

BROKEN-SYSTEM SENTIMENT IN 2022

A 28-country Global Advisor survey

December 2022

For more information: ipsos.com/en/broken-system-sentiment-2022

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GAME CHANGERS



RANGE OF BROKEN-SYSTEM SENTIMENT – SEPT-NOV 2022

% agree	28-country average	Highest:	Lowest:
[Country's] economy is rigged to advantage the rich and powerful	 64%	 Romania (78%)  Hungary (75%)	 Sweden (45%)  Netherlands (55%)  Germany (55%)
Traditional parties and politicians don't care about people like me	 63%	 Romania (79%)  Turkey (70%)	 Sweden (44%)  Netherlands (45%)
[Country] needs a strong leader to take the country back from the rich and powerful	 59%	 Romania (74%)  Indonesia (70%)	 Germany (37%)  Sweden (38%)
Experts in this country don't understand the lives of people like me	 59%	 Peru (70%)  Turkey (69%)	 Sweden (42%)  Netherlands (45%)
To fix [Country], we need a strong leader willing to break the rules	 45%	 Thailand (74%)  Turkey (70%)	 Sweden (27%)  Germany (29%)

BROKEN-SYSTEM SENTIMENT TRENDS

% agree	28-country average	Change since 2021	Steepest decrease	Steepest increase
[Country's] economy is rigged to advantage the rich and powerful	64%	-7	 South Korea (-21)  Chile (-19)	 Great Britain (+5)
Traditional parties and politicians don't care about people like me	63%	-5	 Colombia (-17)  Chile (-16)	 Great Britain (+7)
[Country] needs a strong leader to take the country back from the rich and powerful	59%	-5	 Chile (-20)  Italy (-19)	 Great Britain (+5)
Experts in this country don't understand the lives of people like me	59%	-6	 Italy (-19)  Chile (-16)  Brazil (-16)	 Great Britain (+5)  Belgium (+5)
To fix [Country], we need a strong leader willing to break the rules	45%	+1	 South Korea (-16)  Brazil (-15)	 Turkey (+26)  Malaysia (+8)  Great Britain (+8)

BROKEN-SYSTEM SENTIMENT: AGREEMENT WITH STATEMENTS

Total Agree Sept-Nov 2022

	Global Country Average	Argentina	Australia	Belgium	Brazil	Canada	Chile	Colombia	France	Germany	Great Britain	Hungary	Indonesia	Ireland	Italy	Japan	Malaysia	Mexico	Netherlands	Peru	Poland	Romania	South Africa	South Korea	Spain	Sweden	Thailand	Turkey	United States
[Country's] economy is rigged to advantage the rich and powerful	64%	59%	63%	69%	64%	56%	61%	68%	61%	55%	71%	75%	63%	66%	61%	66%	58%	65%	55%	67%	59%	78%	68%	64%	57%	45%	72%	71%	66%
Traditional parties and politicians don't care about people like me	63%	68%	57%	59%	63%	57%	68%	68%	65%	49%	65%	66%	60%	63%	58%	61%	60%	67%	45%	69%	64%	79%	69%	61%	61%	44%	68%	70%	64%
[Country] needs a strong leader to take the country back from the rich and powerful	59%	57%	61%	63%	65%	56%	53%	62%	57%	37%	67%	62%	70%	65%	50%	52%	69%	65%	55%	62%	52%	74%	67%	53%	55%	38%	66%	67%	63%
Experts in this country don't understand the lives of people like me	59%	64%	58%	62%	49%	52%	68%	66%	62%	48%	61%	65%	57%	62%	52%	53%	56%	67%	45%	70%	56%	68%	63%	46%	59%	42%	64%	69%	61%
To fix [Country], we need a strong leader willing to break the rules	45%	42%	45%	46%	46%	35%	32%	34%	36%	29%	50%	37%	46%	53%	47%	48%	54%	37%	40%	47%	53%	54%	59%	55%	33%	27%	74%	70%	40%
Average 5 items: change in % points vs.																													
2021	-4	-5	-4	+0	-14	-3	-15	-15	-5	-4	+6	-5	NA	NA	-15	-5	-7	-3	+0	-8	-6	NA	-6	-15	-5	-3	NA	+6	-6
2019	-4	-10	-5	-1	-9	-8	-8	NA	-10	-6	-3	-3	NA	NA	-11	+4	+4	-9	NA	-5	-7	NA	-2	-8	-11	-5	NA	+7	-1
2016	-2	-1	-5	+1	-13	-6	NA	NA	-11	-1	+3	-8	NA	NA	-16	+10	NA	-10	NA	-7	-6	NA	+7	-10	-13	+5	NA	+8	-2

