



BROKEN-SYSTEM SENTIMENT IN 2021

POPULISM, ANTI-ELITISM AND NATIVISM

Ipsos Global Advisor – 25-Country Survey

July 2021

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



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)

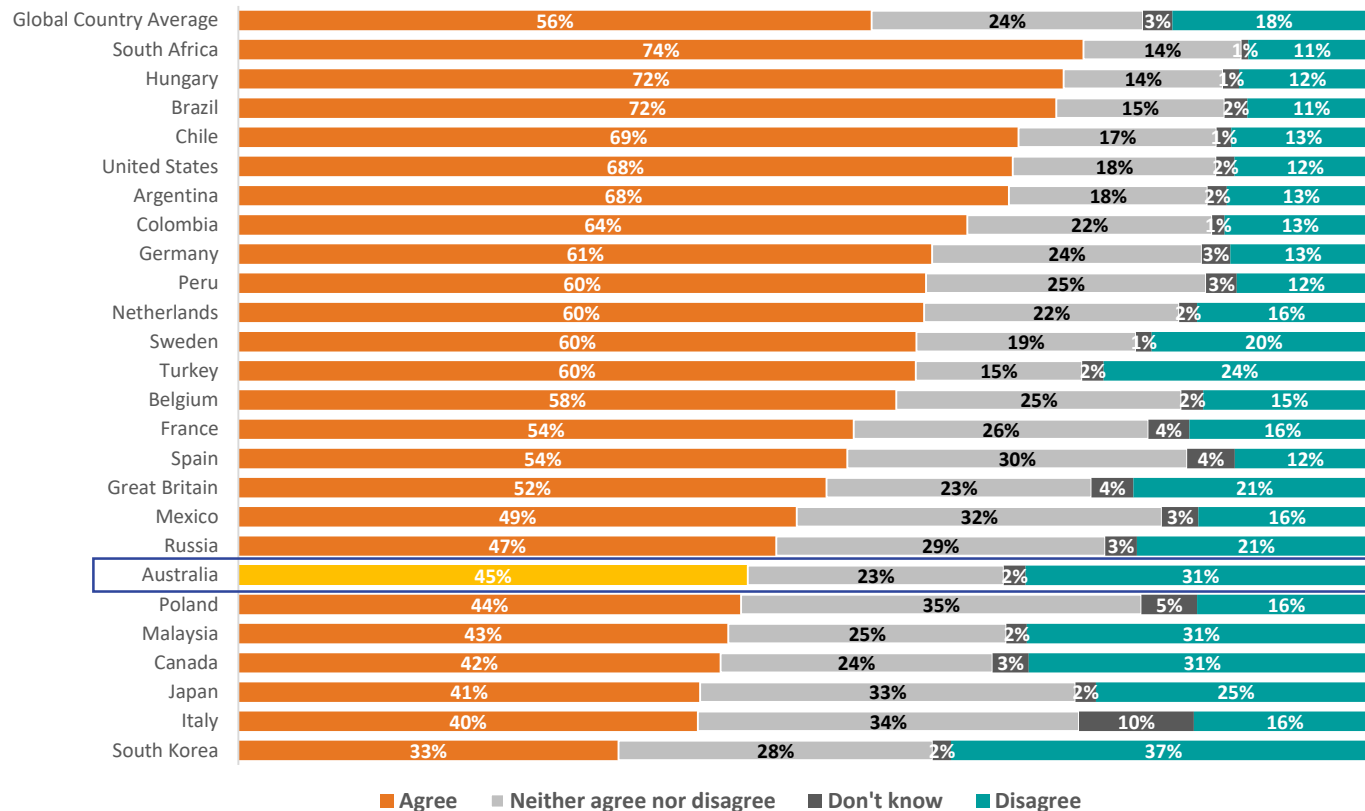
Australia is one of the least Nativist countries with Canada, Sweden, Great Britain, Germany, Spain and Brazil.

Since 2016, nativist sentiment is unchanged in Australia.

Background

1

[Country's] society is broken



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
 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's] society is broken

		2019	2016	vs. 2019	vs.2016
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

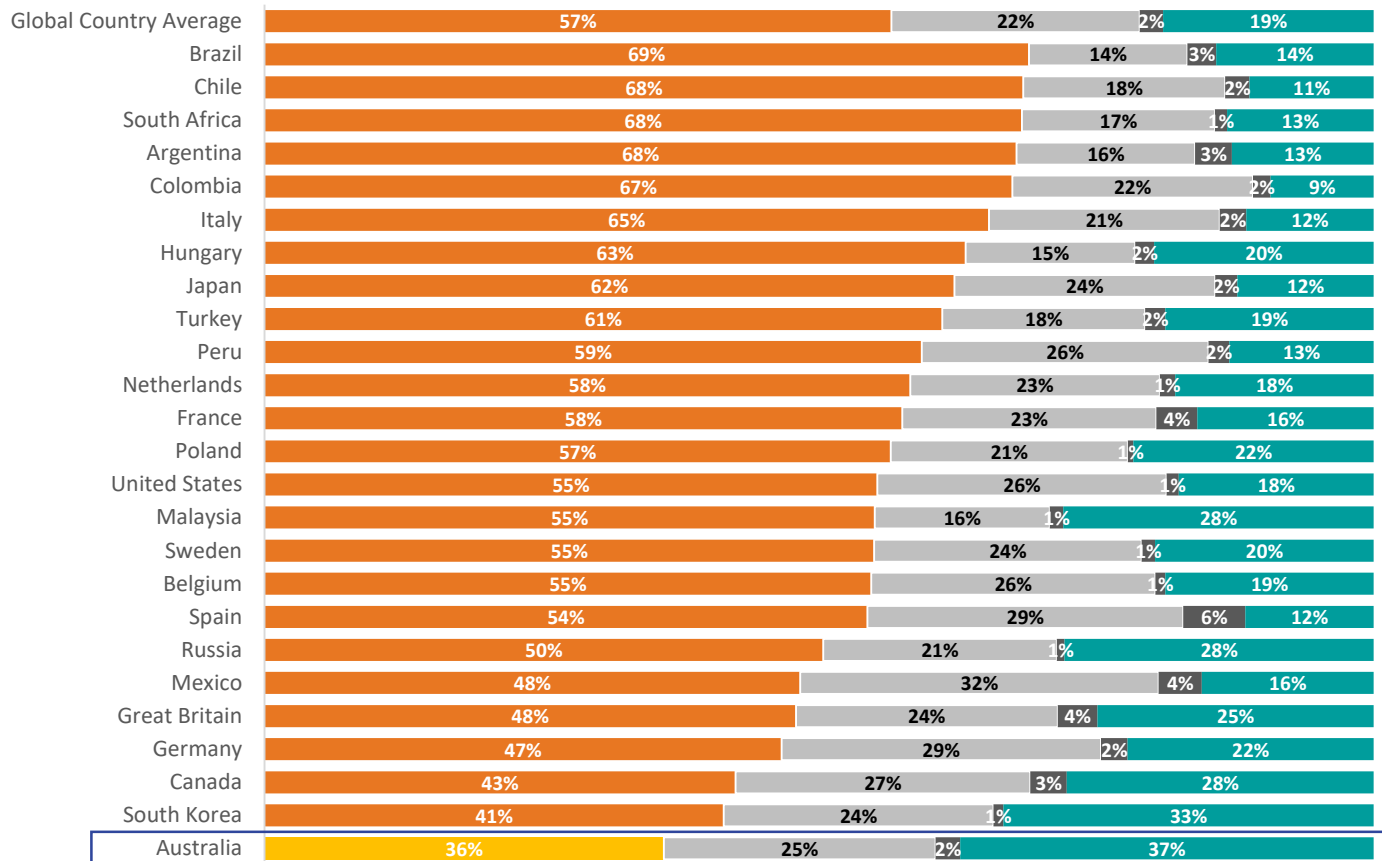
Compared to 2019, pre-pandemic, the sentiment that one's country is broken is significantly more prevalent (up by 5 points or more) in 8 countries and significantly less so in 10 countries.

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.

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] is in decline



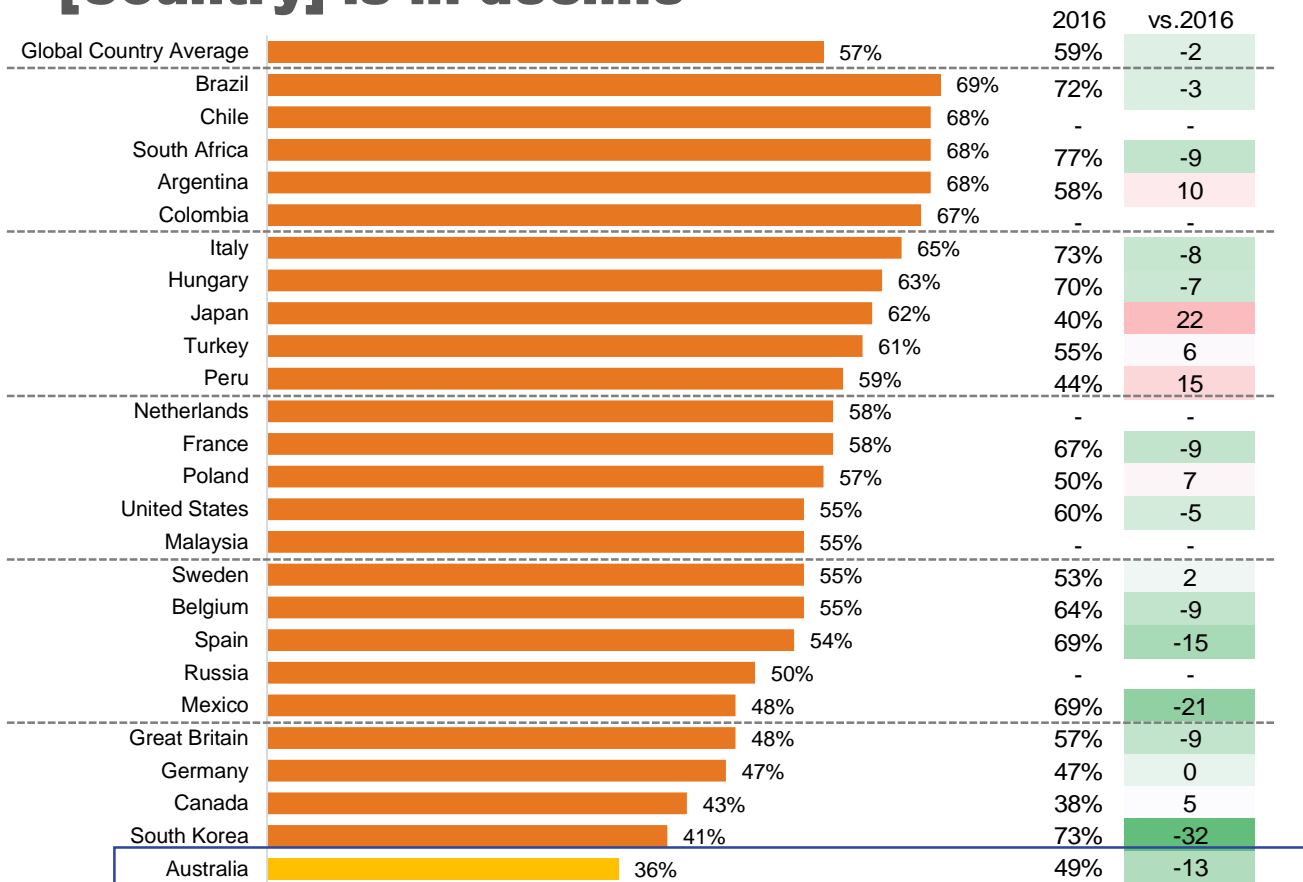
On average, 57% believe their country is in decline.

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
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] 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.

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

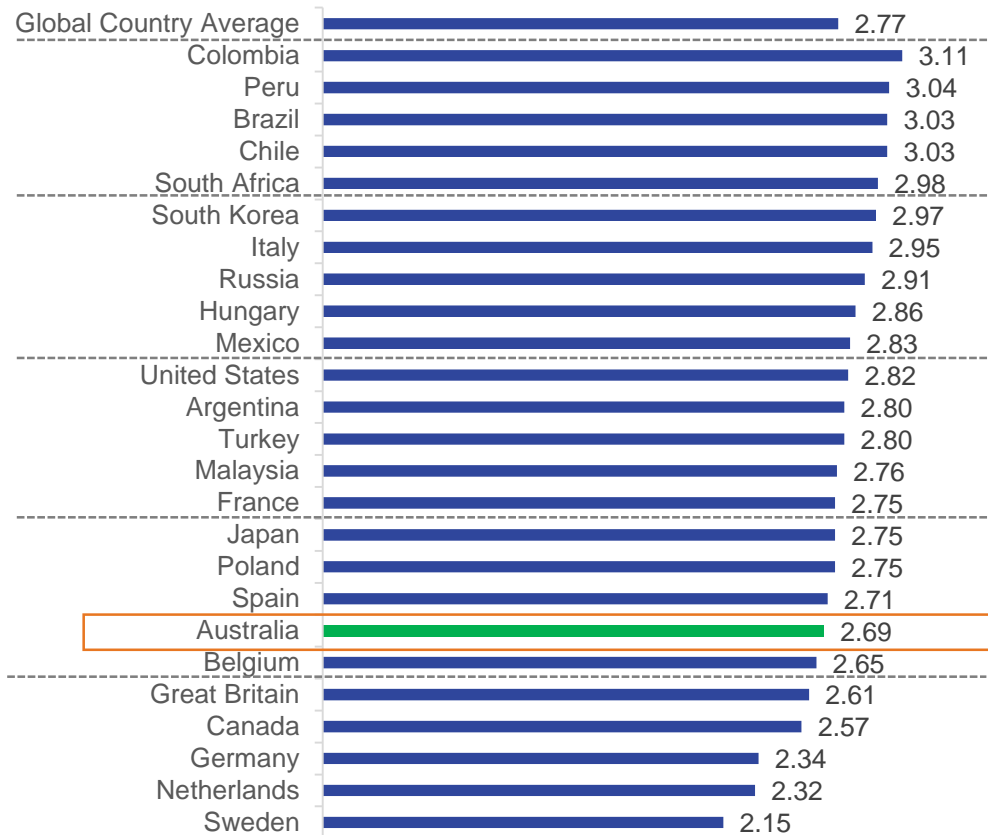
Broken-System Sentiment

2

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



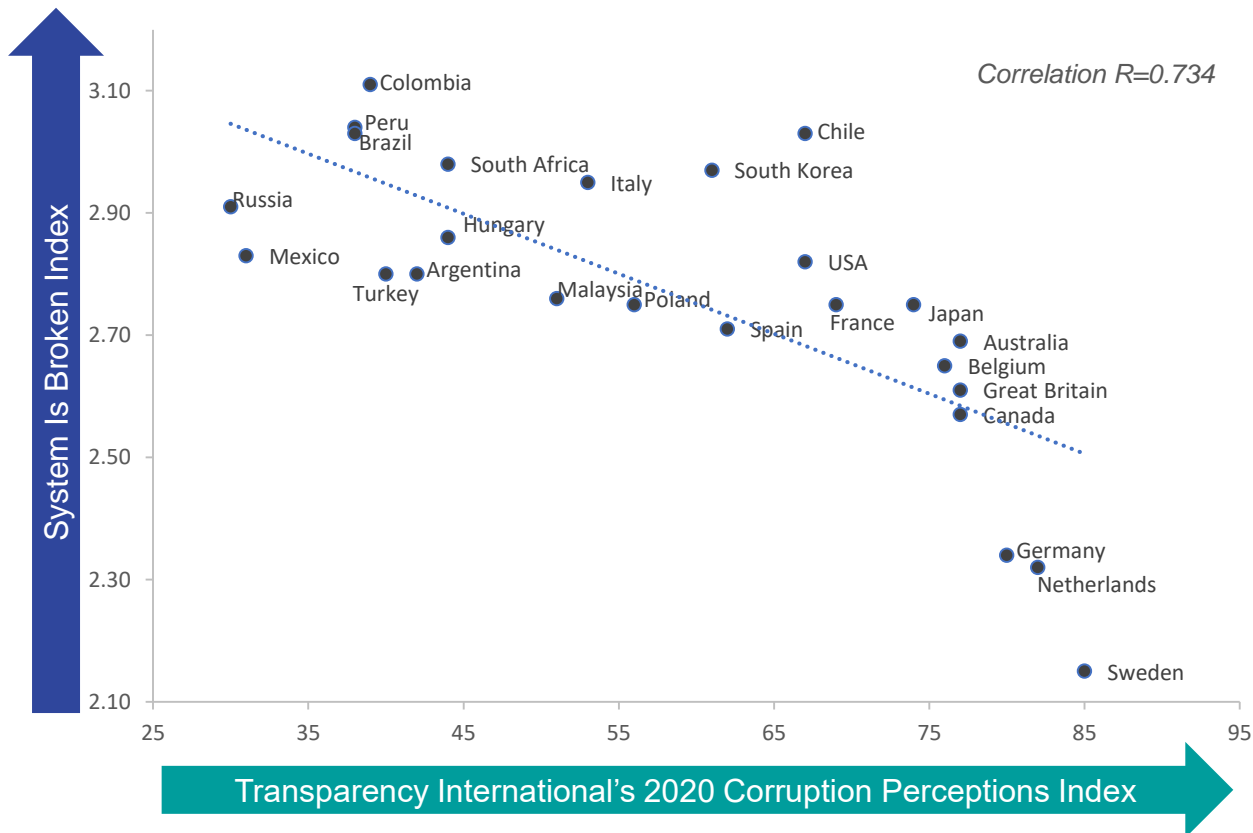
“System Is Broken” Index x Corruption Perceptions Index

