

POPULIST AND NATIVIST SENTIMENT IN 2019: A 27-COUNTRY SURVEY

IPSOS GLOBAL ADVISOR

GAME CHANGERS



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Key Findings

THE SYSTEM IS BROKEN

- The average global citizen feels left out of the “normal order” of life in his/her country:
 - 70% agree the economy is rigged to favor the rich and powerful
 - 66% agree that traditional politics ignores people “like me”
 - 54% agree their country’s society is broken
- Disaffection is most widespread in Latin America and Eastern Europe
- The U.S. shows a wide gender gap as a lot more women than men agree with each statement

POPULISM

- The average global citizen wants more hands-on leadership:
 - 64% want a strong leader to “take country back” from the rich
 - 62% agree that local experts don’t understand people “like me”
 - 49% want a strong leader willing to break rules to fix the country
- Agreement with the first two statements is especially prevalent in Spanish-speaking countries
- In the U.S., it is most common in the 35-49 age group and among low and middle-income earners

NATIVISM

- The average global citizen is ambivalent about immigration, leaning toward a natives-first view:
 - 60% *disagree* their nation would be better off accepting all immigrants
 - 60% say employers should favor natives when jobs are scarce
 - 43% agree that immigrants take social services away from natives
- Nativism is most prevalent in Turkey, Malaysia, Serbia and Russia
- In the U.S., nativist views are far less prevalent among the young

Agreement with Statements – Overall Summary



		Global Total	Argentina	Australia	Belgium	Brazil	Canada	Chile	France	Germany	Great Britain	Hungary	India	Israel	Italy	Japan	Malaysia	Mexico	Peru	Poland	Russia	Saudi Arabia	Serbia	South Africa	South Korea	Spain	Sweden	Turkey	United States
The System Is Broken	[Country's] society is broken	54%	74%	47%	25%	78%	52%	57%	46%	63%	63%	66%	40%	25%	34%	32%	54%	61%	63%	84%	64%	24%	63%	78%	43%	69%	49%	46%	60%
	The [Country's] economy is rigged to advantage the rich and powerful	70%	76%	66%	69%	75%	67%	73%	73%	69%	70%	78%	69%	65%	72%	66%	57%	79%	78%	65%	76%	n/a	76%	69%	72%	77%	50%	66%	66%
	Traditional parties and politicians don't care about people like me	66%	74%	64%	65%	72%	61%	73%	75%	60%	69%	73%	68%	49%	67%	48%	57%	76%	75%	71%	72%	n/a	65%	78%	64%	75%	50%	60%	67%
Populism	To fix [Country], we need a strong leader willing to break the rules	49%	44%	50%	65%	53%	39%	42%	77%	22%	52%	35%	72%	58%	62%	44%	42%	41%	45%	62%	50%	n/a	31%	51%	62%	31%	36%	64%	35%
	[Country] needs a strong leader to take the country back from the rich and powerful	64%	67%	67%	62%	73%	67%	62%	65%	38%	70%	68%	80%	66%	59%	46%	68%	79%	74%	57%	67%	n/a	57%	69%	64%	67%	41%	60%	66%
	Experts in this country don't understand the lives of people like me	62%	75%	63%	61%	59%	62%	70%	72%	57%	67%	65%	61%	40%	62%	55%	56%	73%	68%	66%	54%	n/a	58%	67%	59%	71%	47%	63%	65%
Nativism	Immigrants take important social services away from real [Nationality]	43%	49%	43%	48%	37%	41%	46%	45%	39%	40%	49%	41%	42%	25%	60%	44%	50%	26%	45%	38%	54%	48%	32%	43%	34%	67%	42%	
	When jobs are scarce, employers should prioritize hiring people of this country over immigrants	60%	65%	53%	51%	60%	50%	54%	54%	49%	48%	75%	63%	69%	53%	53%	81%	69%	62%	65%	81%	52%	82%	63%	60%	52%	34%	73%	55%
	[Country] would be better off if we let in all immigrants who wanted to come here	15%	17%	15%	12%	19%	11%	18%	8%	17%	13%	7%	35%	12%	12%	11%	12%	13%	22%	12%	6%	27%	5%	12%	9%	15%	17%	14%	22%

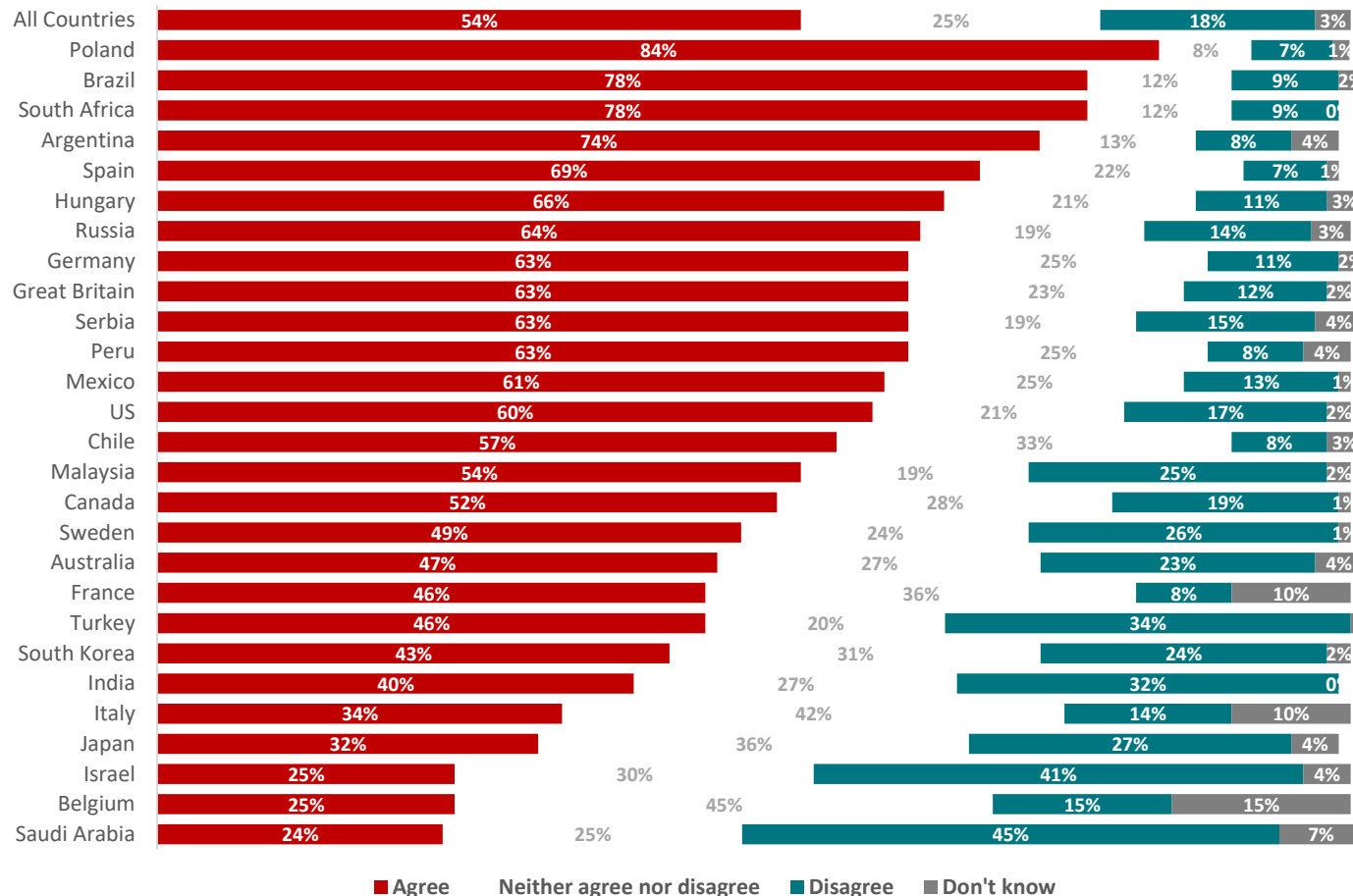
Change in Agreement with Statements since 2016

		Global Total	Argentina	Australia	Belgium	Brazil	Canada	Chile	France	Germany	Great Britain	Hungary	India	Israel	Italy	Japan	Malaysia	Mexico	Peru	Poland	Russia	Saudi Arabia	Serbia	South Africa	South Korea	Spain	Sweden	Turkey	United States
The System Is Broken	[Country's] society is broken	-4	4	0	-13	1	15	n/a	-6	2	7	-7	8	-7	-19	1	n/a	-15	8	5	n/a	n/a	-9	4	-29	-9	-2	-7	-6
	The [Country's] economy is rigged to advantage the rich and powerful	1	11	-2	-2	6	8	n/a	3	3	3	-5	6	-15	-3	11	n/a	-3	-1	-2	n/a	n/a	-5	5	-2	-2	11	11	-3
	Traditional parties and politicians don't care about people like me	2	9	3	2	3	5	n/a	-1	7	11	0	4	-8	-5	9	n/a	-2	-2	1	n/a	n/a	5	13	-1	0	8	-1	1
Populism	Experts in this country don't understand the lives of people like me	2	8	3	4	4	4	n/a	-1	11	8	-5	1	-13	-3	10	n/a	1	-1	2	n/a	n/a	6	7	4	-3	9	1	1
	[Country] needs a strong leader to take the country back from the rich and powerful	1	5	-4	3	5	2	n/a	-5	4	3	-4	9	-6	-8	1	n/a	-2	0	4	n/a	n/a	-2	9	-6	-5	10	-3	-3
	To fix [Country], we need a strong leader willing to break the rules	0	8	0	11	5	-2	n/a	-3	1	2	-7	7	-11	-6	5	n/a	0	-6	2	n/a	n/a	-13	9	-4	-4	13	-2	-5
Nativism	Immigrants take important social services away from real [Nationality]	4	0	4	-2	10	6	n/a	-4	8	-1	-10	3	-9	-5	8	n/a	25	23	7	n/a	n/a	17	4	3	-3	13	4	-4
	When jobs are scarce, employers should prioritize hiring people of this country over immigrants	4	2	2	5	4	5	n/a	3	4	0	-1	1	-4	-7	15	n/a	14	-2	8	n/a	n/a	1	3	6	2	17	-1	-3
	[Country] would be better off if we let in all immigrants who wanted to come here	1	0	-1	5	5	0	n/a	-1	1	0	-1	-2	5	1	3	n/a	0	5	2	n/a	n/a	1	-3	-2	2	-1	-2	2
	Δ in Consumer Confidence Dec 2016- Mar 2019	3	-12	3	4	13	3	n/a	1	2	0	4	-7	4	7	1	n/a	15	n/a	8	0	8	n/a	2	3	4	2	-9	3

A close-up photograph of a hand in a blue suit sleeve moving a white chess piece on a chessboard. The board is filled with other pieces, and the scene is lit with a cool blue tone, accented by a warm red glow in the lower foreground. A dark grey rectangular box is superimposed over the center of the image, containing the text 'THE SYSTEM IS BROKEN' in white, bold, sans-serif capital letters.

