

### DR. DARRELL BRICKER

Chief Executive Officer, Ipsos Global Public Affairs October, 2017

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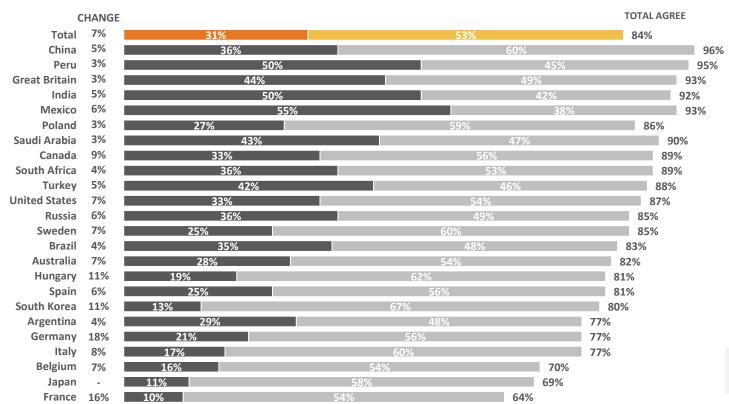


## Methodology

- 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.

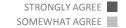
## FREE TRADE

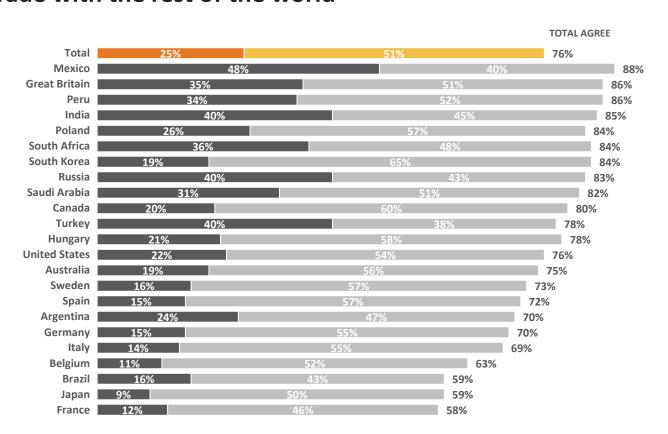
TOP2BOX (AGREE VERY MUCH/ AGREE SOMEWHAT)



Q7. FREE TRADE IS BENEFICIAL FOR MY COUNTRY'S ECONOMY (N=18,593)

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

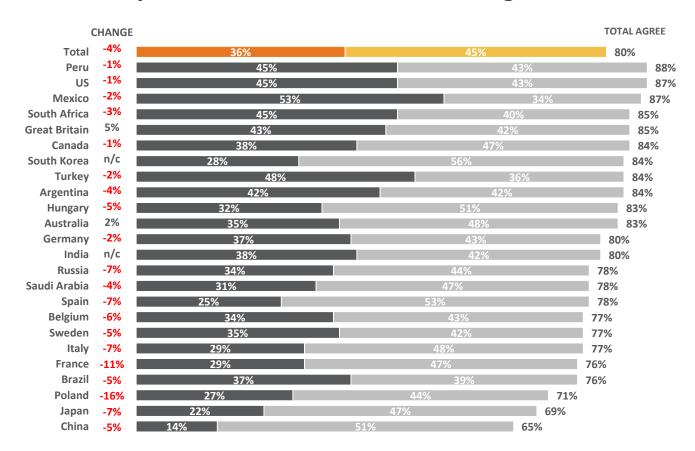




Q3. TO WHAT EXTENT DO YOU AGREE OR DISAGREE ABOUT THE FOLLOWING STATEMENTS: (N= 17,590) (NOT ASKED IN CHINA)

## GLOBAL THREATS ASSESSMENT

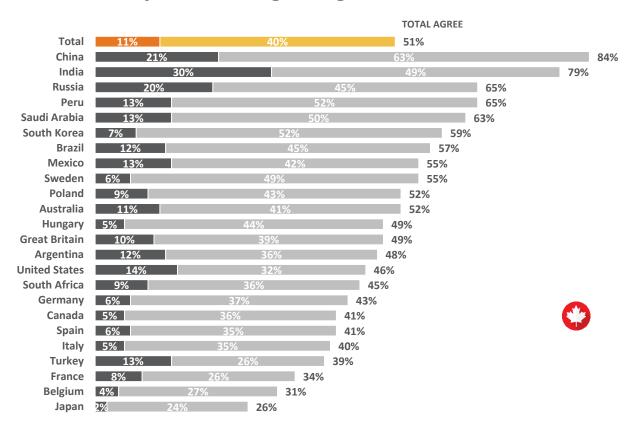
## Over the last year the world became more dangerous.



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



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



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)

CHANGE FROM 2016   2015   2014   2010					
1%	2%	10%	n/a	Being hacked for fraudulent or espionage purposes	74% 73% 72% 64% 70% N/A N/A
1%	3%	17%	29%	Terrorist Attack in Your Country	72% 71% 69% 55% 56% 56% 56% 54%
5%	7%	14%	27%	Nuclear/Chemical Attack in the World	71% 66% 64% 57% 67%
4%	5%	9%	8%	Major Natural Disaster in Your Country	63% 59% 58% 54% 56% 57% 54% 55%

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

OCT 2017 OCT 2016

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)



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

TOP2BOX (VERY REAL THREAT/ SOMEWHAT REAL THREAT)

CHANGE FROM			Л		
2016	2015	2014	2010		
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%
-1%	-1%	2%	22%	Your Country Entering Armed Conflict with Another Country	53% 54% 54% 51% 43% 43% 41%
2%	1%	-6%	14%	Major Health Epidemic in Your Country	53% 51% 52% 59% 46% 44% 35% 39%

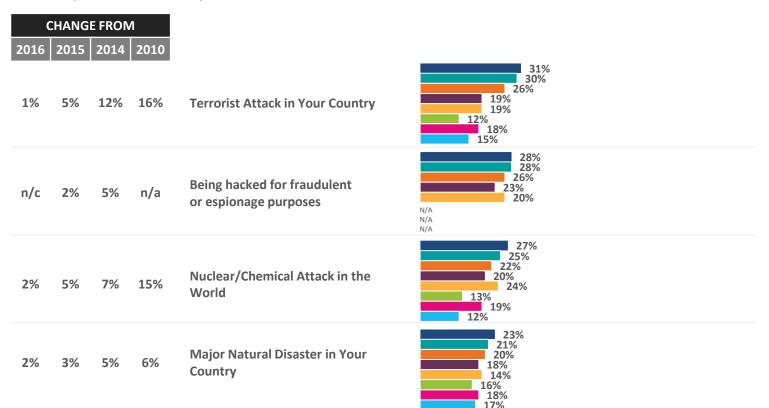
OCT 2016
OCT 2015
OCT 2014
OCT 2013
SEPT 2012
MAY 2011
AUG 2010