Base: 26,007 online adults aged 16-74 across 28 countries

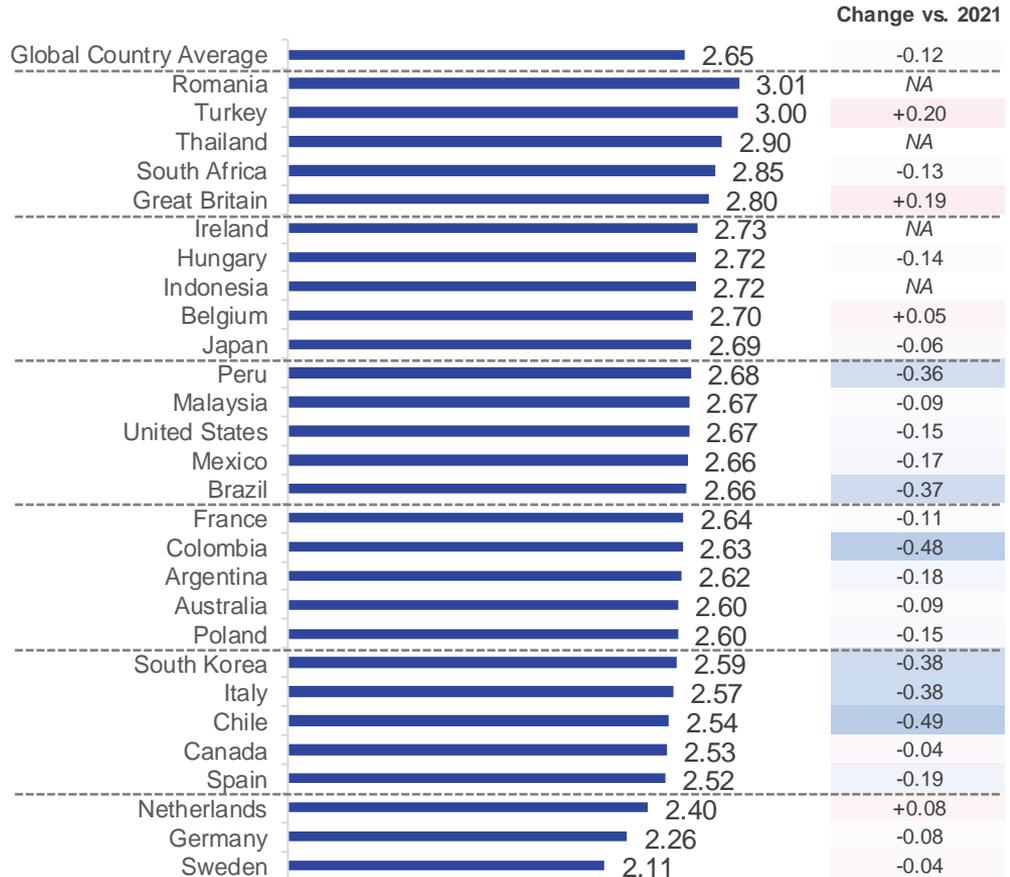
Online samples in Brazil, Chile, Colombia, Indonesia, Ireland, Malaysia, Mexico, Peru, South Africa, Thailand, and Turkey tend to be more urban, educated, and/or affluent than the general population