THE SYSTEM IS BROKEN

[Country's] Society is Broken

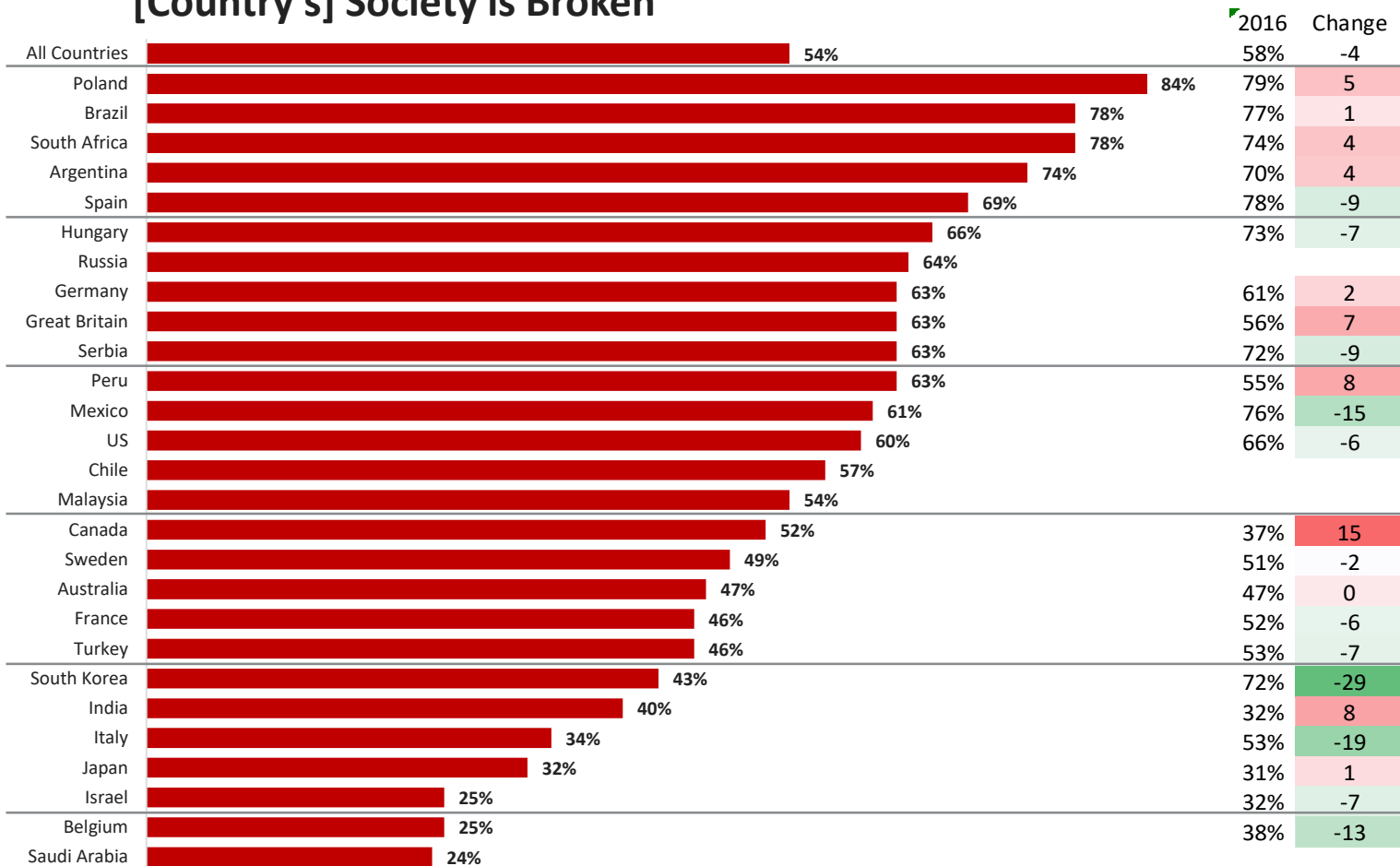


54% of adults globally agree their country's society is broken.

Agreement is especially high across Latin America and Eastern Europe. It varies widely across Western Europe.

In the U.S., views differ more along gender lines (69% of women agree vs. 50% of men) than by age, income, education or region.

[Country's] Society is Broken



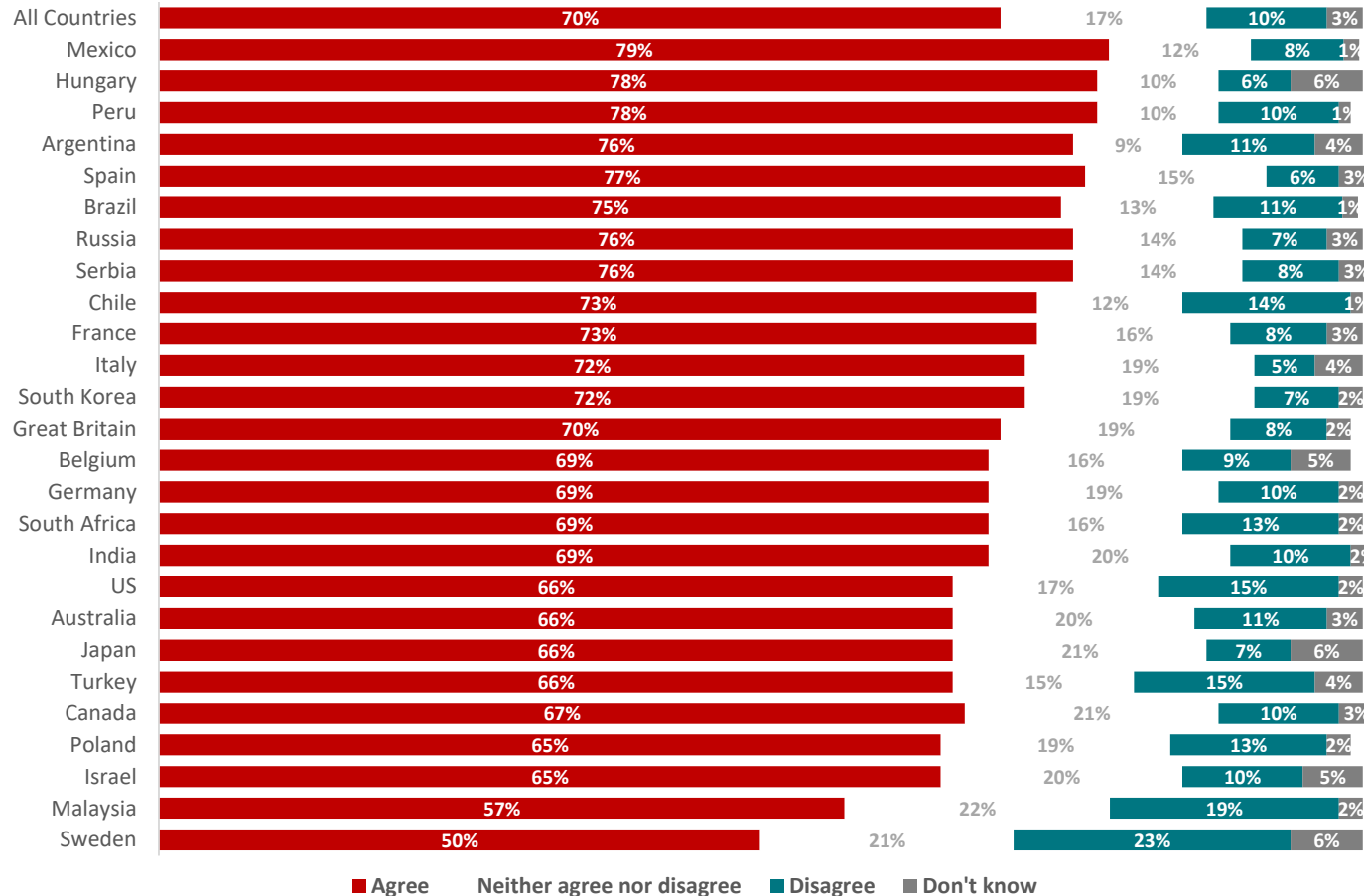
Globally, the feeling that society is broken has slightly receded between late 2016 and early 2019 (down 4 points).

Agreement has dropped steeply in several countries that have experienced political change (South Korea, Italy, Mexico, Spain) or more stability (Belgium).

Only Canada (in the throes of political scandal) shows a double-digit increase in agreement.

The U.S. sees a 6-point drop in agreement since the 2016 wave, which was conducted right after the election of Donald Trump.