OCT 2017

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)

### **Global Threat Assessment**

TOP BOX (VERY REAL THREAT)



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

OCT 2017

OCT 2016

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)



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

TOP BOX (VERY REAL THREAT)

CHANGE FROM 2016   2015   2014   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/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	- <b>2</b> %	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%

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

OCT 2017

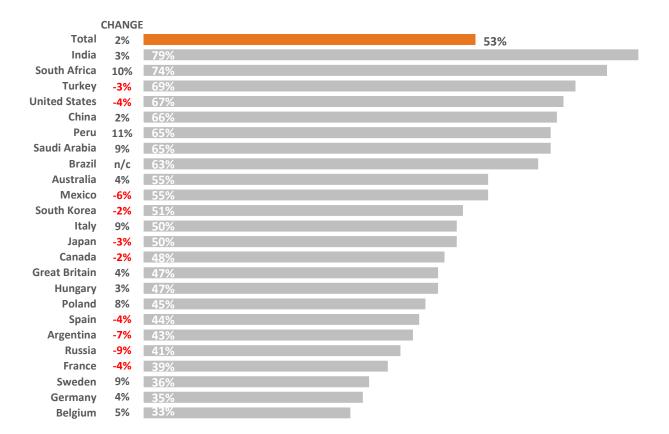
OCT 2016

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

TOP2BOX (VERY REAL THREAT/ SOMEWHAT REAL THREAT)

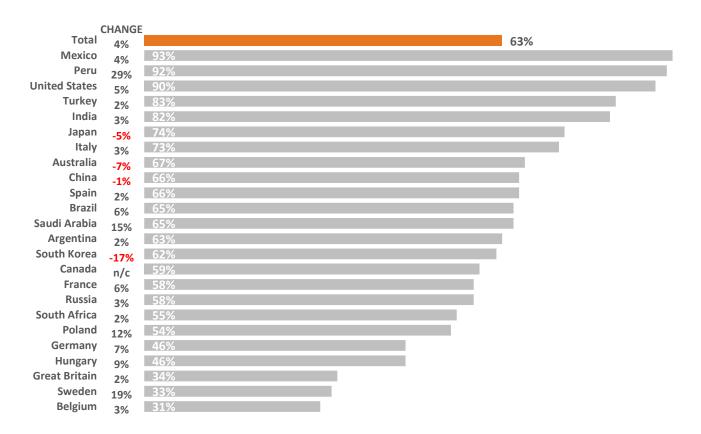


Q1.1. HOW REAL DO YOU FEEL
THE THREAT IS OF ANY OF THE
FOLLOWING HAPPENING IN THE
NEXT TWELVE MONTHS-A VERY
REAL THREAT, A SOMEWHAT
REAL THREAT, NOT MUCH OF A
REAL THREAT OR NOT A REAL
THREAT AT ALL? (N= 18,594)
[CHANGE = CHANGE FROM 2016]



## A major natural disaster occurring in your country

TOP2BOX (VERY REAL THREAT/ SOMEWHAT REAL THREAT)

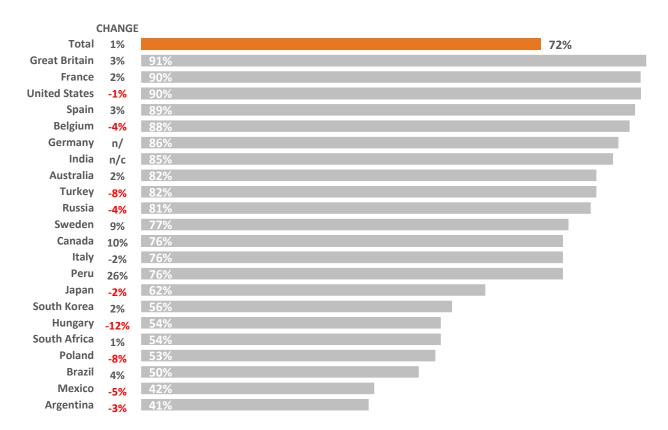


Q1.2 HOW REAL DO YOU FEEL
THE THREAT IS OF ANY OF THE
FOLLOWING HAPPENING IN THE
NEXT TWELVE MONTHS-A VERY
REAL THREAT, A SOMEWHAT
REAL THREAT, NOT MUCH OF A
REAL THREAT OR NOT A REAL
THREAT AT ALL? (N= 18,594)
[CHANGE = CHANGE FROM 2016]



## A terrorist attack taking place in your country

TOP2BOX (VERY REAL THREAT/ SOMEWHAT REAL THREAT)

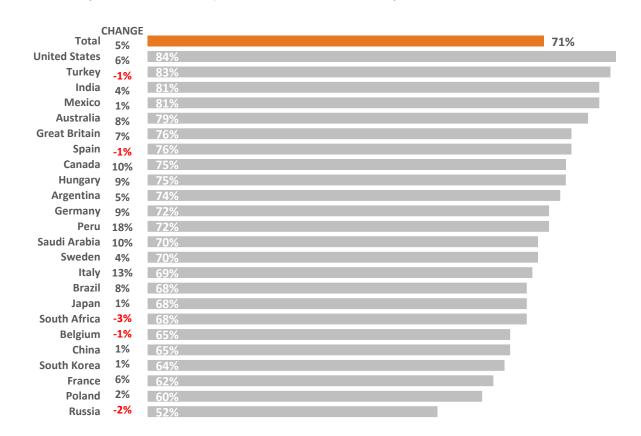


Q1.3 HOW REAL DO YOU FEEL THE THREAT IS OF ANY OF THE FOLLOWING HAPPENING IN THE NEXT TWELVE MONTHS-A VERY REAL THREAT, A SOMEWHAT REAL THREAT OR NOT A REAL THREAT OR NOT A SKED IN CHINA. (N= 17,089) [CHANGE = CHANGE FROM 2016]

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

TOP2BOX (VERY REAL THREAT/ SOMEWHAT REAL THREAT)

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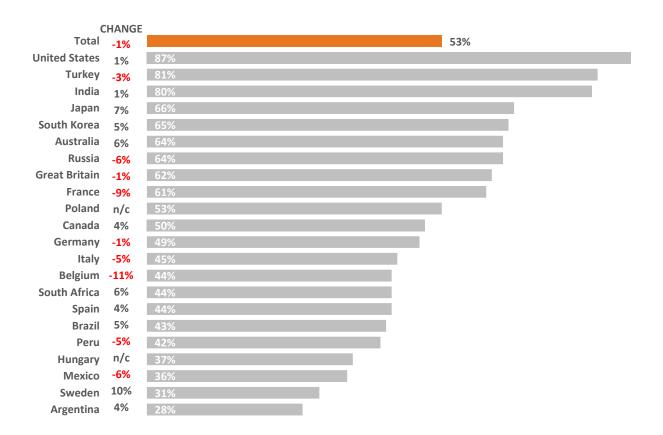
Q1.6. HOW REAL DO YOU FEEL
THE THREAT IS OF ANY OF THE
FOLLOWING HAPPENING IN THE
NEXT TWELVE MONTHS-A VERY
REAL THREAT, A SOMEWHAT
REAL THREAT, NOT MUCH OF A
REAL THREAT OR NOT A REAL
THREAT AT ALL? (N= 18,594)
[CHANGE = CHANGE FROM 2016]