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

IPSOS BROKEN-SYSTEM INDEX

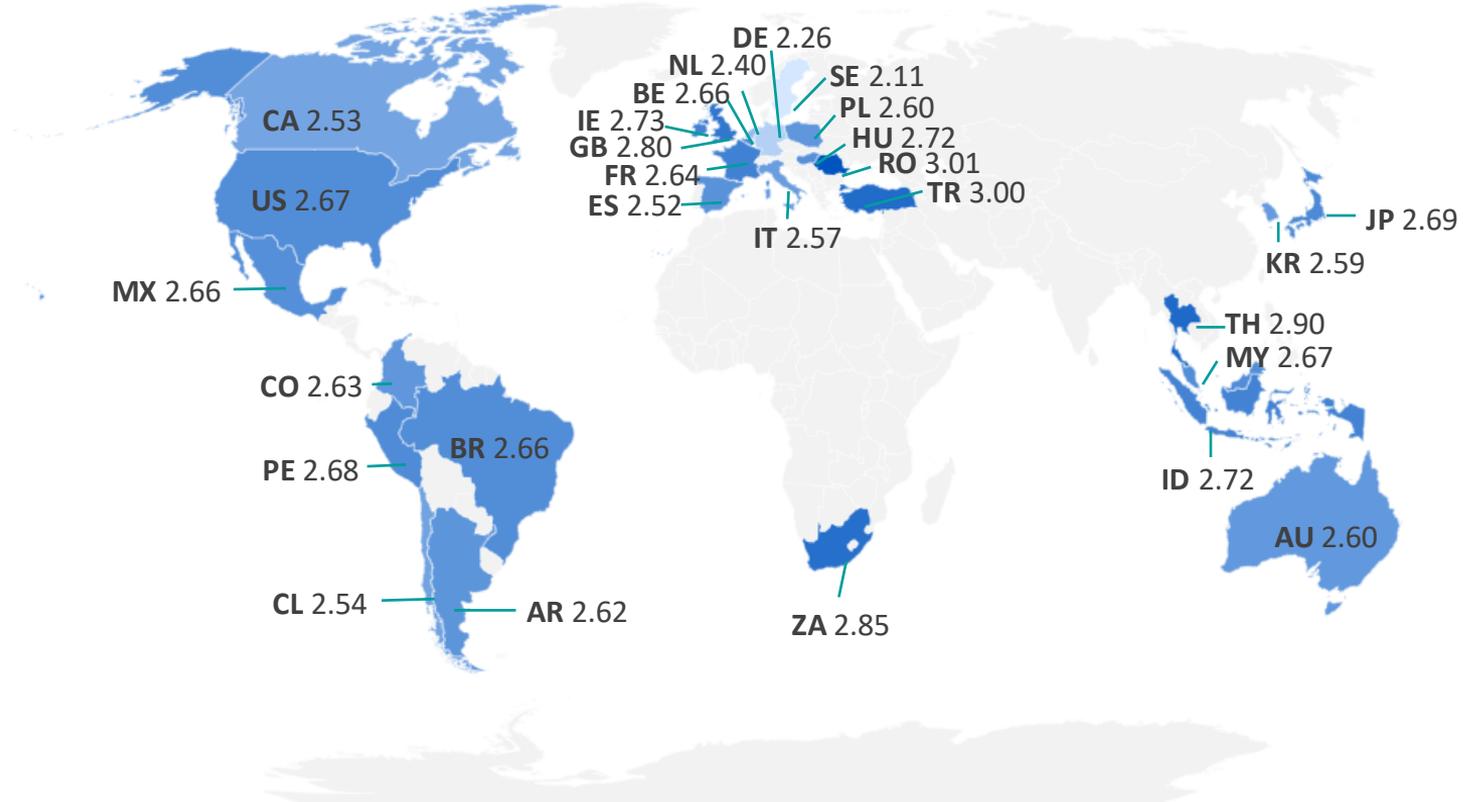
Index based on agreement to 5 statements:

- [Country's] **economy is rigged** to advantage the rich and powerful
- Traditional **parties and politicians don't care about** people like me
- [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
- To fix [country], we need a **strong leader** willing to **break the rules**



IPSOS BROKEN-SYSTEM INDEX

Global Average: 2.65



IPSOS' BROKEN-SYSTEM INDEX AND ELECTIONS

The six countries with the steepest index drop since April 2021 had a national election resulting in major political change; none of four countries showing an index uptick have had a national election since then

	Change since March-April 2021	National election since April 2021 (or campaign in progress)	Type of election	Change of head of government's party since then
Chile	-0.49	Yes	Presidential and General	Yes
Colombia	-0.48	Yes	Presidential	Yes
Italy	-0.38	Yes	General	Yes
South Korea	-0.38	Yes	Presidential	Yes
Brazil	-0.37	Yes	Presidential and General	Yes
Peru	-0.36	Yes	Presidential and General	Yes
Spain	-0.19			
Argentina	-0.18	Yes	Legislative	No
Mexico	-0.17	Yes	Legislative	N/A
Poland	-0.15			
Hungary	-0.15	Yes	Parliamentary	No
United States	-0.14	Yes (after survey)	Midterm	N/A
South Africa	-0.13			
France	-0.11	Yes	Presidential and legislative	No
Australia	-0.09	Yes	Federal	Yes
Malaysia	-0.09	Yes (after survey)	General	N/A
Germany	-0.08	Yes	Parliamentary	Yes
Japan	-0.06	Yes	General	No
Canada	-0.04	Yes	Federal	No
Sweden	-0.04	Yes	General	Yes
Belgium	+0.05			
Netherlands	+0.08			
Great Britain	+0.19			
Turkey	+0.20			