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



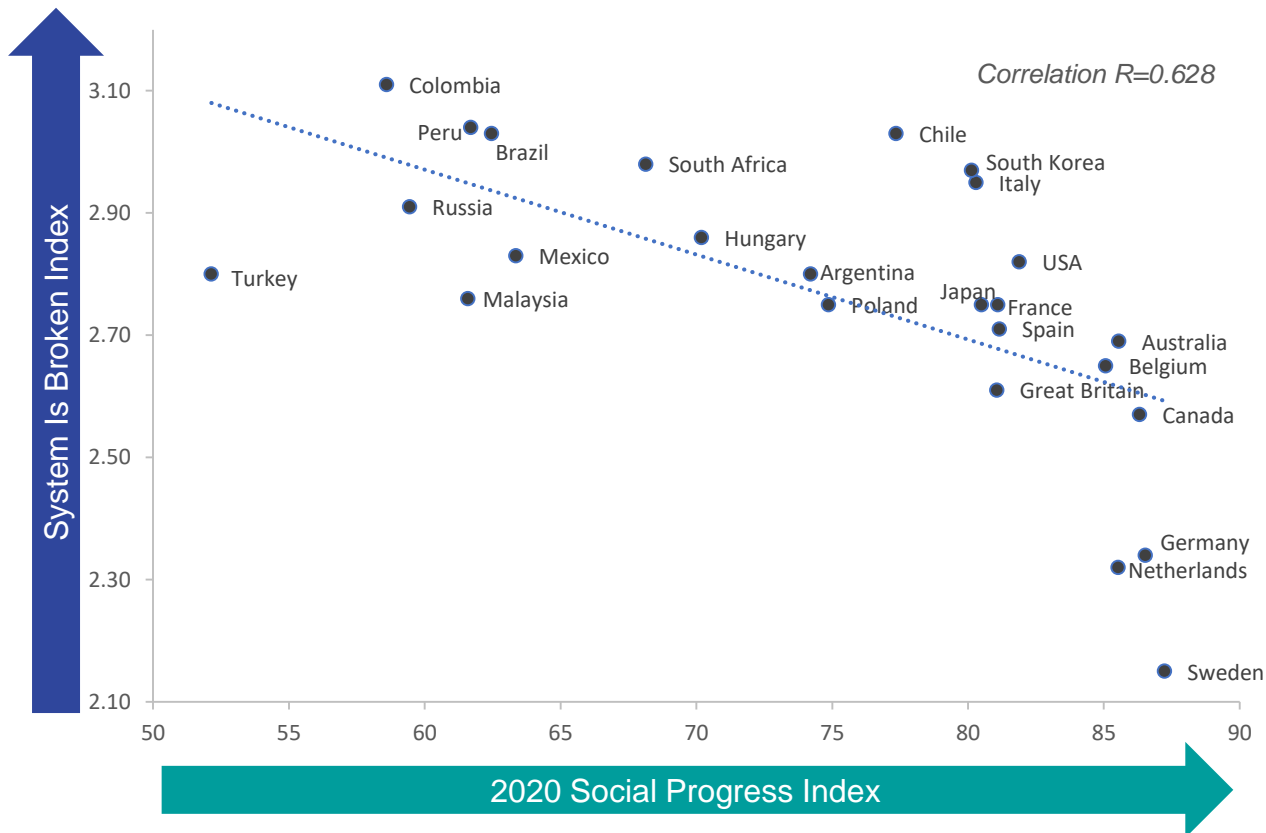
“System Is Broken” Index x Social Progress Index

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

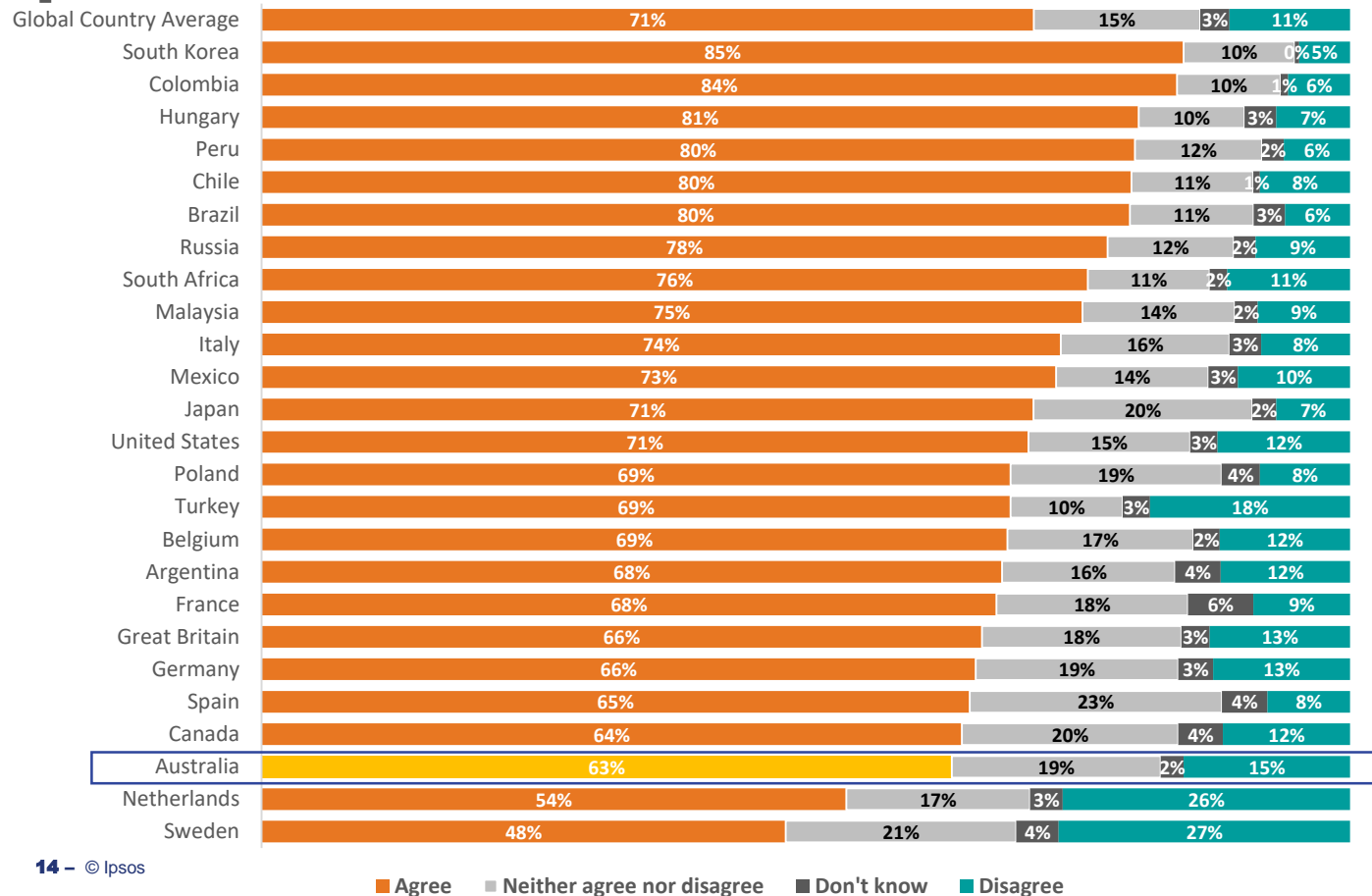
	Global Country Average	Argentina	Australia	Belgium	Brazil	Canada	Chile	Colombia	France	Germany	Great Britain	Hungary	Italy	Japan	Malaysia	Mexico	Netherlands	Peru	Poland	Russia	South Africa	South Korea	Spain	Sweden	Turkey	United States
[Country's] economy is rigged to advantage the rich and powerful	71%	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 "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

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

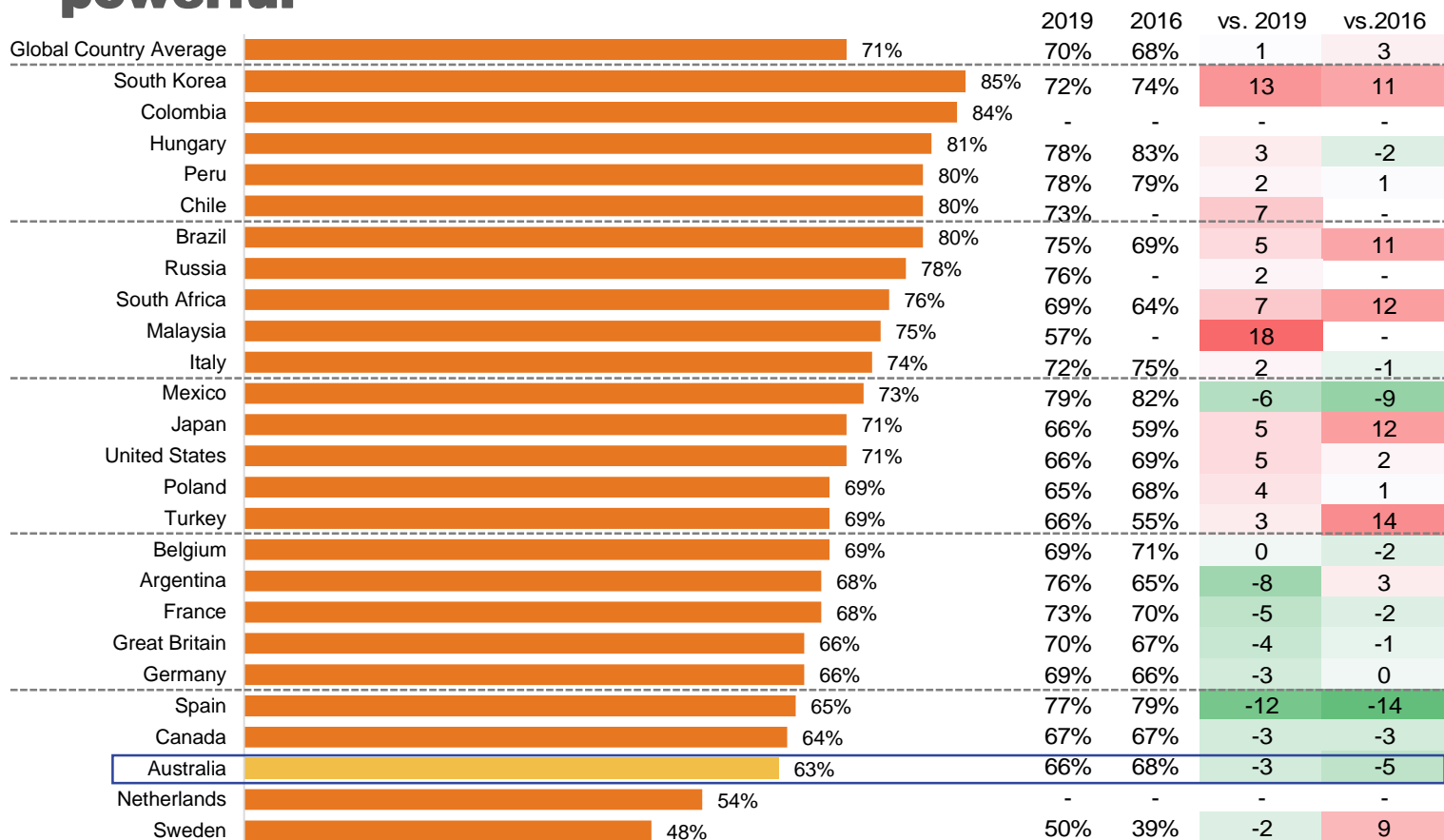


On average, globally, 71% agree their country's economy is rigged; just 11% disagree.

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 "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

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



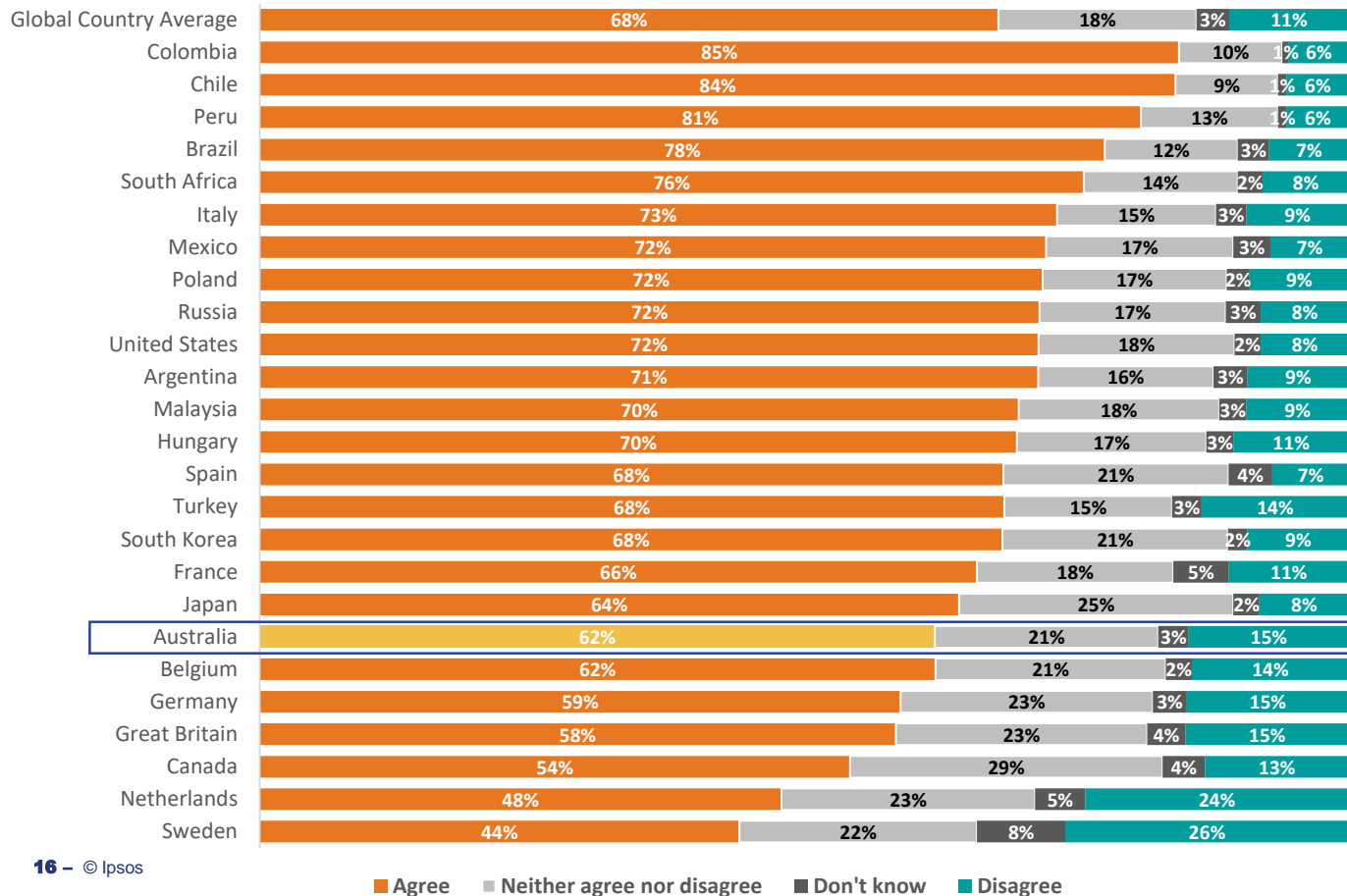
The belief the country's economy is rigged to advantage the rich and powerful remains stable.