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

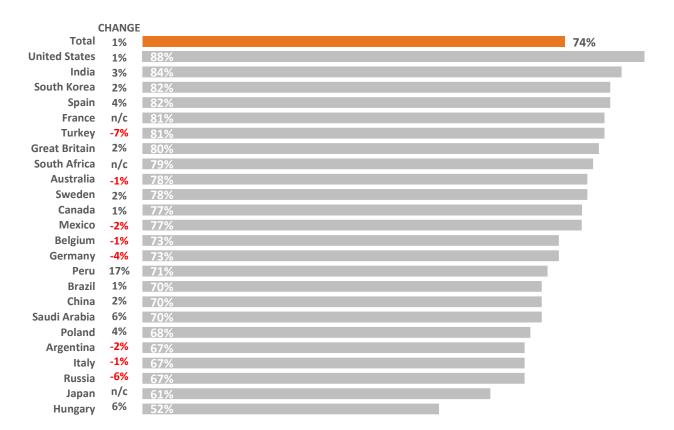
TOP2BOX (VERY REAL THREAT/ SOMEWHAT REAL THREAT)



Q1.5 HOW REAL DO YOU FEEL
THE THREAT IS OF ANY OF THE
FOLLOWING HAPPENING IN THE
NEXT TWELVE MONTHS-A VERY
REAL THREAT, A SOMEWHAT
REAL THREAT, NOT MUCH OF A
REAL THREAT OR NOT A REAL
THREAT AT ALL? NOT ASKED IN
CHINA. (N=17,089) [CHANGE =
CHANGE FROM 2016]

## Being hacked for fraudulent or espionage purposes

TOP2BOX (VERY REAL THREAT/ SOMEWHAT REAL THREAT)

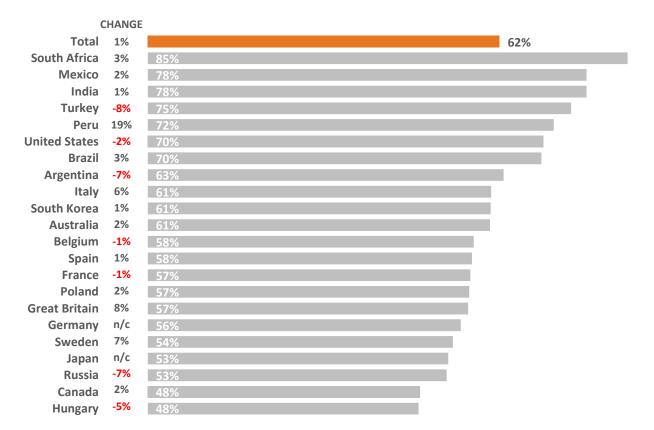


Q1.8. HOW REAL DO YOU FEEL THE THREAT IS OF ANY OF THE FOLLOWING HAPPENING IN THE NEXT TWELVE MONTHS-A VERY REAL THREAT, A SOMEWHAT REAL THREAT, NOT MUCH OF A REAL THREAT OR NOT A REAL THREAT AT ALL? (N= 18,594) [CHANGE = CHANGE FROM 2016]

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

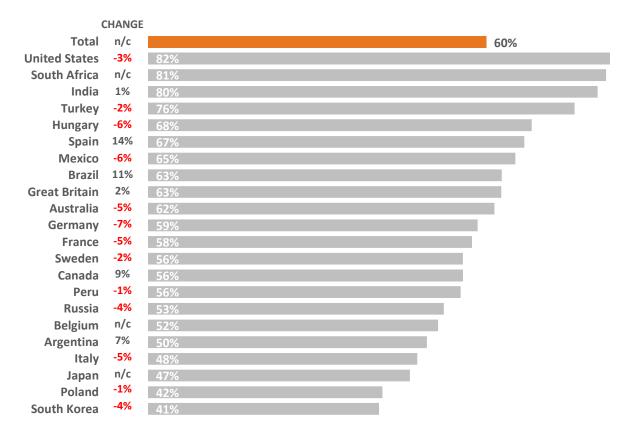
TOP2BOX (VERY REAL THREAT/ SOMEWHAT REAL THREAT)



Q1.8. HOW REAL DO YOU FEEL THE THREAT IS OF ANY OF THE FOLLOWING HAPPENING IN THE NEXT TWELVE MONTHS-A VERY REAL THREAT, A SOMEWHAT REAL THREAT, NOT MUCH OF A REAL THREAT OR NOT A REAL THREAT AT ALL? (N= 18,594) [CHANGE = CHANGE FROM 2016]

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

TOP2BOX (VERY REAL THREAT/ SOMEWHAT REAL THREAT)

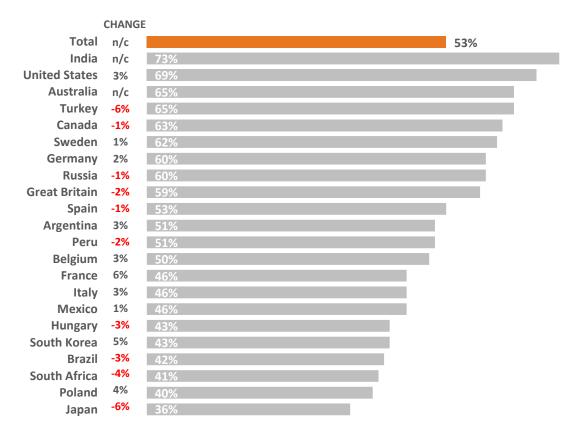


Q1.8. HOW REAL DO YOU FEEL
THE THREAT IS OF ANY OF THE
FOLLOWING HAPPENING IN THE
NEXT TWELVE MONTHS-A VERY
REAL THREAT, A SOMEWHAT
REAL THREAT, NOT MUCH OF A
REAL THREAT OR NOT A REAL
THREAT AT ALL? (N= 18,594)
[CHANGE = CHANGE FROM 2016]

