### **BROKEN-SYSTEM SENTIMENT IN 2021**

### POPULISM, ANTI-ELITISM AND NATIVISM

Ipsos Global Advisor – 25-Country Survey July 2021

© 2021 lpsos. All rights reserved. Contains lpsos' Confidential and Proprietary information and may not be disclosed or reproduced without the prior written consent of lpsos.



### **Key Global Findings**

Across most of 25 countries surveyed by Ipsos in 2021, majorities of citizens express feelings of alienation when thinking about their country: on average, 56% agree their country's society is broken and 57% agree that their country is in decline. In most countries, perceptions of a broken political and economic system prevail. They tend to be accompanied by a populist and anti-elite sentiment and increasingly nativist views. Ipsos's "System Is Broken" index shows high levels of correlation with measures indicative of how much citizens' social and environmental needs are met and how much corruption in the public sector is perceived to be pervasive.

#### **Broken-System Sentiment**

- On average, 71% agree the economy is rigged to favor the rich and powerful
- 68% feel traditional parties and politicians don't care about people "like me"
- 65% agree that local experts don't understand the lives of people "like me"
- 64% want "a strong leader to take the country back from the rich and powerful"
- 44% want "a strong leader willing to break rules"

The four countries with the highest levels of disaffection are all in Latin America: Colombia, Peru, Brazil and Chile.

Since 2016, broken-system sentiment has gained ground most in Japan, South Africa, Sweden, the United States and Argentina; it has receded most in Spain, Mexico and France. Compared to 2019, months before the pandemic, it has increased most in Malaysia and decreased most in Great Britain.

Ipsos's "System Is Broken" Index is highly correlated with Transparency International's *Corruption Perceptions Index* and the Social Progress Imperative's *Social Progress Index*.

#### **Populism and Anti-Elite Sentiment**

On average across the 25 countries:

- 81% agree that politicians always end up finding ways to protect their privileges;
- 72% say the political and economic elite don't care about hard-working people;
- 70% think the main divide in our society is between ordinary citizens and the political and economic elite;
- 62% agree politicians should be able to say what's on their minds regardless of what anyone else thinks; and
- 60% say the most important political issues should be decided directly by the people through referendums, not by the elected officials.

Populist/anti-elite sentiment is strongly correlated with broken-system sentiment; it is most prevalent in Chile, Hungary, Colombia, Peru and Russia.

The "elite" is widely perceived across the world as a closely connected group making decisions based on their own interest and ignoring the needs of others.

On average, 15% of those surveyed identify in any way with their country's elite; Americans and Japanese are those least likely to do.

#### **Nativism**

The "average global citizen" is ambivalent about immigration, leaning toward a natives-first view:

- 57% say employers should favor natives over immigrants when jobs are scarce,
- 38% agree their country would be stronger if it stopped immigration (while 33% disagree), and
- 38% say immigrants take jobs away from their country's "real" nationals (while 35% disagree)

Nativism is most prevalent in Turkey, Malaysia, Colombia, Peru, and Russia and least so in Canada, Sweden, Great Britain, Germany and Spain.

Since 2016, nativist sentiment has grown most in Peru, Sweden (where it was marginal), Japan, South Africa, South Korea and Turkey. Meanwhile, it has receded most in the U.S., Canada, Spain, Italy and Hungary.



### **Key Australian Findings**

In an overall sense, Australia has maintained its position as one of the nations with the lowest proportion of citizens who feel a sense of alienation when thinking about their country. However, perceptions do lean towards a broken political and economic system. There is also some underlying populist and anti-elite sentiment and increasingly nativist views

#### **Broken-System Sentiment**

- On average, 63% agree the economy is rigged to favor the rich and powerful
- 62% feel traditional parties and politicians don't care about people "like me"
- 59% agree that local experts don't understand the lives of people "like me"
- 66% want "a strong leader to take the country back from the rich and powerful"
- 53% want "a strong leader willing to break rules"

Australia has one of the lowest levels of dissatisfaction, although higher than Belgium, Great Britain, Canada, Germany, The Netherlands and Sweden.

Since 2016, broken-system sentiment in Australia is relatively stable, and if anything has improved marginally.

Ipsos's "System Is Broken" Index is highly correlated with Transparency International's *Corruption Perceptions Index* and the Social Progress Imperative's *Social Progress Index*.

#### **Populism and Anti-Elite Sentiment**

On average across the 25 countries:

- 78% agree that politicians always end up finding ways to protect their privileges;
- 66% say the political and economic elite don't care about hard-working people;
- 63% think the main divide in our society is between ordinary citizens and the political and economic elite;
- 53% agree politicians should be able to say what's on their minds regardless of what anyone else thinks; and
- 54% say the most important political issues should be decided directly by the people through referendums, not by the elected officials.

Populist/anti-elite sentiment is strongly correlated with broken-system sentiment; Australia is one of the lowest on this measure, but a little ahead of Great Britain, Canada, Sweden, and The Netherlands.

On average, 18% of those surveyed in Australia identify in any way with their country's elite.

#### Nativism

While the "average global citizen" is ambivalent about immigration, Australians are less negative than most, but still lean towards a natives first view:

- 52% say employers should favor natives over immigrants when jobs are scarce,
- 30% agree their country would be stronger if it stopped immigration (while 33% disagree), and
- 36% say immigrants take jobs away from their country's "real" nationals (while 35% disagree)

Australia is one of the least Nativist countries with Canada, Sweden, Great Britain, Germany, Spain and Brazil.

Since 2016, nativist sentiment is unchanged in Australia.



# Background



### [Country's] society is broken

obal Country Average	56%		24%	3%		18%
South Africa	74%			14%	1 <mark>%</mark>	11%
Hungary	72%			14%	1%	12%
Brazil	72%			15%	2%	11%
Chile	69%			17%	1%	13%
United States	68%			18%	2%	12%
Argentina	68%			18%	2%	13%
Colombia	64%			22%	1%	13%
Germany	61%		24	%	3%	13%
Peru	60%		25	%	3%	12%
Netherlands	60%		22%	29	6	16%
Sweden	60%		19%	1%	2	0%
Turkey	60%		15%	2%	24%	
Belgium	58%		25%	2'	%	15%
France	54%		26%	4%		16%
Spain	54%		30%		4%	<b>12%</b>
Great Britain	52%		23%	4%	21	%
Mexico	49%		32%	3%		16%
Russia	47%		29%	3%	21	%
Australia	45%	23%	2%	3	1%	
Poland	44%		35%	5%		16%
Malaysia	43%	25%	2%	3	1%	
Canada	42%	24%	3%	3	1%	
Japan	41%	33%		2%	25%	
Italy	40%	34%		10%		16%
South Korea	33%	28%	2%	37%		

On average, across all 25 countries, three times as many adults agree (56%) than disagree (18%) that their country's society is broken.

Over two in three in South Africa, Hungary and Brazil, Chile, Argentina and the U.S. agree, compared to just one third in South Korea.

Base: 19,017 online adults aged 16-74 across 25 countries

Online samples in Brazil, Chile, Colombia, Malaysia, Mexico, Peru, Russia, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population



### [Country's] society is broken

		2013	2010	vs. 2019	V3.2010
Global Country Average	56%	58%	61%	-2	-5
South Africa	74%	78%	74%	-4	-
Hungary	72%	66%	73%	6	-1
Brazil	72%	78%	77%	-6	-5
Chile	69%	57%	-	12	-
United States	68%	60%	66%	8	2
Argentina	68%	74%	70%	-6	-2
Colombia	64%	-	-	-	-
Germany	61%	63%	61%	-2	0
Peru	60%	63%	55%	-3	5
Netherlands	60%			_	-
Sweden	60%	49%	51%	11	9
Turkey	60%	46%	53%	14	7
Belgium	58%	-	-	-	-
France	54%	46%	52%	8	2
Spain	54%	69%	78%	-15	-24
Great Britain	52%	63%	56%	-11	-4
Mexico	49%	61%	76%	-12	-27
Russia	47%	64%	-	-17	-
Australia	45%	47%	47%	-2	-2
Poland	44%	84%	79%	-40	-35
Malaysia	43%	54%	-	-11	-
Canada	42%	52%	37%	-10	5
Japan	41%	32%	31%	9	10
Italy	40%	34%	53%	6	-13
South Korea	33%	43%	72%	-10	-39
6 -					

2019

2016

vs. 2019

vs.2016

Compared to 2019, prepandemic, the sentiment that one's country is broken is significantly more prevalent (up by 5 points or more) in 8 countries and significantly less so in 10 countries.

It has increased most in Turkey, Chile and Sweden and decreased most in Poland, Russia and Spain.

Compared to 2016, as many countries (6) show a significant hike as show a significant drop in the perception their society is broken.