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.

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

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

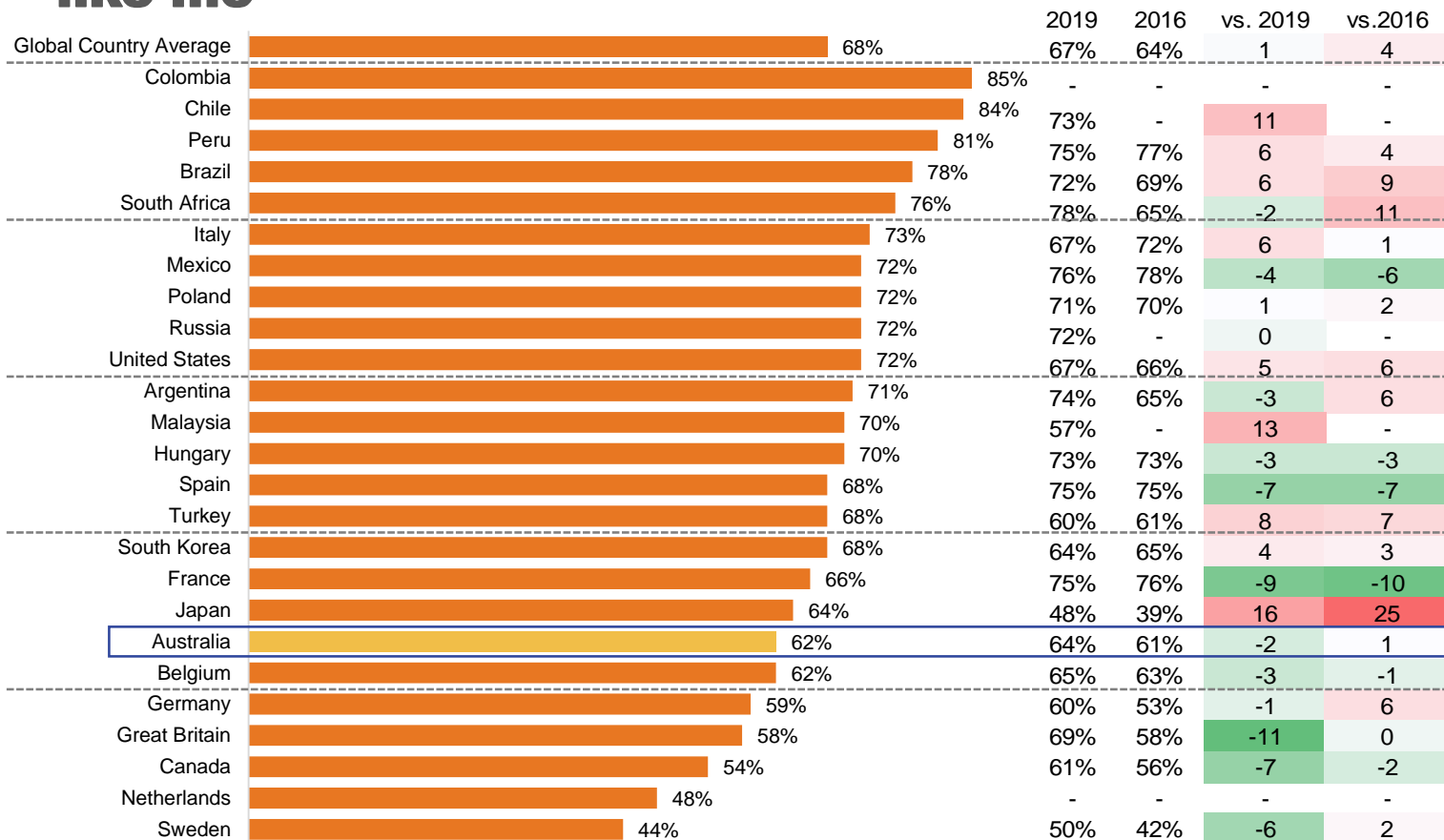


On average globally, 68% agree that traditional parties and politicians don't care about people like them.

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
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

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

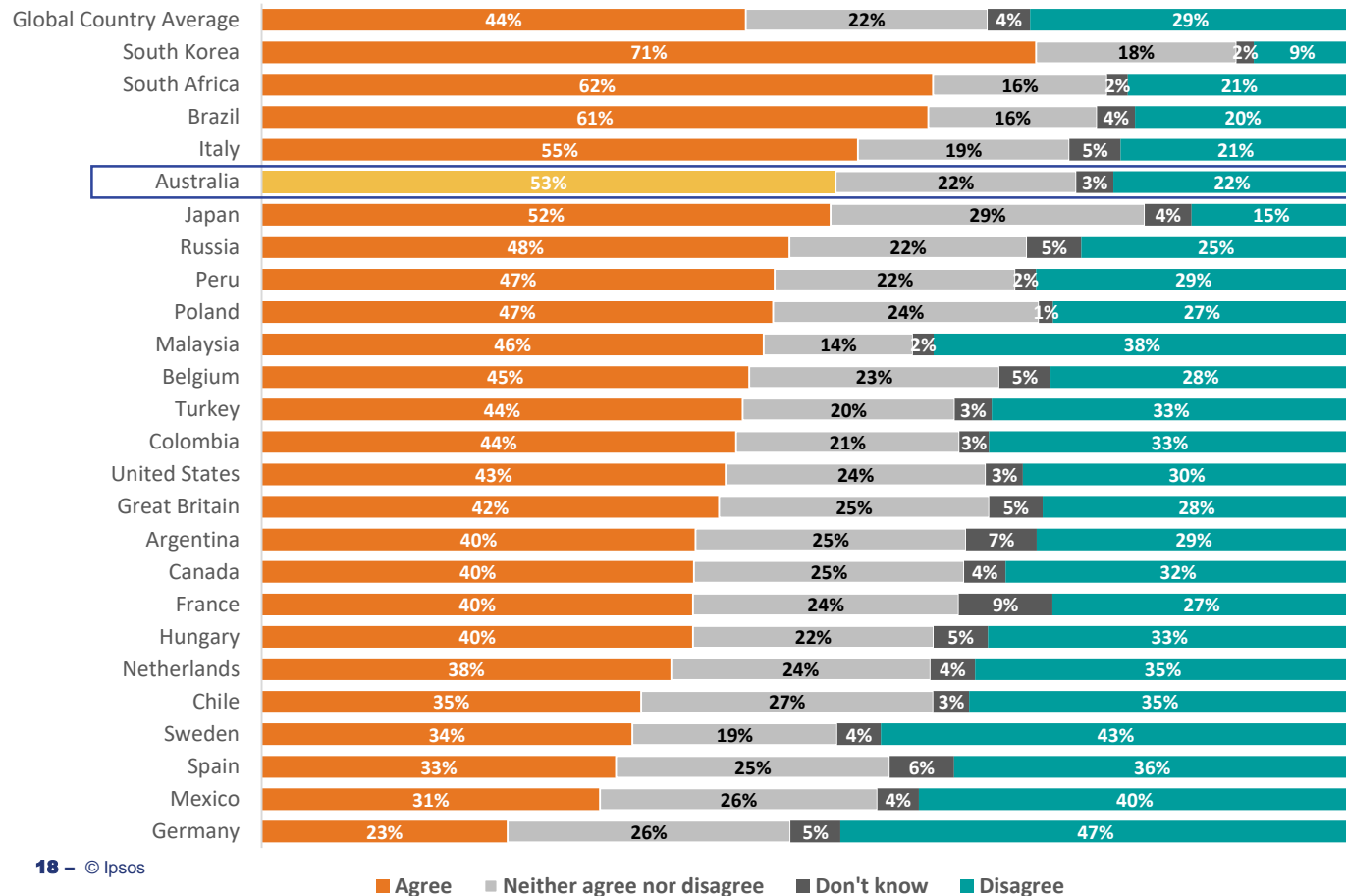


Since 2019, the belief that traditional parties and politicians don't care about the common person has gained significantly (by at least 5 points) in 8 countries (most of all in Japan and Malaysia) and receded significantly in 5 countries (most of all in Great Britain).

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).

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

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



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
 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

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%	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

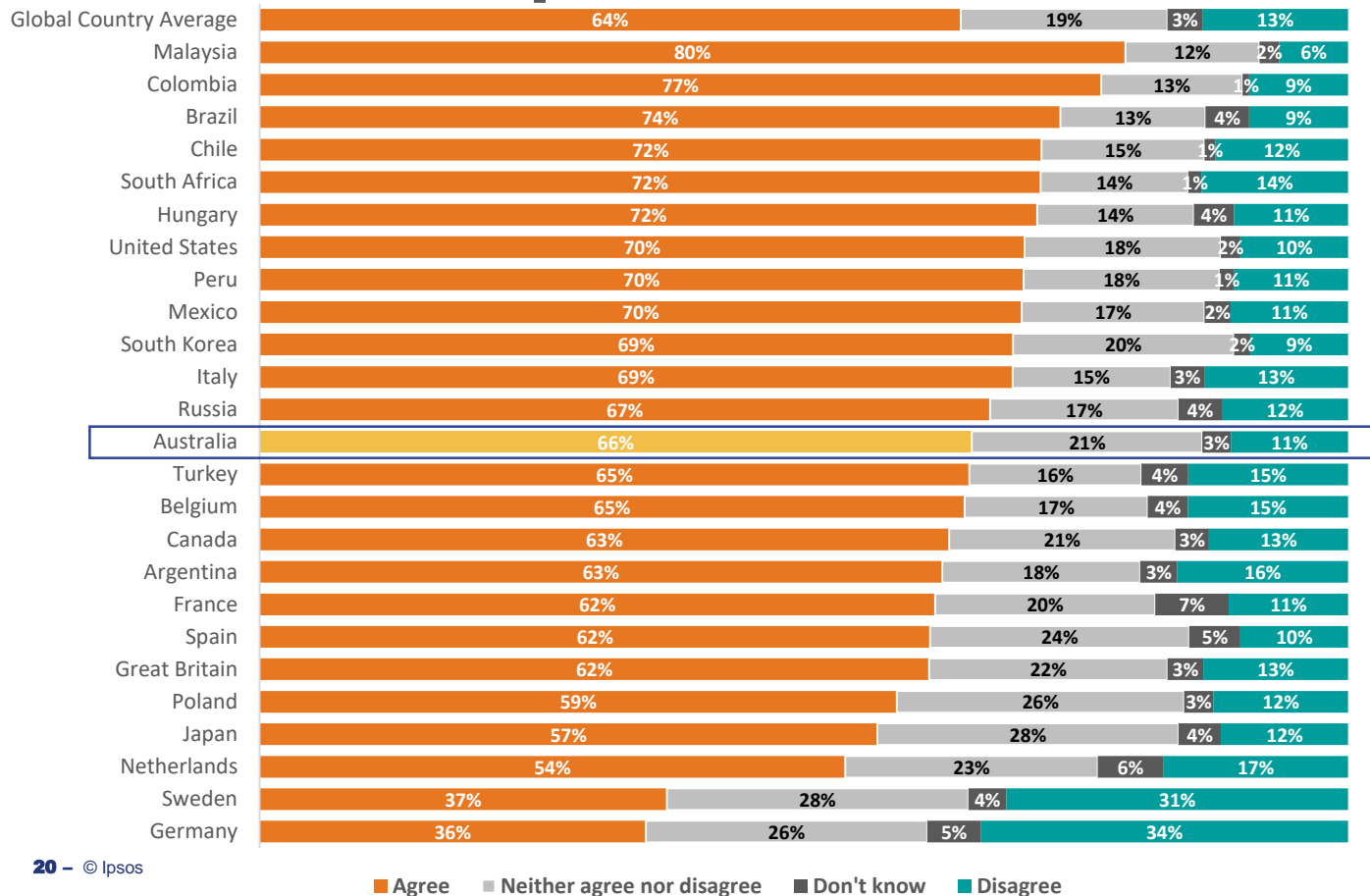
Since 2019, the desire for a strong leader willing to break the rules has increased significantly (by 5+ points) in 6 countries and decreased significantly in 6 countries.

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

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

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



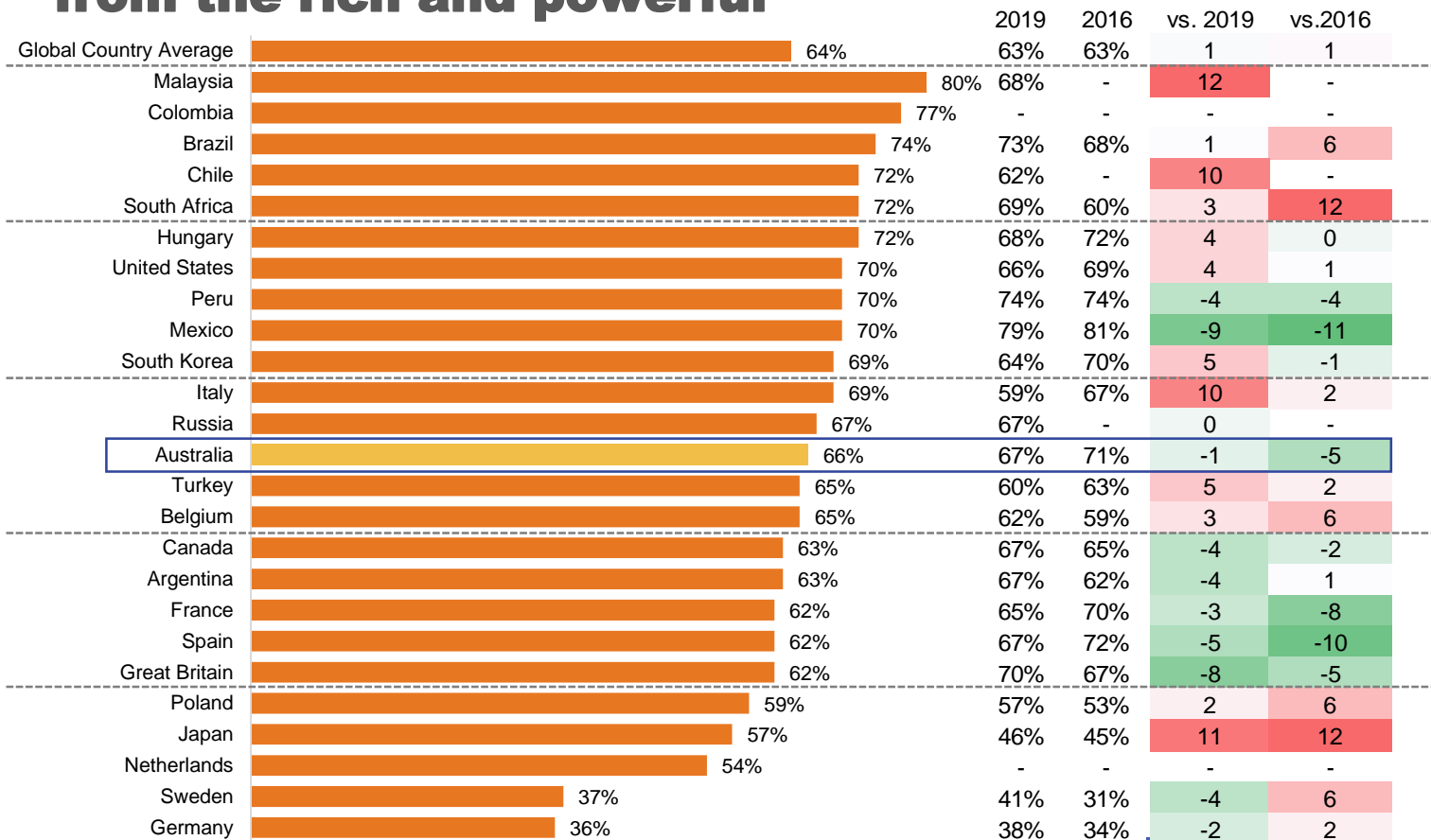
On average, 64% agree that their country needs a strong leader to take the country back from the rich and powerful.