## THREAT CONFIDENCE

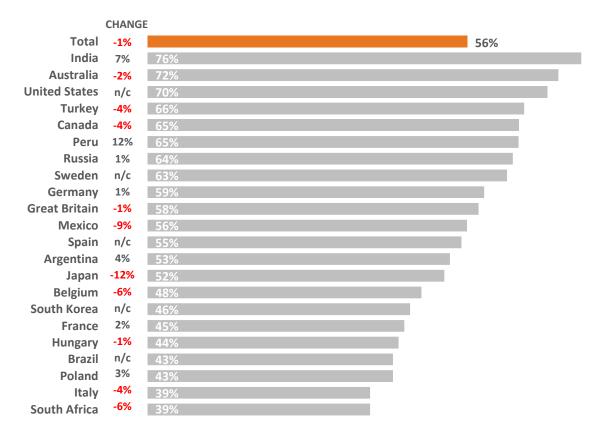
## A major health epidemic breaking out in your country

TOP2BOX (VERY CONFIDENT/SOMEWHAT CONFIDENT)



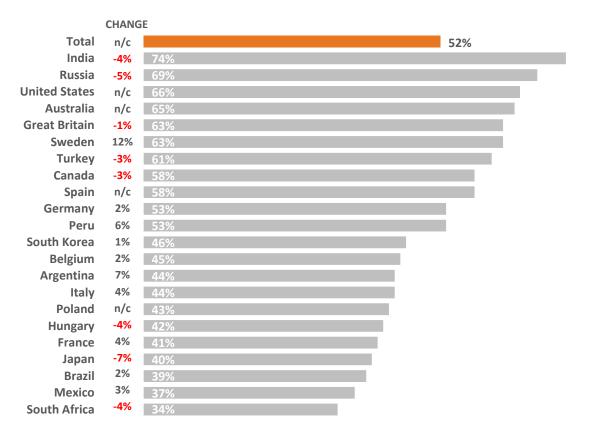
## A major natural disaster occurring in your country

TOP2BOX (VERY CONFIDENT/SOMEWHAT CONFIDENT)



## A terrorist attack taking place in your country

TOP2BOX (VERY CONFIDENT/SOMEWHAT CONFIDENT)

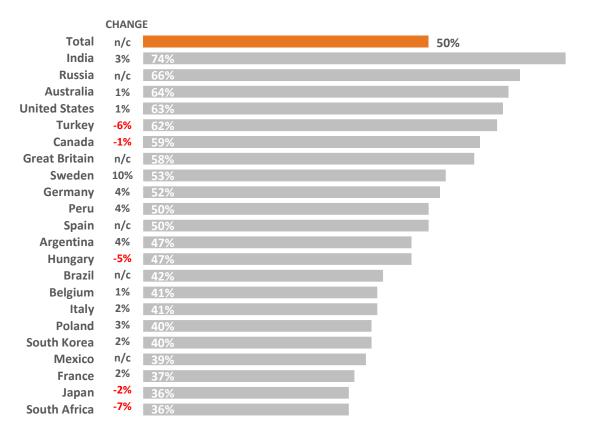


Q.2. AND, IF ANY OF THE
FOLLOWING WERE TO HAPPEN IN
THE NEXT TWELVE MONTHS,
HOW CONFIDENT ARE YOU THAT
THE APPROPRIATE LEVELS OF
SECURITY AND PROTECTION
COULD BE PROVIDED BY YOUR
GOVERNMENT OR ITS AGENCIES
COULD RESPOND EFFECTIVELY
TO? (N=17,089) [CHANGE =
CHANGE FROM 2016]

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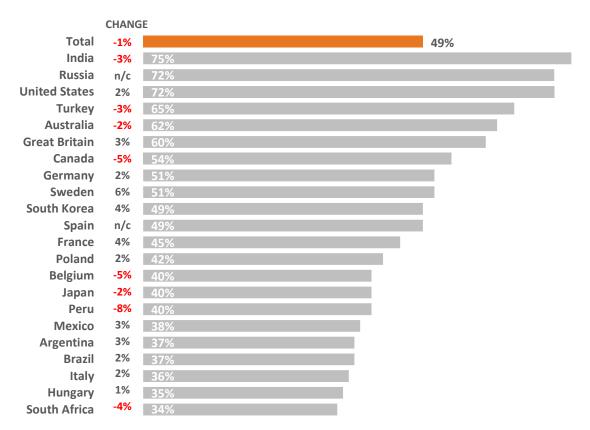
## A violent conflict breaking out between ethnic or minority groups in your country

TOP2BOX (VERY CONFIDENT/SOMEWHAT CONFIDENT)



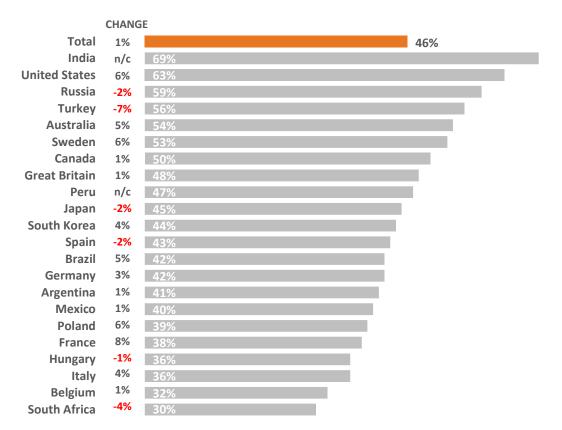
## Your country being involved in an armed conflict with another nation

TOP2BOX (VERY CONFIDENT/SOMEWHAT CONFIDENT)



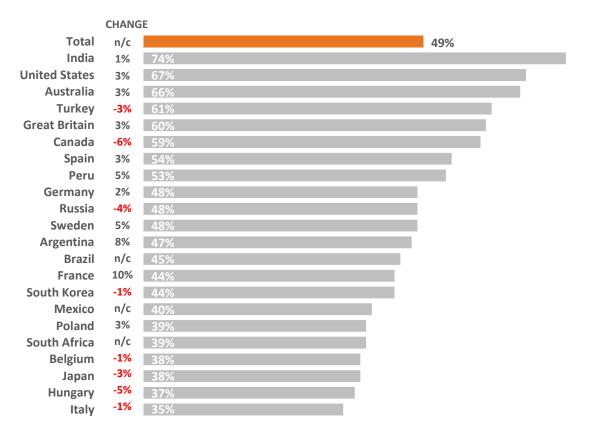
## A nuclear, biological or chemical attack taking place somewhere in the world

TOP2BOX (VERY CONFIDENT/SOMEWHAT CONFIDENT)