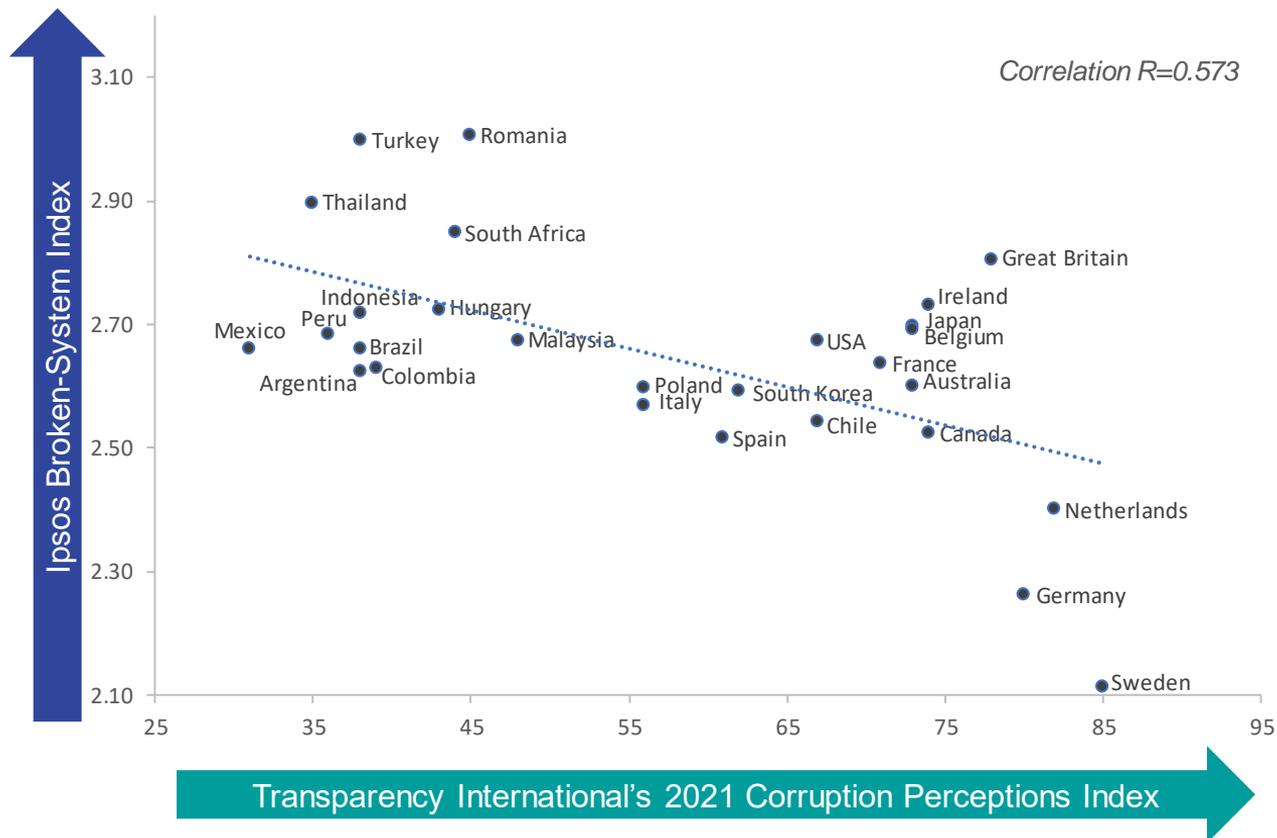
BROKEN-SYSTEM INDEX VS. CORRUPTION PERCEPTIONS INDEX

Broken System Index based on agreement with 5 statements:

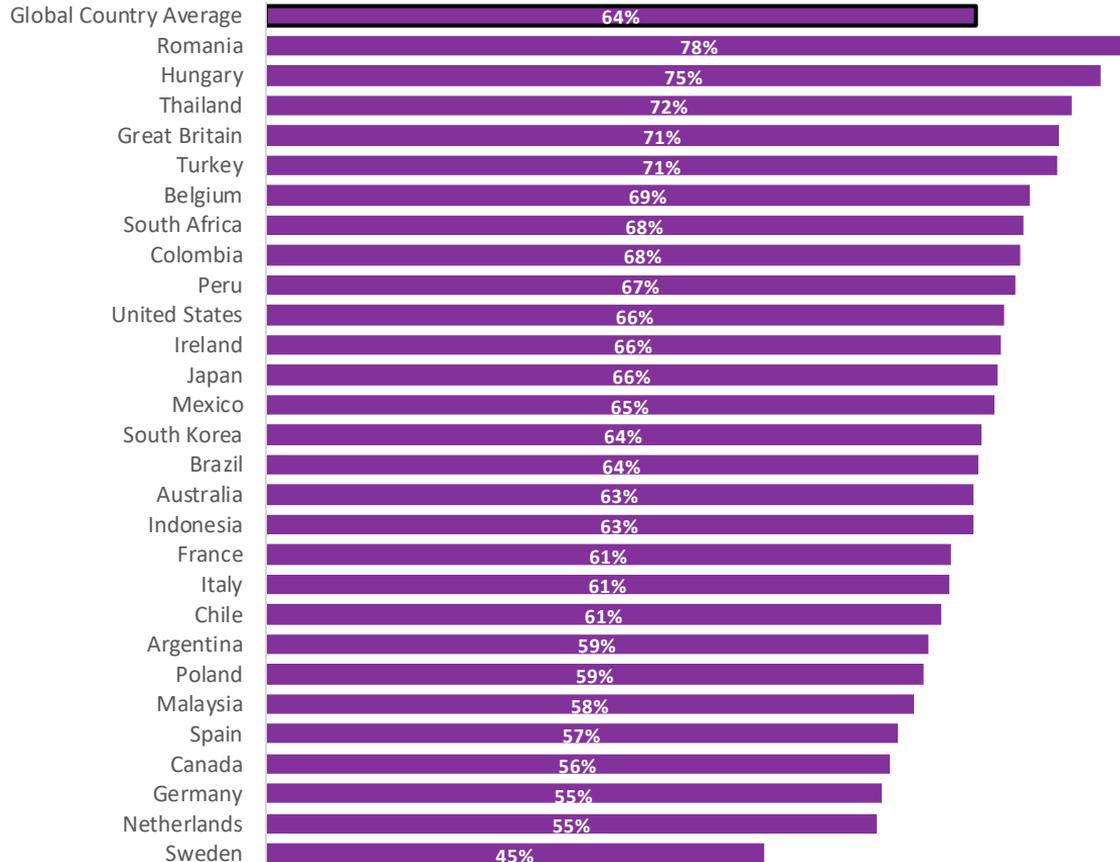
- The [country's] economy is rigged to advantage the rich and powerful
- Traditional parties and politicians don't care about people like me
- To fix [country], we need a strong leader willing to break the rules
- [Country] needs a strong leader to take the country back from the rich and powerful
- Experts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

Transparency International's *2021 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