The [Country's] Economy is Rigged to Advantage the Rich and Powerful

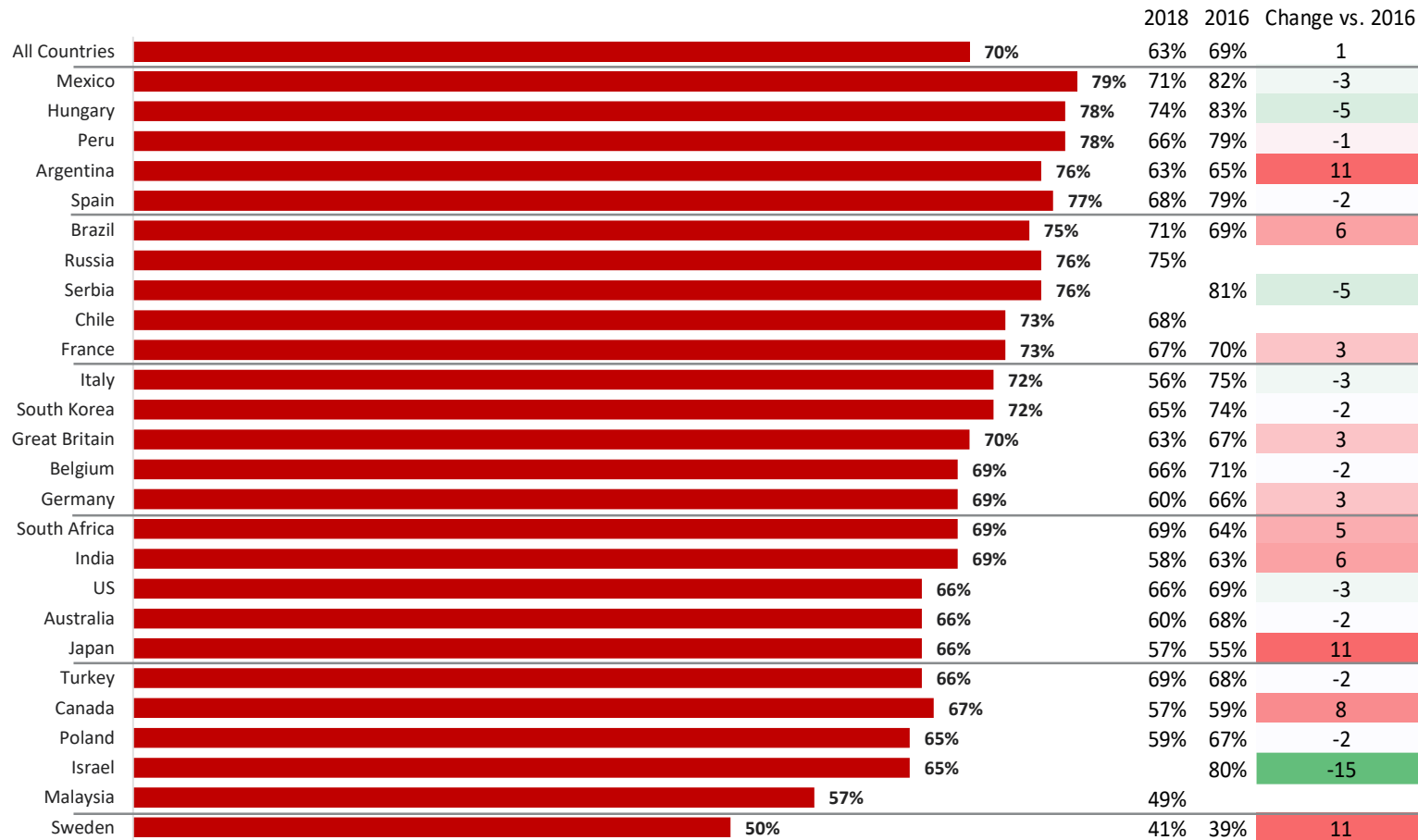


In every single country except for Sweden, a majority of adults view the economy as rigged in favor of the rich and powerful.

Agreement is above the 70% global average throughout Latin America, Eastern Europe (except Poland) and Southern Europe.

In the U.S., this view is more prevalent among women than among men (71% vs. 61%) and among those with a household income in the \$25,000-\$75,000 range than among the more affluent (73% vs. 62%).

The [Country's] Economy is Rigged to Advantage the Rich and Powerful

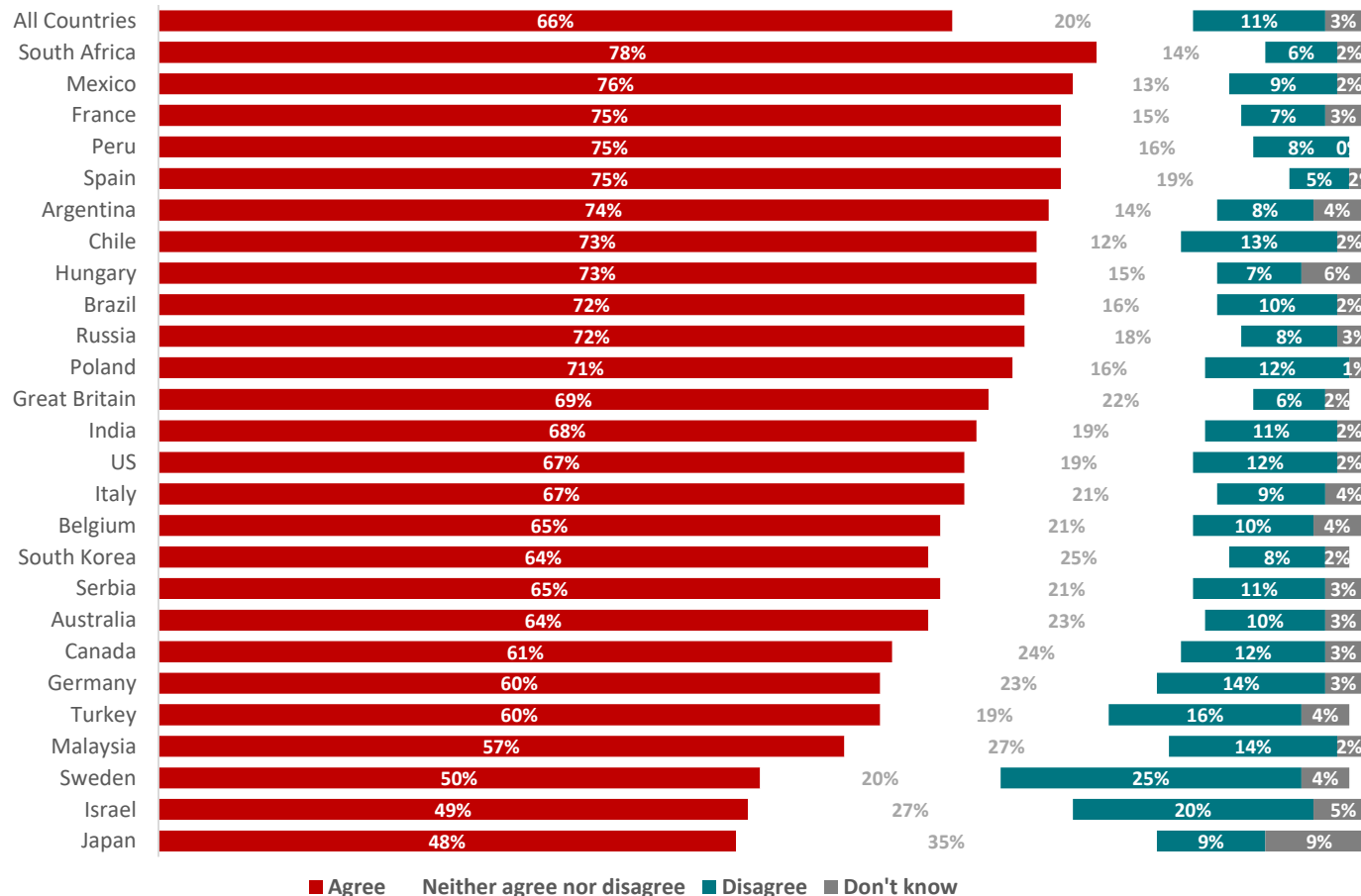


Globally, the perception that the economy is rigged for the rich and powerful is essentially unchanged vs. 2016 (+1 points).

Agreement has grown by double digits in Sweden, Japan, and Argentina, all of which experienced a drop in consumer confidence over the past year. It is down sharply only in Israel, where the survey was conducted days before the April 2019 elections.

Fewer in the U.S. now agree (-3 points).

Traditional Parties and Politicians Don't Care About People Like Me

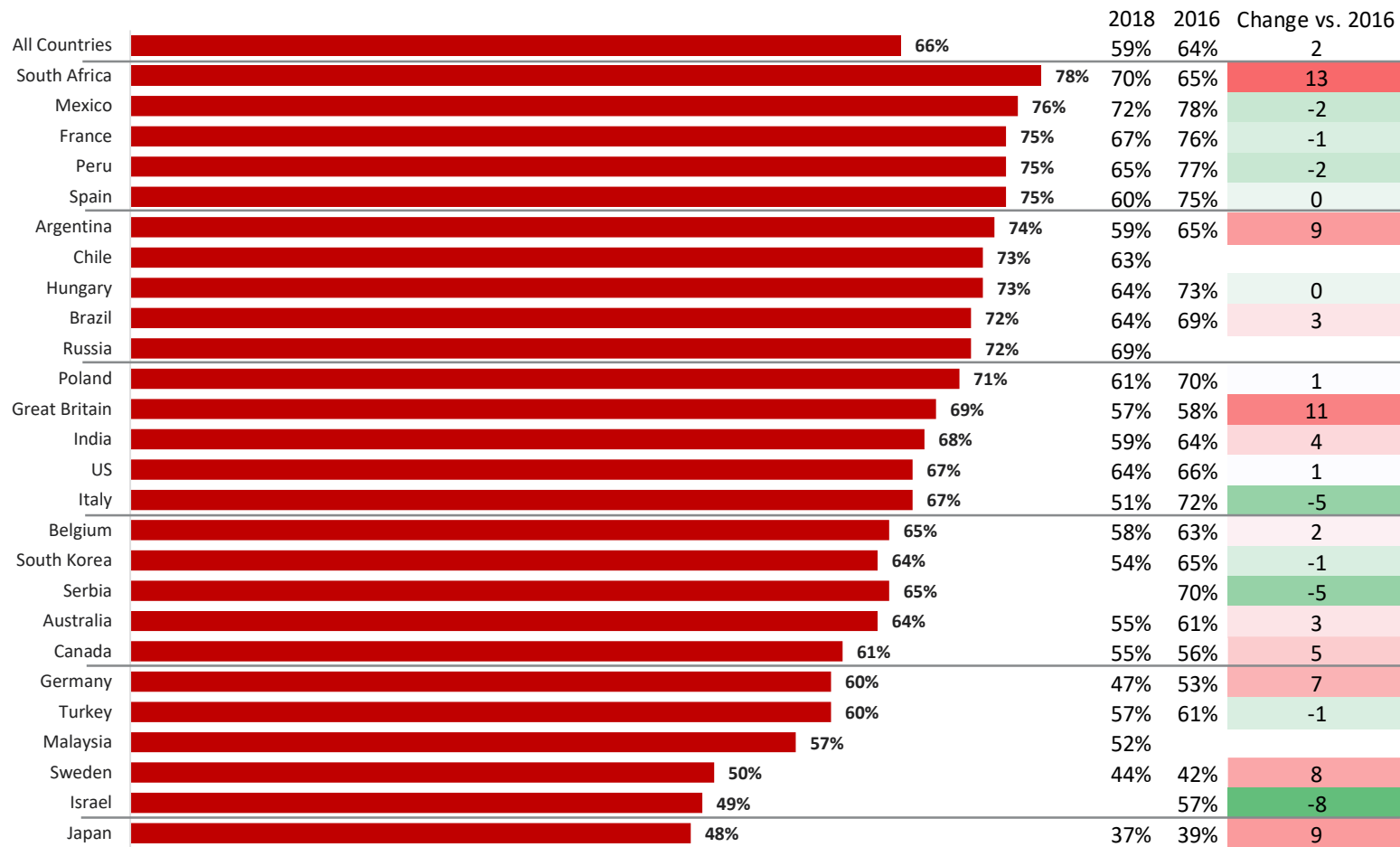


Two in three adults globally feel traditional parties and politicians don't care about them.