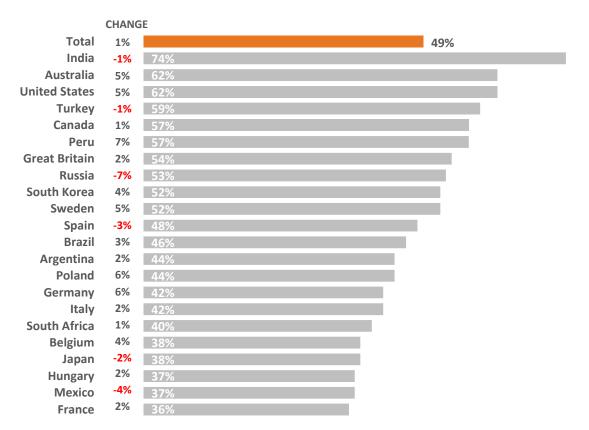
## The personal safety and security of you or your family being violated

TOP2BOX (VERY CONFIDENT/SOMEWHAT CONFIDENT)



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

TOP2BOX (VERY CONFIDENT/SOMEWHAT CONFIDENT)



# GLOBAL GAP BETWEEN PRIORITY OF THREAT AND LEVEL OF PREPARATION

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

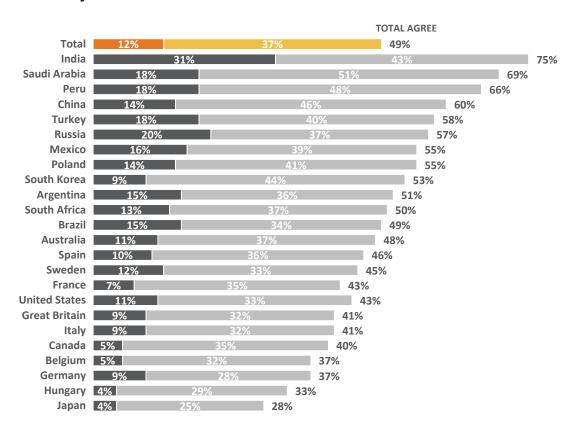
GLOBAL	GAP%*
A nuclear, biological or chemical attack taking place somewhere in the world	-25%
Some person, organization or country hacking into either your public, private or personal information system for fraudulent or espionage purposes	-25%
A terrorist attack taking place in your country	-20%
The 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%

<sup>\*</sup>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

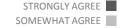


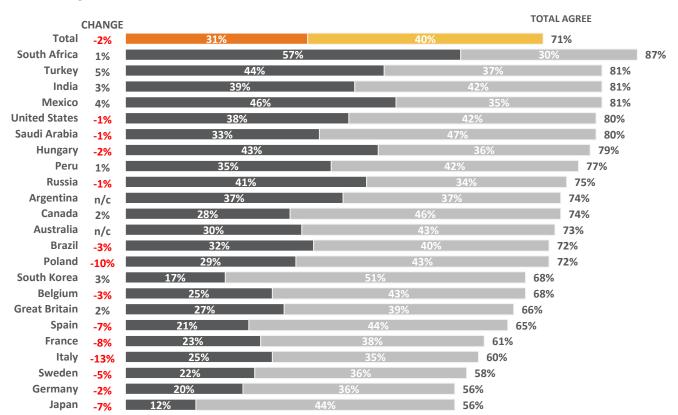


Q3. TO WHAT EXTENT DO YOU AGREE OR DISAGREE ABOUT THE FOLLOWING STATEMENTS: (N= 18,594)

## 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





Q1. 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? NOT ASKED IN
CHINA. (N=17,590) [CHANGE =
CHANGE FROM 2016]

## 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. [SUMMARY - TOP2BOX (STRONGLY AGREE/SOMEWHAT AGREE)] AND, NOW SOME QUESTIONS ABOUT YOUR
My country has enough common values with the European Union to be able to cooperate on solving many important international problems	4%	72%	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

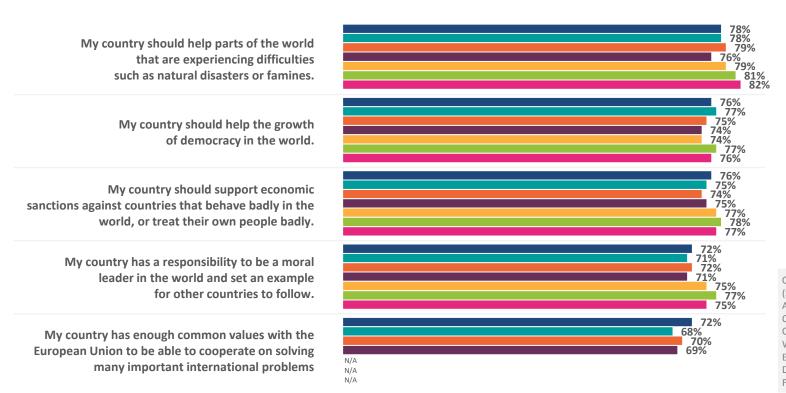
TOP2BOX (STRONGLY AGREE/SOMEWHAT AGREE)

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%
My country has enough common values with Russia to be able to cooperate on solving many important international problems	7%	54%

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—Tracking

TOP2BOX (STRONGLY AGREE/SOMEWHAT AGREE)



OCT 2015
OCT 2014
OCT 2013
SEPT 2012
OCT 2011

OCT 2017

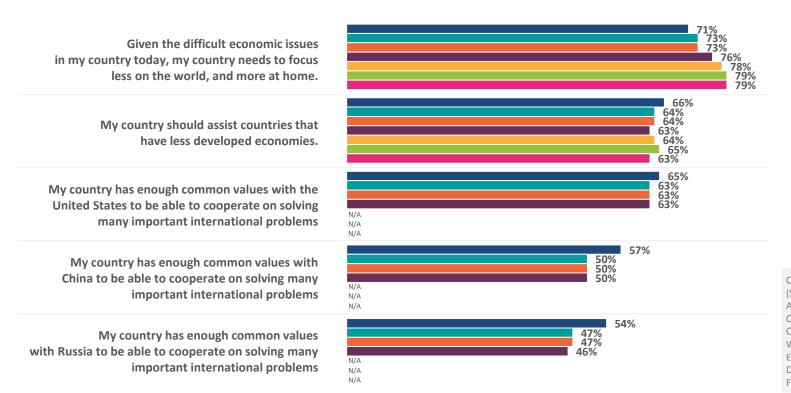
OCT 2016

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?