THE [COUNTRY'S] ECONOMY IS RIGGED TO ADVANTAGE THE RICH AND POWERFUL



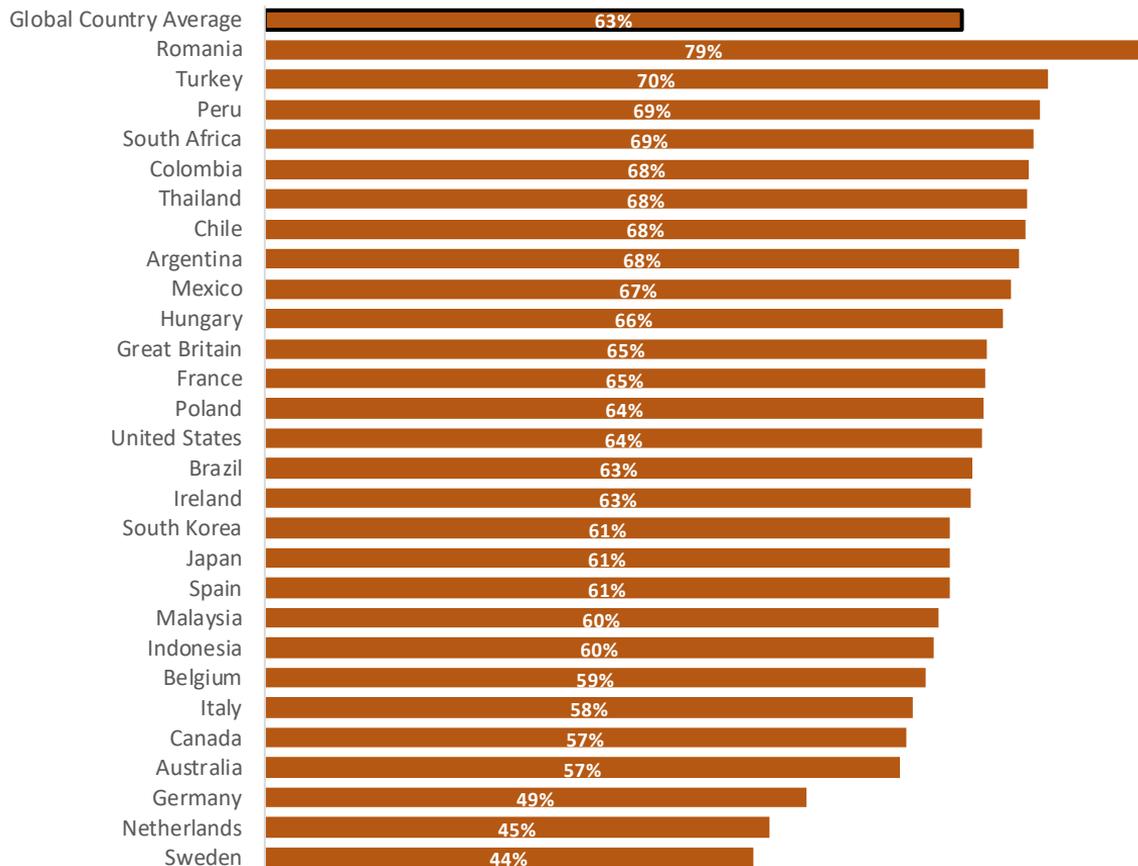
On average, globally, 64% agree their country's economy is rigged; just 14% disagree.

Agreement exceeds 70% in Romania, Hungary, Thailand, Great Britain, and Turkey.

Sweden is the only country where less than half agree.

*Base: 26,007 online adults aged 16-74 across 28 countries
Online samples in Brazil, Chile, Colombia, Indonesia, Ireland, Malaysia, Mexico, Peru, South Africa, Thailand, 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



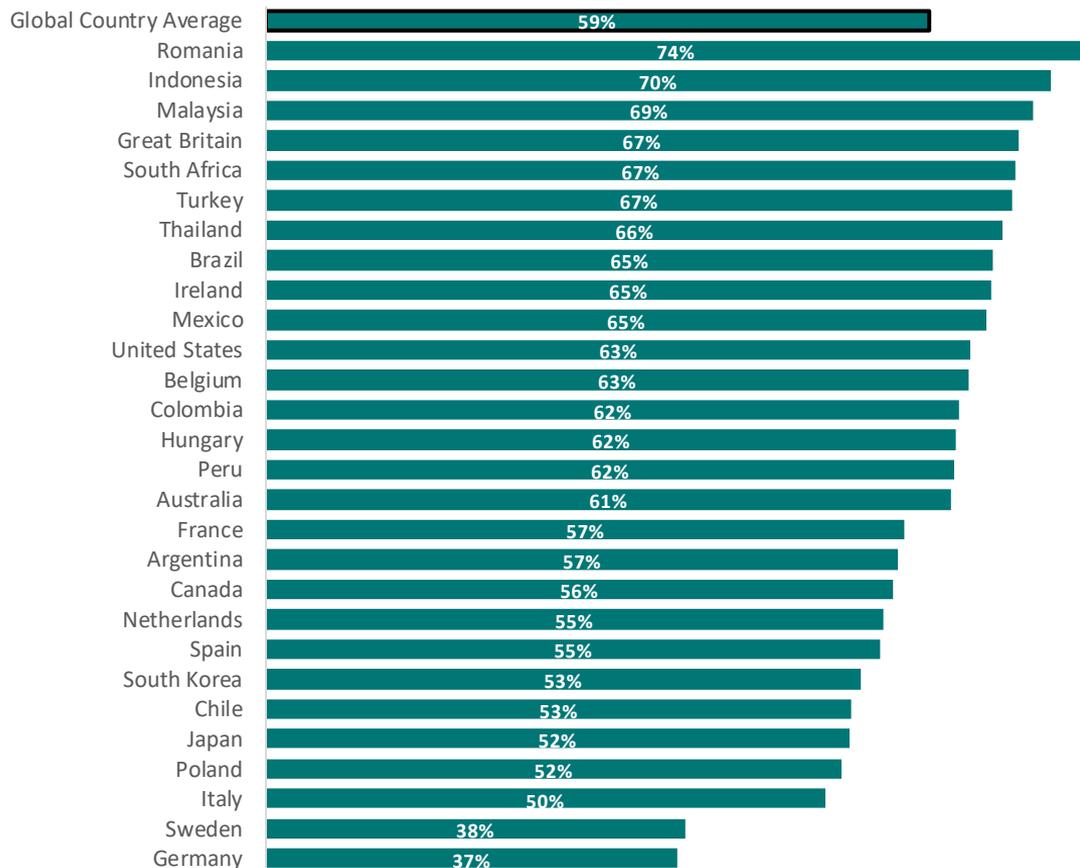
On average globally, 63% agree that traditional parties and politicians don't care about people like them.

