRY'S INVOLVEMENT IN WORLD AFFAIRS. TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH EACH OF THE FOLLOWING STATEMENTS? [CHANGE = CHANGE FROM 2016]

### Willingness to Engage in World Affairs—Global Summary

CHANCE

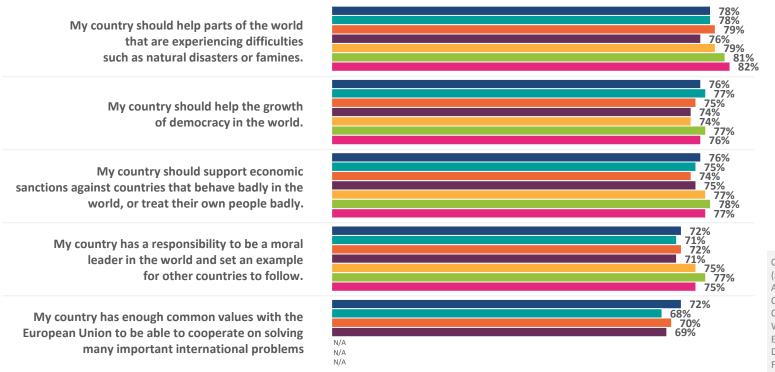
TOP2BOX (STRONGLY AGREE/SOMEWHAT AGREE)

	CHANGE		
Given the difficult economic issues in my country today, my country needs to focus less on the world, and more at home.	-2%	71%	
My country should assist countries that have less developed economies.	2%	66%	
My country has enough common values with the United States to be able to cooperate on solving many important international problems	2%	65%	
My country has enough common values with China to be able to cooperate on solving many important international problems	7%	57%	Q1. [SUMMARY - TOP2BOX (STRONGLY AGREE/SOMEWHAT AGREE)] AND, NOW SOME QUESTIONS ABOUT YOUR COUNTRY'S INVOLVEMENT IN WORLD AFFAIRS. TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH EACH OF THE FOLLOWING STATEMENTS? [CHANGE = CHANGE FROM 2016]
My country has enough common values with Russia to be able to cooperate on solving many important international problems	7%	54%	

A Global @dvisory – 10/2017 – WORLD AFFAIRS Ipsos 43

### Willingness to Engage in World Affairs—Global Summary—Tracking

TOP2BOX (STRONGLY AGREE/SOMEWHAT AGREE)





Q1. [SUMMARY - TOP2BOX (STRONGLY AGREE/SOMEWHAT AGREE)] AND, NOW SOME QUESTIONS ABOUT YOUR COUNTRY'S INVOLVEMENT IN WORLD AFFAIRS. TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH EACH OF THE FOLLOWING STATEMENTS?

### Willingness to Engage in World Affairs—Global Summary—Tracking

TOP2BOX (STRONGLY AGREE/SOMEWHAT AGREE)

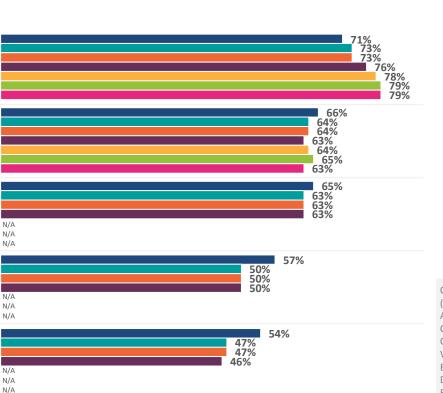
Given the difficult economic issues in my country today, my country needs to focus less on the world, and more at home.

My country should assist countries that have less developed economies.