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

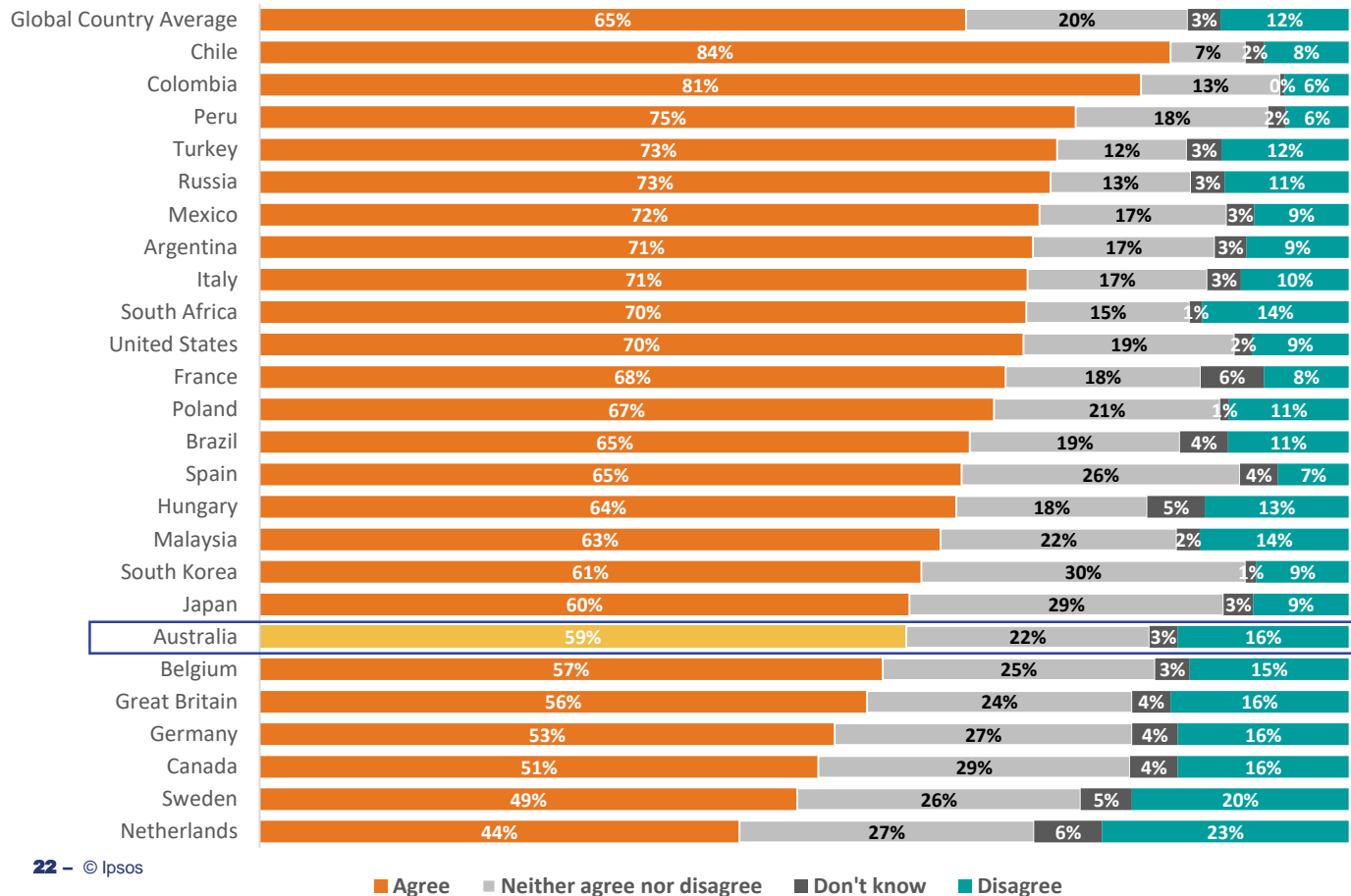


Since 2019, the perceived need for a strong leader to take back the country from the rich and powerful has increased significantly (by 5+ points) in 6 countries (most of all Malaysia, Japan, Chile and Italy) and decreased significantly in 3 countries (most of all Mexico and Great Britain).

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

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

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

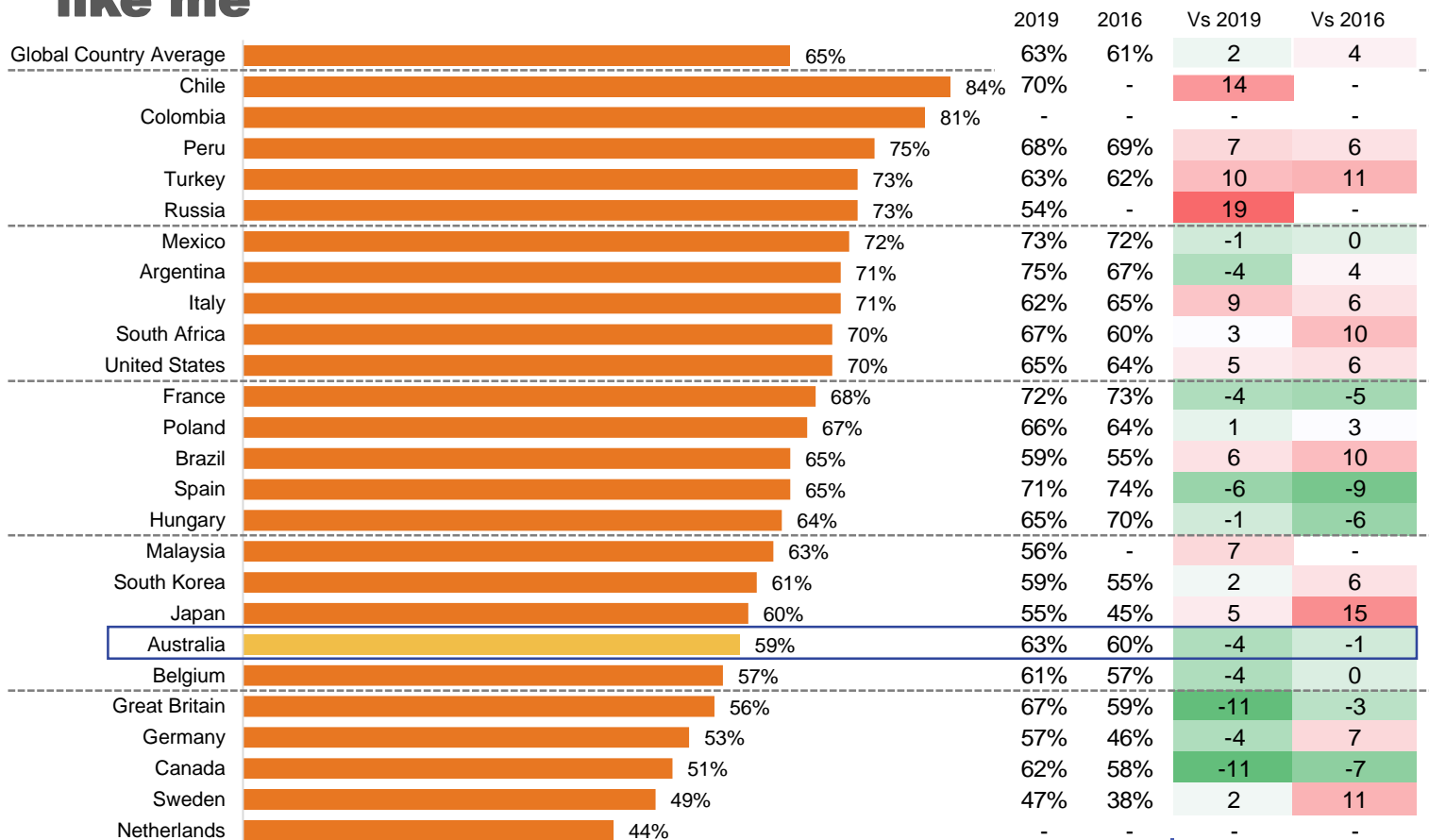


On average, 65% globally believe experts in their country don't understand the lives of people like them.

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
 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

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



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.

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

Populism and Anti-Elite Sentiment

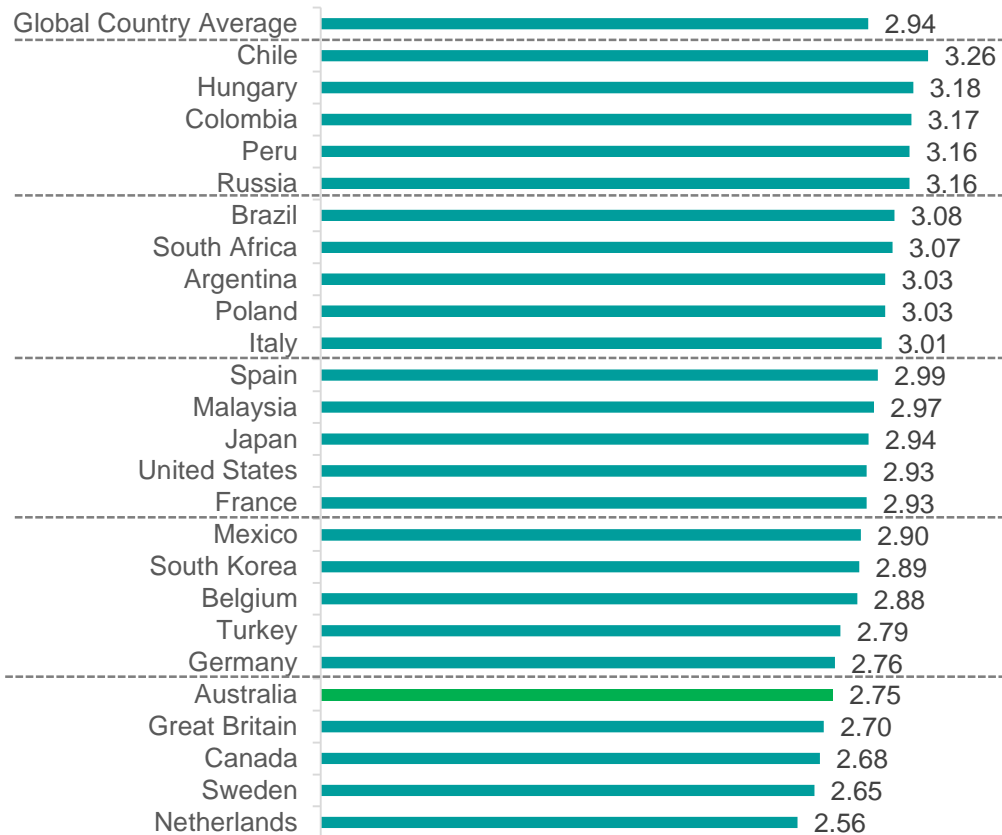
3

Populism Index

NEW

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

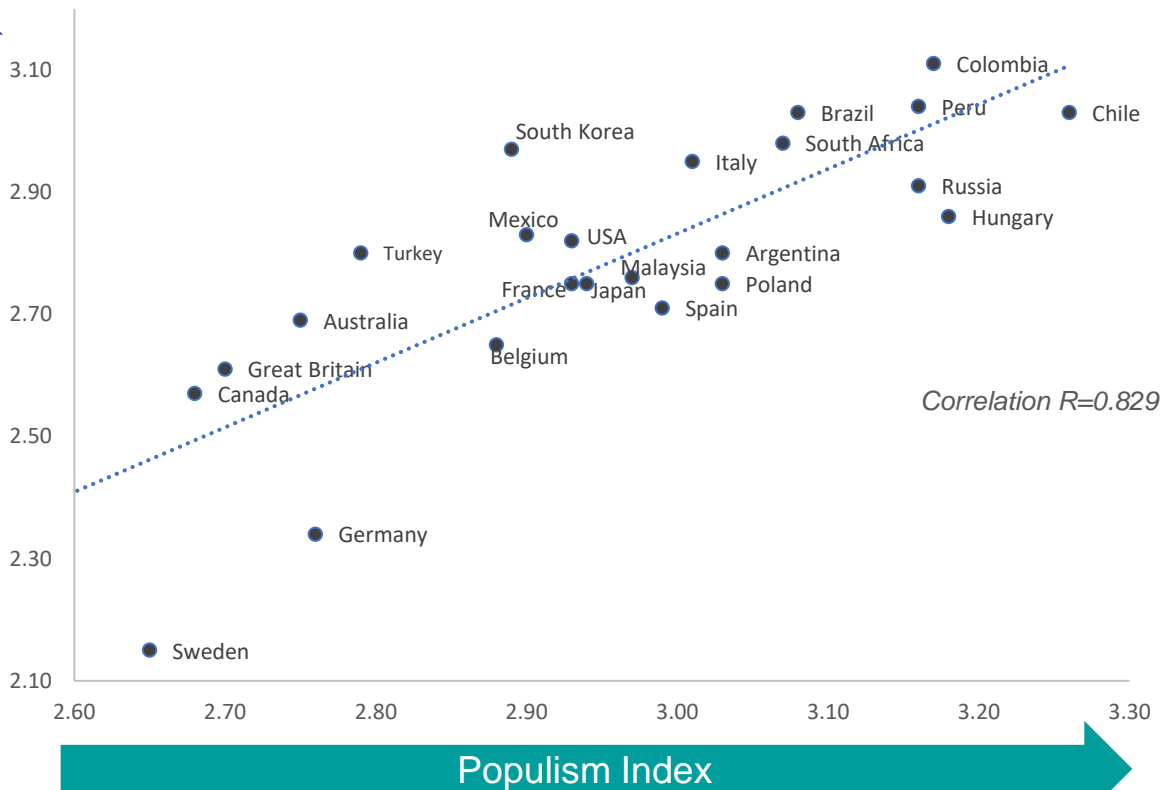
Broken System Index based on agreement with 5 statements:

- 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

System Is Broken Index



Populism – Agreement with Statements

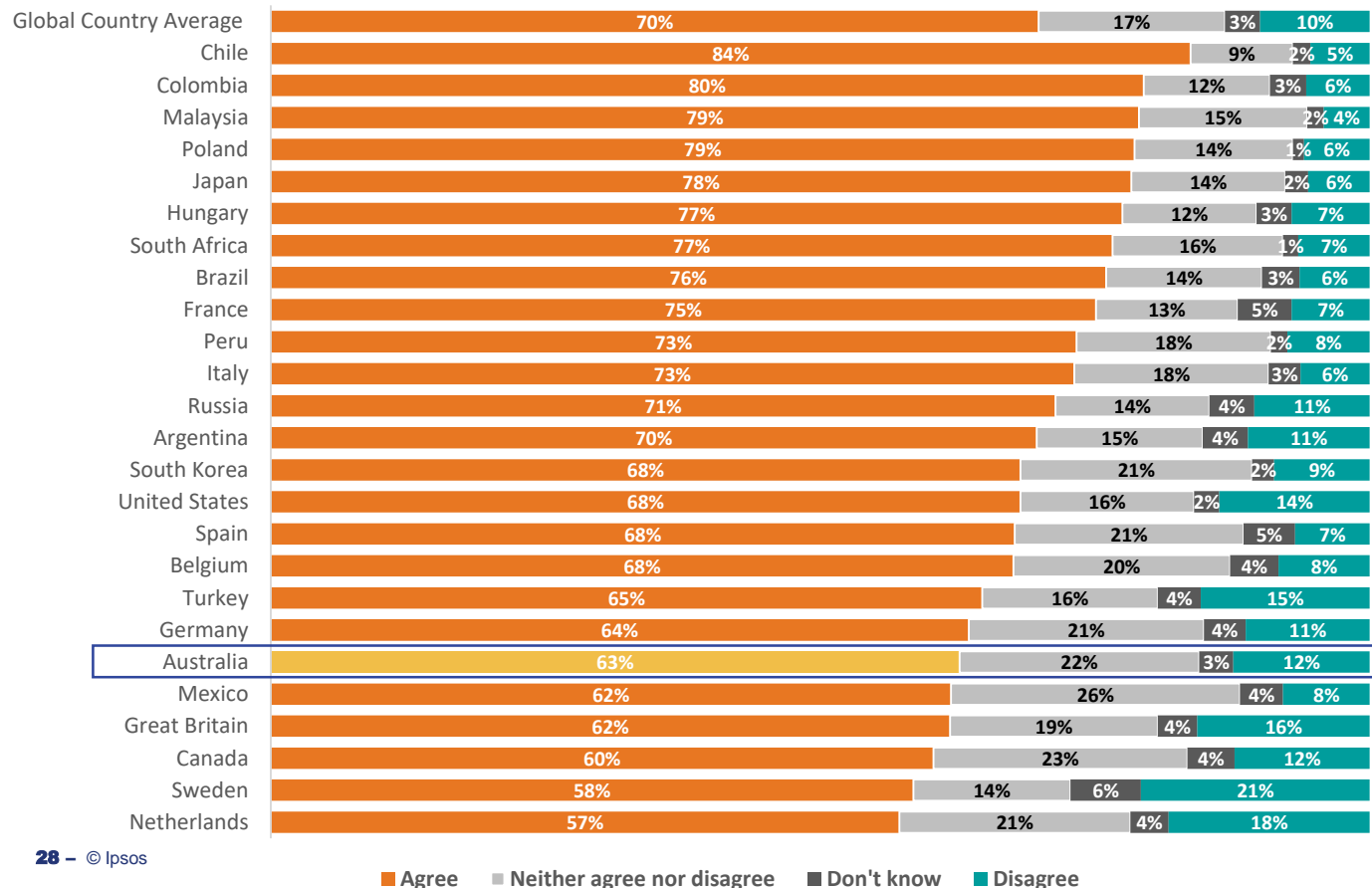
	Global Country Average	Argentina	Australia	Belgium	Brazil	Canada	Chile	Colombia	France	Germany	Great Britain	Hungary	Italy	Japan	Malaysia	Mexico	Netherlands	Peru	Poland	Russia	South Africa	South Korea	Spain	Sweden	Turkey	United States
Politicians always end up finding ways to protect their privileges	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 "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

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

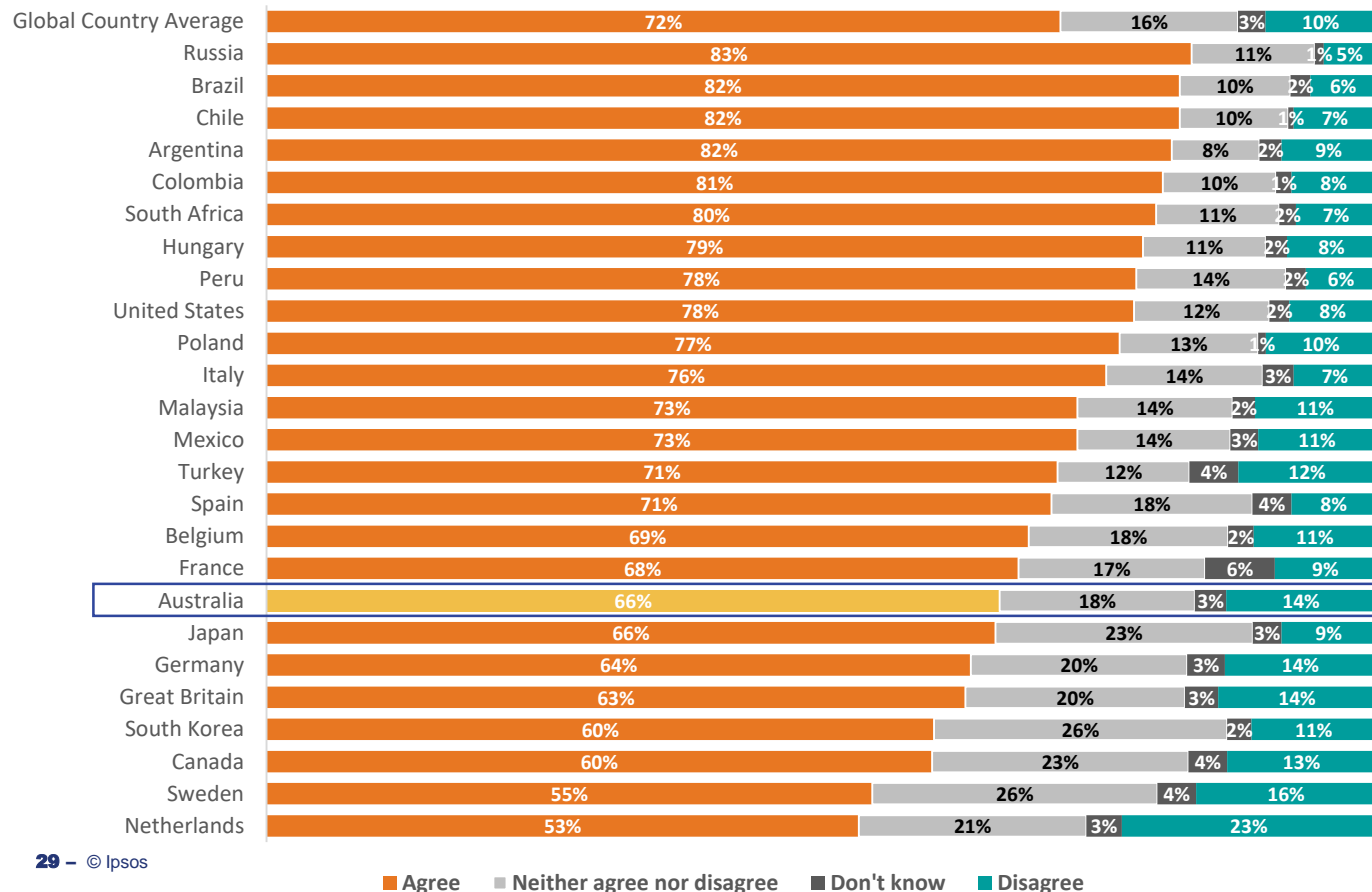


On average globally, 70% agree the main divide in society is between ordinary citizens and the political and economic elite; just 10% disagree.

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 "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

The political and economic elite don't care about hard-working people

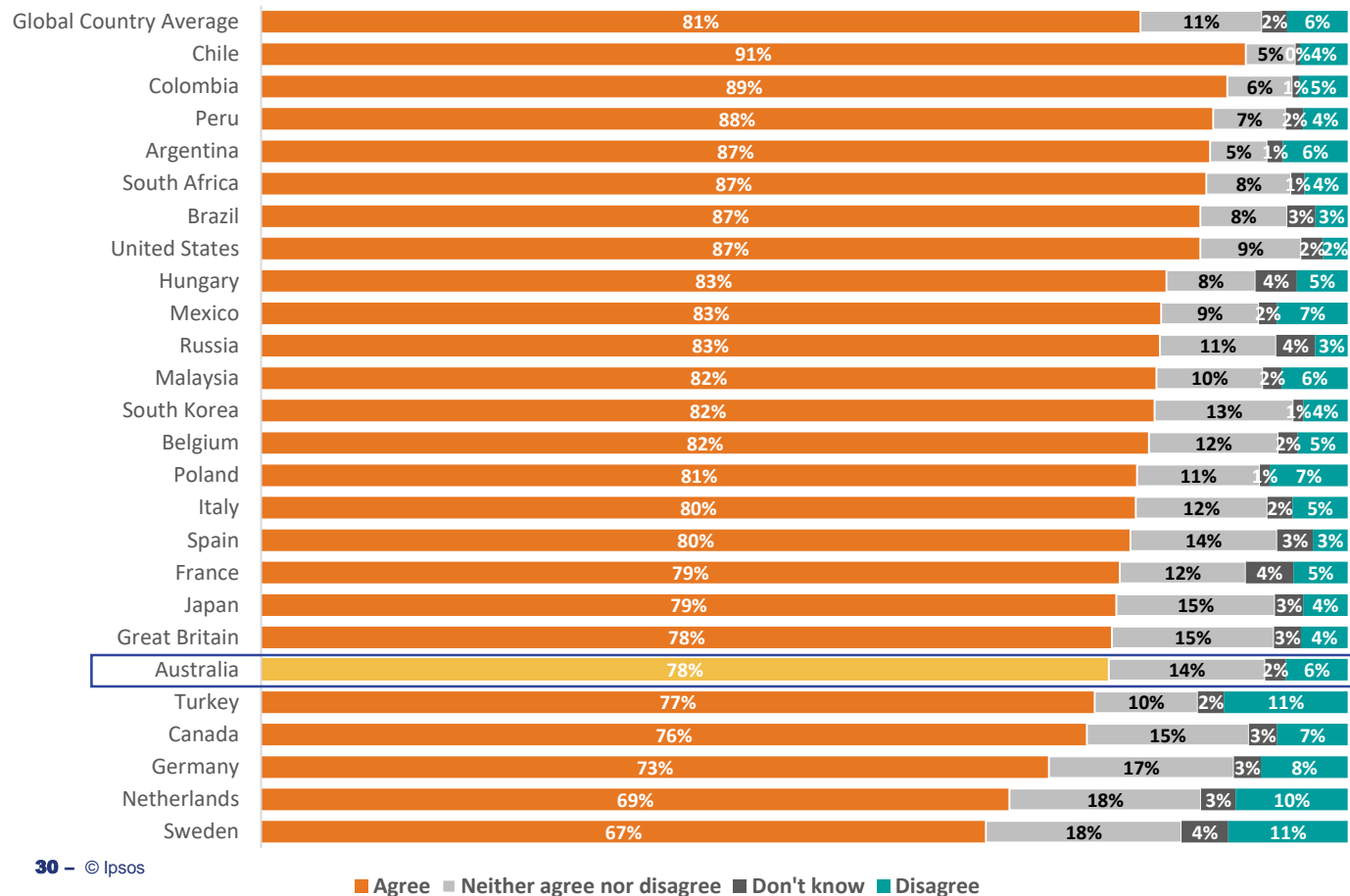


Across all countries, an average of 72% agree the political and economic elite don't care about hard-working people vs. 10% who disagree.

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
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

Politicians always end up finding ways to protect their privileges

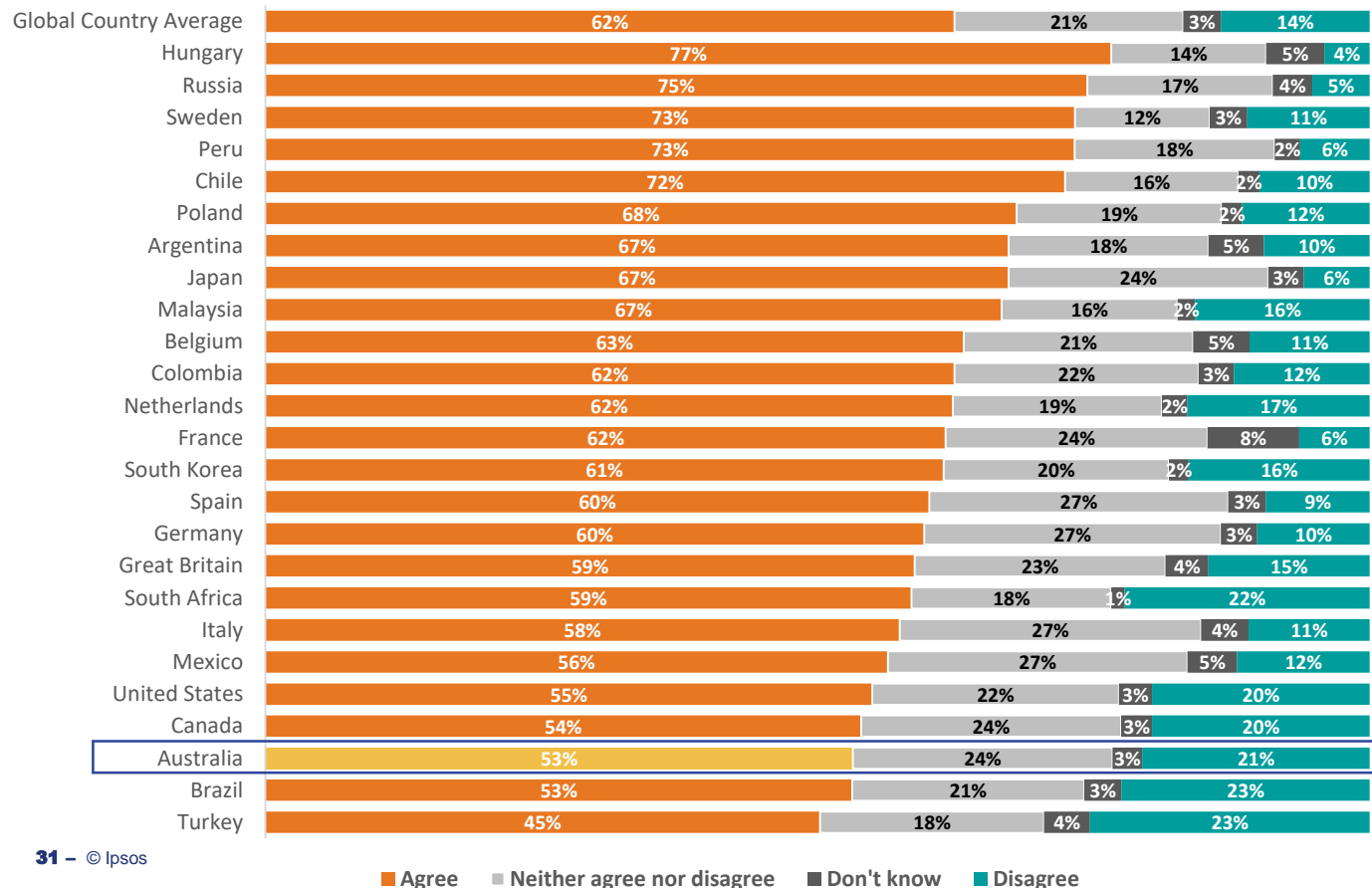


On average across all countries, 81% agree that politicians always end up finding ways to protect their privileges vs. just 6% who disagree.