### [Country] is in decline

lobal Country Average	57%			22%	2%		19%
Brazil	69%				14%	3%	14%
Chile	68%				18%	2%	11%
South Africa	68%				17%	1 <mark>%</mark>	13%
Argentina	68%				16%	3%	13%
Colombia	67%				22%		2% 9%
Italy	65%				21%	2%	12%
Hungary	63%			15%	2%	2	20%
Japan	62%			24	4%	2%	<b>12%</b>
Turkey	61%			18%	2%		19%
Peru	59%			26%	Ď	2%	13%
Netherlands	58%			23%	1%		18%
France	58%			23%	4%	6	16%
Poland	57%			21%	1 <mark>%</mark>	22	2%
United States	55%			26%	1%		18%
Malaysia	55%		16%	6 1 <mark>%</mark>		28%	
Sweden	55%			24%	1%		20%
Belgium	55%			26%	1%		19%
Spain	54%			29%		6%	12%
Russia	50%		<b>21%</b>	1%		28%	
Mexico	48%		32	2%	49	6	16%
Great Britain	48%		24%	49	6	25%	6
Germany	47%		29%		2%	22	2%
Canada	43%	27	%	3%		28%	
South Korea	41%	24%		1%	3	3%	
Australia	36%	25%	2%		37%		

On average, 57% believe their country is in decline.

Sentiment that one's country is in decline is highest in Brazil (69%), Chile (68%), South Africa (68%), and Argentina (68%).

Fewer than half in Australia, South Korea, Canada, Germany, Great Britain and Mexico agree. Australia is the only country where more disagree than agree.

Base: 19,017 online adults aged 16-74 across 25 countries

Online samples in Brazil, Chile, Colombia, Malaysia, Mexico, Peru, Russia, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population



—			2016	vs.2016
Blobal Country Average		57%	59%	-2
Brazil			69% <b>72%</b>	-3
Chile		6	8% _	-
South Africa		6	<sup>8%</sup> 77%	-9
Argentina		6	<sup>8%</sup> 58%	10
Colombia		67		-
Italy		65%	73%	-8
Hungary		63%	70%	-7
Japan		62%	40%	22
Turkey		61%	55%	6
Peru		59%	44%	15
Netherlands		58%		
France		58%	67%	-9
Poland		57%	50%	7
United States		55%	60%	-5
Malaysia		55%	-	-
Sweden		55%	53%	2
Belgium		55%	64%	-9
Spain		54%	69%	-15
Russia		50%	-	-
Mexico		48%	69%	-21
Great Britain		48%	57%	-9
Germany		47%	47%	0
Canada		43%	38%	5
South Korea		41%	73%	-32
Australia	36	5%	49%	-13

### [Country] is in decline

Compared to 2016, 11 countries show a significant decrease vs. just 6 that show a gain of 5 points or more. The feeling of decline has eased most in South Korea and Mexico while it has increased most in Japan and Peru.

----



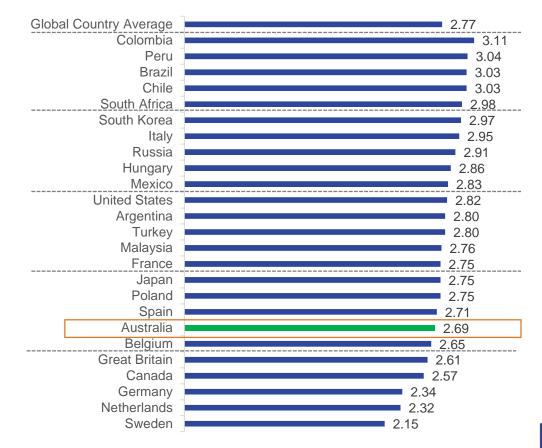
## Broken-System Sentiment



### Ipsos' "System Is Broken" Index

Index based on agreement to 5 statements:

- The [country's] economy is rigged to advantage the rich and powerful
- Traditional parties and politicians don't care about people like me
- [To fix [COUNTRY], we need a strong leader willing to break the rules
- [COUNTRY] needs a strong leader to take the country back from the rich and powerful
- Experts in this country don't understand the lives of people like me





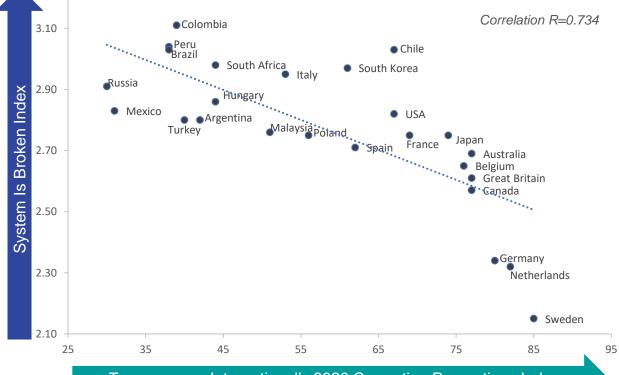
### **"System Is Broken" Index x Corruption Perceptions Index**

Broken System Index based on agreement with 5 statements:

- The [country's] economy is rigged to advantage the rich and powerful
- . Traditional parties and politicians don't care about people like me
- [To fix [COUNTRY], we need a strong leader willing to break the rules
- . [COUNTRY] needs a strong leader to take the country back from the rich and powerful
- Experts in this country don't understand the lives of people like me

Transparency International's *2020 Corruption Perceptions Index* ranks 180 countries and territories by their perceived levels of public sector corruption according to experts and businesspeople, using a scale of zero to 100, where zero is highly corrupt and 100 is very clean.

More information at www.transparency.org



Transparency International's 2020 Corruption Perceptions Index



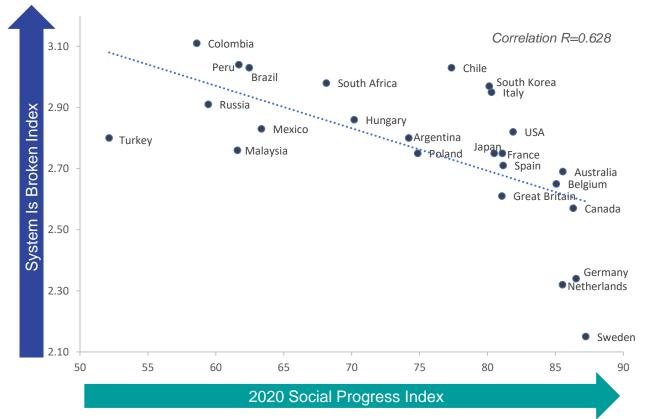
### "System Is Broken" Index x Social Progress Index

Broken System Index based on agreement with 5 statements:

- The [country's] economy is rigged to advantage the rich and powerful
- Traditional parties and politicians don't care about people like me
- [To fix [COUNTRY], we need a strong leader willing to break the rules
- . [COUNTRY] needs a strong leader to take the country back from the rich and powerful
- Experts in this country don't understand the lives of people like me

The Social Progress Imperative's 2020 Social *Progress Index* (SPI) measures the relative performance of countries in providing for the social and environmental needs of their citizens. It is based on metrics indicative of outcomes pertaining to wellness (including health, shelter and sanitation), equality, inclusion, sustainability and personal freedom and safety.

More information at www.socialprogress.org





### **Broken-system sentiment: Agreement with statements**

	Global Country Average	Argentina	Australia	Belgium	Brazil	Canada	Chile	Colombia	France	Germany	Great Britain	Hungary	Italy	Japan	Malaysia	Mexico	Netherlands	Peru	Poland	Russia	South Africa	South Korea	Spain	Sweden	Turkey	United States
[Country's] economy is rigged to advantage the rich and powerful	71%	68%	63%	69%	80%	64%	80%	84%	68%	66%	66%	81%	74%	71%	75%	73%	54%	80%	69%	78%	76%	85%	65%	48%	69%	71%
Traditional parties and politicians don't care about people like me	68%	71%	62%	62%	78%	54%	84%	85%	66%	59%	58%	70%	73%	64%	70%	72%	48%	81%	72%	72%	76%	68%	68%	44%	68%	72%
[Country] needs a strong leader to take the country back from the rich and powerful	64%	63%	66%	65%	74%	63%	72%	77%	62%	36%	62%	72%	69%	57%	80%	70%	54%	70%	59%	67%	72%	69%	62%	37%	65%	70%
Experts in this country don't understand the lives of people like me	65%	71%	59%	57%	65%	51%	84%	81%	68%	53%	56%	64%	71%	60%	63%	72%	44%	75%	67%	73%	70%	61%	65%	49%	73%	70%
To fix [Country], we need a strong leader willing to break the rules	44%	40%	53%	45%	61%	40%	35%	44%	40%	23%	42%	40%	55%	52%	46%	31%	38%	47%	47%	48%	62%	71%	33%	34%	44%	43%
Change in % point vs. 2019 (average 5 items)	0	-5	-1	-1	5	-5	7	NA	-5	-2	-9	2	4	9	11	-6	NA	3	-1	4	4	7	-6	-2	1	5
Change in % point vs. 2016 (average 5 items)	2	4	-1	1	1	-3	NA	NA	-6	3	-3	-3	-1	15	NA	-7	NA	1	0	NA	13	5	-8	8	2	4

Base: 19,017 online adults aged 16-74 across 25 countries

Online samples in Brazil, Chile, Colombia, Malaysia, Mexico, Peru, Russia, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population



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

Global Country Average	71%	15% 3% 11%
South Korea	85%	10% 0 <mark>%5%</mark>
Colombia	84%	10% 1 <mark>% 6%</mark>
Hungary	81%	10% 3% 7%
Peru	80%	12% 2% 6%
Chile	80%	11% 1 <mark>% 8%</mark>
Brazil	80%	11% 3% 6%
Russia	78%	12% 2% 9%
South Africa	76%	11% 2% 11%
Malaysia	75%	14% 2% 9%
Italy	74%	16% 3% 8%
Mexico	73%	14% 3% 10%
Japan	71%	20% 2% 7%
United States	71%	15% 3% 12%
Poland	69%	19% 4% 8%
Turkey	69%	10% 3% 18%
Belgium	69%	17% 2% 12%
Argentina	68%	16% 4% 12%
France	68%	18% 6% 9%
Great Britain	66%	18% 3% 13%
Germany	66%	19% 3% 13%
Spain	65%	23% 4% 8%
Canada	64%	20% 4% 12%
Australia	63%	19% 2% 15%
Netherlands	54% 17%	3% 26%
Sweden	48% 21%	4% 27%

On average, globally, 71% agree their country's economy is rigged; just 11% disagree.