My country has enough common values with the United States to be able to cooperate on solving many important international problems

My country has enough common values with China to be able to cooperate on solving many important international problems

My country has enough common values with Russia to be able to cooperate on solving many important international problems

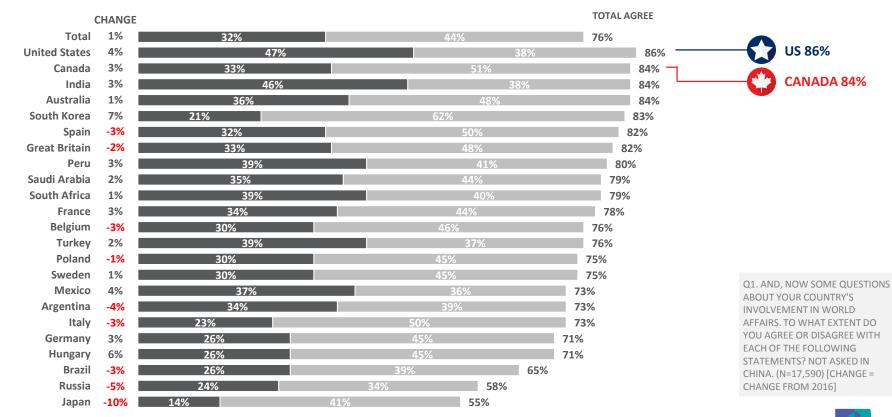




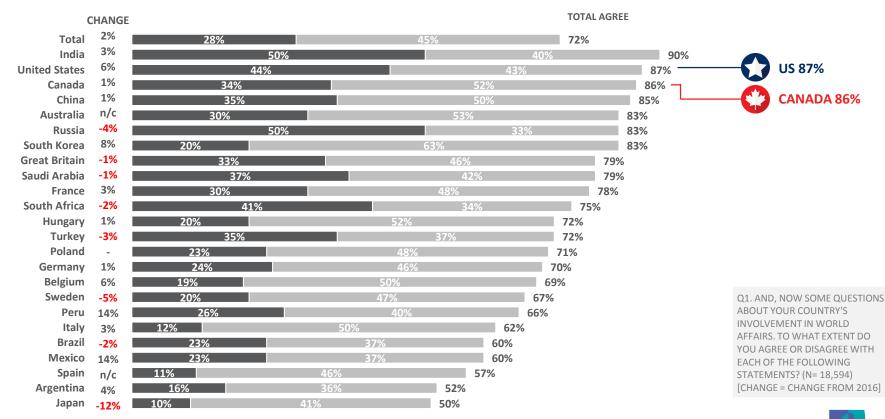
Q1. [SUMMARY - TOP2BOX (STRONGLY AGREE/SOMEWHAT AGREE)] AND, NOW SOME QUESTIONS ABOUT YOUR COUNTRY'S INVOLVEMENT IN WORLD AFFAIRS. TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH EACH OF THE FOLLOWING STATEMENTS?

## My country should support economic sanctions against countries that behave badly in the world, or treat their own people badly