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
 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

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

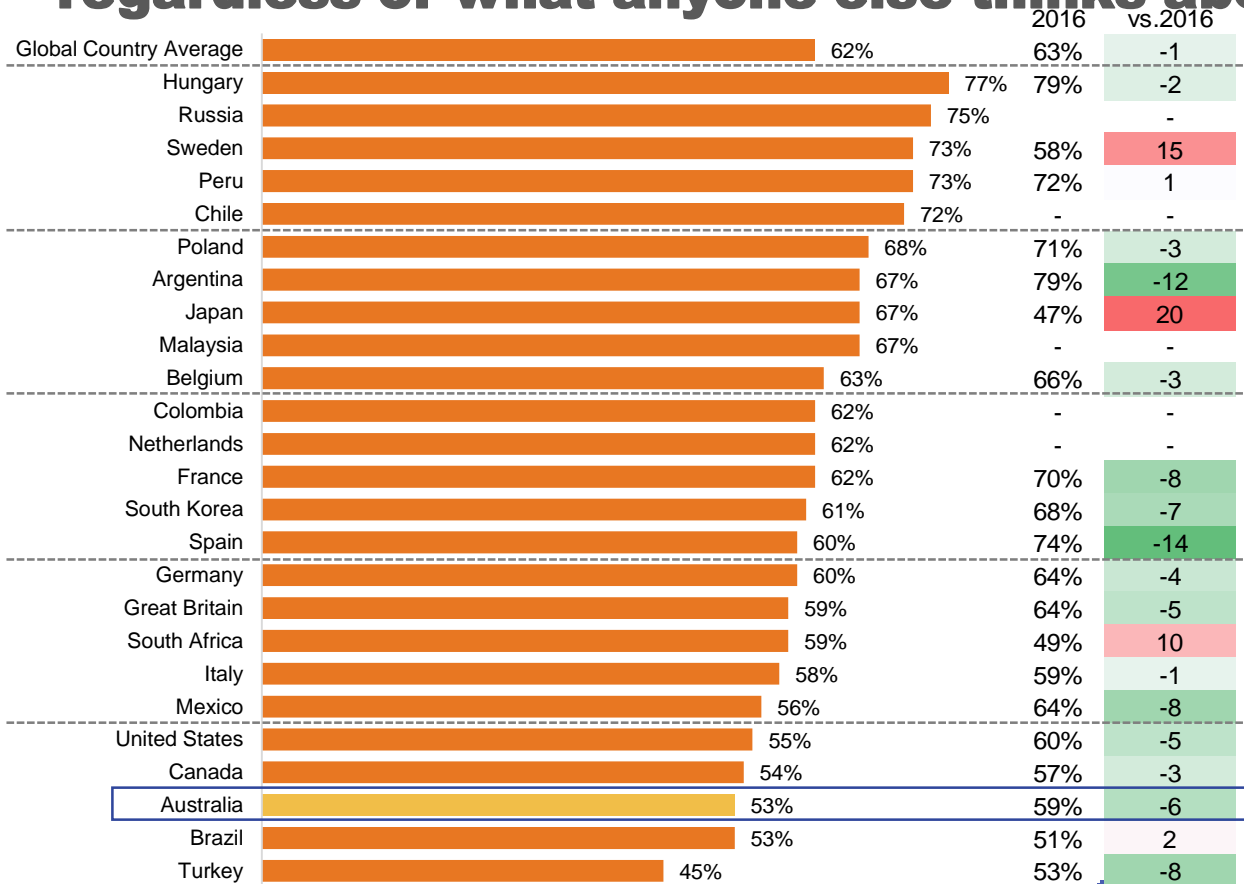


Globally, an average of 62% agree that politicians should be able to say what's on their minds.

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
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

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

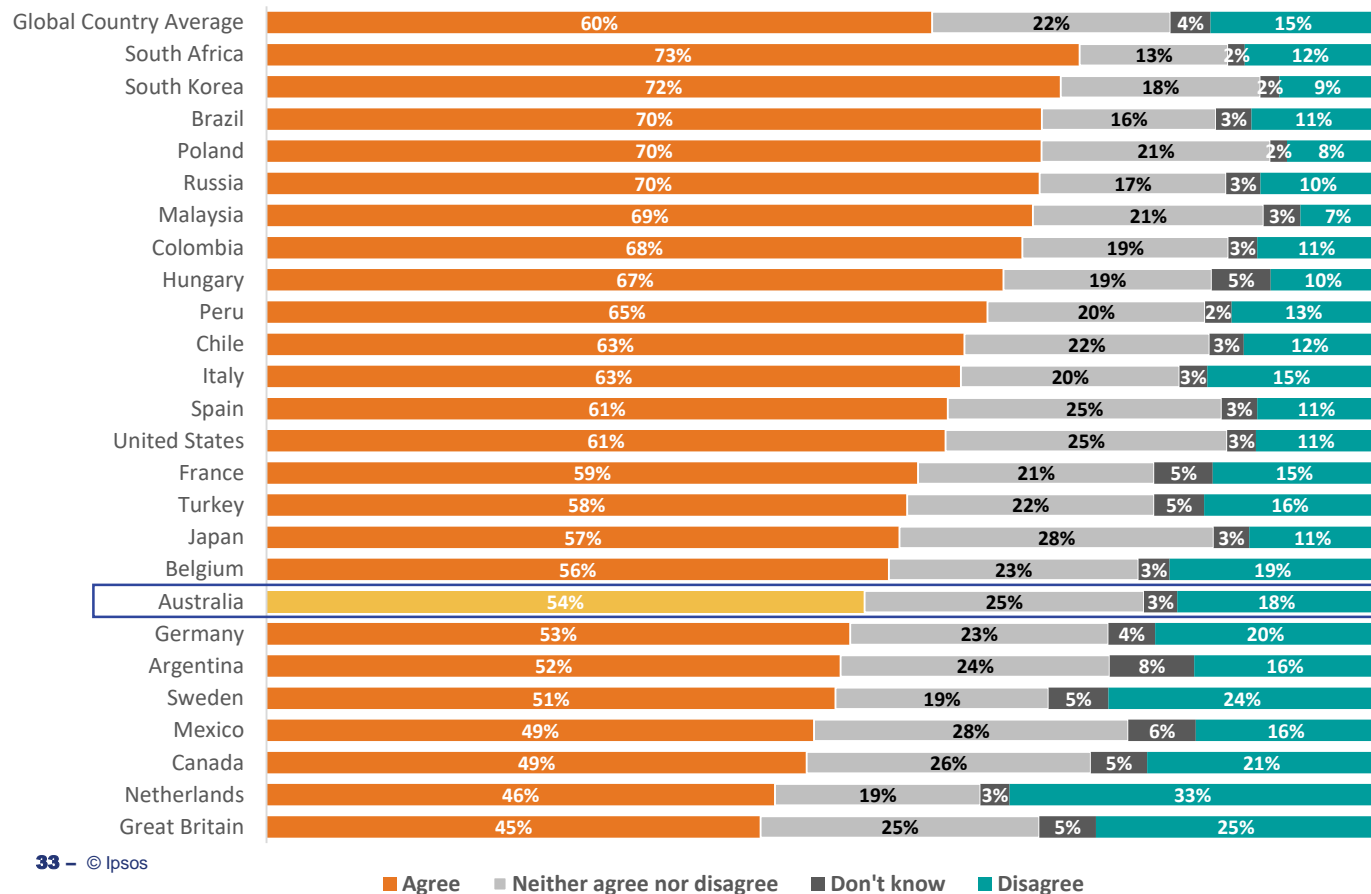


Globally, agreement that politicians should be able to say what's on their minds has averaged at around six in ten since 2016.

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).

*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*

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



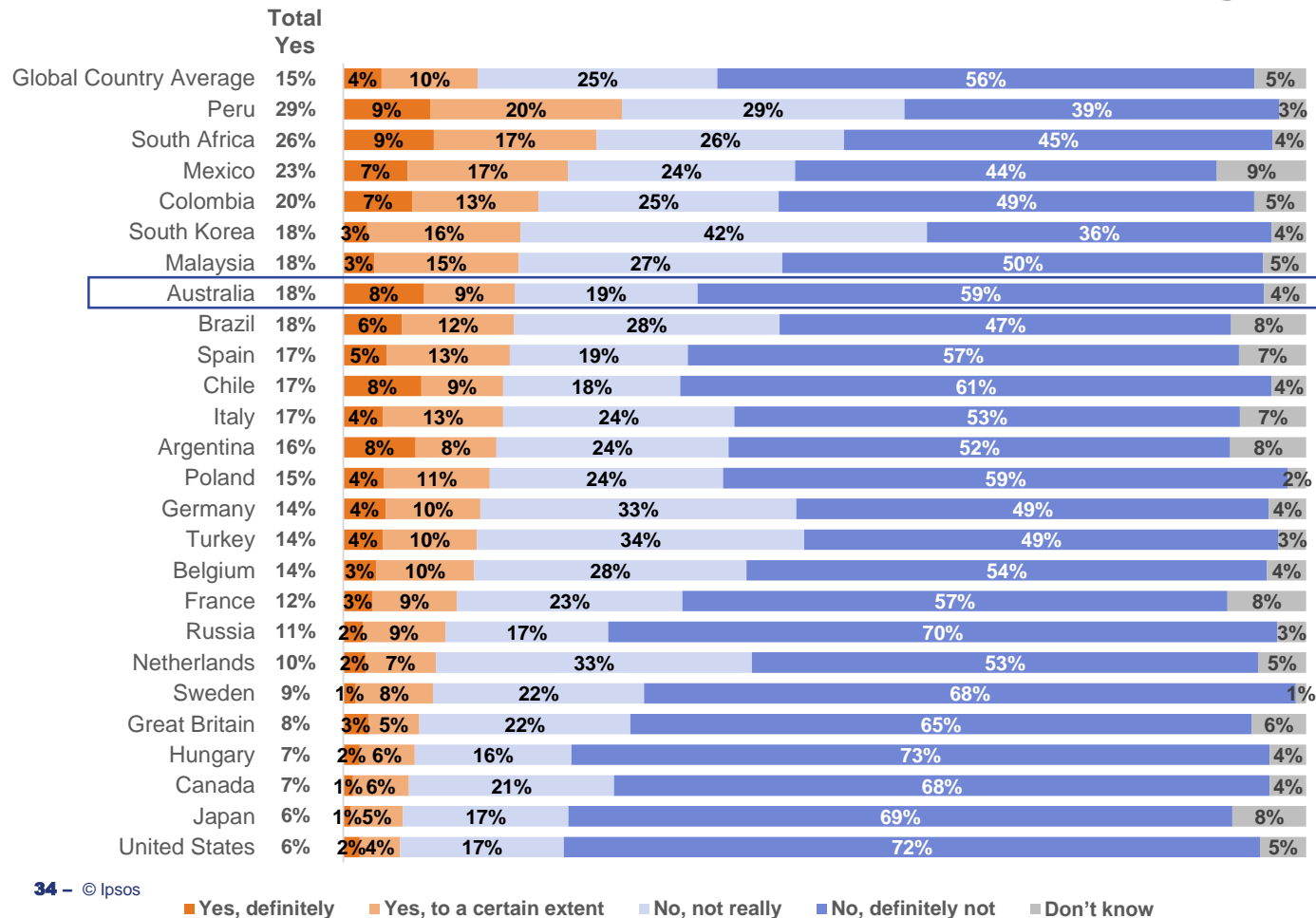
Across all 25 countries, an average of 60% agree that the most important political issues in their country should be decided directly by the people through referendums – only 15% disagree.

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
 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

Prevalence of identification with the country's "elite"

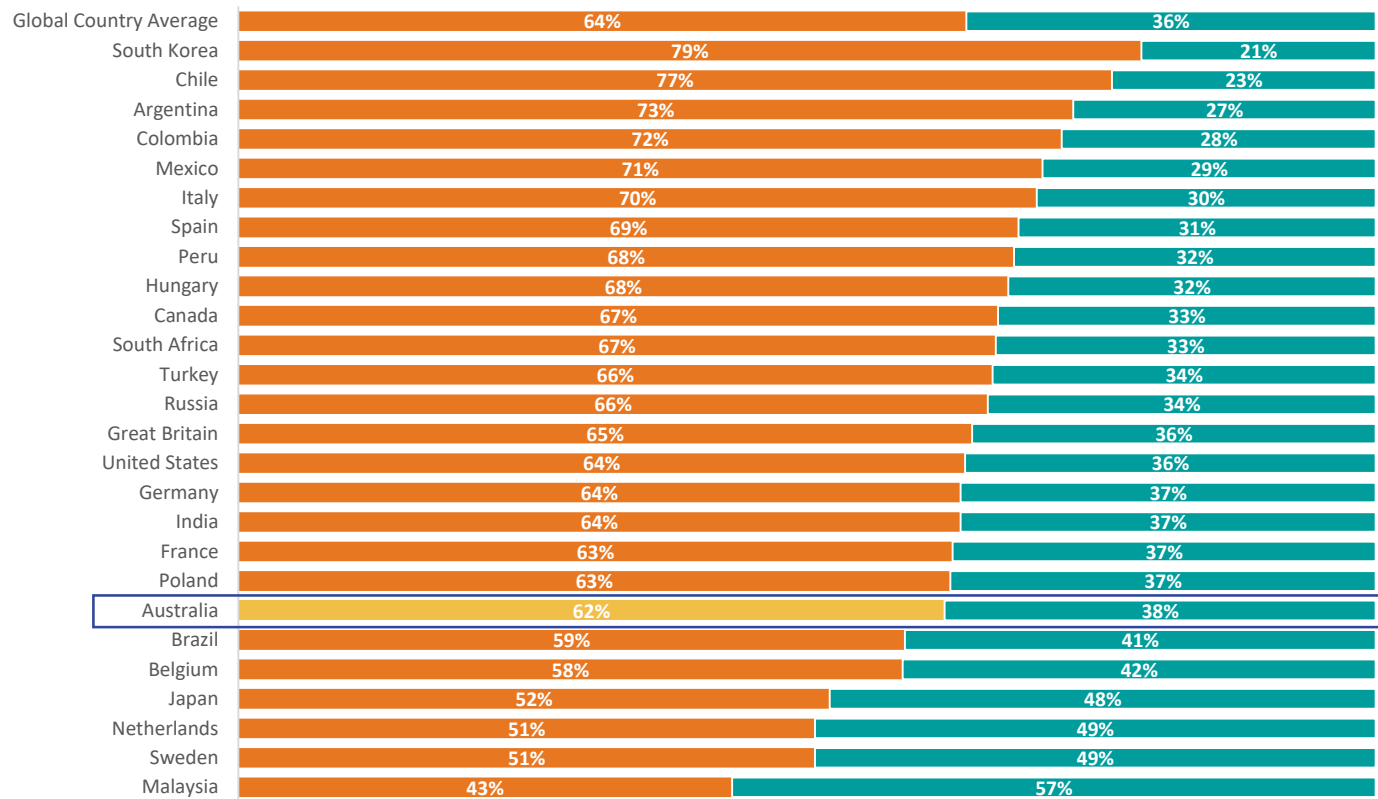


On average across all 25 countries, only 15% identify with their country's elite.

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

Perception of the country's “elite” as a unified group



■ 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

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.