Fewer than one in three disagree in *any* country.

In the U.S., agreement is higher among women (71%) than among men (64%), and among those with a household income of less than \$75,000 (72%) than among the more affluent (63%).

Traditional Parties and Politicians Don't Care About People Like Me



Across the world, the perception of not being cared for by traditional parties and politicians has grown slightly between 2016 and 2019 (+2 points).

This feeling has become a lot more prevalent in South Africa, Great Britain, Japan, Sweden and Argentina.

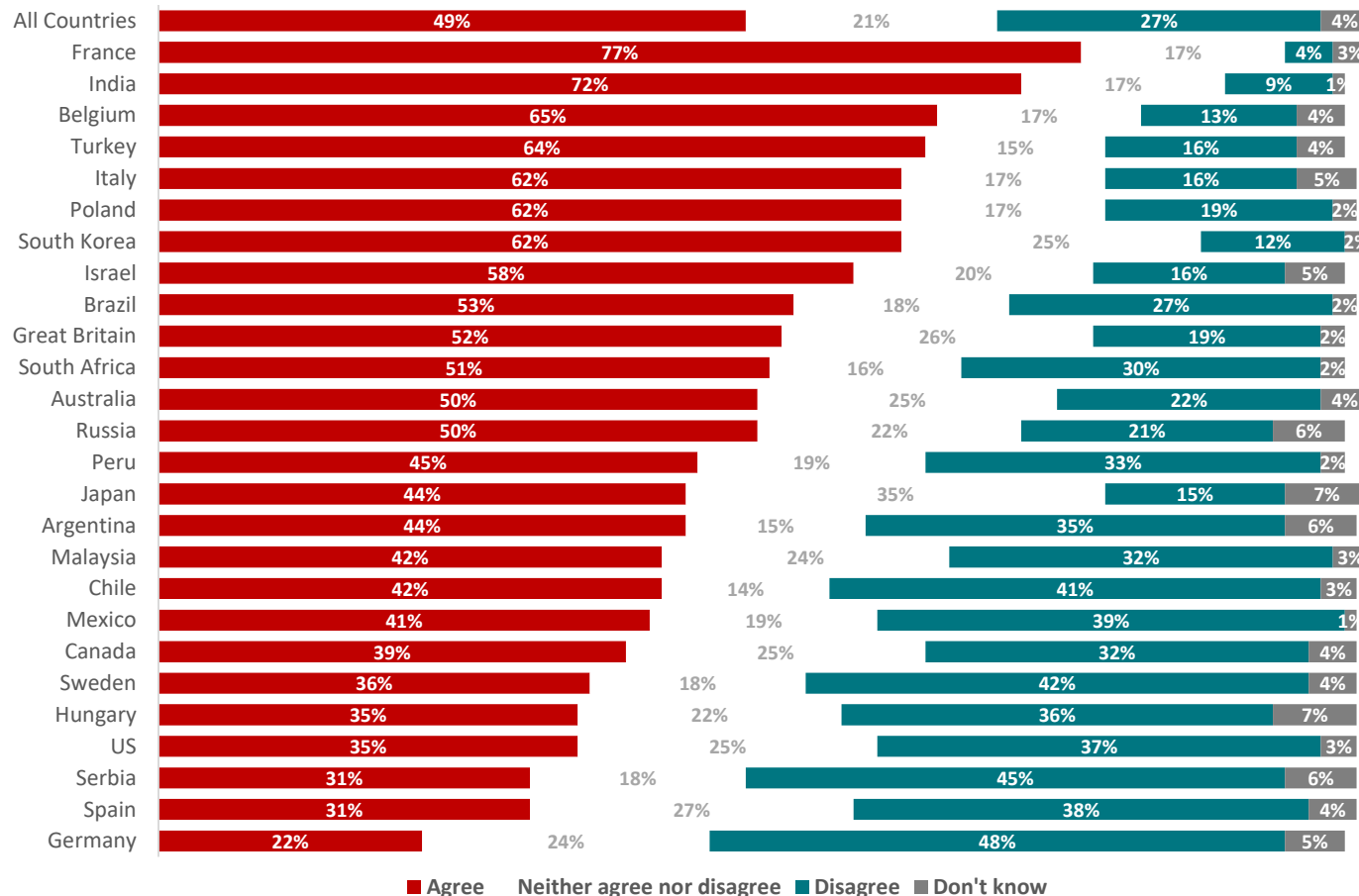
It has receded notably only in Israel, Serbia and Italy.

The U.S. shows virtually no change (+1 point).



POPULISM

To Fix [Country], We Need a Strong Leader Willing to Break the Rules

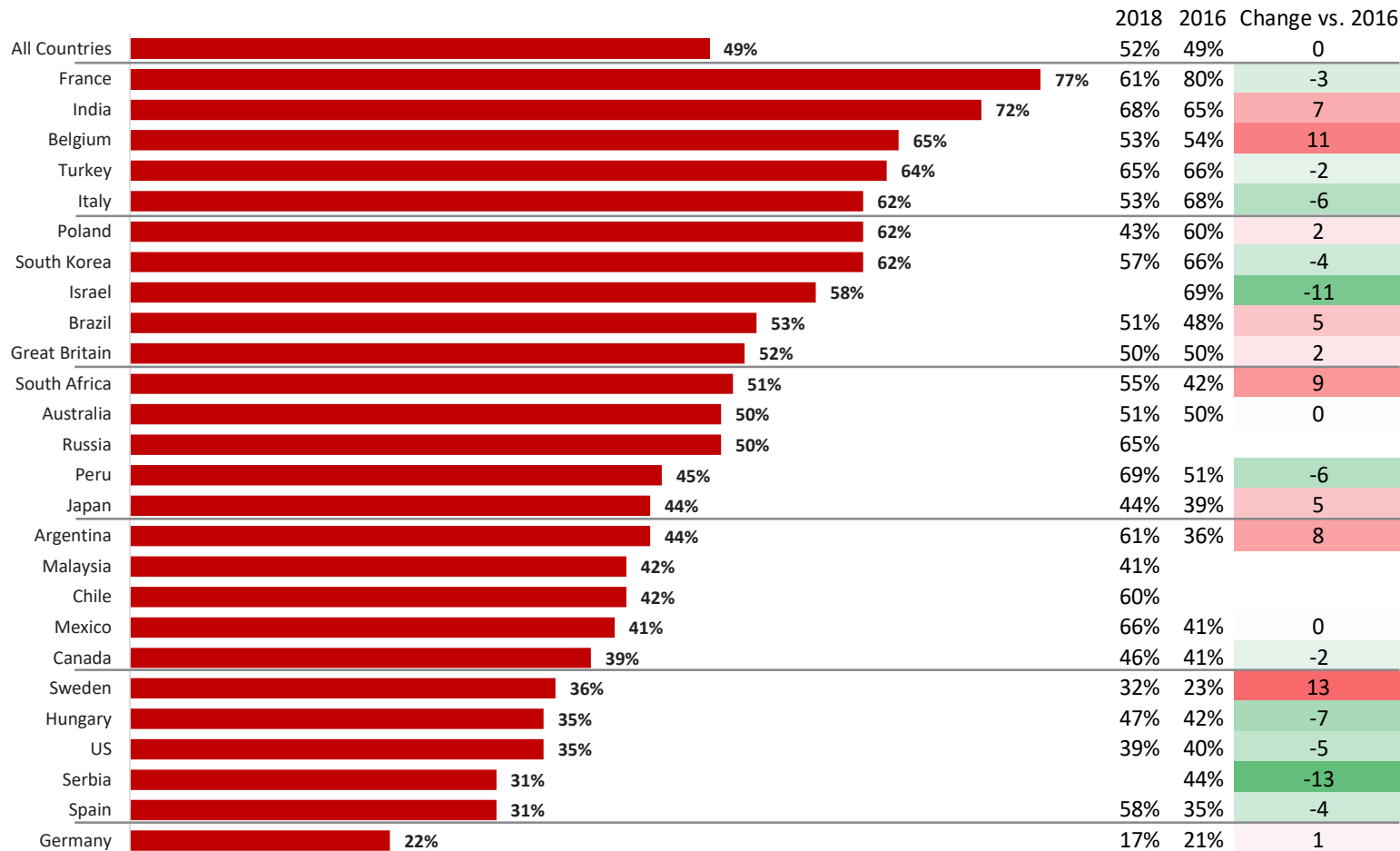


49% globally agree that fixing their country requires a strong leader willing to break the rules.

Views vary widely across countries, but no clear regional pattern emerges.

In the U.S. where 35% agree, this view is more prevalent among those who are not employed (44%), Midwesterners (41%), those with a household income under \$25,000 (41%), and business owners (39%). It is lowest among those aged 50-74 (31%).

