

WORLD OPINION ON GLOBALIZATION AND INTERNATIONAL TRADE IN 2021

Ipsos Global Advisor 25-Country Survey for the World Economic Forum
August 2021

For more information, go to <https://www.ipsos.com/en/sentiment-about-globalization-cooler-pandemic-across-world>

GAME CHANGERS



KEY FINDINGS

MOST SUPPORT EXPANDING TRADE, BUT MANY ESPOUSE PROTECTIONIST VIEWS

Most adults in each of 25 countries recently surveyed agree that expanding trade is a good thing (an average of 75% per country).

Yet in most countries, more agree than disagree that there should be more trade barriers to limit imports of foreign goods and services: on average across the 25 countries, 37% agree, 27% disagree and 36% are neutral or don't have an opinion.

SENTIMENT ABOUT GLOBALIZATION IS MIXED AND DECLINING

On average globally, only 48% agree that globalization is a good thing for their country.

Positive views of globalization are down in every country (most of all in Latin America) by an average of 10 points since 2019, pre-COVID and vary widely across countries (from 72% in Malaysia to 27% in France).

About as many agree as disagree that globalization prevents their country's government from implementing effective economic policies and democracy in their country from functioning properly, but more are neutral or unsure.

OPPOSITION TO FOREIGN INVESTMENT IS MARGINAL

Despite polarization and ambivalence about globalization, no more than 15% in any country disagree that investment by global companies in their country is essential for its growth and expansion.