STRONGLY AGREE SOMEWHAT AGREE

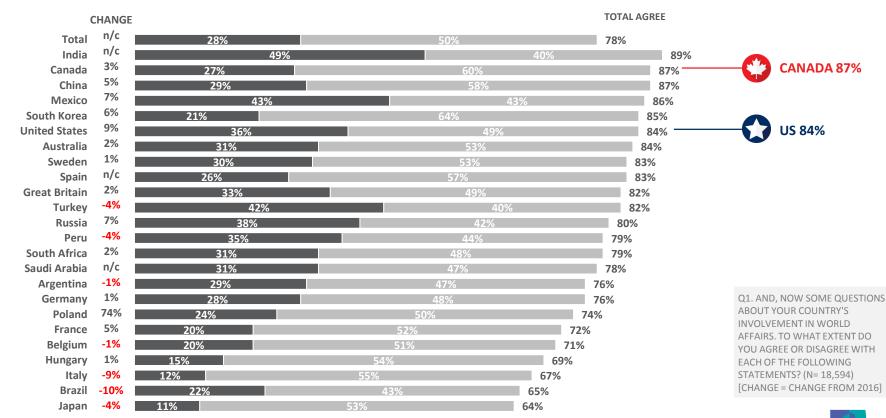


### My country has a responsibility to be a moral leader in the world and set an example for other countries to follow

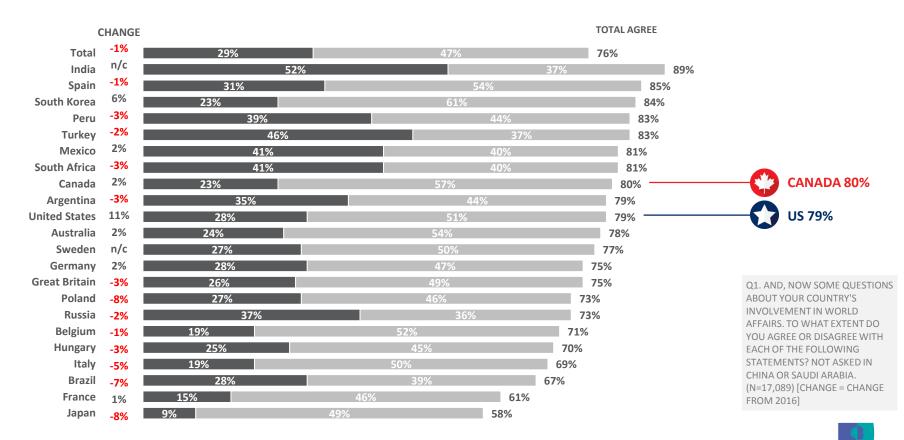


### My country should help parts of the world that are experiencing difficulties such as famines or natural disasters

STRONGLY AGREE SOMEWHAT AGREE

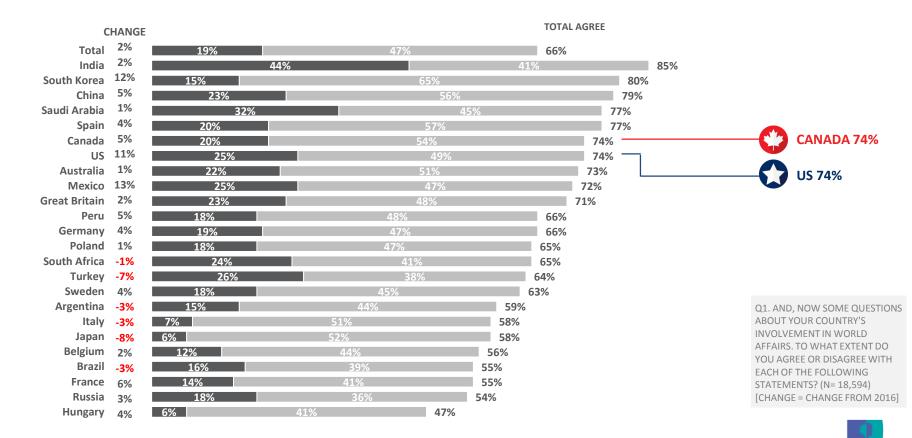


### My country should help the growth of democracy in the world



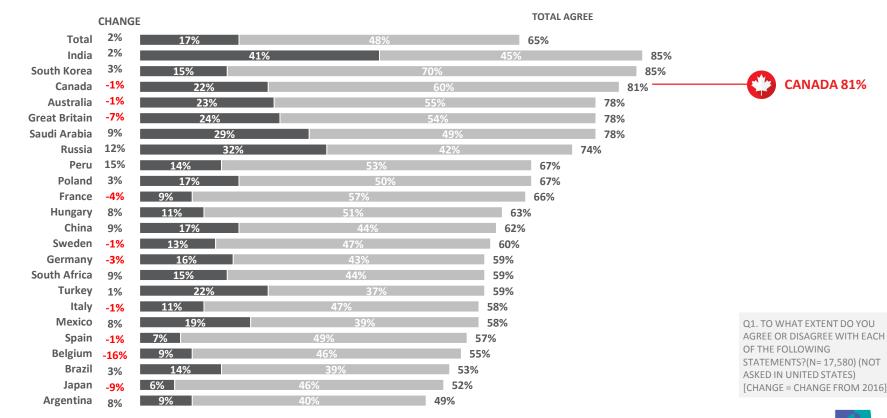
### My country should assist countries that have less developed economies