To Fix [Country], We Need a Strong Leader Willing to Break the Rules



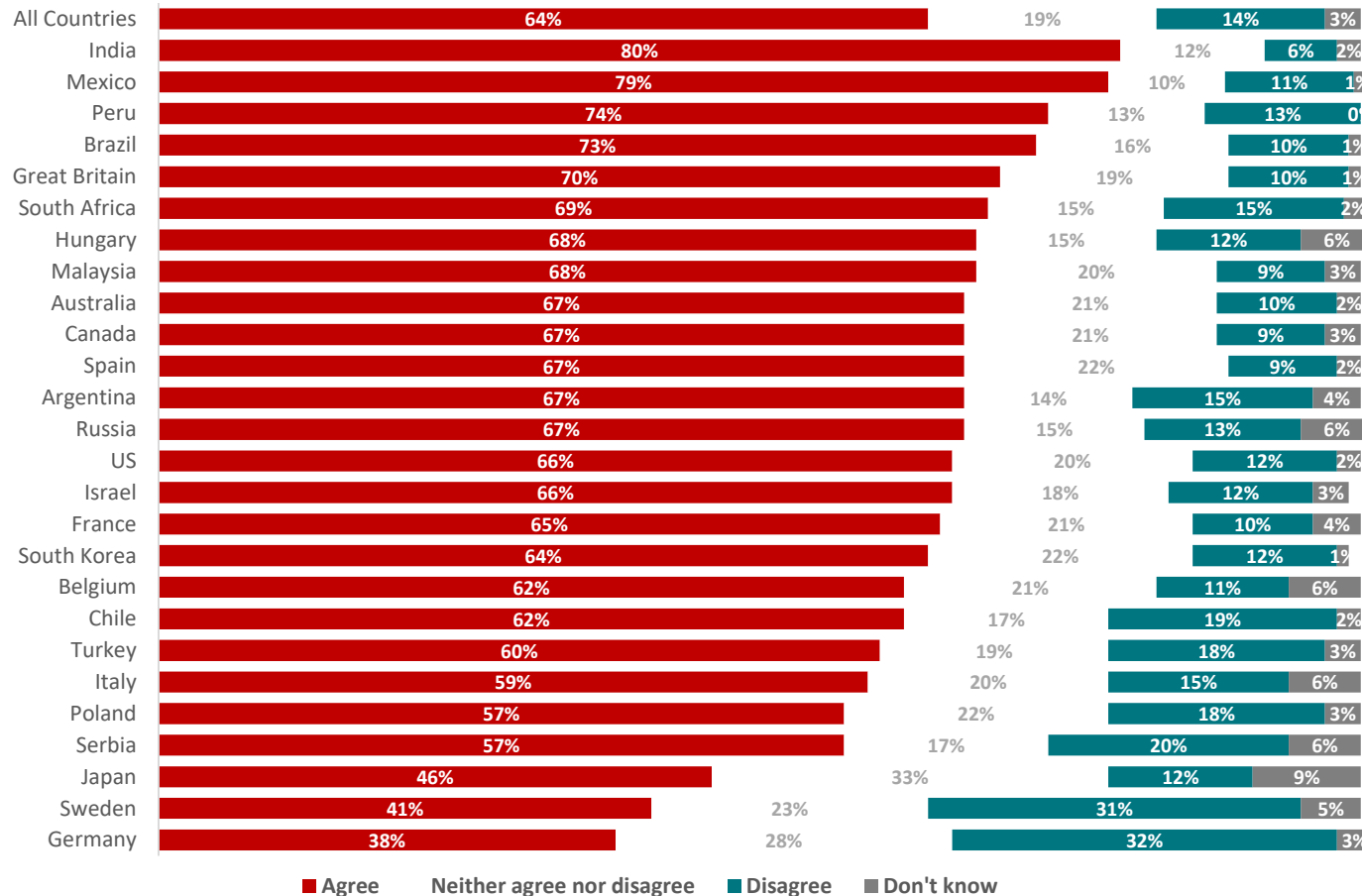
In aggregate at the global level, the percentage of those who agree has not changed between 2016 and 2019.

Double-digit increases are seen in Sweden and Belgium amid political fragmentation and concerns about immigrations and security.

Israel and Serbia are the only countries showing a double-digit decrease, which is consistent with other statements.

Smaller decreases are seen in countries with populist leaders, e.g., Italy, Hungary and the U.S.

[Country] Needs a Strong Leader to Take the Country Back from the Rich and Powerful



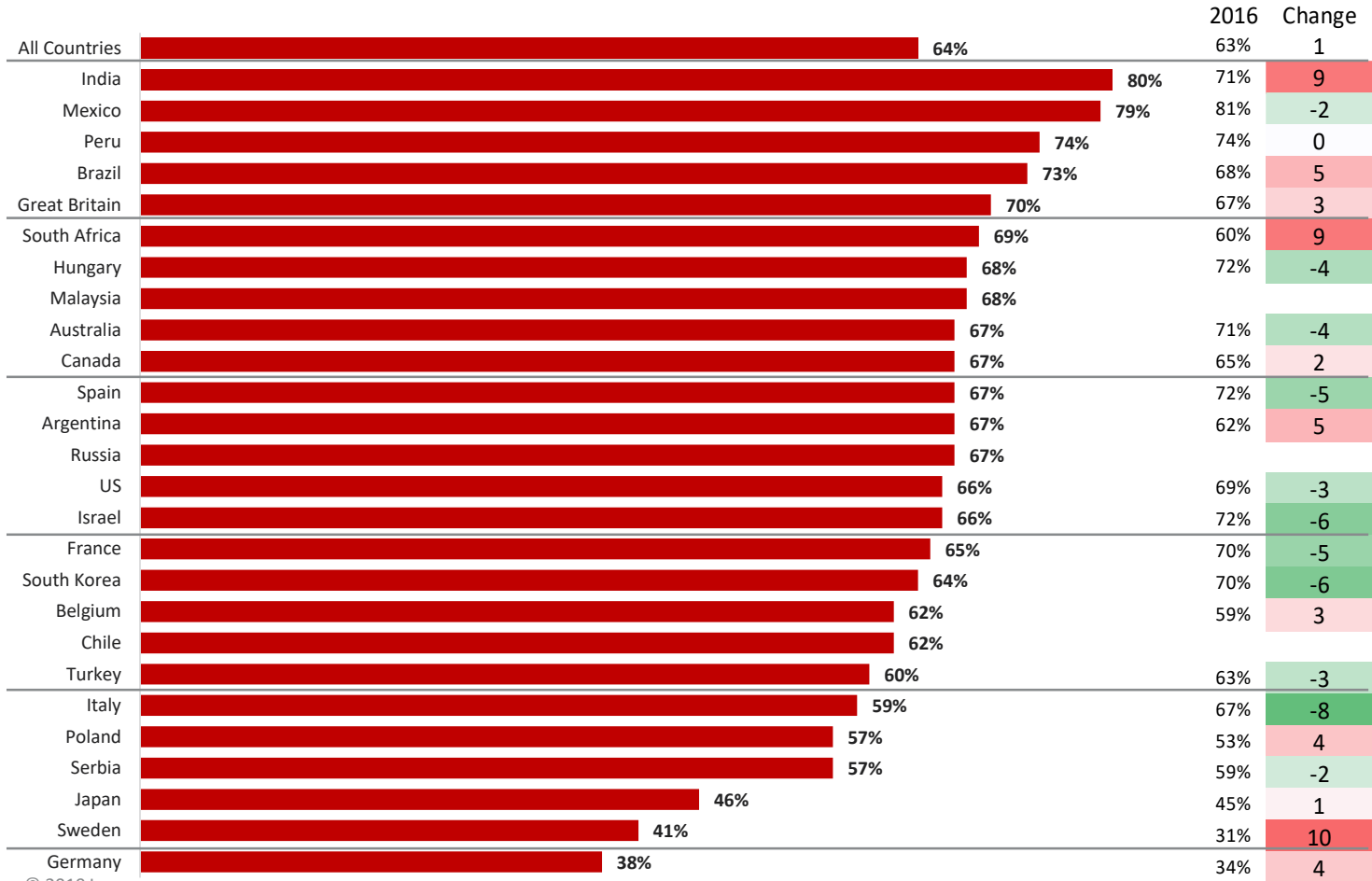
Globally, 64% feel a need for a strong leader to take their country back from the rich and powerful.

Agreement is above the global average in all BRICS, English-speaking, and Latin American countries surveyed (except Chile).

Agreement is below 50% only in Germany, Sweden and Japan.

In the U.S. (66%), agreement is higher among those aged 35-49 (74%), those with a household income in the \$25,000-\$75,000 range (71%), women (70%), and in the Northeast (69%) – and notably lower among men (61%), those under age 35 (61%) and business owners (53%).

[Country] Needs a Strong Leader to Take the Country Back from the Rich and Powerful



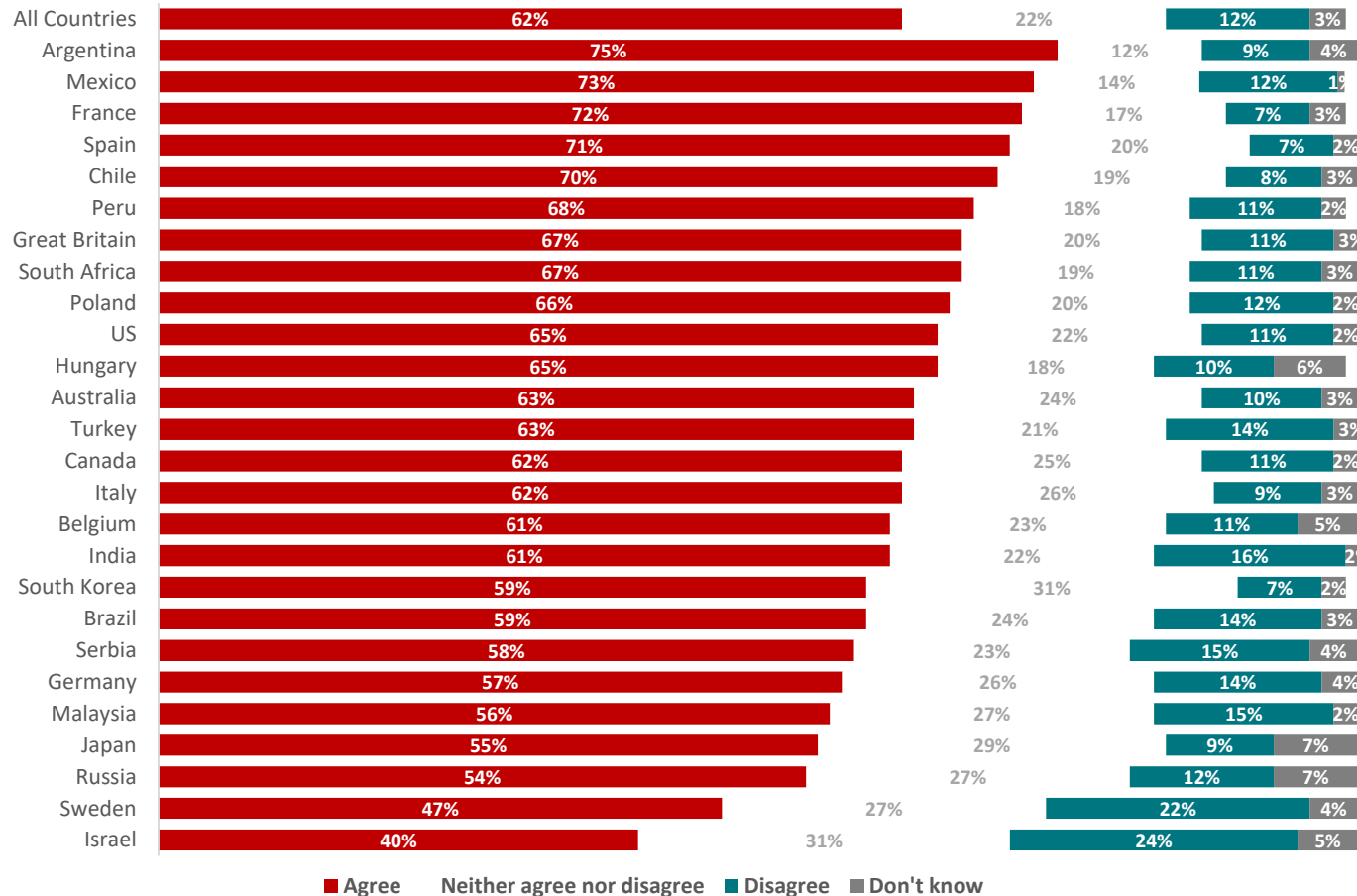
The percentage of those who agree has not changed at all globally.