More than two-thirds agree in Romania, Turkey, South Africa, Thailand, and all five Spanish-speaking countries in the Americas surveyed (Peru, Chile, Argentina, Colombia, and Mexico).

Fewer than half agree in Sweden, the Netherlands, and Germany.

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[COUNTRY] NEEDS A STRONG LEADER TO TAKE THE COUNTRY BACK FROM THE RICH AND POWERFUL



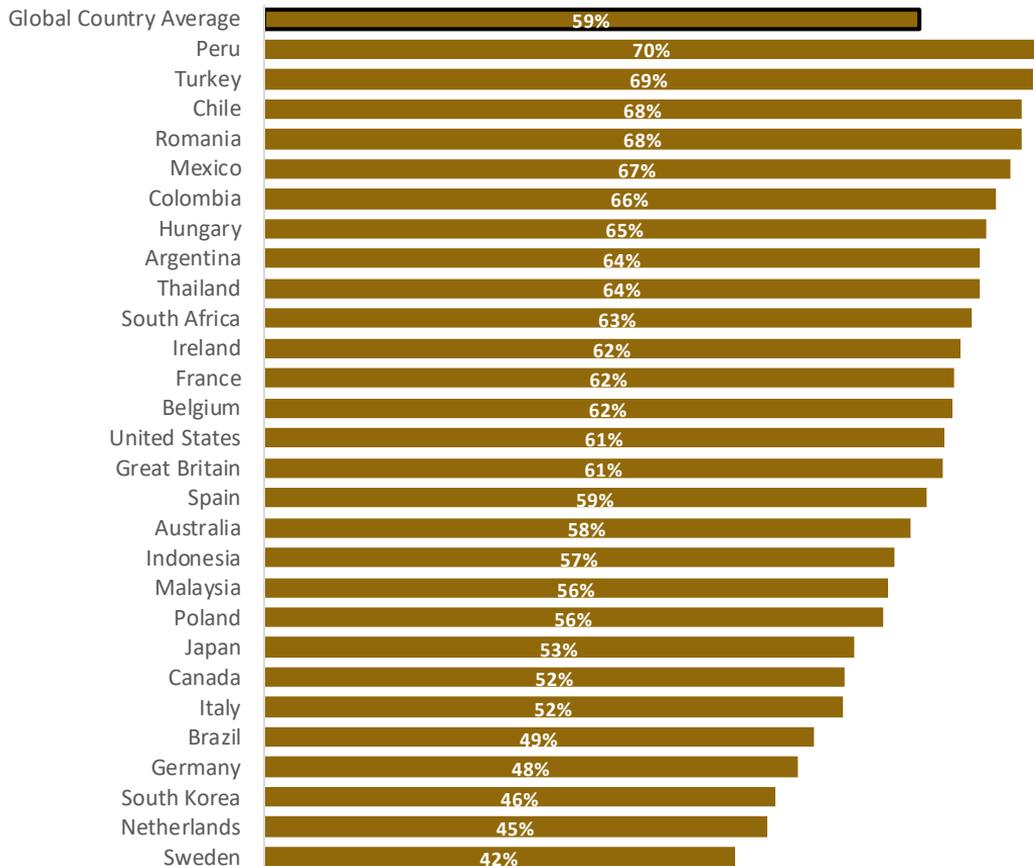
On average, 59% agree that their country needs a strong leader to take the country back from the rich and powerful.