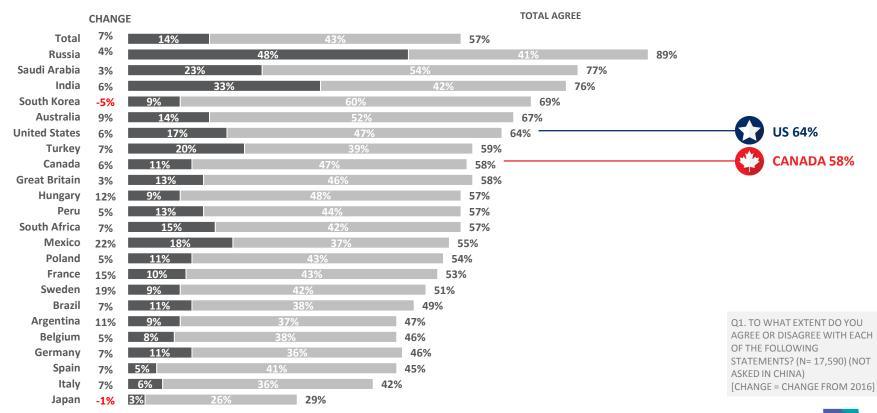


### My country has enough common values with the United States to be able to cooperate on solving many important international problems





## My country has enough common values with China to be able to cooperate on solving many important international problems

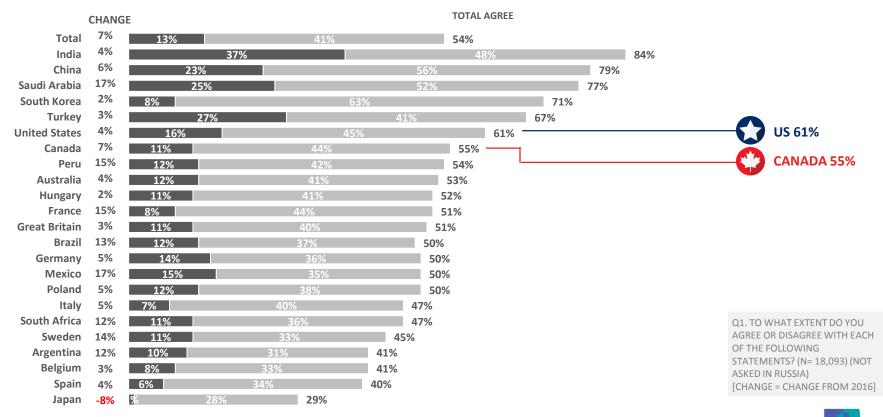


Q1. TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH EACH OF THE FOLLOWING STATEMENTS? (N= 17,590) (NOT ASKED IN CHINA)

© 2017 lpsos [CHANGE = CHANGE FROM 2016]

STRONGLY AGREE

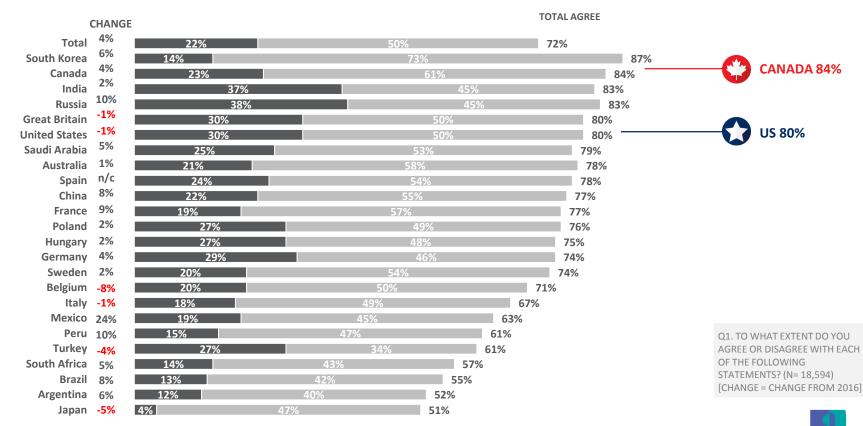
## My country has enough common values with Russia to be able to cooperate on solving many important international problems