GLOBALIZATION – AGREEMENT WITH STATEMENTS

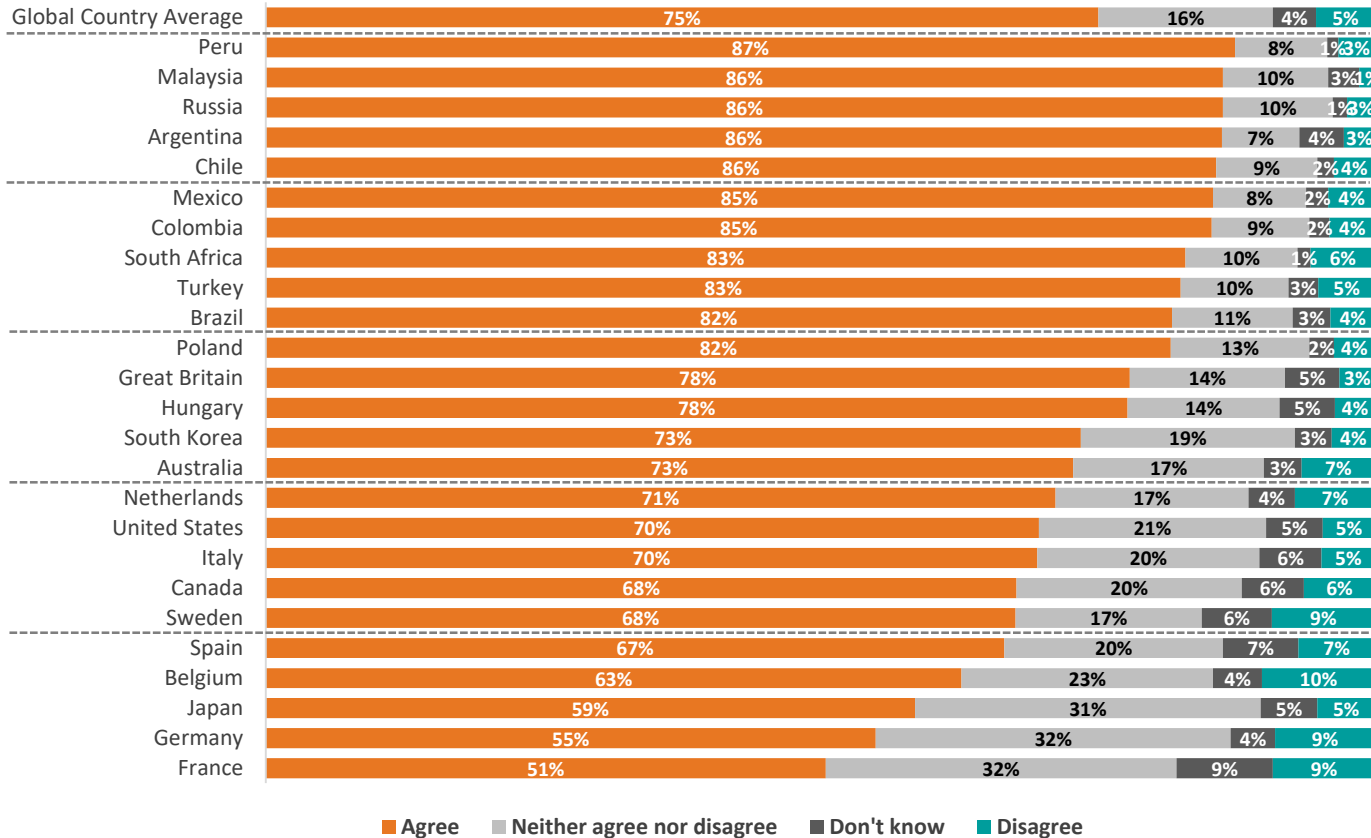
	Global Country Average	Argentina	Australia	Belgium	Brazil	Canada	Chile	Colombia	France	Germany	Great Britain	Hungary	Italy	Japan	Malaysia	Mexico	Netherlands	Peru	Poland	Russia	South Africa	South Korea	Spain	Sweden	Turkey	United States
Expanding trade is a good thing	75%	86%	73%	63%	82%	68%	86%	85%	51%	55%	78%	78%	70%	59%	86%	85%	71%	87%	82%	86%	83%	73%	67%	68%	83%	70%
Investment by global companies in [country] is essential for our growth and expansion	63%	73%	57%	58%	74%	59%	65%	71%	53%	48%	65%	61%	54%	49%	87%	68%	54%	73%	54%	51%	81%	72%	59%	50%	74%	54%
Overall, globalization is a good thing for my country	48%	48%	45%	35%	62%	46%	55%	54%	27%	46%	45%	46%	40%	50%	72%	46%	42%	63%	42%	34%	64%	61%	44%	48%	55%	42%
There should be more trade barriers to limit imports of foreign goods and services in [country]	37%	35%	49%	36%	38%	31%	31%	55%	49%	24%	25%	35%	46%	22%	47%	32%	23%	46%	27%	39%	55%	24%	36%	25%	56%	39%
Globalization prevents the [country's] government from implementing effective economic policies	31%	22%	35%	36%	33%	28%	34%	37%	48%	26%	23%	21%	41%	21%	38%	29%	30%	35%	25%	34%	37%	19%	29%	24%	34%	29%
Globalization prevents democracy in [country] from functioning well	28%	23%	32%	30%	31%	20%	27%	32%	41%	23%	22%	20%	38%	17%	38%	28%	30%	28%	28%	26%	36%	14%	24%	26%	39%	27%

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

EXPANDING TRADE IS A GOOD THING



Majorities in all 25 countries agree that expanding trade is a good thing, averaging at 75% with only 5% disagreeing.