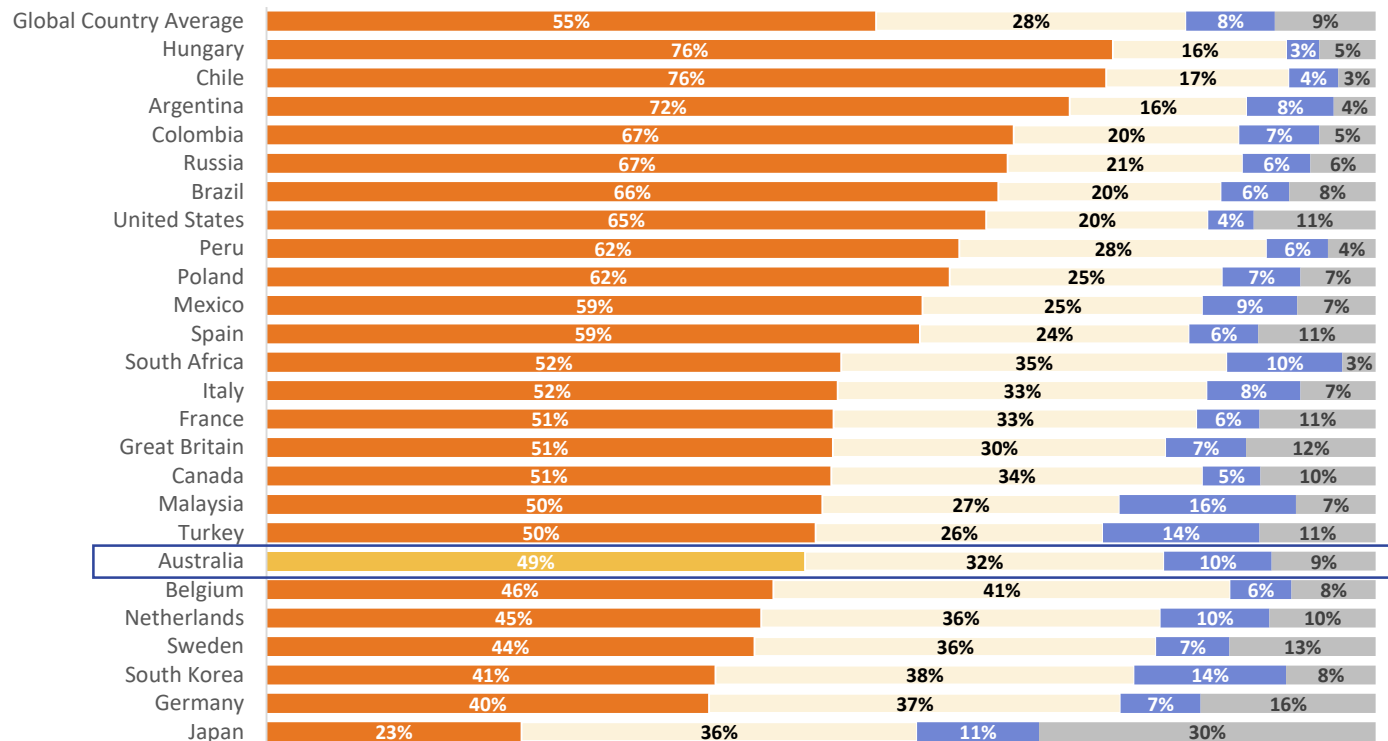
South Korea (79%) and Chile (77%) have the strongest belief that the elite is a closely connected group of people.

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*

Perceived motivation of elite's decision



■ 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

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

Nativism

4

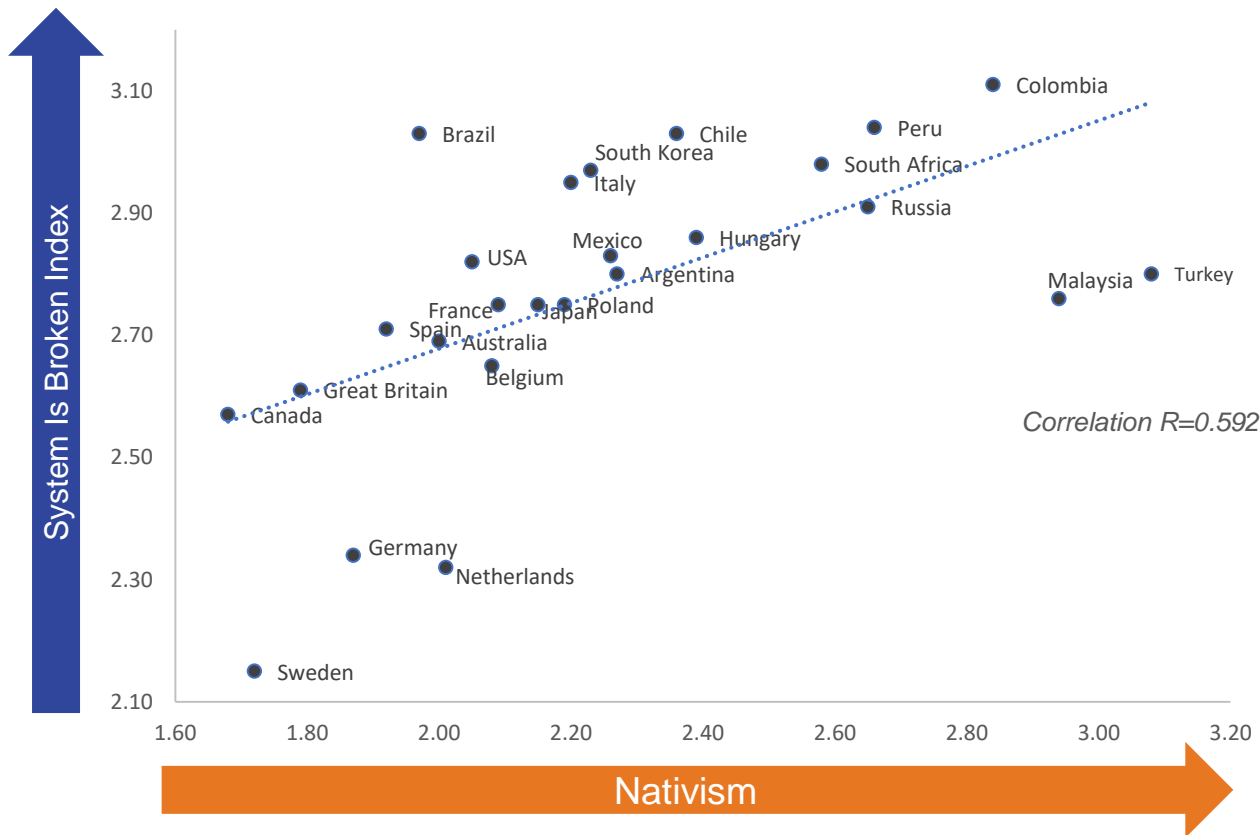
“System Is Broken” Index x Nativism Index

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]

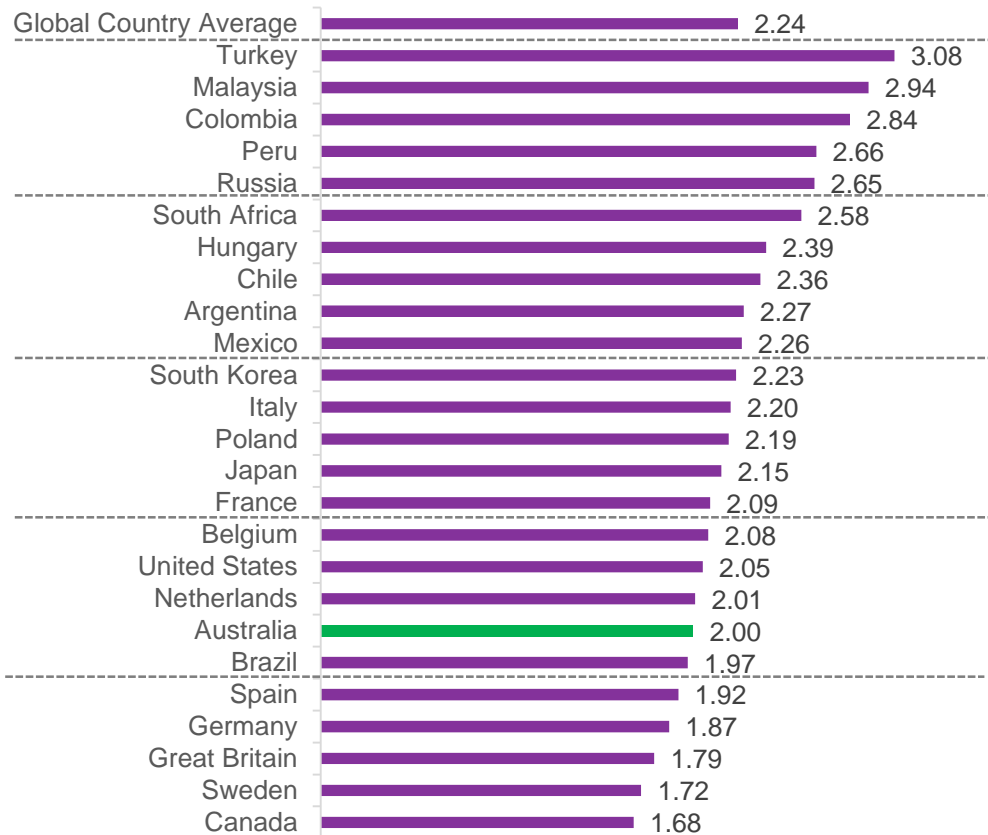


Nativism Index

NEW

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]



Nativism – Agreement with Statements

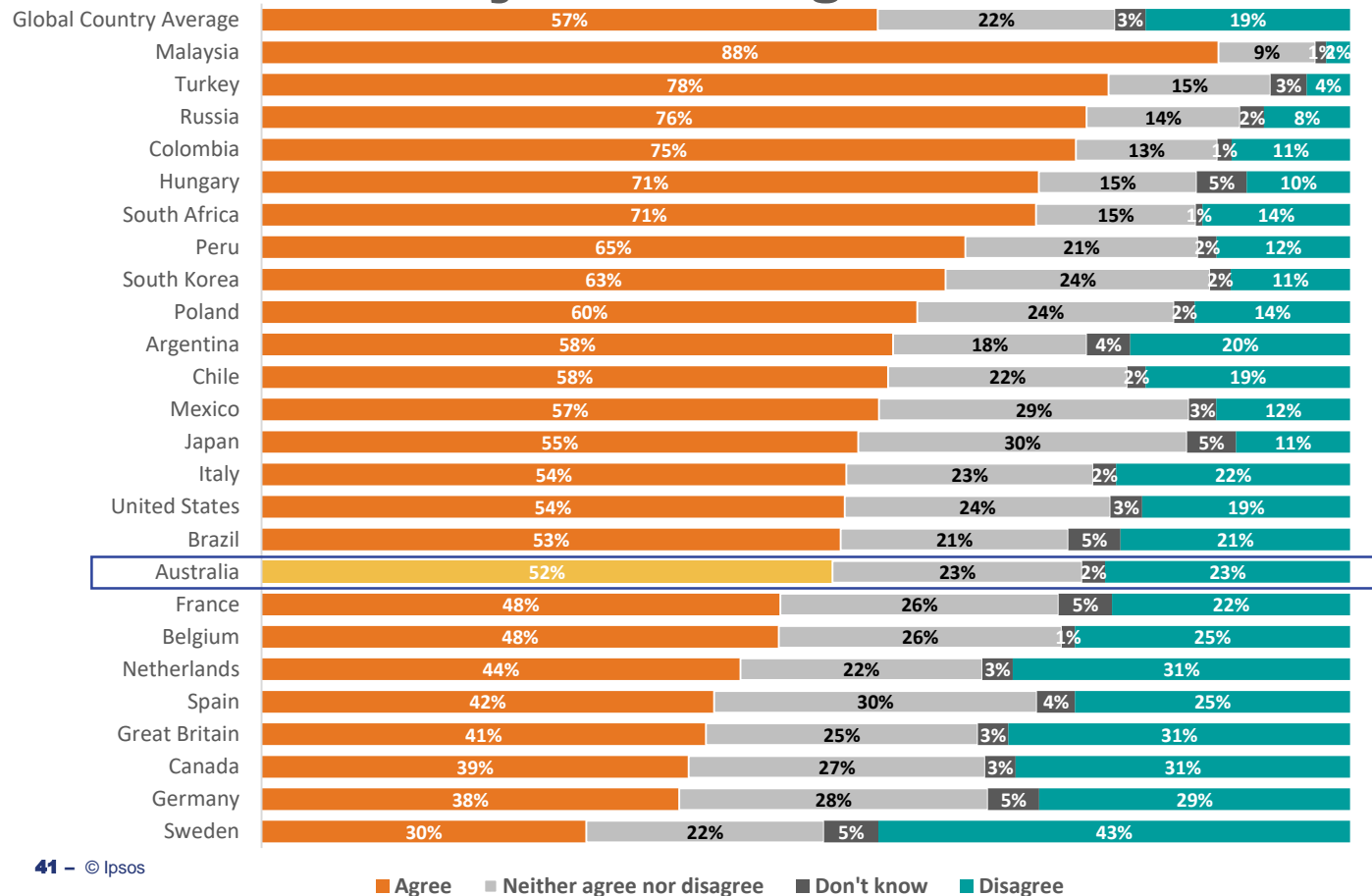
	Global Country Average	Argentina	Australia	Belgium	Brazil	Canada	Chile	Colombia	France	Germany	Great Britain	Hungary	Italy	Japan	Malaysia	Mexico	Netherlands	Peru	Poland	Russia	South Africa	South Korea	Spain	Sweden	Turkey	United States
When jobs are scarce, employers should prioritize hiring people of 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



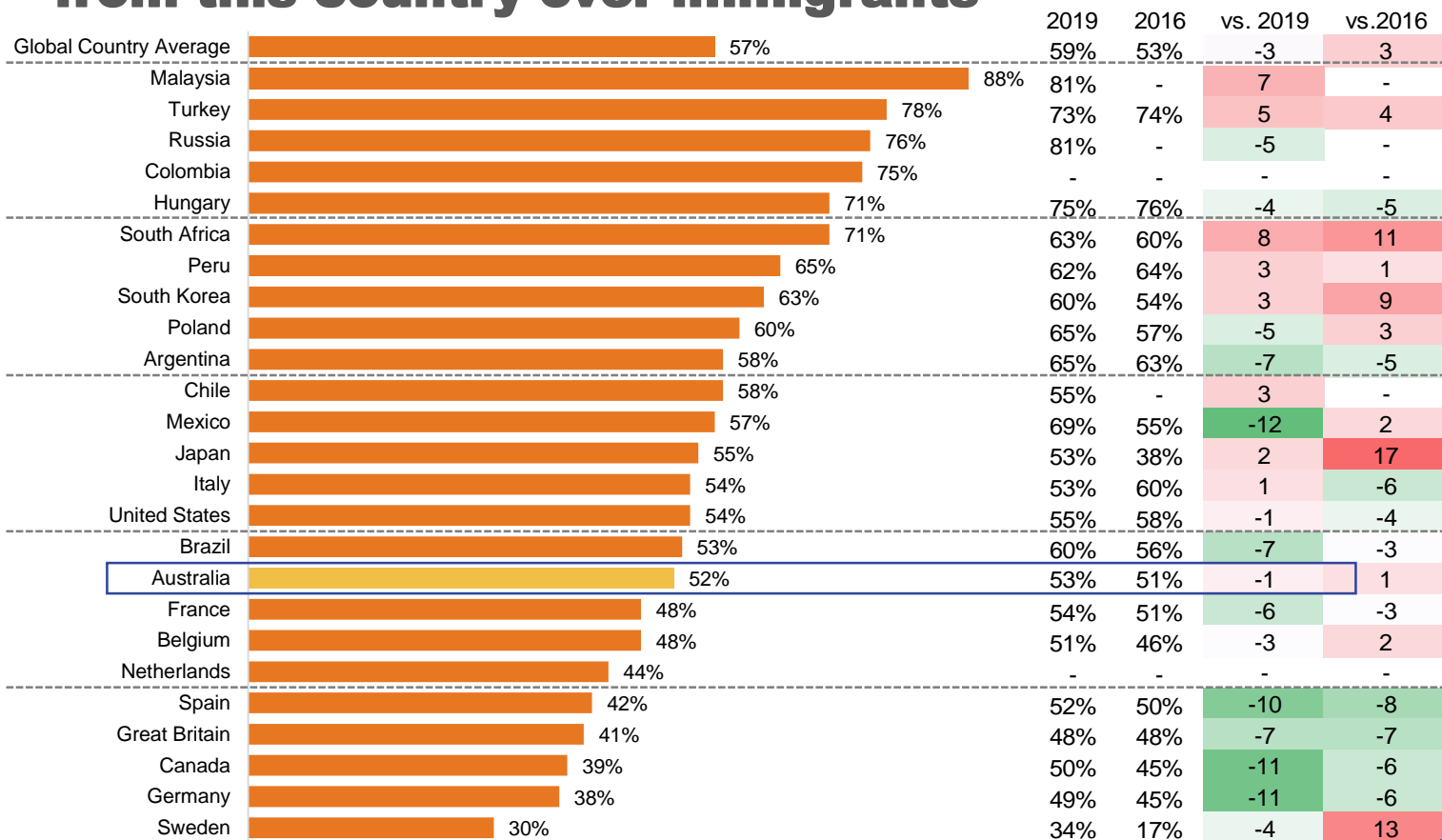
On average, globally, 57% agree that employers should prioritize natives over immigrants when jobs are scarce.