Countries with the largest upticks include Sweden (10 points), South Africa (9 points) and India (9 points).

Those with the largest drops include Italy (8 points), Israel (6 points) and South Korea (6 points).

The U.S. shows a 3-point drop.

Experts in This Country Don't Understand the Lives of People Like Me

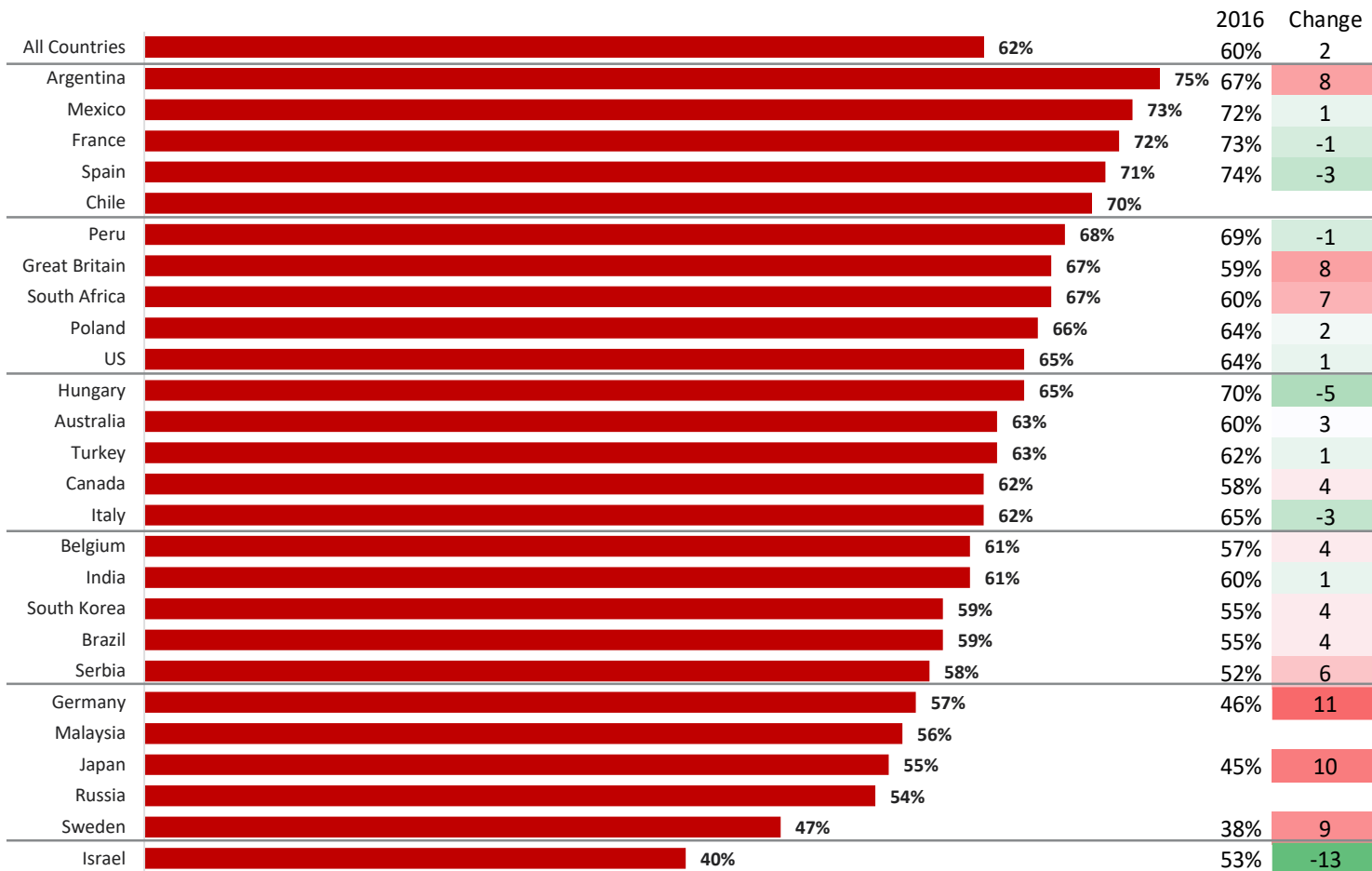


62% of adults globally feel that experts don't understand the lives of people like them.

It's a view shared by majority of people in nearly every country. It is most prevalent in Spanish-speaking countries and in France.

Agreement in the U.S. is at 65%, but it is higher among those aged 35-49 (70%), with a household income below \$75,000 (70%) and those living in the Midwest (70%).

Experts in this Country Don't Understand the Lives of People Like Me



Globally, agreement that “experts don’t understand people like me” has very slightly increased since 2016 (by 2 points).

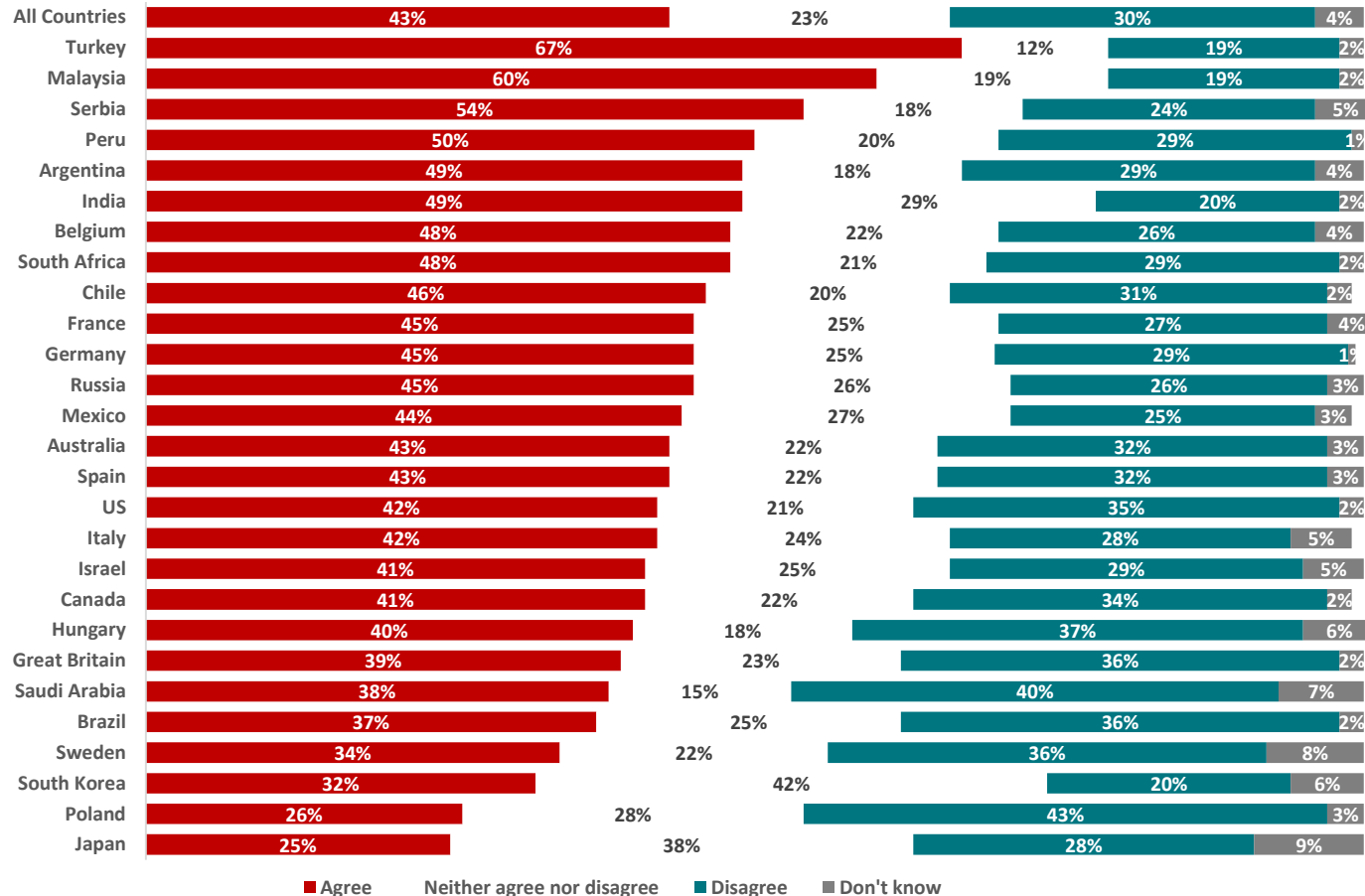
It has grown by double digits in two countries, Germany and Japan, while showing a steep decrease only in Israel.