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

TOP2BOX (STRONGLY AGREE/SOMEWHAT AGREE)

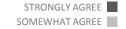


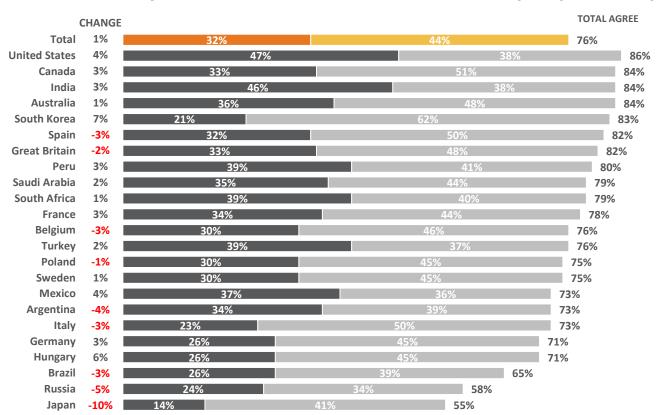
OCT 2016
OCT 2015
OCT 2014
OCT 2013
SEPT 2012
OCT 2011

OCT 2017

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

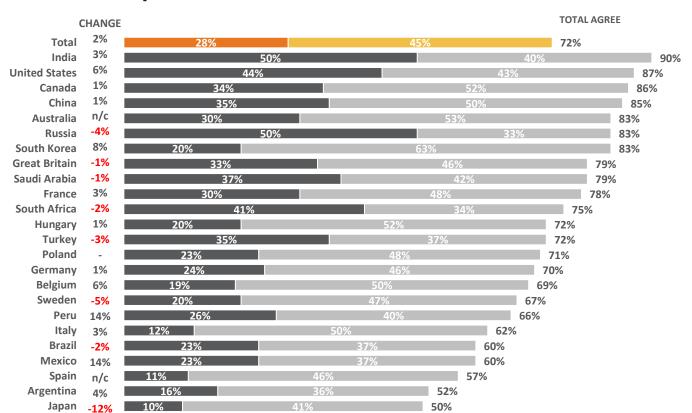




Q1. AND, NOW SOME QUESTIONS
ABOUT YOUR COUNTRY'S
INVOLVEMENT IN WORLD
AFFAIRS. TO WHAT EXTENT DO
YOU AGREE OR DISAGREE WITH
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STATEMENTS? NOT ASKED IN
CHINA. (N=17,590) [CHANGE =
CHANGE FROM 2016]

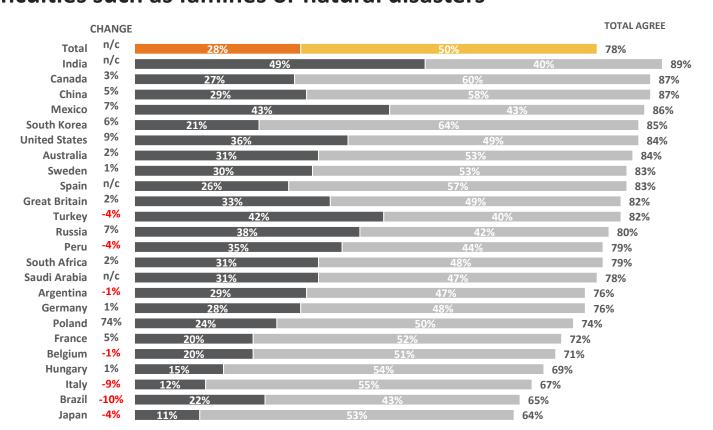
40

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



Q1. 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? (N= 18,594) [CHANGE = CHANGE FROM 2016]

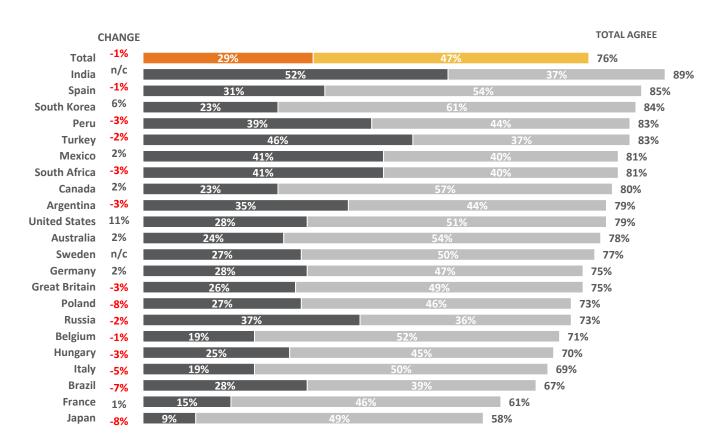
## My country should help parts of the world that are experiencing difficulties such as famines or natural disasters



Q1. 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? (N= 18,594) [CHANGE = CHANGE FROM 2016]

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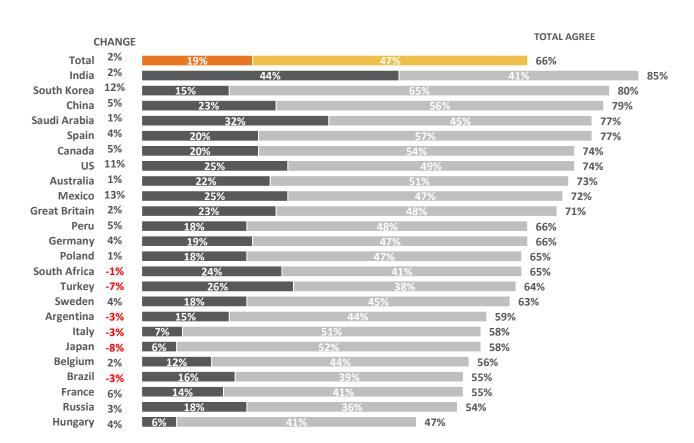
### My country should help the growth of democracy in the world



Q1. 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? NOT ASKED IN
CHINA OR SAUDI ARABIA.
(N=17,089) [CHANGE = CHANGE
FROM 2016]

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



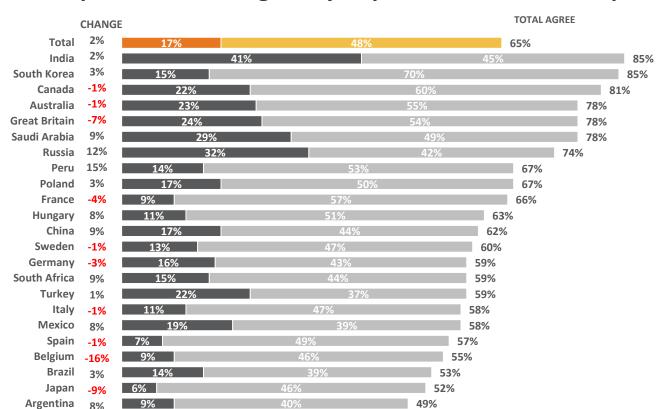


Q1. AND, NOW SOME QUESTIONS ABOUT YOUR COUNTRY'S INVOLVEMENT IN WORLD AFFAIRS. TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH EACH OF THE FOLLOWING STATEMENTS? (N= 18,594) [CHANGE = CHANGE FROM 2016]



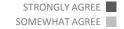
## My country has enough common values with the United States to be able to cooperate on solving many important international problems