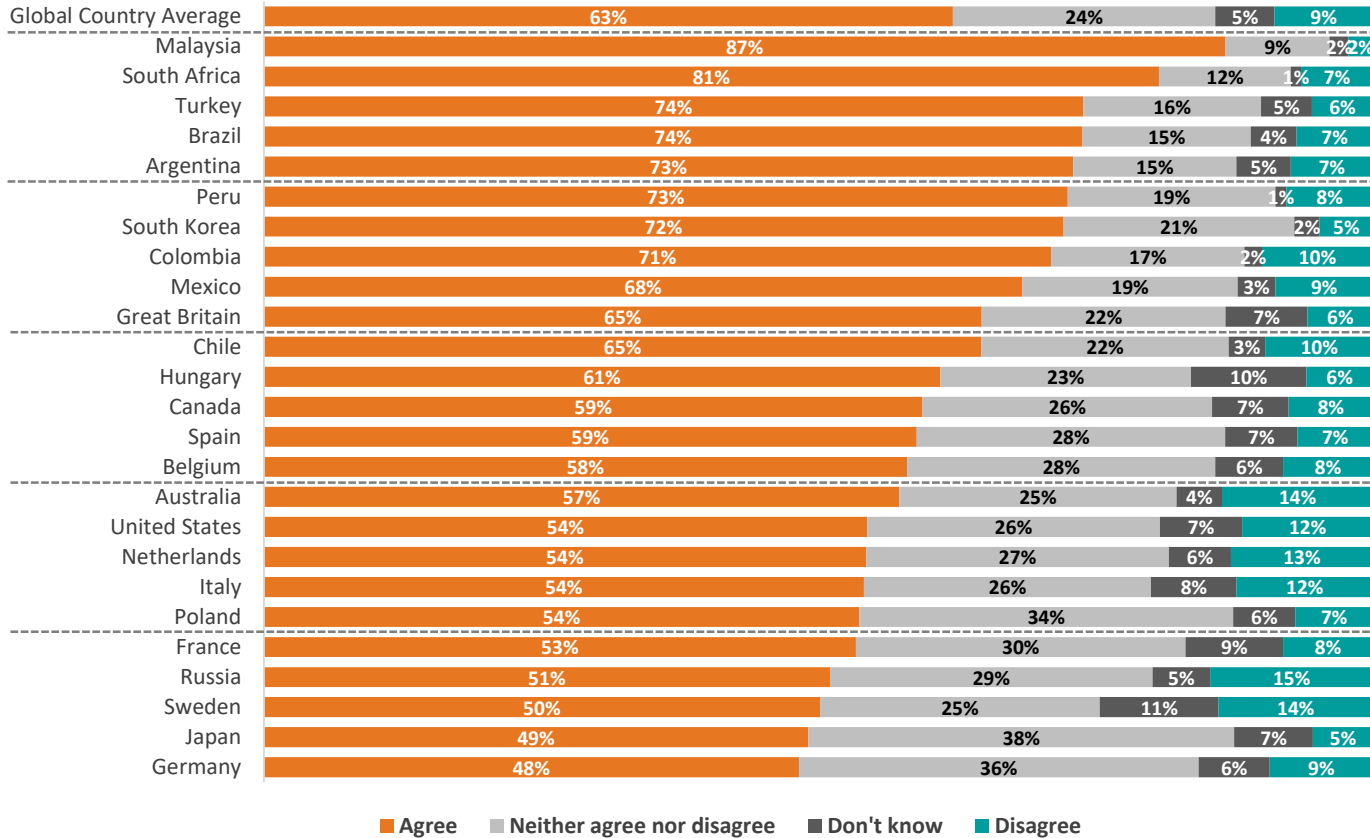
Agreement is highest in Peru (87%), Malaysia, Russia, Argentina and Chile (all 86%) while it is lowest in France (51%) and Germany (55%).

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INVESTMENT BY GLOBAL COMPANIES IN [COUNTRY] IS ESSENTIAL FOR OUR GROWTH AND EXPANSION