Agreement is highest in South Korea (85%), Colombia (84%) and Hungary (81%). Sweden and the Netherlands are the only countries where only about half agree and over one quarter disagree.

Base: 19,017 online adults aged 16-74 across 25 countries

Online samples in Brazil, Chile, Colombia, Malaysia, Mexico, Peru, Russia, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population



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

-		2019	2016	vs. 2019	vs.2016
Global Country Average	71%	70%	68%	1	3
South Korea	85%	72%	74%	13	11
Colombia	84%	-	-	-	-
Hungary	81%	78%	83%	3	-2
Peru	80%	78%	79%	2	1
Chile	80%	_73%	<del>_</del>	7	
Brazil	80%	75%	69%	5	11
Russia	78%	76%	-	2	-
South Africa	76%	69%	64%	7	12
Malaysia	75%	57%	-	18	-
Italy	74%	72%	75%	2	-1
Mexico	73%	79%	82%	-6	-9
Japan	71%	66%	59%	5	12
United States	71%	66%	69%	5	2
Poland	69%	65%	68%	4	1
Turkey	69%	66%	55%	3	14
Belgium	69%	69%	71%	0	-2
Argentina	68%	76%	65%	-8	3
France	68%	73%	70%	-5	-2
Great Britain	66%	70%	67%	-4	-1
Germany	66%	69%	66%	-3	0
Spain	65%	77%	79%	-12	-14
Canada	64%	67%	67%	-3	-3
Australia	63%	66%	68%	-3	-5
Netherlands	54%	-	-	-	-
Sweden	48%	50%	39%	-2	9
15 – © Ipsos					

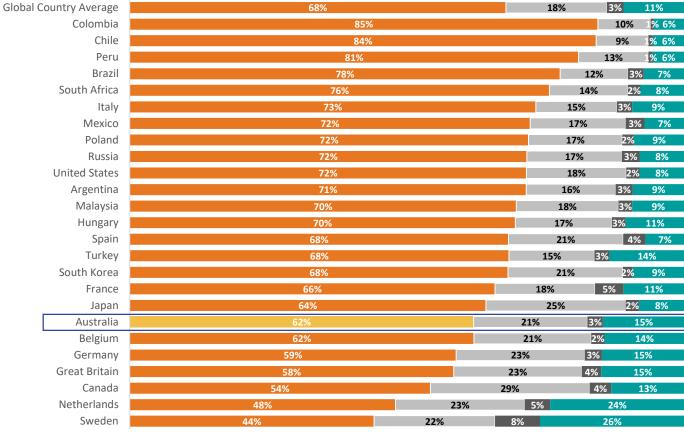
The belief the country's economy is rigged to advantage the rich and powerful remains stable.

It has increased significantly (5+ points) in 7 countries vs. 2019 and 6 countries vs. 2016. It has decreased significantly in 4 countries vs. 2019 and 3 countries vs. 2016.

Malaysia (+18) has seen the largest increase since 2019 and South Korea, Brazil, South Africa, Japan, and Turkey since 2016. Spain shows the steepest drop vs. both 2019 and 2016.



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



On average globally, 68% agree that traditional parties and politicians don't care about people like them.

Agreement is highest in the four South American countries -- Colombia (85%), Chile (84%), and Peru (81%) and Brazil (76%). In Sweden (44%) and the Netherlands (48%), only a minority agree.

Base: 19,017 online adults aged 16-74 across 25 countries

Online samples in Brazil, Chile, Colombia, Malaysia, Mexico, Peru, Russia, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population



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

		2019	2016	vs. 2019	vs.2016
Global Country Average	68%	67%	64%	1	4
Colombia	85%	-	-	-	-
Chile	84%	73%	-	11	-
Peru	81%	75%	77%	6	4
Brazil	78%	72%	69%	6	9
South Africa	76%	78%		-2	11
Italy	73%	67%	72%	6	1
Mexico	72%	76%	78%	-4	-6
Poland	72%	71%	70%	1	2
Russia	72%	72%	-	0	-
United States	72%	67%	66%	5	6
Argentina	71%	74%	65%	-3	6
Malaysia	70%	57%	-	13	-
Hungary	70%	73%	73%	-3	-3
Spain	68%	75%	75%	-7	-7
Turkey	68%	60%	61%	8	7
South Korea	68%	64%	65%	4	3
France	66%	75%	76%	-9	-10
Japan 📕	64%	48%	39%	16	25
Australia	62%	64%	61%	-2	1
Belgium	62%	65%	63%	-3	-1
Germany	59%	60%	53%	-1	6
Great Britain	58%	69%	58%	-11	0
Canada	54%	61%	56%	-7	-2
Netherlands	48%	-	-	-	-
Sweden	44%	50%	42%	-6	2
<b>17</b> – © Ipsos					

Since 2019, the belief that traditional parties and politicians don't care about the common person has gained significantly (by at least 5 points) in 8 countries (most of all in Japan and Malaysia) and receded significantly in 5 countries (most of all in Great Britain).

Compared to 2016, it is up by 5 points or more in 7 countries (most of all in Japan, by 25 points) and it has abated significantly in 3 countries (most of all in France).



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

Global C	Country Average		44%			2	2%	4%		29%	
	South Korea			71%					18%	2%	9%
	South Africa		62%	6				16%	2%	21%	
	Brazil		61%	5				16%	4%	20%	5
	Italy		55%					19%	5%	21%	
	Australia		53%					22%	3%	22%	
	Japan		52%					29%	4	%	15%
	Russia		48%				22%	55	%	25%	
	Peru		47%				22%	2%		29%	
	Poland		47%				24%	1%		27%	
	Malaysia		46%			14%	2%		38%		
	Belgium		45%			2	23%	5%		28%	
	Turkey		44%			20%	6	3%	33	3%	
	Colombia		44%			21%	0	3%	33	%	
	United States		43%			24	%	3%		30%	
	Great Britain		42%			259	%	5%		28%	
	Argentina		40%			25%		7%		29%	
	Canada		40%			25%		4%	3	2%	
	France		40%			24%		9%		27%	
	Hungary		40%			22%		5%	33	%	
	Netherlands		38%			24%		4%	35	%	
	Chile	3	5%		2	.7%		3%	35%	6	
	Sweden	34	1%		19%	49	%		43%		
	Spain	33	%		25%		6%		36%		
	Mexico	31%			26%		4%		40%		
	Germany	23%		26%		5%			47%		
48 - (											

On average, 44% across all 25 countries agree that fixing their country requires a strong leader willing to break the rules.

Agreement is expressed by outright majorities in 6 countries (South Korea, South Africa, Brazil, Italy, Australia and Japan) and by pluralities in 14 countries.

Disagreement exceeds agreement in Germany, Mexico, Spain, Sweden and matches it in Chile.

Base: 19,017 online adults aged 16-74 across 25 countries

Online samples in Brazil, Chile, Colombia, Malaysia, Mexico, Peru, Russia, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population



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

				2019	2016	vs. 2019	vs.2016
Global Country Average		44%		46%	46%	-2	-2
South Korea				71% 62%	66%	9	5
South Africa			62%	51%	42%	11	20
Brazil			61%	53%	48%	8	13
Italy			55%	62%	68%	-7	-13
Australia		53	\$%	50%	50%	3	3
Japan		52%	6	44%	39%	8	13
Russia		48%		50%	-	-2	-
Peru		47%		45%	51%	2	-4
Poland		47%		62%	60%	-15	-13
Malaysia		46%		42%		4	-
Belgium		45%		-	-	-	-
Turkey		44%		64%	66%	-20	-22
Colombia		44%		-	-	-	-
United States		43%		35%	40%	8	3
Great Britain		42%		52%	50%	-10	-8
Argentina		40%		44%	36%	-4	4
Canada		40%		39%	41%	1	-1
France		40%		-	-	-	-
Hungary		40%		35%	42%	5	-2
Netherlands		38%					-
Chile		35%		42%	-	-7	-
Sweden		34%		36%	23%	-2	11
Spain		33%		31%	35%	2	-2
Mexico		31%		41%	41%	-10	-10
Germany	23%			22%	21%	1	2
<b>19</b> – © Ipsos							

 Since 2019, the desire for a strong leader willing to break the rules has increased significantly (by 5+ points) in 6 countries and decreased significantly in 6 countries.