STRONGLY AGREE

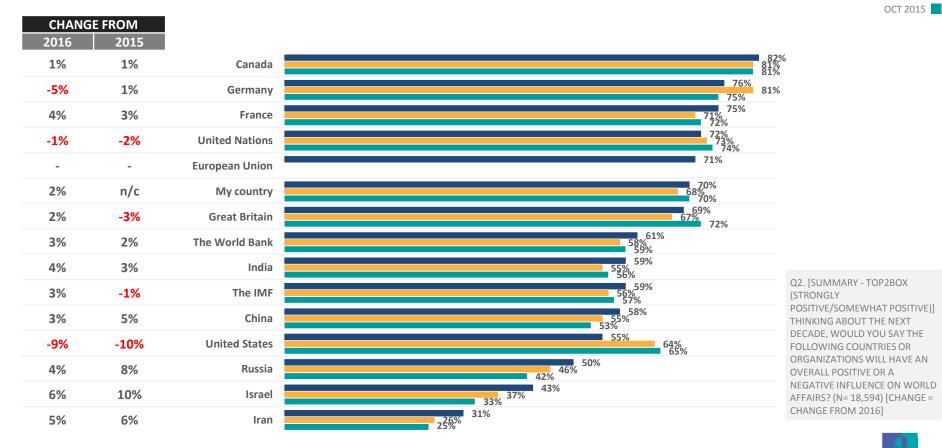
### My country has enough common values with the European Union to be able to cooperate on solving many important international problems