The U.S. shows virtually no change (up 1 point).



NATIVISM

Immigrants Take Important Social Services Away from Real [Nationals]



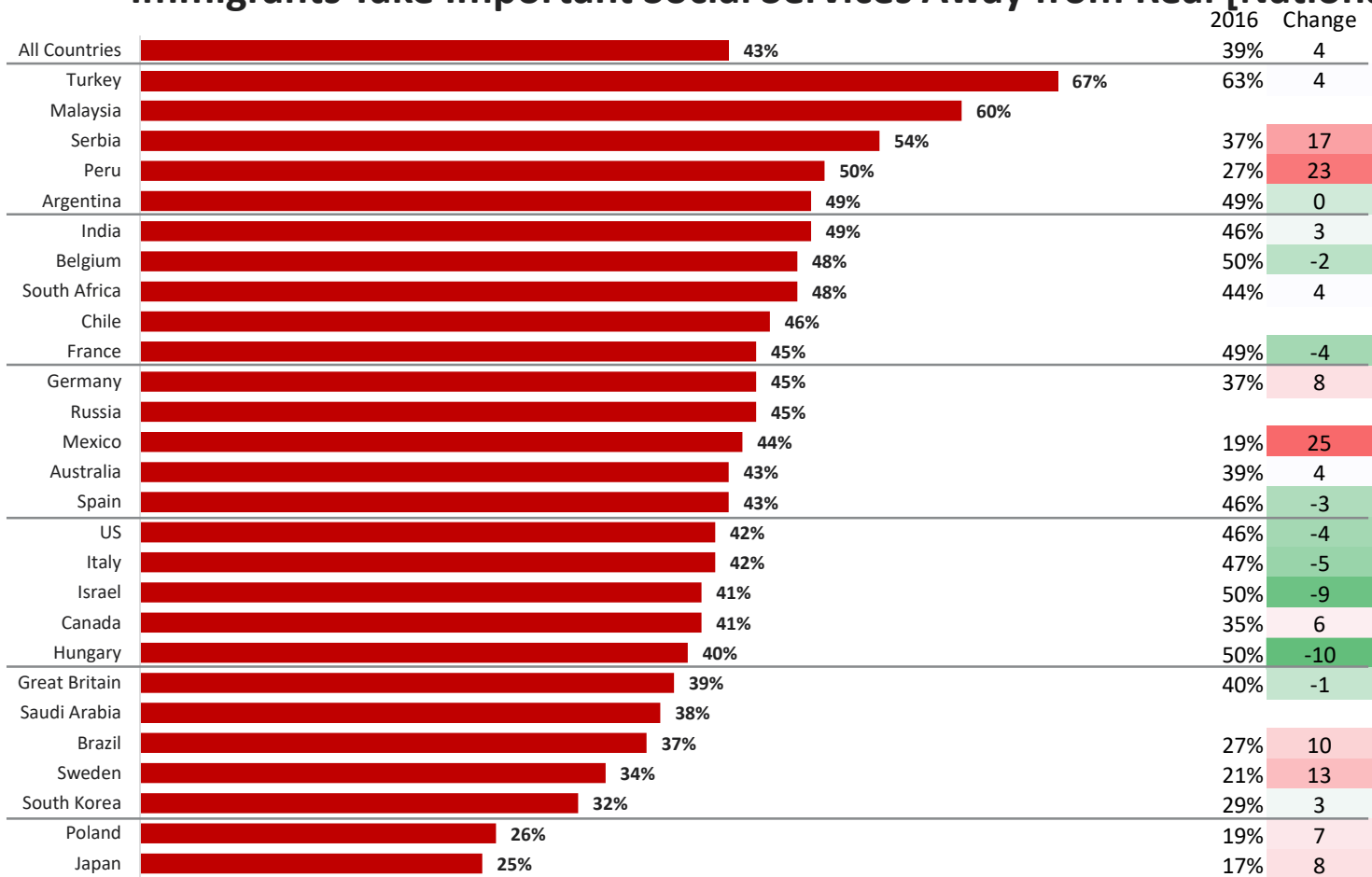
43% globally agree that immigrants take important social services from real nationals while 29% disagree.

Only three countries record a level of agreement of more than 50%: Turkey, Malaysia and Serbia.

At the end of the spectrum, only a quarter in Japan (25%) and Poland (26%) agree.

Agreement in the U.S. (42% overall) varies widely by age (51% among those aged 50-74, vs. 30% among those aged 18-34) and region (46% in both the South and Midwest, vs. 33% in the West) and is especially high among business owners (55%).

Immigrants Take Important Social Services Away from Real [Nationals]



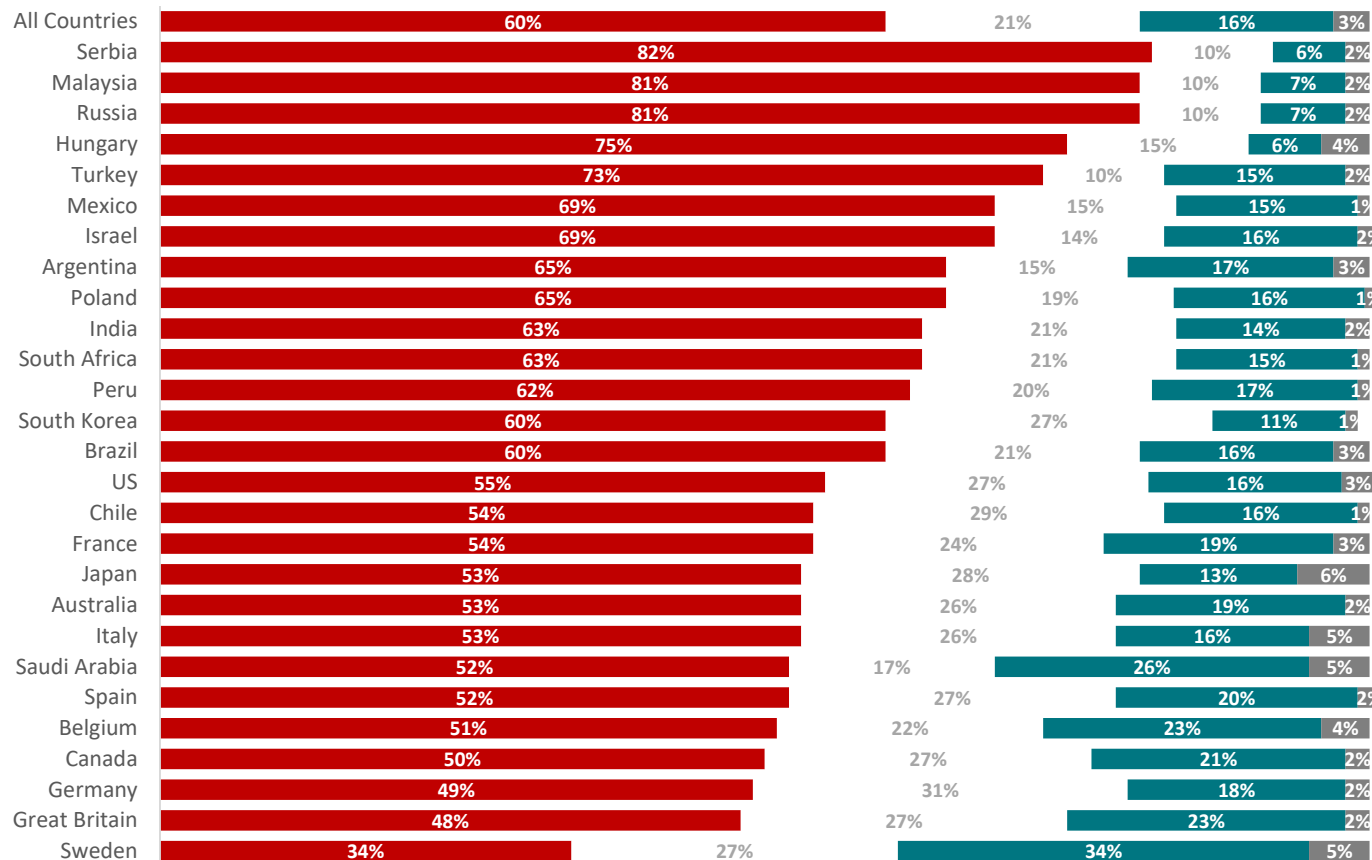
Globally, the percentage of those who agree has increased by 4 points between 2016 and 2019.

All four countries recording double-digit gains have experienced an influx of refugees: Mexico (+25), Peru (+23), Serbia (+17), Sweden (+13) and Brazil (+10).

Only Hungary (-10) and Israel (-9) show a steep drop in agreement.

Agreement in the U.S. is down 4 points.