The most notable increase both vs. 2019 and 2016 is seen in South Africa.

Turkey, Poland and Mexico all show double-digit decreases.



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

Global Cou	untry Average		64%			19%		3%	13%
	Malaysia			80%				12%	2% 6%
	Colombia			77%			1	3% 1	% 9%
	Brazil		74	4%			13%	4%	9%
	Chile		72	%			15%	1%	12%
	South Africa		729	%			14%	1%	14%
	Hungary		729	%			14%	4%	11%
	United States		70%	6			18%	2%	10%
	Peru		70%				18%	1%	11%
	Mexico		70%				17%	2%	11%
	South Korea		69%				20%	2	% 9%
	Italy		69%			1	5%	3%	13%
	Russia		67%			17	'%	4%	12%
	Australia		66%			21	L%	3%	11%
	Turkey		65%			16%	4	%	15%
	Belgium		65%			17%	4	%	15%
	Canada		63%			21%		3%	13%
	Argentina		63%			18%	3%	6	16%
	France		62%			20%		7%	11%
	Spain		62%			24%		5%	10%
	Great Britain		62%			22%		3%	13%
	Poland		59%			26%		3%	<b>12%</b>
	Japan		57%			28%		4%	1 <b>2</b> %
	Netherlands		54%		23	%	6%		17%
	Sweden	33	7%	28%		4%	3	31%	
	Germany	369	%	26%	5%		34	%	

On average, 64% agree that their country needs a strong leader to take the country back from the rich and powerful.

Agreement is highest in Malaysia (80%), Colombia (77%) and Brazil (74%).

Sweden (37%) and Germany (36%) are the only countries where less than half agree.

Base: 19,017 online adults aged 16-74 across 25 countries

Online samples in Brazil, Chile, Colombia, Malaysia, Mexico, Peru, Russia, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population



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

	-		2019	2016	vs. 2019	VS.2016
Global Country Average		64%	63%	63%	1	1
Malaysia		80%	68%	-	12	-
Colombia		77%	-	-	-	-
Brazil		74%	73%	68%	1	6
Chile		72%	62%	-	10	-
South Africa		72%	69%	60%	3	12
Hungary		72%	68%	72%	4	0
United States		70%	66%	69%	4	1
Peru		70%	74%	74%	-4	-4
Mexico		70%	79%	81%	-9	-11
South Korea		69%	64%	70%	5	-1
Italy		69%	59%	67%	10	2
Russia		67%	67%	-	0	-
Australia		66%	67%	71%	-1	-5
Turkey		65%	60%	63%	5	2
Belgium		65%	62%	59%	3	6
Canada		63%	67%	65%	-4	-2
Argentina		63%	67%	62%	-4	1
France		62%	65%	70%	-3	-8
Spain		62%	67%	72%	-5	-10
Great Britain		62%	70%	67%	-8	-5
Poland		59%	57%	53%	2	6
Japan		57%	46%	45%	11	12
Netherlands		54%	-	-	-	-
Sweden	37%		41%	31%	-4	6
Germany	36%		38%	34%	-2	2
21 - © Ipsos						

Since 2019, the perceived need for a strong leader to take back the country from the rich and powerful has increased significantly (by 5+ points) in 6 countries (most of all Malaysia, Japan, Chile and Italy) and decreased significantly in 3 countries.(most of all Mexico and Great Britain).

Relative to 2016, this desire has grown most notably in Japan and South Africa and subsided most in Mexico and Spain



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

Global Cou	untry Average	65%		20%	3%	12%
	Chile	84%			7%	2% 8%
	Colombia	81%			13%	0 <mark>% 6%</mark>
	Peru	75%		1	8%	<mark>2% 6%</mark>
	Turkey	73%		12%	3%	12%
	Russia	73%		13%	3%	11%
	Mexico	72%		17%	3	9%
	Argentina	71%		17%	39	6 9%
	Italy	71%		17%	3%	10%
	South Africa	70%		15%	1%	14%
	United States	70%		19%		2% 9%
	France	68%		18%	65	% 8%
	Poland	67%		21%	1%	5 11%
	Brazil	65%		19%	4%	11%
	Spain	65%		26%		4% 7%
	Hungary	64%		18%	5%	13%
	Malaysia	63%		22%	2%	14%
	South Korea	61%		30%		1 <mark>% 9%</mark>
	Japan	60%		29%	3	% 9%
Г	Australia	59%	22	% 3	%	16%
	Belgium	57%	25%	6	3%	15%
	Great Britain	56%	24%	4%	5	16%
	Germany	53%	27%	49	6	16%
	Canada	51%	29%	4%	6	16%
	Sweden	49%	.6%	5%	2	0%
	Netherlands	44% 27%		6%	23%	6

On average, 65% globally believe experts in their country don't understand the lives of people like them.

Agreement is highest in Chile (84%) and Colombia (81%). In the Netherlands (44%) and Sweden (49%), only a minority agree.

Base: 19,017 online adults aged 16-74 across 25 countries

Online samples in Brazil, Chile, Colombia, Malaysia, Mexico, Peru, Russia, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population



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

		2019	2016	Vs 2019	Vs 2016
Global Country Average	65%	63%	61%	2	4
Chile	84	% 70%	-	14	- '
Colombia	81%	-	-	-	-
Peru	75%	68%	69%	7	6
Turkey	73%	63%	62%	10	11
Russia	73%	54%	-	19	-
Mexico	72%	73%	72%	-1	0
Argentina	71%	75%	67%	-4	4
Italy	71%	62%	65%	9	6
South Africa	70%	67%	60%	3	10
United States	70%	65%	64%	5	6
France	68%	72%	73%	-4	-5
Poland	67%	66%	64%	1	3
Brazil	65%	59%	55%	6	10
Spain	65%	71%	74%	-6	-9
Hungary	64%	65%	70%	-1	-6
Malaysia	63%	56%	-	7	-
South Korea	61%	59%	55%	2	6
Japan	60%	55%	45%	5	15
Australia	59%	63%	60%	-4	-1
Belgium	57%	61%	57%	-4	0
Great Britain	56%	67%	59%	-11	-3
Germany	53%	57%	46%	-4	7
Canada	51%	62%	58%	-11	-7
Sweden	49%	47%	38%	2	11
Netherlands	44%	-		-	-
<b>23</b> – © lpsos					

Globally, agreement that "experts don't understand people like me" has trended upward.

It has increased significantly (5+ points) in 9 countries both vs. 2019 and 10 countries vs. 2016. It has decreased significantly in 3 countries vs. 2019 and in 5 countries vs. 2016.

Russia (+19) and Chile (+14) have seen the largest increases since 2019 and Japan, Turkey and the Netherlands since 2016. Great Britain and Sweden show the steepest drops vs. 2019 and Spain vs. 2016.



## Populism and Anti-Elite Sentiment

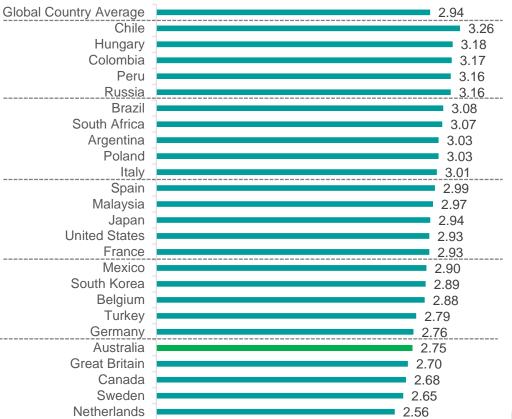




### **Populism Index**

Index based on agreement to 5 statements:

- The main divide in our society is between ordinary citizens and the political and economic elite
- The political and economic elite don't care about hard-working people
- Politicians always end up finding ways to protect their privileges
- Politicians should be able to say what's on their minds regardless of what anyone else thinks about their views
- 'The most important political issues in [COUNTRY] should be decided directly by the people through referendums, not by the elected officials





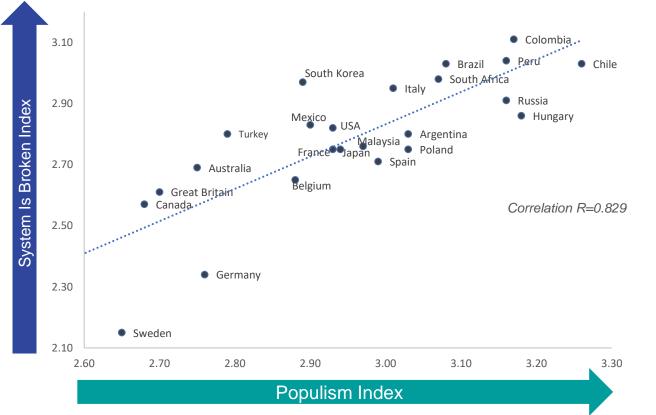
### "System Is Broken" Index x Populism Index