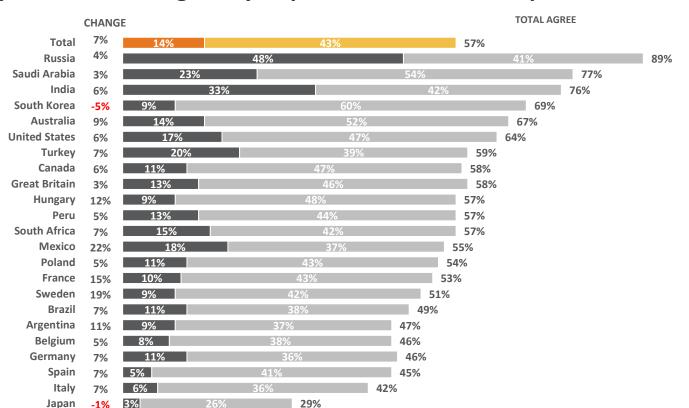




Q1. TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH EACH OF THE FOLLOWING STATEMENTS? (N= 17,580) (NOT ASKED IN UNITED STATES) [CHANGE = CHANGE FROM 2016]

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

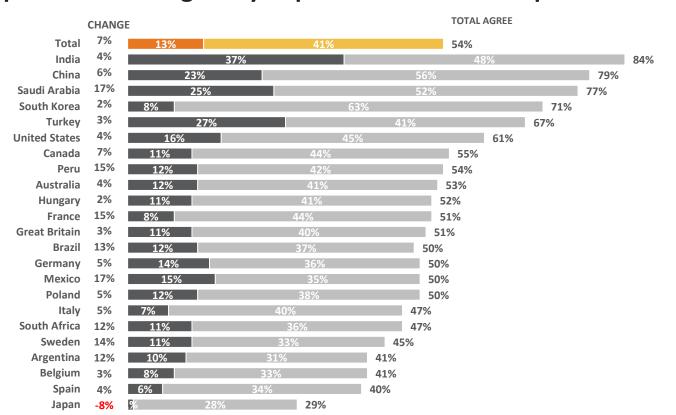




Q1. TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH EACH OF THE FOLLOWING STATEMENTS? (N= 17,590) (NOT ASKED IN CHINA) [CHANGE = CHANGE FROM 2016]



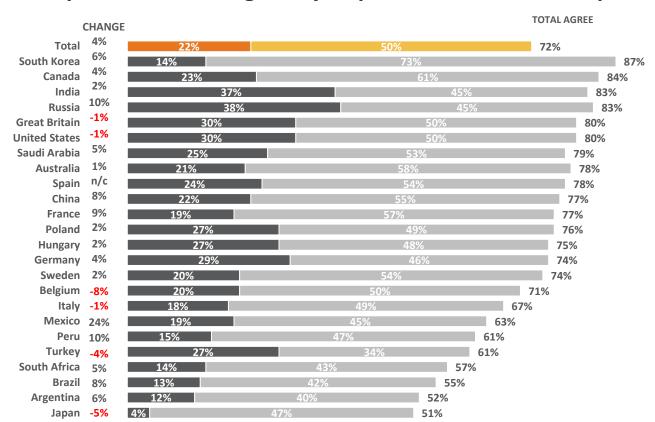
## My country has enough common values with Russia to be able to cooperate on solving many important international problems



Q1. TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH EACH OF THE FOLLOWING STATEMENTS? (N= 18,093) (NOT ASKED IN RUSSIA) [CHANGE = CHANGE FROM 2016]

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





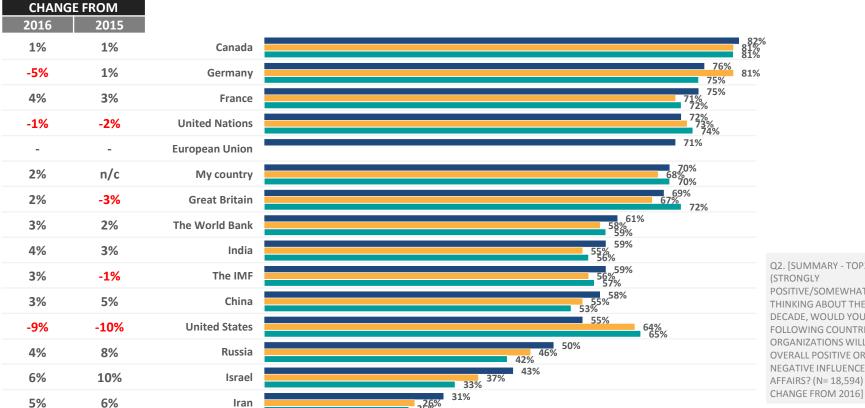
Q1. TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH EACH OF THE FOLLOWING STATEMENTS? (N= 18,594) [CHANGE = CHANGE FROM 2016]



48

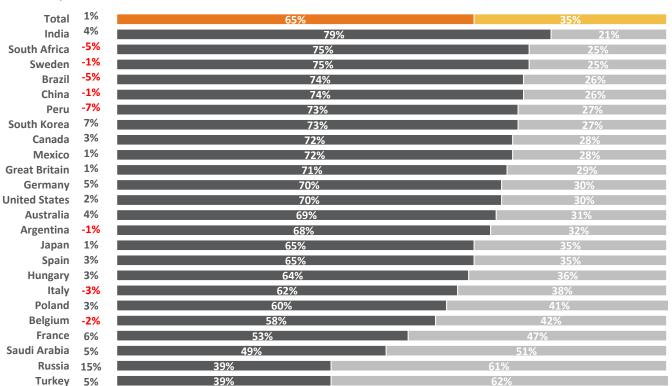
# WORLD AFFAIRS INFLUENCERS

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



Q2. [SUMMARY - TOP2BOX POSITIVE/SOMEWHAT POSITIVE)] THINKING ABOUT THE NEXT DECADE, WOULD YOU SAY THE **FOLLOWING COUNTRIES OR** ORGANIZATIONS WILL HAVE AN **OVERALL POSITIVE OR A NEGATIVE INFLUENCE ON WORLD** AFFAIRS? (N= 18,594) [CHANGE =





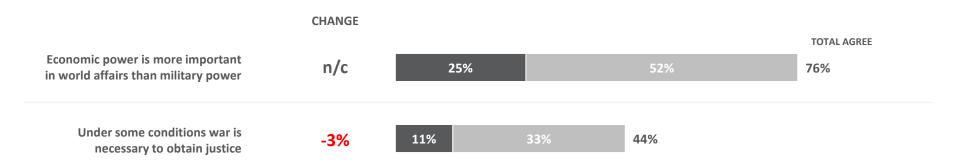
Q6. WHICH IS CLOSER TO YOUR OWN POINT OF VIEW: (N=18,594)

# WORLD AFFAIRS: VALUES



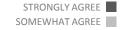
### **Global Views on Justification of War**