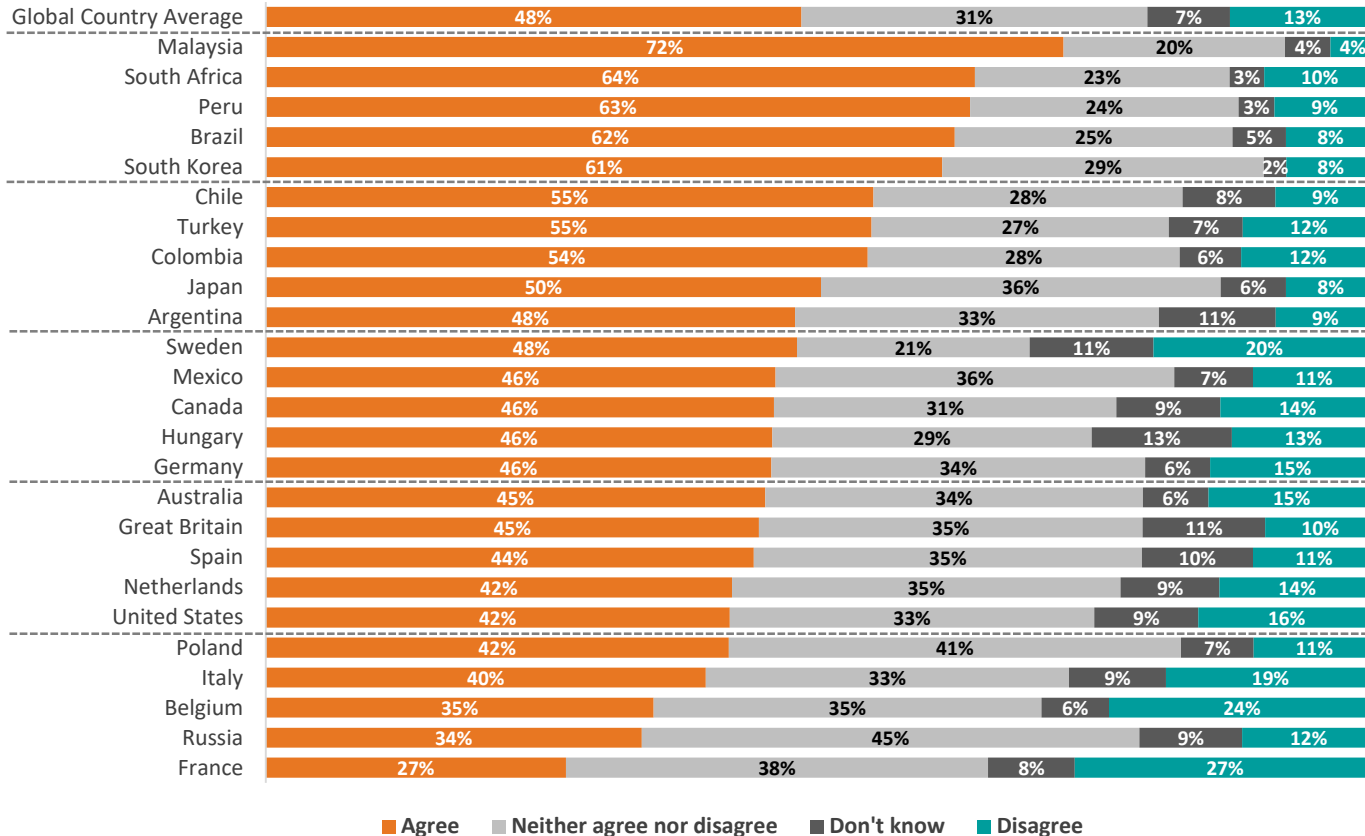


An average of 63% globally agree that investment by global companies in their country is essential for its growth and expansion while just 9% disagree.

Agreement is highest in Malaysia (87%) and South Africa (81%) and lowest in Germany (48%) and Japan (49%).