Broken System Index based on agreement with 5 statements:

- The [country's] economy is rigged to advantage the rich and powerful
- Traditional parties and politicians don't care about people like me
- [To fix [COUNTRY], we need a strong leader willing to break the rules
- . [COUNTRY] needs a strong leader to take the country back from the rich and powerful
- Experts in this country don't understand the lives of people like me

Populism Index based on agreement with 5 statements:

- The main divide in our society is between ordinary citizens and the political and economic elite
- The political and economic elite don't care about hard-working people
- Politicians always end up finding ways to protect their privileges
- Politicians should be able to say what's on their minds regardless of what anyone else thinks about their views
- 'The most important political issues in [COUNTRY] should be decided directly by the people through referendums, not by the elected officials





### **Populism – Agreement with Statements**

	Global Country Average	Argentina	Australia	Belgium	Brazil	Canada	Chile	Colombia	France	Germany	Great Britain	Hungary	Italy	Japan	Malaysia	Mexico	Netherlands	Peru	Poland	Russia	South Africa	South Korea	Spain	Sweden	Turkey	United States
Politicians always end up finding ways to protect their privileges	81%	87%	78%	82%	87%	76%	91%	89%	79%	73%	78%	83%	80%	79%	82%	83%	69%	88%	81%	83%	87%	82%	80%	67%	77%	87%
The political and economic elite don't care about hard-working people	72%	82%	66%	69%	82%	60%	82%	81%	68%	64%	63%	79%	76%	66%	73%	73%	53%	78%	77%	83%	80%	60%	71%	55%	71%	78%
The main divide in our society is between ordinary citizens and the political and economic elite	70%	70%	63%	68%	76%	60%	84%	80%	75%	64%	62%	77%	73%	78%	79%	62%	57%	73%	79%	71%	77%	68%	68%	58%	65%	68%
Politicians should be able to say what's on their minds regardless of what anyone else thinks about their views	62%	67%	53%	63%	53%	54%	72%	62%	62%	60%	59%	77%	58%	67%	67%	56%	62%	73%	68%	75%	59%	61%	60%	73%	45%	55%
The most important political issues in [Country] should be decided directly by the people through referendums, not by the elected officials	60%	52%	54%	56%	70%	49%	63%	68%	59%	53%	45%	67%	63%	57%	69%	49%	46%	65%	70%	70%	73%	72%	61%	51%	58%	61%

Base: 19,017 online adults aged 16-74 across 25 countries

Online samples in Brazil, Chile, Colombia, Malaysia, Mexico, Peru, Russia, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population



### The main divide in our society is between ordinary citizens and the political and economic elite

Global C	Country Average	70%		17%	3%	6 10%
	Chile	84%			9%	<u> 2% 5%</u>
	Colombia	80%			12%	3% 6%
	Malaysia	79%			15%	2% 4%
	Poland	79%			14%	1% 6%
	Japan	78%			14%	2% 6%
	Hungary	77%			12%	3% 7%
	South Africa	77%			16%	1% 7%
	Brazil	76%			14%	3% 6%
	France	75%		13	3%	5% 7%
	Peru	73%		1	.8%	2% 8%
	Italy	73%		1	8%	3% 6%
	Russia	71%		14%	4%	11%
	Argentina	70%		15%	4%	11%
	South Korea	68%		21%		2% 9%
	United States	68%		16%	2%	14%
	Spain	68%		21%		5% 7%
	Belgium	68%		20%	4	l% 8%
	Turkey	65%	10	6%	4%	15%
	Germany	64%		21%	4%	11%
	Australia	63%		22%	3%	12%
	Mexico	62%		26%		4% 8%
	Great Britain	62%	19%	6	4%	16%
	Canada	60%	23	%	4%	12%
	Sweden	58%	14%	6%	2	1%
	Netherlands	57%	21%	4%		18%
20	@ Incore					

On average globally, 70% agree the main divide in society is between ordinary citizens and the political and economic elite; just 10% disagree.

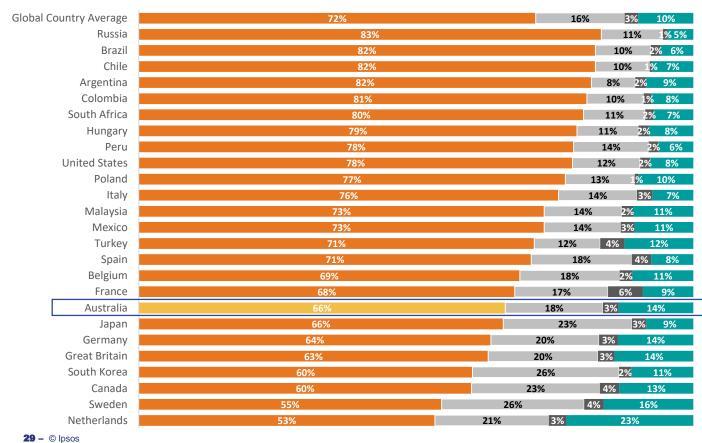
Agreement prevails in every one of the 25 countries; it is highest in Chile (84%), Colombia (80%), Malaysia (79%) and Poland (79%).

Base: 19,017 online adults aged 16-74 across 25 countries

Online samples in Brazil, Chile, Colombia, Malaysia, Mexico, Peru, Russia, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population



### The political and economic elite don't care about hardworking people



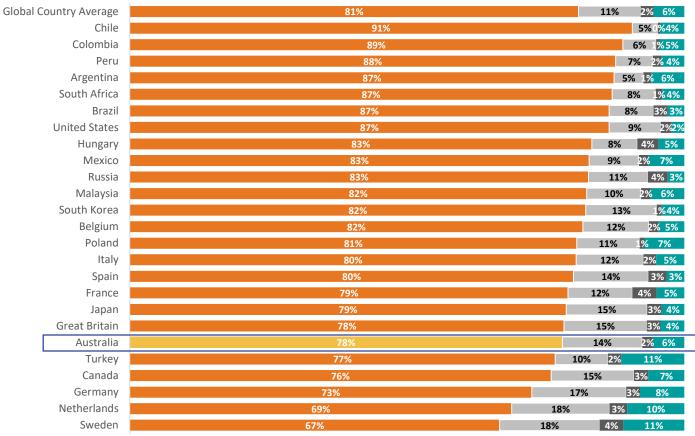
Across all countries, an average of 72% agree the political and economic elite don't care about hard-working people vs. 10% who disagree.

Majorities in all country agree with the largest in Russia (83%), Brazil (82%), Chile (82%), Argentina (82%), Colombia (81%), and South Africa (80%) and the smallest in the Netherlands (53%) and Sweden (55%).

Base: 19,017 online adults aged 16-74 across 25 countries

Online samples in Brazil, Chile, Colombia, Malaysia, Mexico, Peru, Russia, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population





### Politicians always end up finding ways to protect their privileges

On average across all countries, 81% agree that politicians always end up finding ways to protect their privileges vs. just 6% who disagree.

Agreement is highest in Chile (91%), Colombia (89%) and Peru (88%), while it is lowest in the Netherlands (69%) and Sweden (67%).

Base: 19,017 online adults aged 16-74 across 25 countries

Online samples in Brazil, Chile, Colombia, Malaysia, Mexico, Peru, Russia, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population



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

Global Country Averag	e	62%			21%	3%	14%
Hungar	y	77%				14%	5% 4%
Russi	a 📃	75%				17%	4% 5%
Swede	n 🗾	73%			12%	<b>6 3%</b>	11%
Per	u 📃	73%				18%	2% 6%
Chil	e 📃	72%			16	% 29	<mark>% 10%</mark>
Polan	d	68%			19%	2%	12%
Argentin	a 📃	67%			18%	5%	10%
Japa	n 📃	67%			24%	1	3% 6%
Malaysi	a	67%			16%	2%	16%
Belgiur	n 📃	63%			21%	5%	11%
Colombi	a	62%			22%	3%	12%
Netherland	s 📃	62%		1	.9%	2%	17%
Franc	e 📃	62%			24%	8	% 6%
South Kore	a	61%		2	0%	<mark>2%</mark>	16%
Spai	n 📃	60%			27%	3%	6 9%
German	y 📃	60%			27%	3%	10%
Great Britai	n 📃	59%		239	%	4%	15%
South Afric	a 📃	59%		18%	1%	22	%
Ital	y	58%		27	7%	4%	11%
Mexic	o 📃	56%		27%	6	5%	12%
United State	s 📃	55%		22%	3%	2	0%
Canad	a	54%		24%	3%	2	0%
Australi	a	53%		24%	3%	2:	1%
Braz	il 📃	53%		21%	3%	23	%
Turke	y	45%	18%	6	4%	23%	

Globally, an average of 62% agree that politicians should be able to say what's on their minds.

Majorities in all countries except Turkey agree – most of all in Hungary (77%), Russia (75%), Sweden (73%), Peru (73%) and Chile (72%).