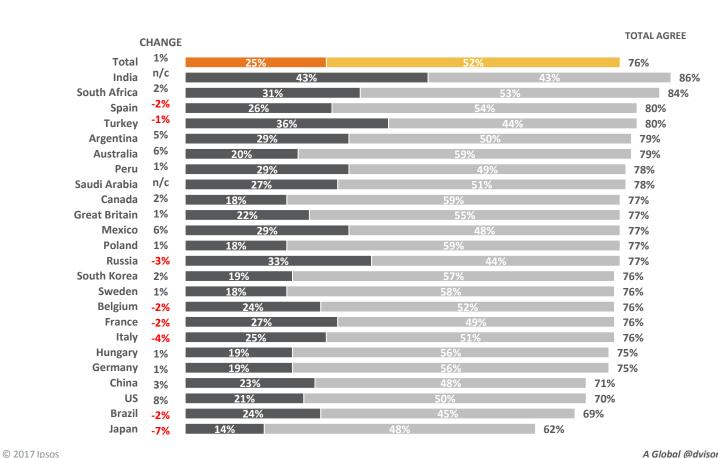




BASE: ALL RESPONDENTS, TOTAL (N= 18,594) [CHANGE = CHANGE FROM 2016]

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

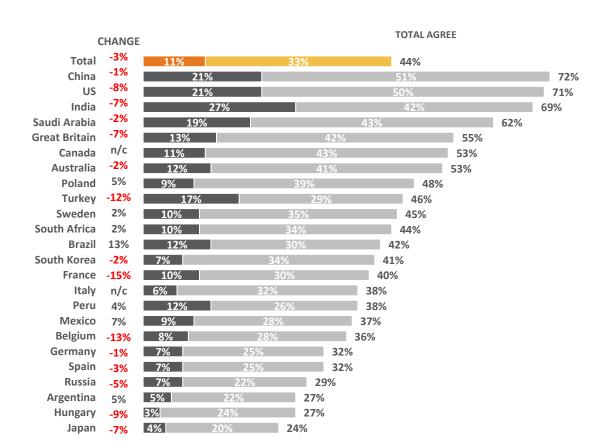




Q3. TO WHAT EXTENT DO YOU AGREE OR DISAGREE ABOUT THE **FOLLOWING STATEMENTS:** (N= 18,594) [CHANGE = CHANGE FROM 2016]

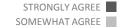


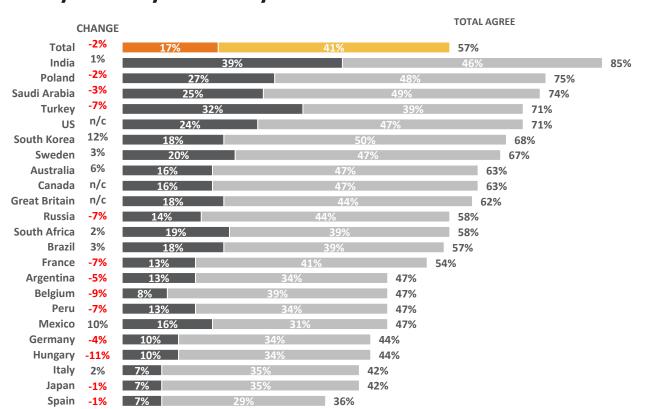
### Under some conditions war is necessary to obtain justice



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

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



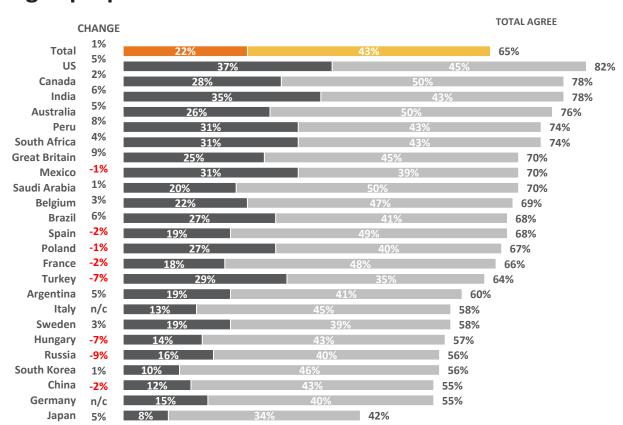


Q3. TO WHAT EXTENT DO YOU AGREE OR DISAGREE ABOUT THE **FOLLOWING STATEMENTS:** (N= 18,594) [CHANGE = CHANGE FROM 2016]

56

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



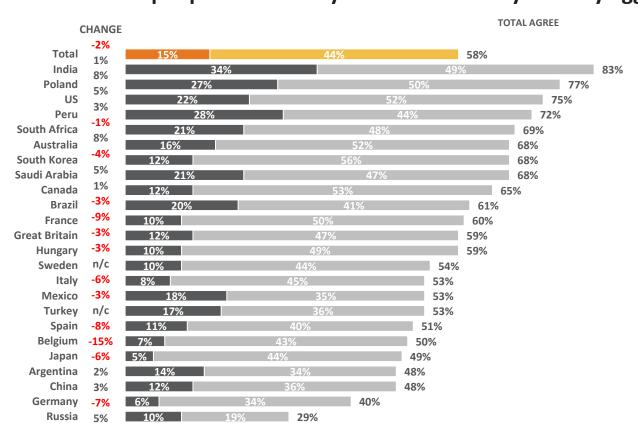


Q3. TO WHAT EXTENT DO YOU AGREE OR DISAGREE ABOUT THE FOLLOWING STATEMENTS: (N= 18,594) [CHANGE = CHANGE FROM 2016]



## 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



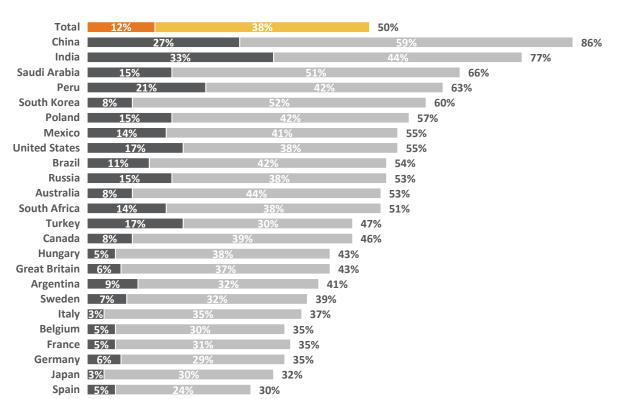


Q3. TO WHAT EXTENT DO YOU AGREE OR DISAGREE ABOUT THE FOLLOWING STATEMENTS: (N= 18,594) [CHANGE = CHANGE FROM 2016]

# CLIMATE CHANGE

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





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

### **Contacts**



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