# WORLD AFFAIRS INFLUENCERS

#### **Influencers** TOP2BOX (STRONGLY POSITIVE/SOMEWHAT POSITIVE)



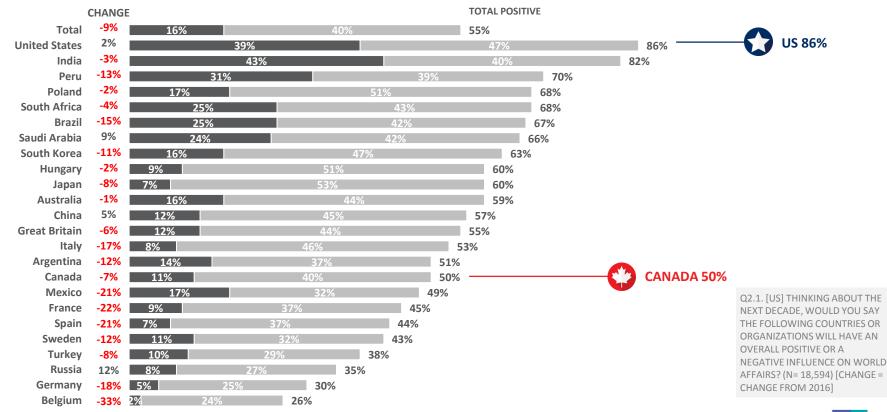
OCT 2017

OCT 2016



(	CHANG	E		τοτΑ	AL POSITIVE		
Total	1%	22%	60%	82%	6		
Canada	3%	42%	5	3%	95%	- <b>CANADA 95%</b>	
India	5%	37%	55%	55% 92%			
Mexico	1%	47%		45%	92%		
United States	3%	33%	57%		90%	US 90%	
Great Britain	-3%	23%	64%		87%		
Peru	-4%	31%	55%		87%		
South Africa	-1%	23%	64%		87%		
Australia	1%	23%	63%		86%		
South Korea	3%	15%	71%		86%		
Sweden	-1%	23%	63%		85%		
Poland	n/c	22%	61%	83	3%		
Argentina	- <b>2%</b>	24%	58%	82%			
Germany	1%	18%	65%	82			
Hungary	3%	16%	65%	82%			
Spain	n/c	17%	65%	82%	6		
Saudi Arabia	15%	25%	55%	80%		Q2.1. [CANADA] THINKING	
China	7%	15%	64%	79%		ABOUT THE NEXT DECADE,	
Belgium	-4%	12%	66%	78%		WOULD YOU SAY THE	
France	- <b>6%</b>	11%	67% 78%			FOLLOWING COUNTRIES OR	
Brazil	-6%	27%	49%	76%		ORGANIZATIONS WILL HAVE AN OVERALL POSITIVE OR A	
Italy	-7%	13%	62%	75%		NEGATIVE INFLUENCE ON WORLD	
Japan	3%	6%	69%	74%		AFFAIRS? (N= 18,594) [CHANGE =	
Russia	9%	10%	58%	68%		CHANGE FROM 2016]	
Turkey	2%	23%	42% 65	5%			





### **The United Nations**

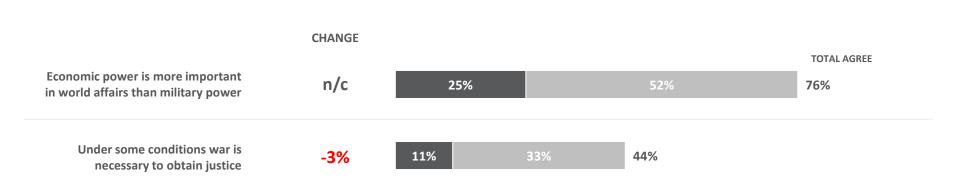
1% Total 65% 4% India 79% -5% South Africa 75% Sweden -1% 75% -5% Brazil 74% China -1% 74% -7% Peru 73% 27% 7% South Korea 73% 27% Canada 3% 72% 1% Mexico 72% 1% **Great Britain** 71% 5% Germany 70% 2% **United States** 70% Australia 4% 69% Argentina -1% 68% 1% Japan 65% 3% Spain 65% 3% Hungary 64% -3% Italy 62% 3% Poland 60% Belgium -2% 58% France 6% 53% Saudi Arabia 5% 49% Russia 15% 39% Turkey 5% 39%

CHANGE Important/Relevant

> Q6. WHICH IS CLOSER TO YOUR OWN POINT OF VIEW: (N=18,594)

# WORLD AFFAIRS: VALUES

### **Global Views on Justification of War**



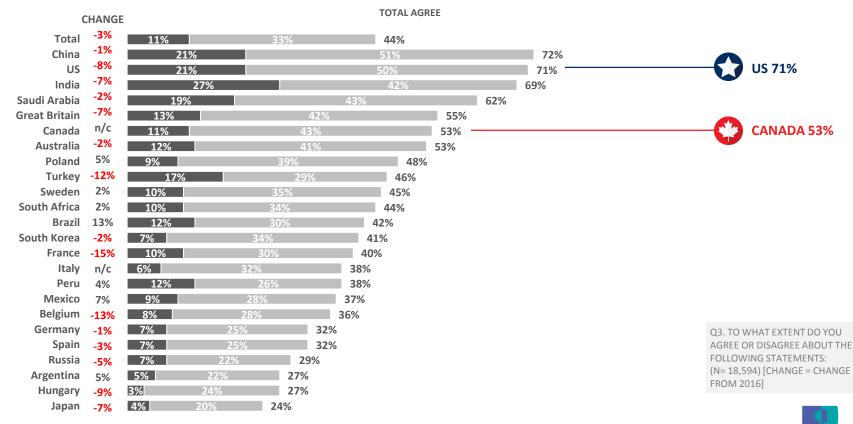
BASE: ALL RESPONDENTS, TOTAL (N= 18,594) [CHANGE = CHANGE FROM 2016]