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OVERALL, GLOBALIZATION IS A GOOD THING FOR MY COUNTRY



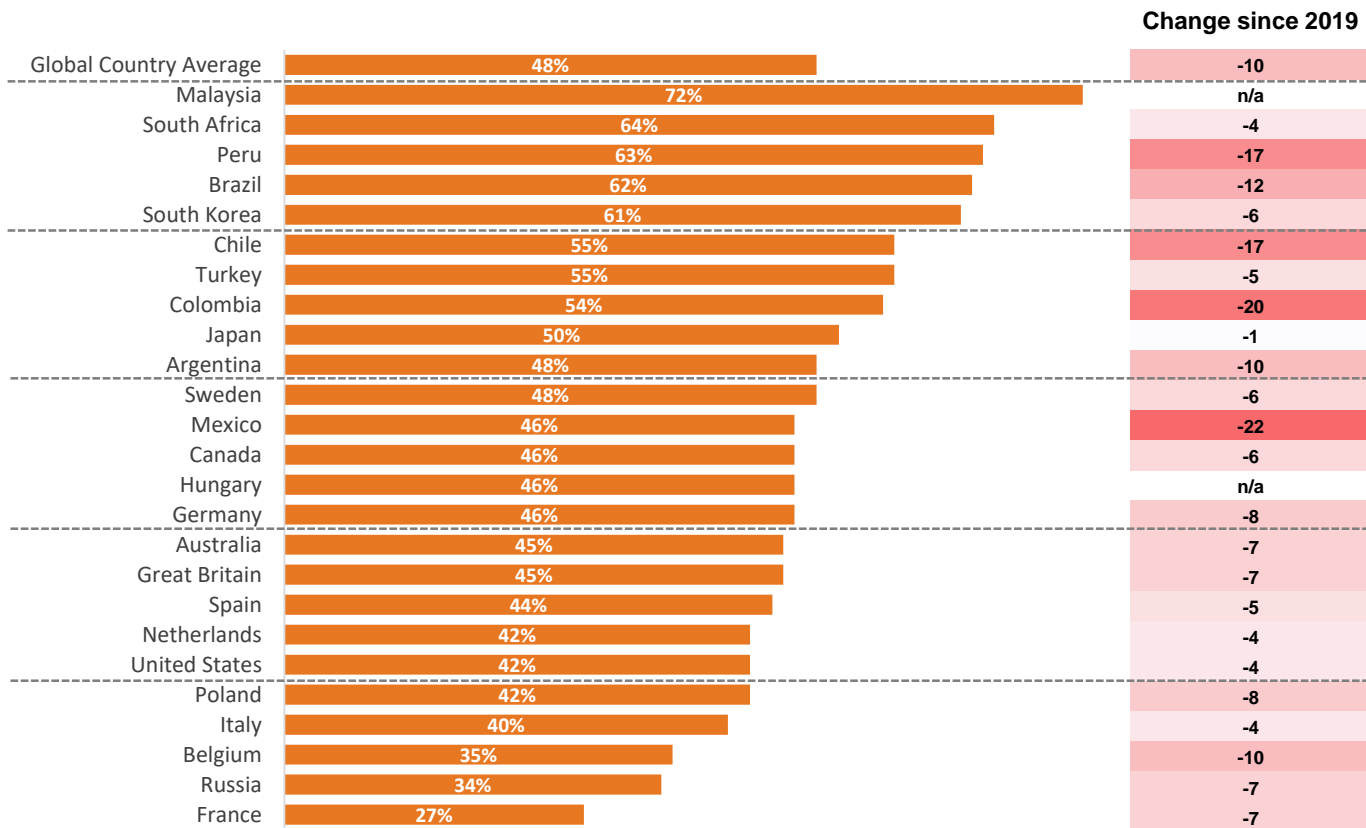
An average of 48% globally agree that globalization is a good thing for their country while just 13% disagree and the rest are neutral or unsure.

Majorities in 9 countries have a positive assessment of globalization with the largest in Malaysia (72%), South Africa (64%), Peru (63%), Brazil (62%) and South Korea (61%).

Countries with the lowest levels of agreement that globalization is a good thing for them are France (27%), Russia (34%) and Belgium (35%).