Base: 19,017 online adults aged 16-74 across 25 countries

Online samples in Brazil, Chile, Colombia, Malaysia, Mexico, Peru, Russia, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population



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

-				2010	VS.2010
Global Country Average		62%		63%	-1
Hungary			77%	79%	-2
Russia			75%		-
Sweden			73%	58%	15
Peru			73%	72%	1
Chile			72%	-	-
Poland		6	8%	71%	-3
Argentina		67	7%	79%	-12
Japan		67	7%	47%	20
Malaysia		67	7%	-	-
Belgium		63%		66%	-3
Colombia		62%		-	-
Netherlands		62%		-	-
France		62%		70%	-8
South Korea		61%		68%	-7
Spain		60%		74%	-14
Germany		60%		64%	-4
Great Britain		59%		64%	-5
South Africa		59%		49%	10
Italy		58%		59%	-1
Mexico		56%		64%	-8
United States		55%		60%	-5
Canada		54%		57%	-3
Australia		53%		59%	-6
Brazil		53%		51%	2
Turkey	45%			53%	-8
32 - © Ipsos					

Globally, agreement that politicians should be able to say what's on their minds has averaged at around six in ten since 2016.

Since then, it has significantly gained in prevalence only in Japan, Sweden, and South Africa, while it has lost ground in 9 countries (most of all Spain and Argentina).



### The most important political issues in [country] should be decided directly by the people through referendums, not by the elected officials

Global Country Average	60%		22%	4%	15%
South Africa	73%			13% 2%	12%
South Korea	72%			18%	2% 9%
Brazil	70%		16	5% 3%	11%
Poland	70%			21%	2% 8%
Russia	70%		17	7% 3%	6 10%
Malaysia	69%			21%	3% 7%
Colombia	68%		19	% 3%	<b>6 11%</b>
Hungary	67%		19%	5%	10%
Peru	65%		20%	2%	13%
Chile	63%		22%	3%	12%
Italy	63%		20%	3%	15%
Spain	61%		25%	3%	11%
United States	61%		25%	3%	i 11%
France	59%		21%	5%	15%
Turkey	58%	2	2%	5%	16%
Japan	57%		28%	3%	11%
Belgium	56%	239	%	3%	19%
Australia	54%	25%		3%	18%
Germany	53%	23%	4	%	20%
Argentina	52%	24%		8%	16%
Sweden	51%	19%	5%	249	%
Mexico	49%	28%		6%	16%
Canada	49%	26%	5%	5 2	21%
Netherlands	46% 199	% 3%		33%	
Great Britain	45%	25%	5%	25%	6

Across all 25 countries, an average of 60% agree that the most important political issues in their country should be decided directly by the people through referendums – only 15% disagree.

Agreement is highest in South Africa (73%) and South Korea (72%).

Majorities in 21 countries prefer referendums is expressed. The only exceptions are Great Britain (45%), the Netherlands (46%), Canada (49%) and Mexico (49%).

Base: 19,017 online adults aged 16-74 across 25 countries

Online samples in Brazil, Chile, Colombia, Malaysia, Mexico, Peru, Russia, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population



### Prevalence of identification with the country's "elite"

		Yes						
Global C	Country Average	15%	4%	10%	25%		56%	5%
	Peru	29%	9%		20%	29%	39%	3%
	South Africa	26%	9%	1	7%	26%	45%	4%
	Mexico	23%	7%	17%		24%	44%	9%
	Colombia	20%	7%	13%	25	%	49%	5%
	South Korea	18%	3%	16%		42%	36%	4%
_	Malaysia	18%	<mark>3%</mark>	15%	27%	6	50%	5%
	Australia	18%	8%	9%	19%		59%	4%
	Brazil	18%	6%	12%	28%	0	47%	8%
	Spain	17%	5%	13%	19%		57%	7%
	Chile	17%	8%	9%	18%		61%	4%
	Italy	17%	4%	13%	24%		53%	7%
	Argentina	16%	8%	8%	24%		52%	8%
	Poland	15%	4%	11%	24%		59%	2%
	Germany	14%	4%	10%	33%		49%	4%
	Turkey	14%	4%	10%	34%	•	49%	3%
	Belgium	14%	3%	10%	28%		54%	4%
	France	<b>12%</b>	<mark>3%</mark> 9	9%	23%		57%	8%
	Russia	11%	<mark>2% 9</mark> 9	/0	17%		70%	3%
	Netherlands	10%	<mark>2%</mark> 7%	6	33%		53%	5%
	Sweden	9%	1 <mark>% 8%</mark>	)	22%		68%	1%
	Great Britain	8%	<mark>3%</mark> 5%		22%		65%	6%
	Hungary	7%	2 <mark>%</mark> 6%	16%	0		73%	4%
	Canada	7%	1 <mark>%6%</mark>	2	1%		68%	4%
	Japan	6%	1 <mark>%5%</mark>	17%			69%	8%
	United States	6%	2 <mark>%</mark> 4%	17%			72%	5%

On average across all 25 countries, only 15% identify with their country's elite.

Identification with the elite is highest in Peru (29%) and South Africa (26%), while it is lowest in the United States (6%), Japan (6%), Canada (7%) and Hungary (7%).

Base: 19,017 online adults aged 16-74 across 25 countries

Online samples in Brazil, Chile, Colombia, Malaysia, Mexico, Peru, Russia, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population

The "Global Country Average" reflects the average result for all the countries where the survey was conducted; it has not been adjusted to the population size of each country and is not intended to suggest a total result



G

Total

### Perception of the country's "elite" as a unified group

Global Country Average	64%	36%
South Korea	79%	21%
Chile	77%	23%
Argentina	73%	27%
Colombia	72%	28%
Mexico	71%	29%
Italy	70%	30%
Spain	69%	31%
Peru	68%	32%
Hungary	68%	32%
Canada	67%	33%
South Africa	67%	33%
Turkey	66%	34%
Russia	66%	34%
Great Britain	65%	36%
United States	64%	36%
Germany	64%	37%
India	64%	37%
France	63%	37%
Poland	63%	37%
Australia	62%	38%
Brazil	59%	41%
Belgium	58%	42%
Japan	52%	48%
Netherlands	51%	49%
Sweden	51%	49%
Malaysia	43%	57%

Globally, an average of 64% believe that the elite is a closely connected group with similar interests, while 36% believe that it is a loose group of people with different interest.

South Korea (79%) and Chile (77%) have the strongest belief that the elite is a closely connected group of people.

Malaysia is the only country where a majority believe the elite is a loose group of people with different interests.

#### Opinions are almost equally split in Japan, the Netherlands and Sweden.

Base: 19,017 online adults aged 16-74 across 25 countries

Online samples in Brazil, Chile, Colombia, Malaysia, Mexico, Peru, Russia, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population

The "Global Country Average" reflects the average result for all the countries where the survey was conducted; it has not been adjusted to the population size of each country and is not intended to suggest a total result



They are a closely connected group of people with similar interests and views on many important issues

They are a loose group of people with different interests and views on many important issues

### **Perceived motivation of elite's decision**

Global Country Average	55%		28%	8% 9%
Hungary	76%	6		16% 3% 5%
Chile	76%			17% 4% 3%
Argentina	72%			16% 8% 4%
Colombia	67%		20%	7% 5%
Russia	67%		21%	6% 6%
Brazil	66%		20%	6% 8%
United States	65%		20%	4% 11%
Peru	62%		28%	6% 4%
Poland	62%		25%	7% 7%
Mexico	59%		25%	9% 7%
Spain	59%		24%	6% 11%
South Africa	52%		35%	10% 3%
Italy	52%		33%	8% 7%
France	51%		33%	6% 11%
Great Britain	51%		30%	7% 12%
Canada	51%		34%	5% 10%
Malaysia	50%		27%	16% 7%
Turkey	50%		26%	14% 11%
Australia	49%		32%	10% 9%
Belgium	46%		41%	6% 8%
Netherlands	45%		36%	10% 10%
Sweden	44%		36%	7% 13%
South Korea	41%	38	3%	14% 8%
Germany	40%	379	%	7% 16%
Japan	23%	36%	11%	30%

On average globally, 55% believe that those are part of the elite tend to make their decisions based on their own interest, and that the needs of the rest of the country do not matter.

Another 28% say the elites believe their decisions are in the best interest of most of the country, but it is often not the case, while only 8% believe the elites tend to make decisions in the best interest of the country.

More than 3 in 4 in Hungary and Chile say the elites make decisions based solely on their own interests, vs. only 1 in 4 in Japan.