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



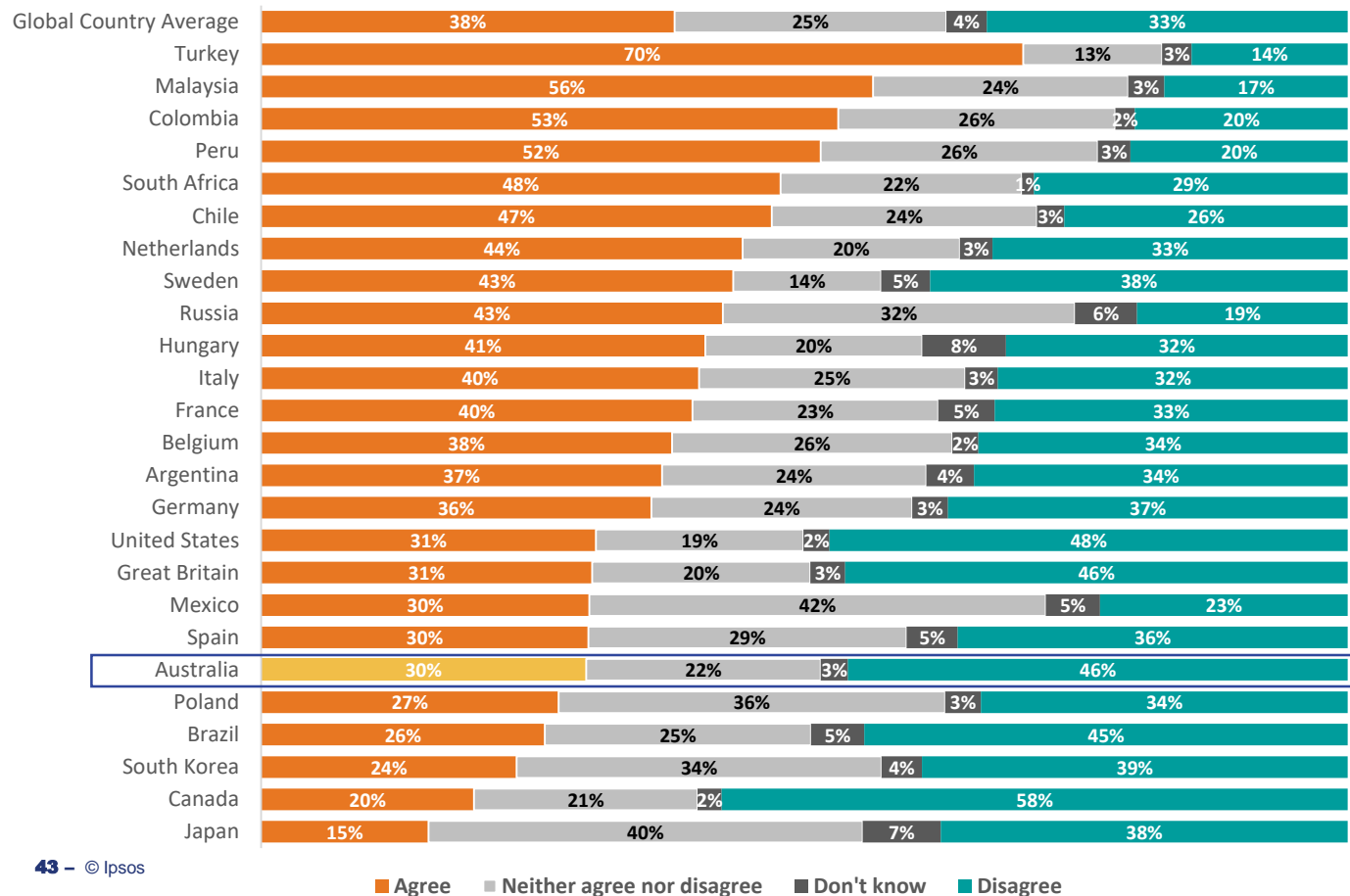
Globally, the belief that, when jobs are scarce, employers should prioritize the country's people over immigrants is trending downward.

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, 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



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

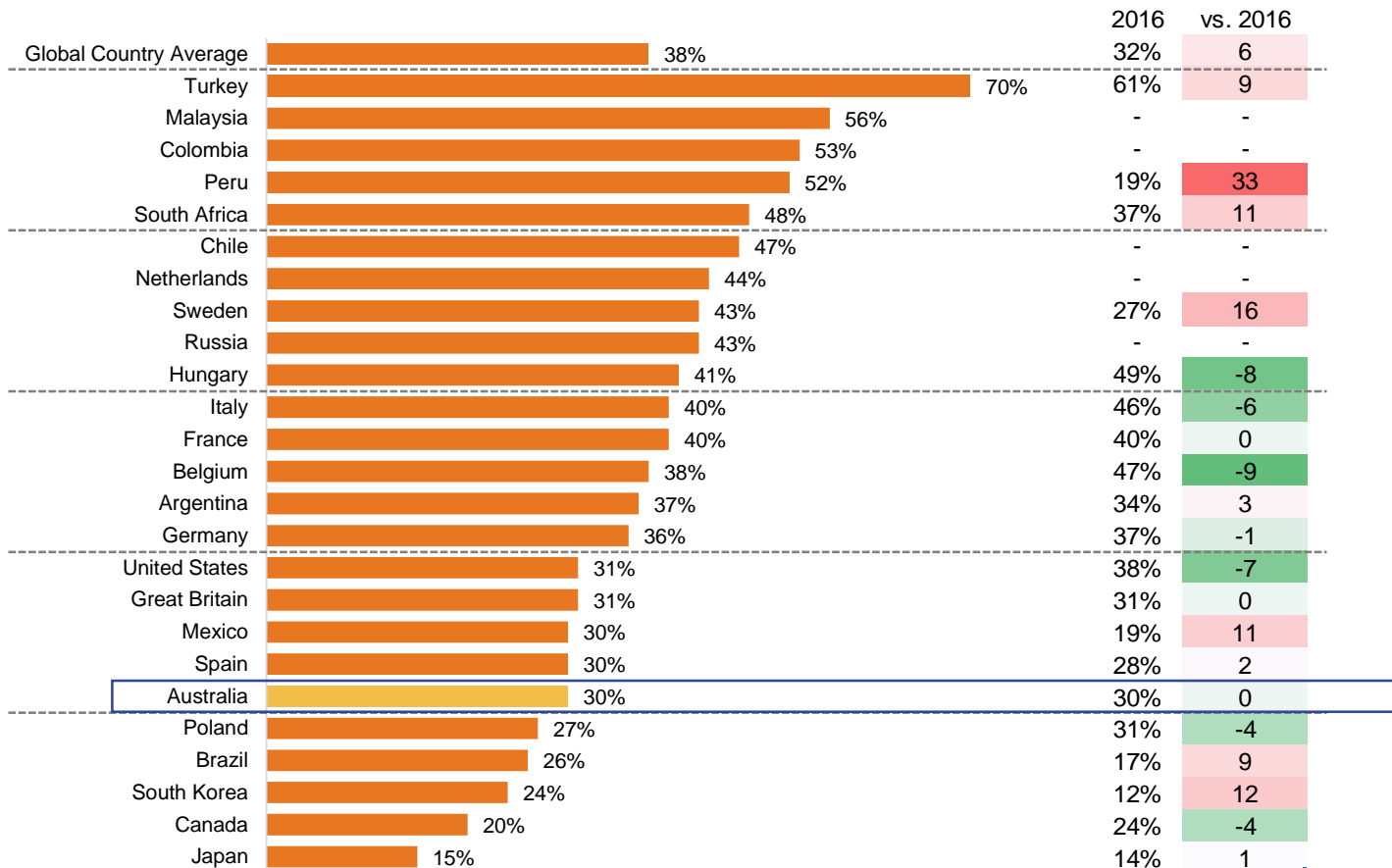
Majorities in 4 countries -- most of all Turkey (70%) -- and pluralities in 10 countries agree.

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

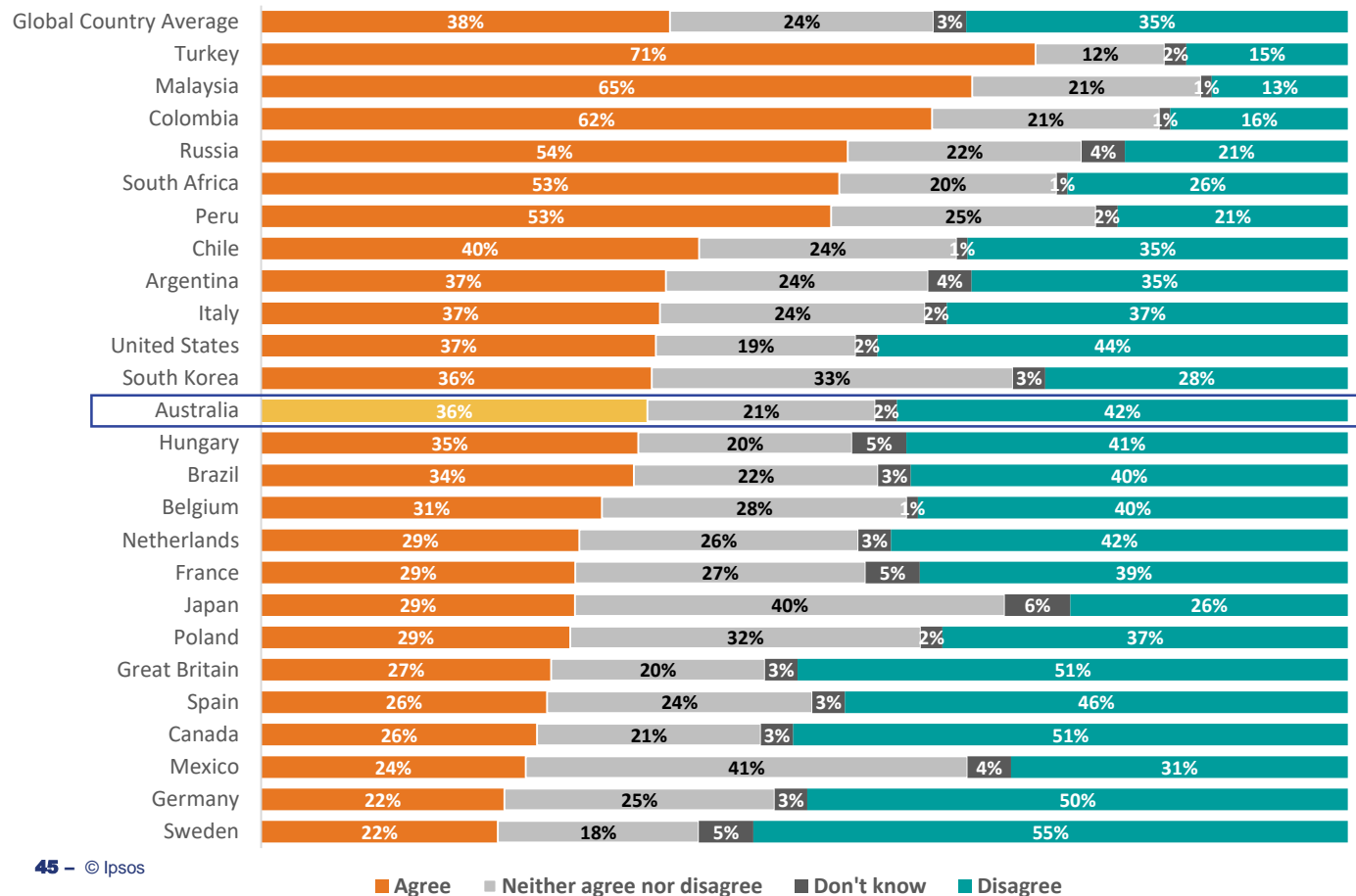


On average, globally, more agree that their country would be stronger if it stopped immigration than did in 2016.

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]



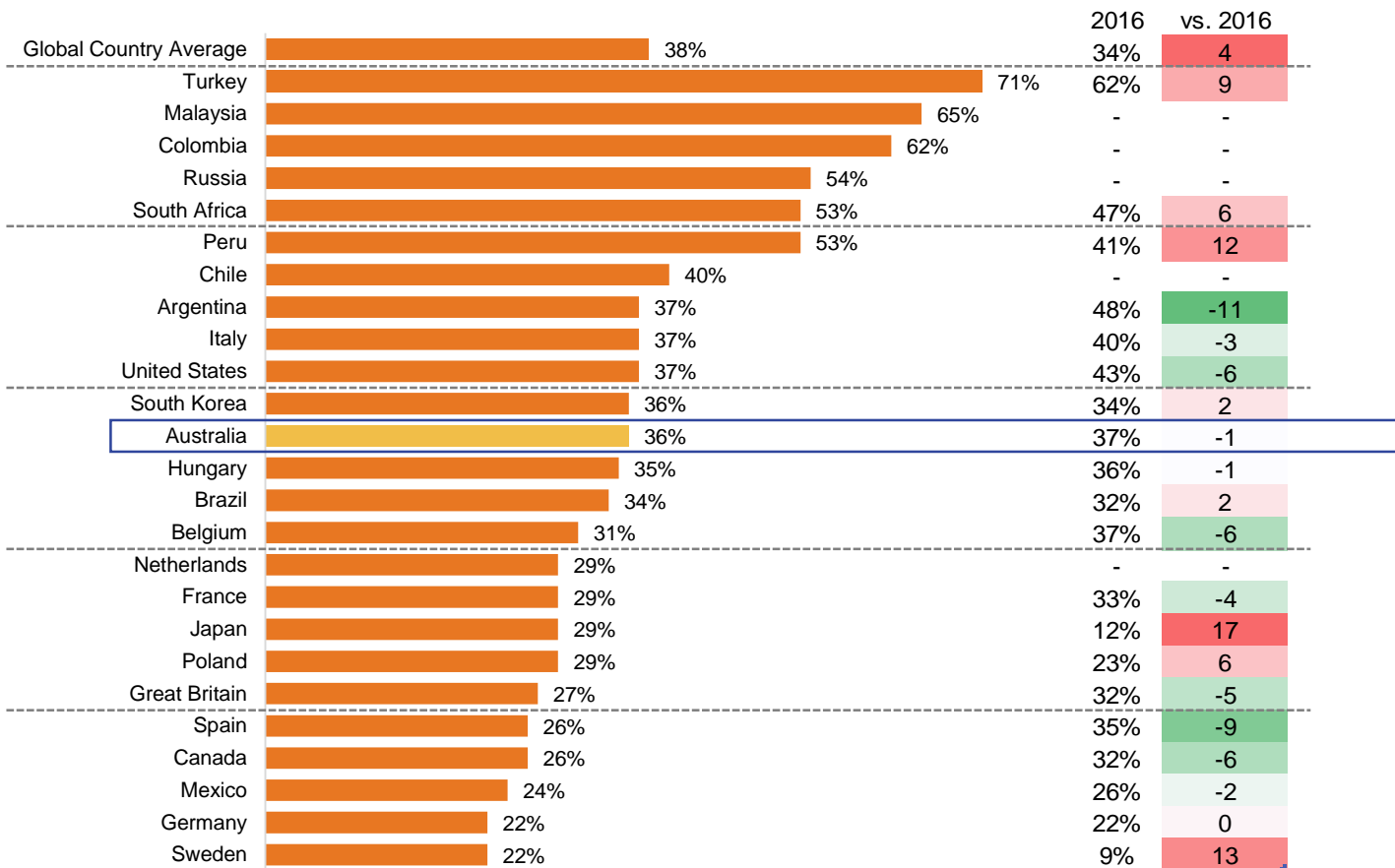
Across all 25 countries, an average of 38% agree that immigrants take jobs away from “real” nationals while 35% disagree.

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.