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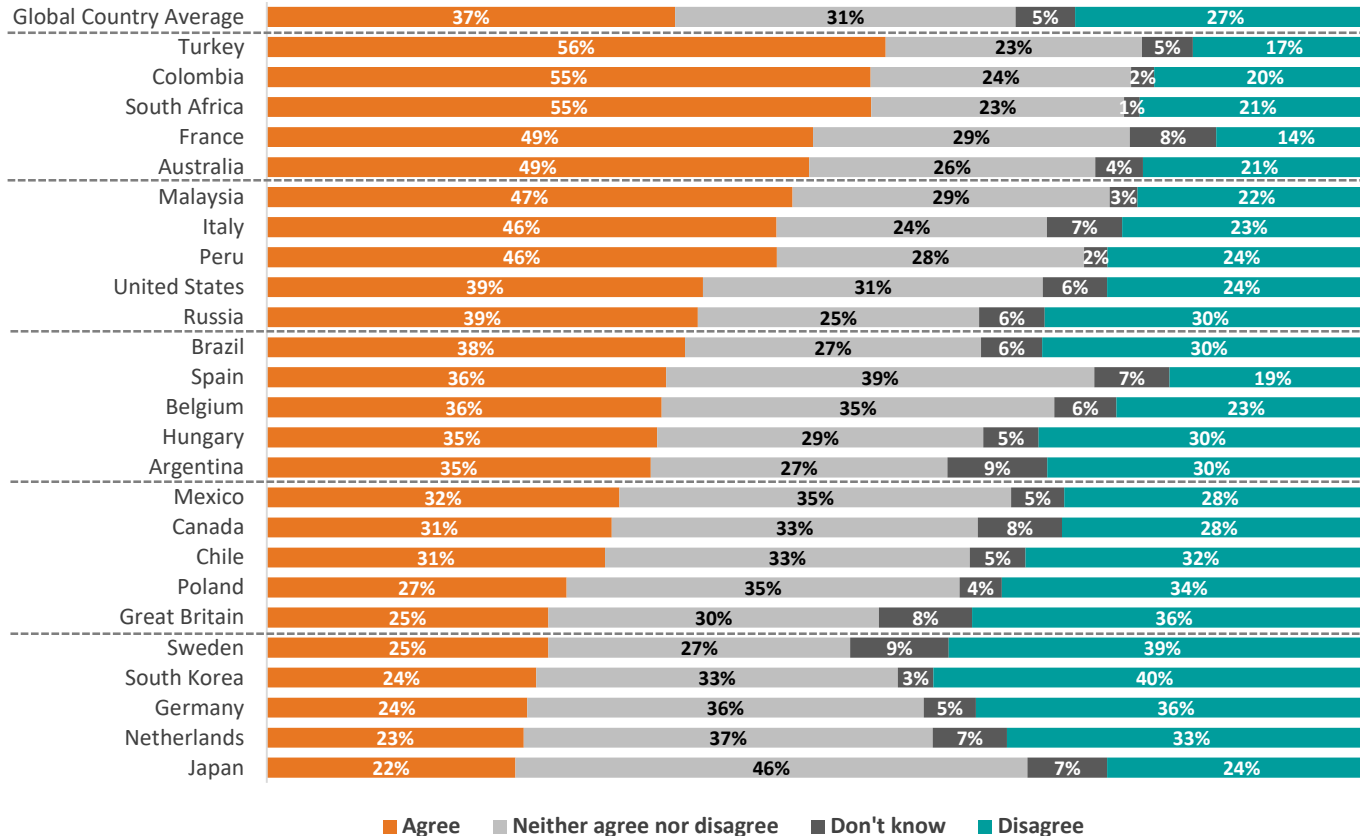
In every country, fewer agree that globalization is a good thing for their country than did in 2019.

The average drop across the 23 countries where the question surveyed in 2019 is 10 points. It is steepest in Mexico, Colombia, Chile, and Peru.

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■ Agree

THERE SHOULD BE MORE TRADE BARRIERS TO LIMIT IMPORTS OF FOREIGN GOODS AND SERVICES IN [COUNTRY]



Globally, an average of 37% agree there should be more trade barriers to limit imports of foreign goods and services in their country vs. 27% who disagree.