When Jobs Are Scarce, Employers Should Prioritize People from this Country Over Immigrants



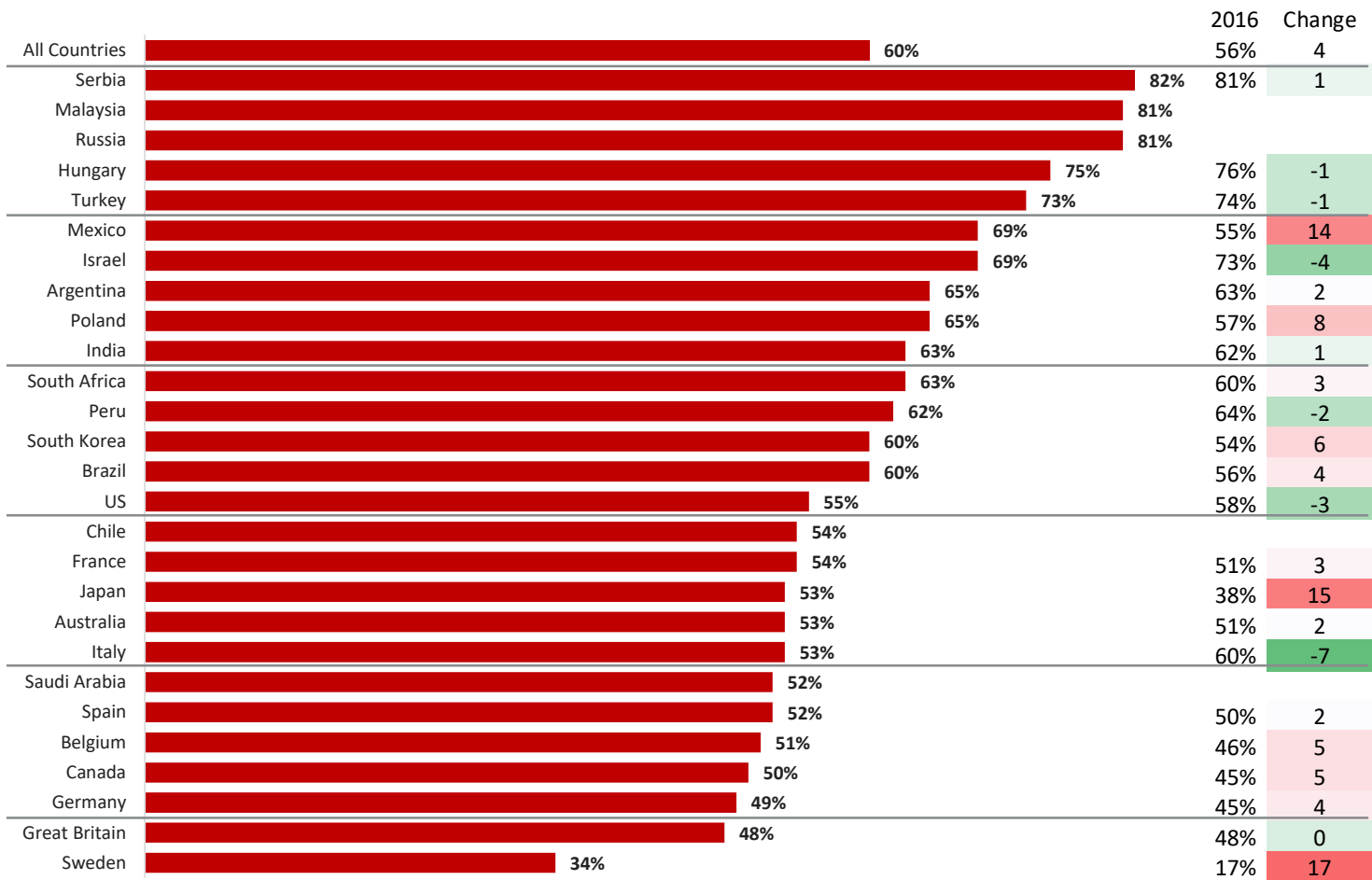
■ Agree ■ Neither agree nor disagree ■ Disagree ■ Don't know

60% of adults globally agree that employers should prioritize natives over immigrants when jobs are scarce.

With few exceptions, agreement is above average across Eastern Europe, Latin America and Asia and below average in economically advanced countries.

Agreement in the U.S. (55% overall) varies widely by age (62% among those aged 50-74, but only 43% among those aged 18-34) and region (60% in the Midwest, but only 49% in the Northeast) and is especially high among business owners (68%).

When Jobs Are Scarce, Employers Should Prioritize People from This Country Over Immigrants



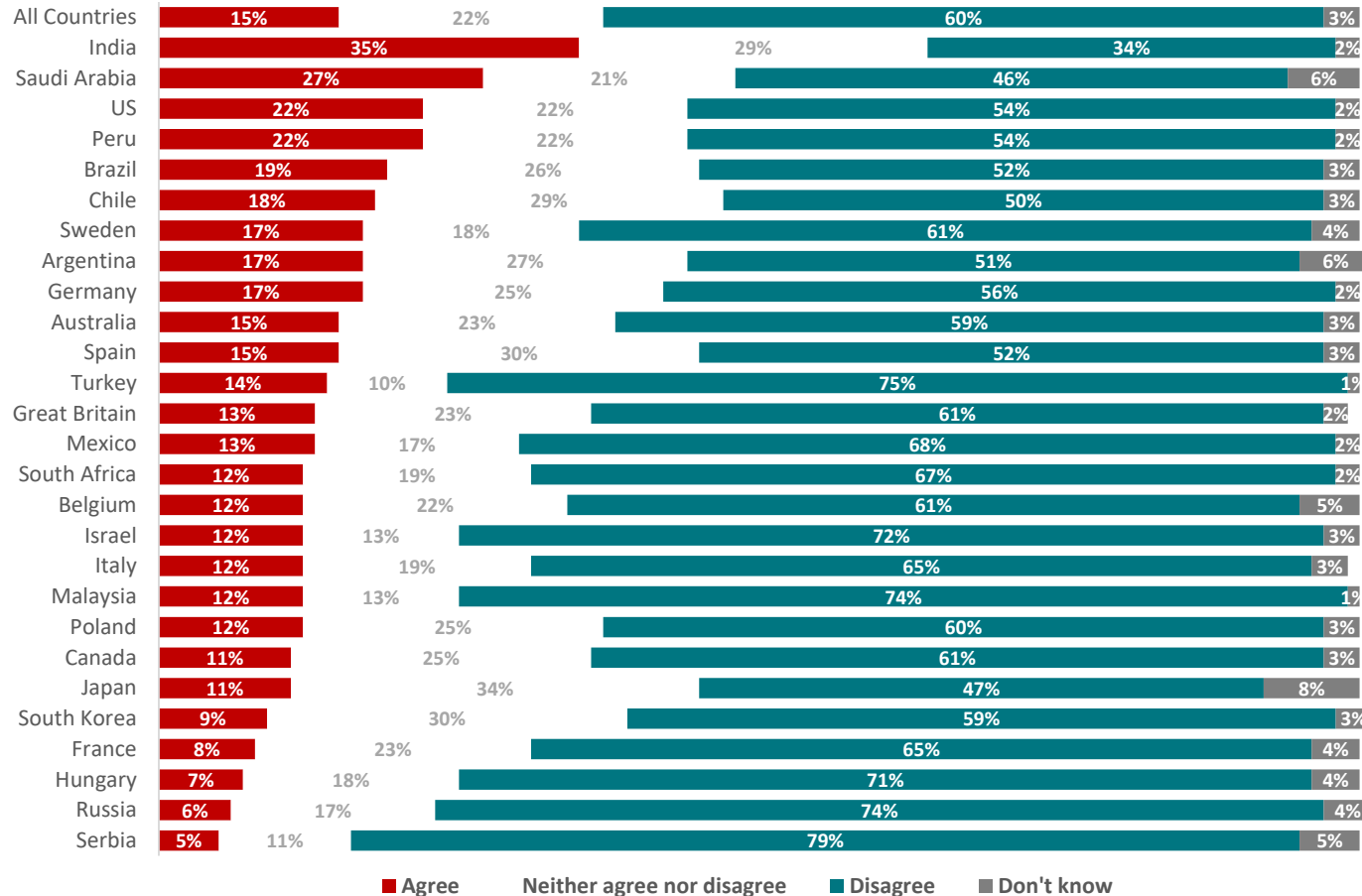
Globally, the percentage of those who agree has increased by 4 points between 2016 and 2019.

Three countries show double-digit gains: Sweden (+17), Japan (+15) and Mexico (+14).

Italy (-7) is the only country with a notable drop in agreement.

Agreement in the U.S. is down 3 points.

[Country] Would Be Better Off If We Let In All immigrants Who Wanted to Come Here



Only 15% of adults globally agree that their country “would be better off if we let in all immigrants who wanted to come here”. In all but three countries, a full majority disagree.

In the U.S., 22% agree while 54% disagree. Views vary widely by age: Among those aged 50-74 agree, 12% agree while 67% disagree; among those under the age of 35, nearly as many agree (33%) as disagree (40%).

[Country] Would Be Better Off If We Let In All immigrants Who Wanted to Come Here

		2016	Change
All Countries	15%	14%	1
India	35%	37%	-2
Saudi Arabia	27%		
US	22%	20%	2
Peru	22%	17%	5
Brazil	19%	14%	5
Chile	18%		
Sweden	17%	18%	-1
Argentina	17%	17%	0
Germany	17%	16%	1
Australia	15%	16%	-1
Spain	15%	13%	2
Turkey	14%	16%	-2
Great Britain	13%	13%	0
Mexico	13%	13%	0
South Africa	12%	15%	-3
Belgium	12%	7%	5
Israel	12%	7%	5
Italy	12%	11%	1
Malaysia	12%		
Poland	12%	10%	2
Canada	11%	11%	0
Japan	11%	8%	3
South Korea	9%	11%	-2
France	8%	9%	-1
Hungary	7%	8%	-1
Russia	6%		
Serbia	5%	4%	1

Globally, the percentage of those who agree has barely changed between 2016 and 2019 (+1 point) and no country records an increase or a drop of more than 5 points.

Methodology

- These are the findings of a survey conducted in 27 countries via Global Advisor, the online survey platform of Ipsos, between March 22 and April 5, 2019.
- For this survey, Ipsos interviews a total of 18,528 adults aged:
 - 16-74 in Argentina, Australia, Belgium, Brazil, Chile, France, Germany, Great Britain, Hungary, India, Italy, Malaysia, Mexico, Peru, Poland, Russia, Saudi Arabia, Serbia, South Africa, Spain, and Sweden;
 - 18-74 in Canada, Israel, South Africa, Turkey, and the United States of America;
 - 19-74 in South Korea
- The sample consists of 1,000+ individuals in each of Australia, Brazil, Canada, France, Germany, Great Britain, Italy, Japan, Spain, and the U.S., and of 500+ individuals in each of the other countries surveyed.
- The data is weighted so each country's sample composition best reflects the demographic profile of its adult population according to the most recent census data, and to give each country an equal weight in the total "global" sample.
- Online surveys can be taken as representative of the general working-age population in Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, Italy, Japan, Poland, South Korea, Spain, Sweden, and the United States. Online samples in other countries surveyed are more urban, more educated and/or more affluent than the general population and the results should be viewed as reflecting the views of a more "connected" population.
- Sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error, and measurement error. The precision of online surveys conducted on Global Advisor is measured using a Bayesian Credibility Interval. Here, the poll has a credibility interval of +/-3.5 percentage points for countries where the sample is 1,000+ and +/- 4.8 points for countries where the sample is 500+. For more information on the Ipsos use of credibility intervals, please go to www.ipsos-na.com/news-polls/pressrelease.aspx?id=5836.

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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.

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