Base: 19,017 online adults aged 16-74 across 25 countries

Online samples in Brazil, Chile, Colombia, Malaysia, Mexico, Peru, Russia, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population

The "Global Country Average" reflects the average result for all the countries where the survey was conducted; it has not been adjusted to the population size of each country and is not intended to suggest a total result

They tend to make decisions based on their own interests and the needs of the rest of the people in [country] do not matter

They sincerely believe their decisions are in the best interest of most people in [country], but that is often not the case

They tend to make decisions that are in the best interest of most the people in [country]

None of these



# Nativism



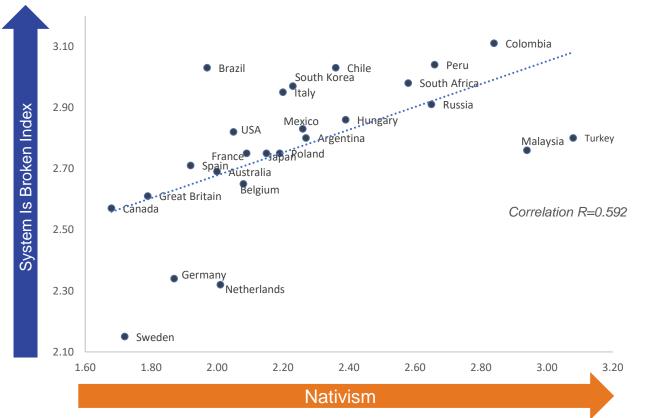
## "System Is Broken" Index x Nativism Index

Broken System Index based on agreement with 5 statements:

- The [country's] economy is rigged to advantage the rich and powerful
- . Traditional parties and politicians don't care about people like me
- [To fix [COUNTRY], we need a strong leader willing to break the rules
- . [COUNTRY] needs a strong leader to take the country back from the rich and powerful
- Experts in this country don't understand the lives of people like me

Nativism Index based on agreement with 3 statements:

- [COUNTRY] would be stronger if we stopped immigration
- When jobs are scarce, employers should prioritize hiring people of this country over immigrants
- Immigrants take jobs away from real [NOUN FOR PEOPLE FROM COUNTRY, PLURAL]







### **Nativism Index**

Index based on agreement to 3 statements:

- . [COUNTRY] would be stronger if we stopped immigration
- When jobs are scarce, employers should prioritize hiring people of this country over immigrants
- Immigrants take jobs away from real [NOUN FOR PEOPLE FROM COUNTRY, PLURAL]

	Global Country Average	2.24
	Turkey	3.08
	Malaysia	2.94
	Colombia	2.84
	Peru	2.66
	Russia	2.65
J	South Africa	2.58
2	Hungary	2.39
	Chile	2.36
	Argentina	2.27
	Mexico	2.26
	South Korea	2.23
	Italy	2.20
	Poland	2.19
	Japan	2.15
	France	2.09
	Belgium	2.08
	United States	2.05
	Netherlands	2.01
	Australia	2.00
	Brazil	1.97
	Spain	1.92
	Germany	1.87
	Great Britain	1.79
	Sweden	1.72
	Canada	1.68
	Callaua	1.00



#### **Nativism – Agreement with Statements**

	Global Country Average	Argentina	Australia	Belgium	Brazil	Canada	Chile	Colombia	France	Germany	Great Britain	Hungary	Italy	Japan	Malaysia	Mexico	Netherlands	Peru	Poland	Russia	South Africa	South Korea	Spain	Sweden	Turkey	United States
When jobs are scarce, employers should prioritize hiring people of this country over immigrants	57%	58%	52%	48%	53%	39%	58%	75%	48%	38%	41%	71%	54%	55%	88%	57%	44%	65%	60%	76%	71%	63%	42%	30%	78%	54%
[Country] would be stronger if we stopped immigration	38%	37%	30%	38%	26%	20%	47%	53%	40%	36%	31%	41%	40%	15%	56%	30%	44%	52%	27%	43%	48%	24%	30%	43%	70%	31%
Immigrants take jobs away from real [Country's people]	38%	37%	36%	31%	34%	26%	40%	62%	29%	22%	27%	35%	37%	29%	65%	24%	29%	53%	29%	54%	53%	36%	26%	22%	71%	37%
Change in % point vs. 2016 (average 3 items)	4	-4	0	-4	3	-5	NA	NA	-2	-2	-4	-5	-5	12	NA	4	NA	15	2	NA	9	8	-5	14	7	-6

Base: 19,017 online adults aged 16-74 across 25 countries

Online samples in Brazil, Chile, Colombia, Malaysia, Mexico, Peru, Russia, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population

The "Global Country Average" reflects the average result for all the countries where the survey was conducted; it has not been adjusted to the population size of each country and is not intended to suggest a total result





# When jobs are scarce, employers should prioritize people from this country over immigrants

			·			
Global Country Average	57%			22%	3%	19%
Malaysia		88%				9% 1%2%
Turkey	7	78%			15%	3% 4%
Russia	76			14%	2% 8%	
Colombia	75	%			13%	<b>%</b> 11%
Hungary	71%				15%	5% 10%
South Africa	71%				<b>15%</b> 1 <mark>%</mark>	14%
Peru	65%			219	% 2%	<b>12%</b>
South Korea	63%			24%	6	% 11%
Poland	60%			24%	2%	14%
Argentina	58%			18%	4%	20%
Chile	58%			22%	2%	19%
Mexico	57%			29%	3%	12%
Japan	55%			30%	59	
Italy	54%		23	%	2%	22%
United States	54%		24	1%	3%	19%
Brazil	53%		21%	5		21%
Australia	52%		23%			23%
France	48%		26%	5%		22%
Belgium	48%		26%	1%	25	%
Netherlands	44%		22%	3%	31%	
Spain	42%		30%	4%	25	%
Great Britain	41%	25		3%	31%	-
Canada	39%	27		3%	31%	
Germany	38%	28		5%	29%	
Sweden	30%		5%	3/0	43%	
	30%	22/0				

On average, globally, 57% agree that employers should prioritize natives over immigrants when jobs are scarce.

Agreement is highest in Malaysia (88%), Turkey (78%), Russia (76%), Colombia (75%), Hungary and South Africa (71% both).

Majorities in 17 countries and pluralities in 7 countries agree. Sweden is the only country where more disagree than agree.

Base: 19,017 online adults aged 16-74 across 25 countries

Online samples in Brazil, Chile, Colombia, Malaysia, Mexico, Peru, Russia, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population

The "Global Country Average" reflects the average result for all the countries where the survey was conducted; it has not been adjusted to the population size of each country and is not intended to suggest a total result



# When jobs are scarce, employers should prioritize people from this country over immigrants

		•		2019	2016	vs. 2019	vs.2016
Global Country Average		57%		59%	53%	-3	3
Malaysia			88%	81%	-	7	-
Turkey			78%	73%	74%	5	4
Russia			76%	81%	-	-5	-
Colombia			75%	-	-	-	-
Hungary		71%	, D	_75%	76%	-4	-5
South Africa		71%	, D	63%	60%	8	11
Peru		65%		62%	64%	3	1
South Korea		63%		60%	54%	3	9
Poland		60%		65%	57%	-5	3
Argentina		58%		65%	63%	-7	-5
Chile		58%		55%	-	3	-
Mexico		57%		69%	55%	-12	2
Japan		55%		53%	38%	2	17
Italy		54%		53%	60%	1	-6
United States		54%		55%	58%	-1	-4
Brazil		53%		60%	56%	-7	-3
Australia		52%		53%	51%	-1	1
France		48%		54%	51%	-6	-3
Belgium		48%		51%	46%	-3	2
Netherlands		44%					-
Spain		42%		52%	50%	-10	-8
Great Britain		41%		48%	48%	-7	-7
Canada		39%		50%	45%	-11	-6
Germany		38%		49%	45%	-11	-6
Sweden	30%			34%	17%	-4	13
<b>42</b> – © Ipsos							

Globally, the belief that, when jobs are scarce, employers should prioritize the country's people over immigrants is trending downward.

Compared to 2019, it shows significant losses (5+ points) in 10 countries and gains in only 3 countries; compared to 2016, 7 and 4, respectively.

Over the past two years, this opinion has receded most in Mexico, Canada, Germany and Spain and grown most in South Africa and Malaysia. Since 2016, it has increased most in Japan and Sweden.

Base: 19,017 online adults aged 16-74 across 25 countries Online samples in Brazil, Chile, Colombia, Malaysia, Mexico, Peru, Russia, South Africa, and Turkey tend to be more urban, ed4cated, and/or affluent than the general population The "Global Country Average" reflects the average result for all the countries where the survey was conducted; it has not been adjusted to the population size of each country and is not intended to suggest a total result



### [Country] would be stronger if we stopped immigration

al Country Average	38%			25%	4%			33%		
Turkey		70	%				13%	3%	14%	
Malaysia		56%				24%		8%	17%	Across
Colombia		53%			26	%	2%		20%	of 38%
Peru		52%			26%		3%		20%	be stror
South Africa	48	%			22%	1%		29%		33% dis
Chile	47	%			24%	3%		26	5%	Majoriti
Netherlands	44%			20%	3%	6		33%		Turkey
Sweden	43%			14%	5%		38	3%		countrie
Russia	43%				32%		6%		19%	
Hungary	41%			20%	8%			32%		A majo
Italy	40%			25%	39	%		32%		pluraliti
France	40%			23%	5%			33%		Neutral
Belgium	38%			26%	2%			34%		countrie
Argentina	37%			24%	4%			34%		
Germany	36%			24%	3%		3	7%		
United States	31%		19%	2%			48%			
Great Britain	31%		20%	3%			46%			
Mexico	30%			42%			5%		23%	Base: 19,01
Spain	30%		299	%	5%			36%		countries
Australia	30%		22%	3%			46%			Online sam Mexico, Pe
Poland	27%		36	%	3%			34%		to be more general pop
Brazil	26%		25%	5%			45%			The "Globa
South Korea	24%		34%		4%		39	%		result for all conducted;
Canada	20%	21%	2%			58%				size of eacl
Japan	15%	40	)%		7%		3	8%		total result

Don't know

Disagree

Agree

Neither agree nor disagree

Across all 25 countries, an average of 38% agree that their country would be stronger if it stopped immigration; 33% disagree.