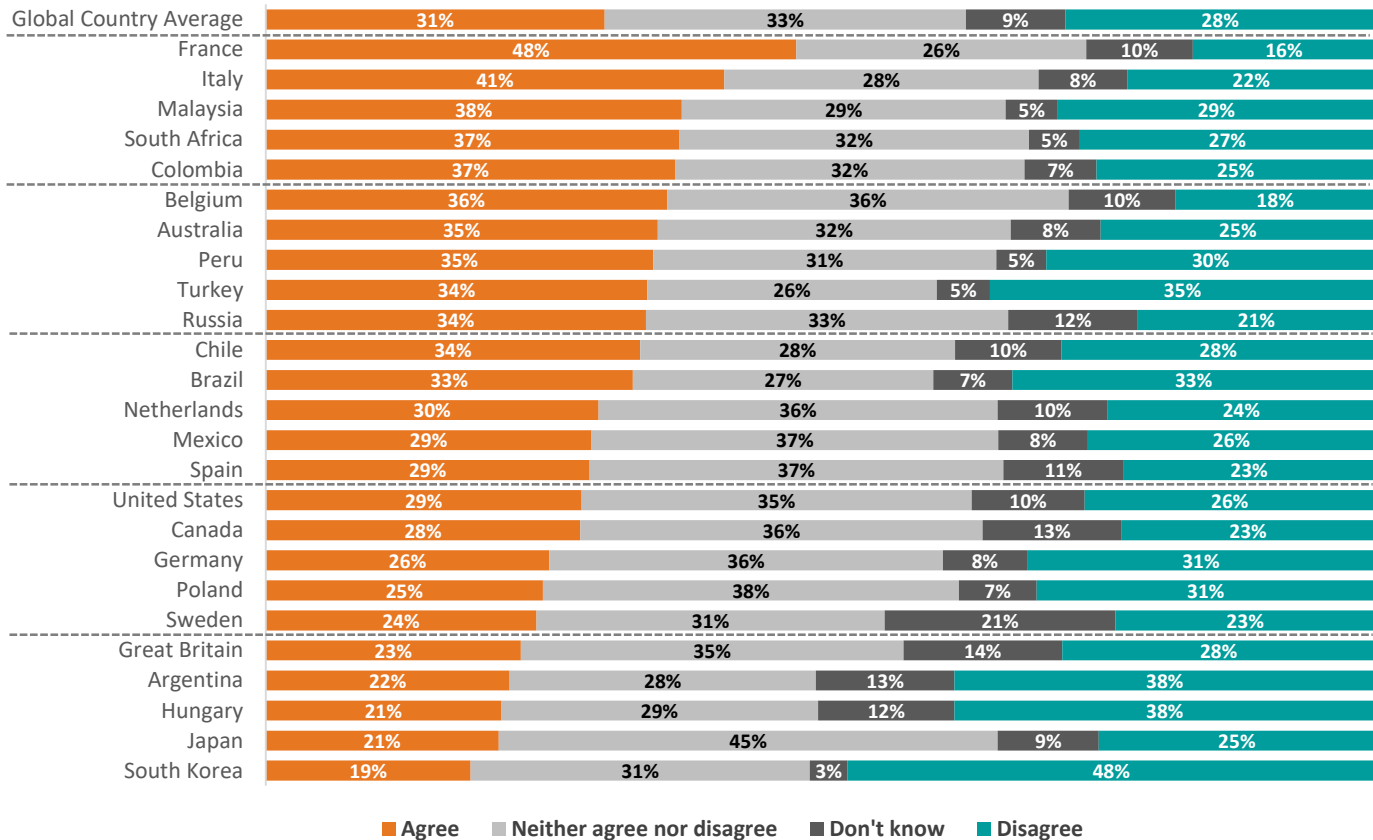
Majorities in 3 countries (Turkey, Colombia and South Africa) and pluralities in 10 countries agree.

Pluralities in 4 countries (South Korea, Sweden, Great Britain and Germany) disagree.

The prevailing opinion in 8 other countries is neutral.

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GLOBALIZATION PREVENTS THE [COUNTRY'S] GOVERNMENT FROM IMPLEMENTING EFFECTIVE ECONOMIC POLICIES