### Economic power is more important in world affairs than military power

STRONGLY AGREE SOMEWHAT AGREE

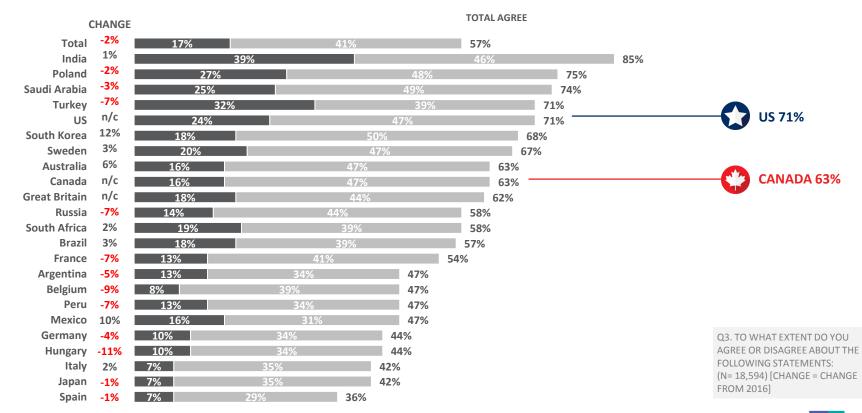
C	HANGE	E		TOTAL AGREE
Total	1%	25%	52%	76%
India	n/c	43%		43% 86%
South Africa	2%	31%	53%	84%
Spain	- <b>2%</b>	26%	54%	80%
Turkey	-1%	36%	44%	80%
Argentina	5%	29%	50%	79%
Australia	6%	20%	59%	79%
Peru	1%	29%	49%	78%
Saudi Arabia	n/c	27%	51%	78%
Canada	2%	18%	59%	77% CANADA 77%
Great Britain	1%	22%	55%	77%
Mexico	6%	29%	48%	77%
Poland	1%	18%	59%	77%
Russia	-3%	33%	44%	77%
South Korea	2%	19%	57%	76%
Sweden	1%	18%	58%	76%
Belgium	<b>-2%</b>	24%	52%	76%
France	- <b>2</b> %	27%	49%	76%
Italy	-4%	25%	51%	76%
Hungary	1%	19%	56%	75% Q3. TO WHAT EXTENT DO YOU
Germany	1%	19%	56%	75% AGREE OR DISAGREE ABOUT THE
China	3%	23%	48%	71% FOLLOWING STATEMENTS: (N= 18,594) [CHANGE = CHANGE
US	8%	21%	50%	FROM 2016
Brazil	<b>-2%</b>	24%	45%	69%
Japan	-7%	14%	48%	62%

### Under some conditions war is necessary to obtain justice



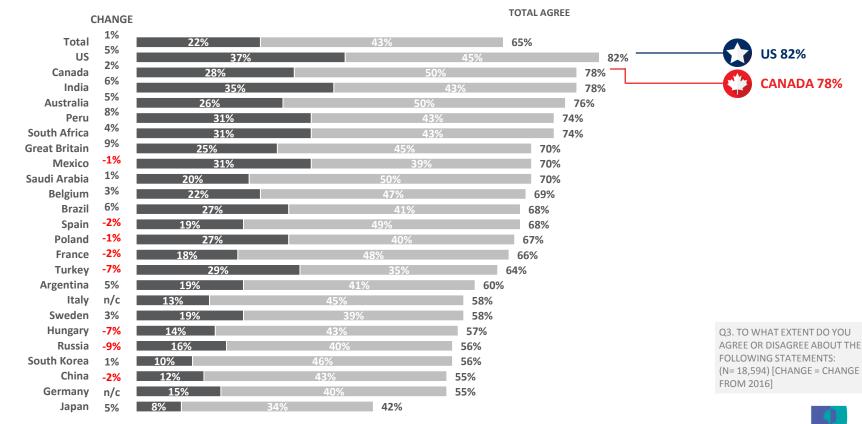
### Given the dangers in the world, my government needs to spend more on my country's military