Majorities in 4 countries -- most of all Turkey (70%) – and pluralities in 10 countries agree.

A majority in Canada (58%) and pluralities in 7 countries disagree.

Neutral views prevail in the other 3 countries.

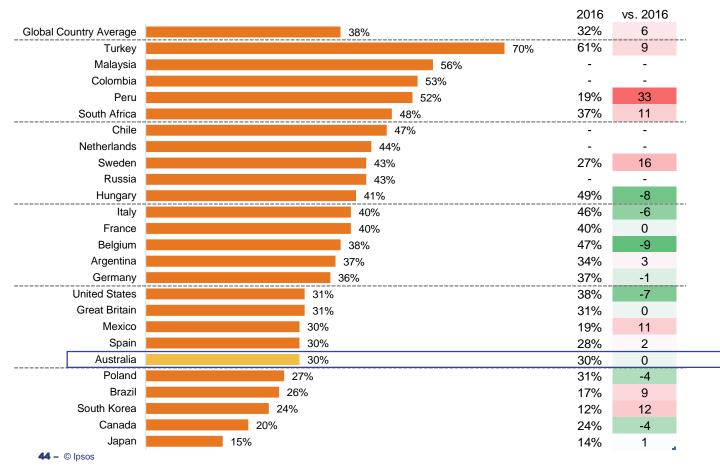
Base: 19,017 online adults aged 16-74 across 25 countries

Online samples in Brazil, Chile, Colombia, Malaysia, Mexico, Peru, Russia, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population

The "Global Country Average" reflects the average result for all the countries where the survey was conducted; it has not been adjusted to the population size of each country and is not intended to suggest a total result



### [Country] would be stronger if we stopped immigration



On average, globally, more agree that their country would be stronger if it stopped immigration than did in 2016.

This view is significantly more prevalent (by 5 points or more) in 7 countries – most of all in Peru with a whopping 33-point increase – and significantly less common in 4 countries.

Base: 19,017 online adults aged 16-74 across 25 countries Online samples in Brazil, Chile, Colombia, Malaysia, Mexico, Peru, Russia, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population The "Global Country Average" reflects the average result for all the countries where the survey was conducted; it has not been adjusted to the population size of each country and is not intended to suggest a total result



### Immigrants take jobs away from real [country's nationals]

Global Country Ave	erage	38%		2	1%	3%		35%	
T	urkey 📕		71%				12%	2%	15%
Mal	laysia 📕		65%				21%	1%	13%
Colo	ombia 📕		62%				21%	1%	16%
R	Russia 📕		54%			22%	4%		21%
South A	Africa 📕		53%			20%	1 <mark>%</mark>	26%	6
	Peru 📕		53%			25%	2%		21%
	Chile	40%			24%	1%		35%	
Arge	entina 📕	37%		24	%	4%		35%	
	Italy	37%		24	%	2%		37%	
United S	States 📕	37%		19%	2%		44%		
South H	Korea 📕	36%			33%		3%	28%	
Aus	stralia	36%		21%	2%		429	6	
Hui	ngary	35%		20%	5%		41	%	
	Brazil	34%		22%	39	6	40	%	
Bel	lgium 📕	31%		28%		1%	4(	)%	
Nether	rlands 📕	29%		26%	3%		42%	6	
Fi	rance 📕	29%		27%	5%	6	3	9%	
J	Japan 📕	29%		40	6		6%	26%	6
P	oland 📕	29%		32%		2%		37%	
Great B	Britain 📕	27%	20%	3%			51%		
:	Spain	26%	24	4%	3%		46%		
Ca	anada 📕	26%	21%	3%			51%		
Μ	1exico 📕	24%		41%		4%		31%	
Ger	many 📕	22%	25%	3%	5		50%		
Sw	veden	22%	18%	5%			55%		

Across all 25 countries, an average of 38% agree that immigrants take jobs away from "real" nationals while 35% disagree.

Majorities in 6 countries -- most of all Turkey (71%) – and small pluralities in 3 countries agree.

Majorities in 3 countries – most of all Sweden (55%) and pluralities in 10 countries disagree.

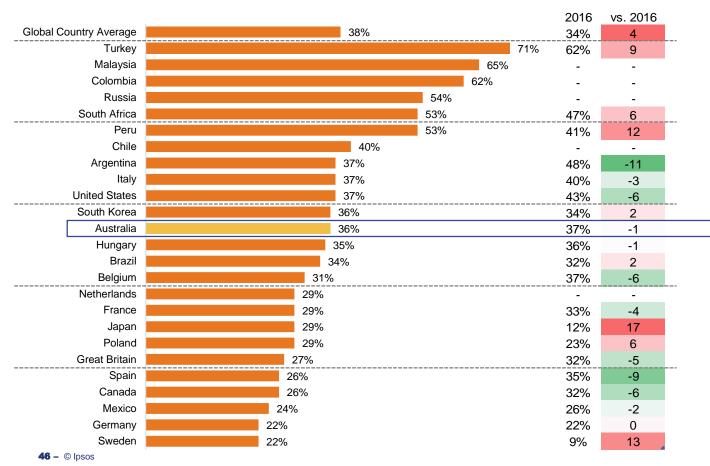
Base: 19,017 online adults aged 16-74 across 25 countries

Online samples in Brazil, Chile, Colombia, Malaysia, Mexico, Peru, Russia, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population

The "Global Country Average" reflects the average result for all the countries where the survey was conducted; it has not been adjusted to the population size of each country and is not intended to suggest a total result



#### Immigrants take jobs away from real [country's nationals]



Compared to 2016, the feeling that immigrants take jobs away from their country's natives has gained significantly (by 5 points or more) in 6 countries (most of all in Japan, Sweden and Peru) and subsided in 6 other countries (most of all Argentina and Spain).

Base: 19,017 online adults aged 16-74 across 25 countries Online samples in Brazil, Chile, Colombia, Malaysia, Mexico, Peru, Russia, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population The "Global Country Average" reflects the average result for all the countries where the survey was conducted; it has not been adjusted to the population size of each country and is not intended to suggest a total result



#### Methodology

This study did not have any external sponsors or partners. It was initiated and run by Ipsos, because we are curious about the world we live in and how citizens around the globe think and feel about their world.

These are the results of a 25-country survey conducted by Ipsos on its Global Advisor online platform. Ipsos interviewed a total of 19,017 adults aged 18-74 in the United States, Canada, Malaysia, South Africa, and Turkey, and 16-74 in 20 other markets between March 26 and April 9, 2021.

The sample consists of approximately 1,000 individuals in each of Australia, Belgium, Brazil, Canada, France, Germany, Great Britain, Italy, Japan, Spain, and the U.S., and 500 individuals in each of Argentina, Chile, Colombia, Hungary, Malaysia, Mexico, the Netherlands, Peru, Poland, Russia, South Africa, South Korea, Sweden, and Turkey.

The samples in Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, Italy, Japan, the Netherlands, Poland, South Korea, Spain, Sweden, and the U.S. can be taken as representative of these countries' general adult population under the age of 75.

The samples in Brazil, Chile, Colombia, Malaysia, Mexico, Peru, Russia, South

Africa, and Turkey are more urban, more educated, and/or more affluent than the general population. The survey results for these countries should be viewed as reflecting the views of the more "connected" segment of their population.

The data is weighted so that each country's sample composition best reflects the demographic profile of the adult population according to the most recent census data.

Where results do not sum to 100 or the 'difference' appears to be +/-1 more/less than the actual, this may be due to rounding, multiple responses, or the exclusion of don't know or not stated responses.

Sample surveys and polls may be subject to sources of error, including, but not limited to coverage error, and measurement error. The precision of the online surveys conducted is measured using a Bayesian Credibility Interval. Here, the Australian results have a credibility interval of +/-3.5 percentage points. For more information on the Ipsos use of credibility intervals, please go to: https://www.ipsos.com/sites/default/files/2017-03/IpsosPA\_CredibilityIntervals.pdf

The publication of these findings abides by local rules and regulations.



#### **About Ipsos**

Ipsos is the third largest Insights and Analytics company in the world, present in 90 markets and employing more than 18,000 people.

Our research professionals, analysts and scientists have built unique multi-specialist capabilities that provide powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 business solutions are based on primary data coming from our surveys, social media monitoring, and qualitative or observational techniques.

"Game Changers" – our tagline – summarises our ambition to help our 5,000 clients to navigate more easily our deeply changing world.

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

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

#### **Game Changers**

In our world of rapid change, the need for reliable information to make confident decisions has never been greater.

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder. Ultimately, success comes down to a simple truth: You act better when you are sure.