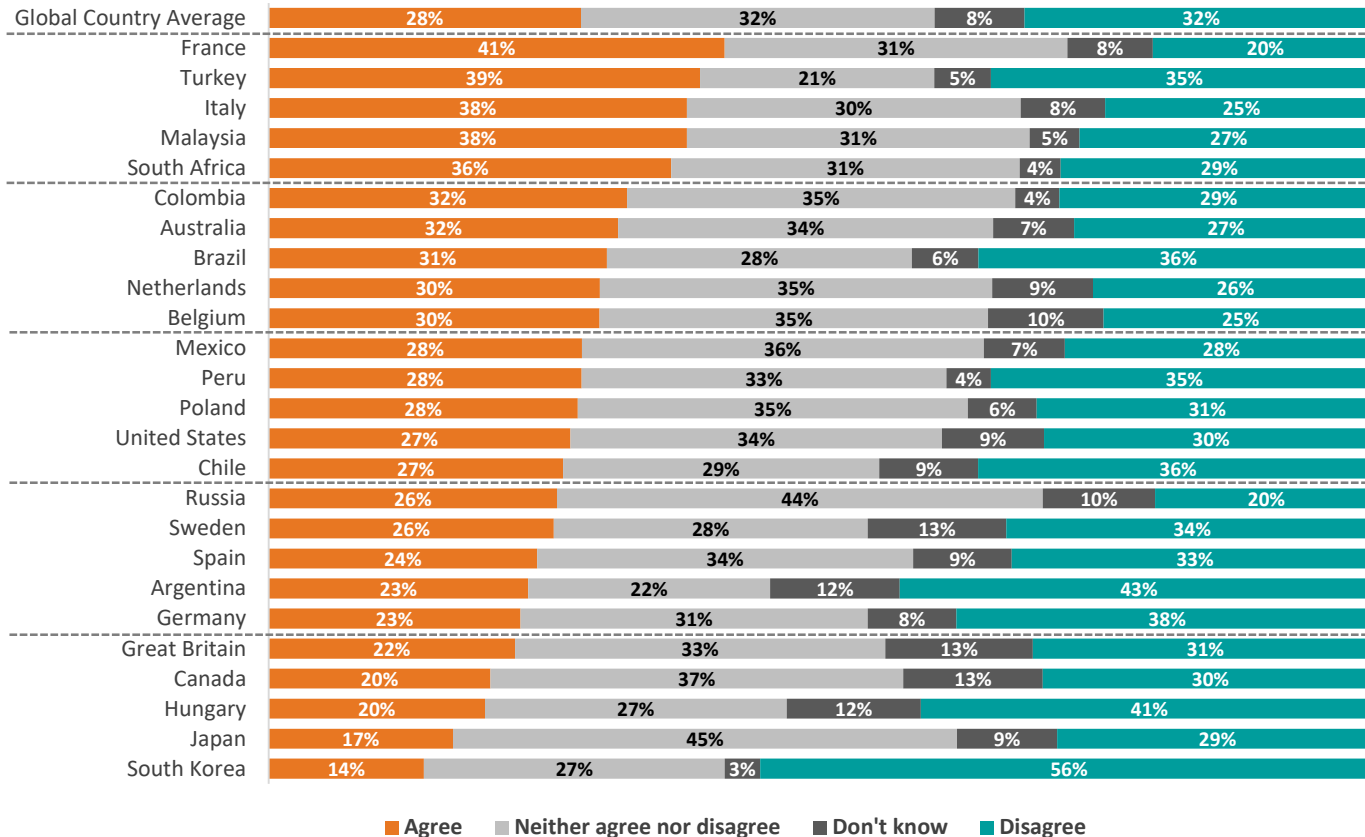
Globally and in most countries, public opinion is divided or neutral on whether globalization prevents their country's government from implementing effective economic policies: on average, 31% agree, 28% disagree, and 33% neither agree nor disagree.

No country shows a majority agreeing or a majority disagreeing.

Agreement is most prevalent in France (48%) and Italy (41%) and disagreement in South Korea (48%).

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GLOBALIZATION PREVENTS DEMOCRACY IN [COUNTRY] FROM FUNCTIONING WELL



An average of 28% across all 25 countries agree that globalization prevents democracy in their country from functioning well while more disagree (32%) or are neutral (also 32%).

Agreement is highest in France (41%), Turkey (39%), Italy (38%) and Malaysia (38%).

South Korea is the only country with a majority disagreeing (56%).

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METHODOLOGY

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.

The precision of Ipsos online polls is calculated using a credibility interval with a poll of 1,000 accurate to +/- 3.5 percentage points and of 500 accurate to +/- 4.8 percentage points. For more information on Ipsos's use of credibility intervals, please visit the Ipsos website.

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

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

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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.