STRONGLY AGREE SOMEWHAT AGREE



### I expect in the next 25 years we could see another world conflict involving superpowers similar to World Wars 1 and 2

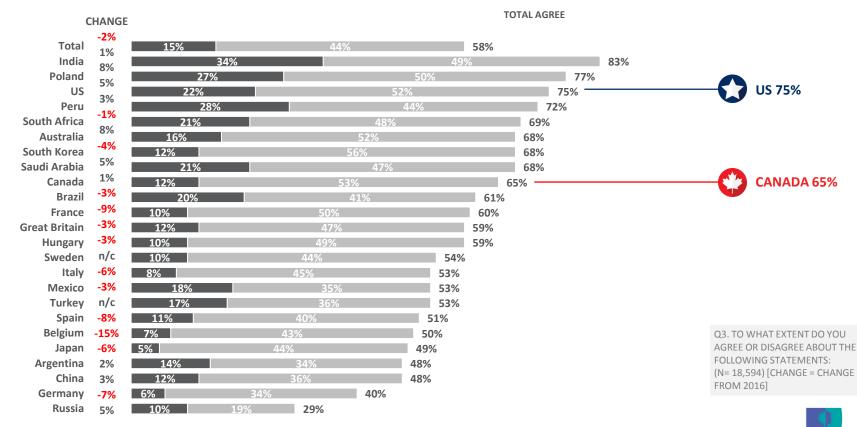
STRONGLY AGREE SOMEWHAT AGREE



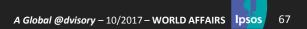
65

### It is good for the world that the United States feels it has a special responsibility to assist countries or peoples when they are confronted by military aggressors

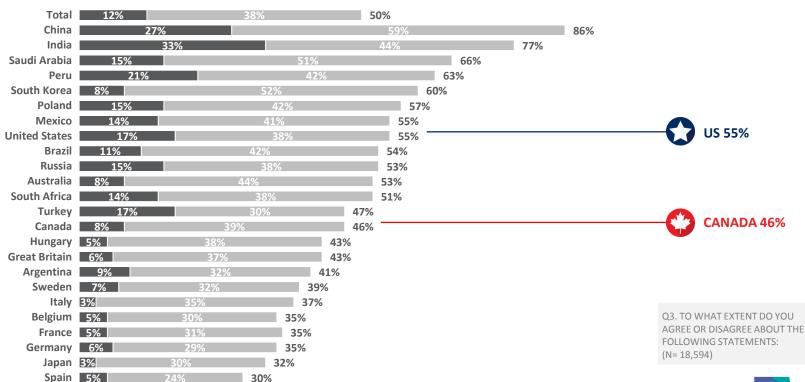
STRONGLY AGREE



## **CLIMATE CHANGE**



### Most of the world's countries are doing what is appropriate and reasonable to fight climate change



TOTAL AGREE

#### Contacts



Dr. Darrell Bricker, Chief Executive Officer, Ipsos Global Public Affairs

300—160 Bloor Street East Toronto, Ontario, Canada M4W 1B9

Direct Phone: 416.324.2001 email: <u>darrell.bricker@ipsos.com</u>



#### **ABOUT IPSOS**

Ipsos ranks third in the global research industry. With a strong presence in 87 countries, Ipsos employs more than 16,000 people and has the ability to conduct research programs in more than 100 countries. Founded in France in 1975, Ipsos is controlled and managed by research professionals. They have built a solid Group around a multispecialist positioning – Media and advertising research; Marketing research; Client and employee relationship management; Opinion & social research; Mobile, Online, Offline data collection and delivery.

Ipsos is listed on Eurolist – NYSE – Euronext. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg IPS:FP www.ipsos.com

#### **GAME CHANGERS**

At Ipsos we are passionately curious about people, markets, brands and society. We deliver information and analysis that makes our complex world easier and faster to navigate and inspires our clients to make smarter decisions.

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.