More than two-thirds agree in Romania, Indonesia, Malaysia, Great Britain, South Africa, and Turkey.

Germany and Sweden are the only countries where less than half agree.

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EXPERTS IN THIS COUNTRY DON'T UNDERSTAND THE LIVES OF PEOPLE LIKE ME



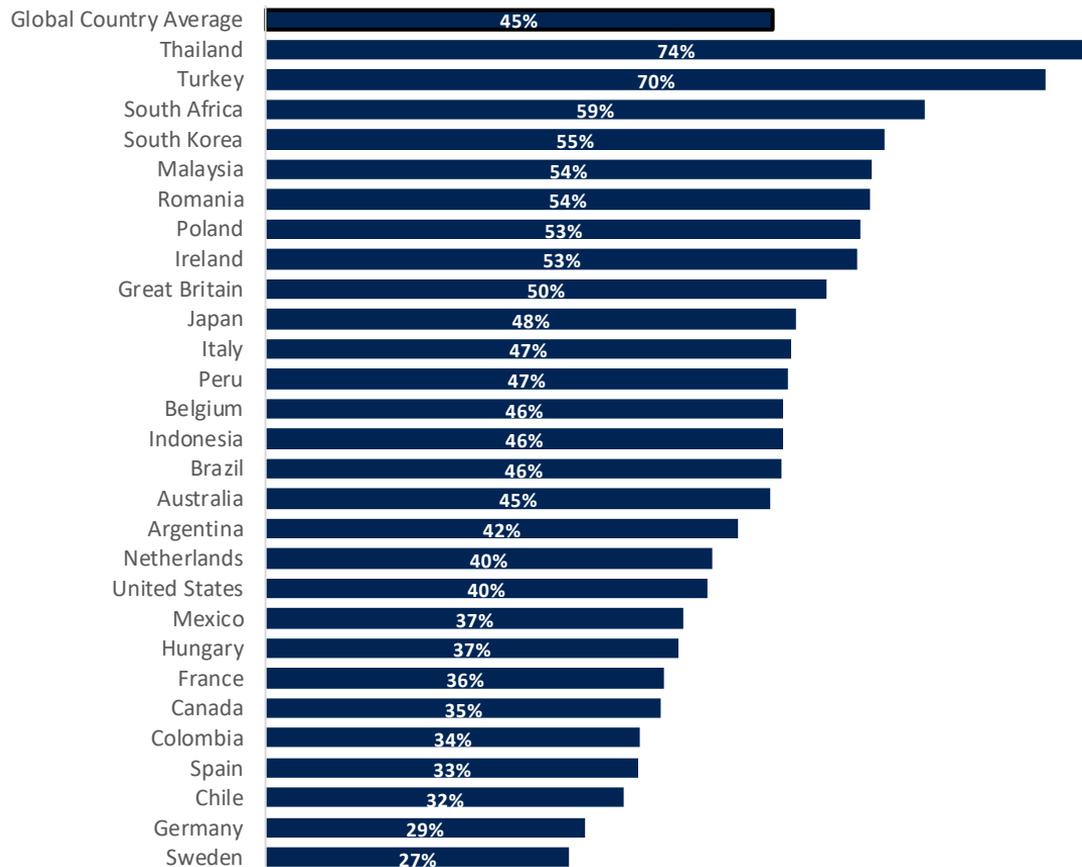
On average, 59% globally believe experts in their country don't understand the lives of people like them.

Agreement is especially high across all Spanish-speaking countries in Latin America (Peru, Chile, Mexico, Colombia, and Argentina), as well as Turkey, Romania and Hungary.

Less than half agree in Sweden, the Netherlands, South Korea, Germany, and Brazil.

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TO FIX [COUNTRY], WE NEED A STRONG LEADER WILLING TO BREAK THE RULES



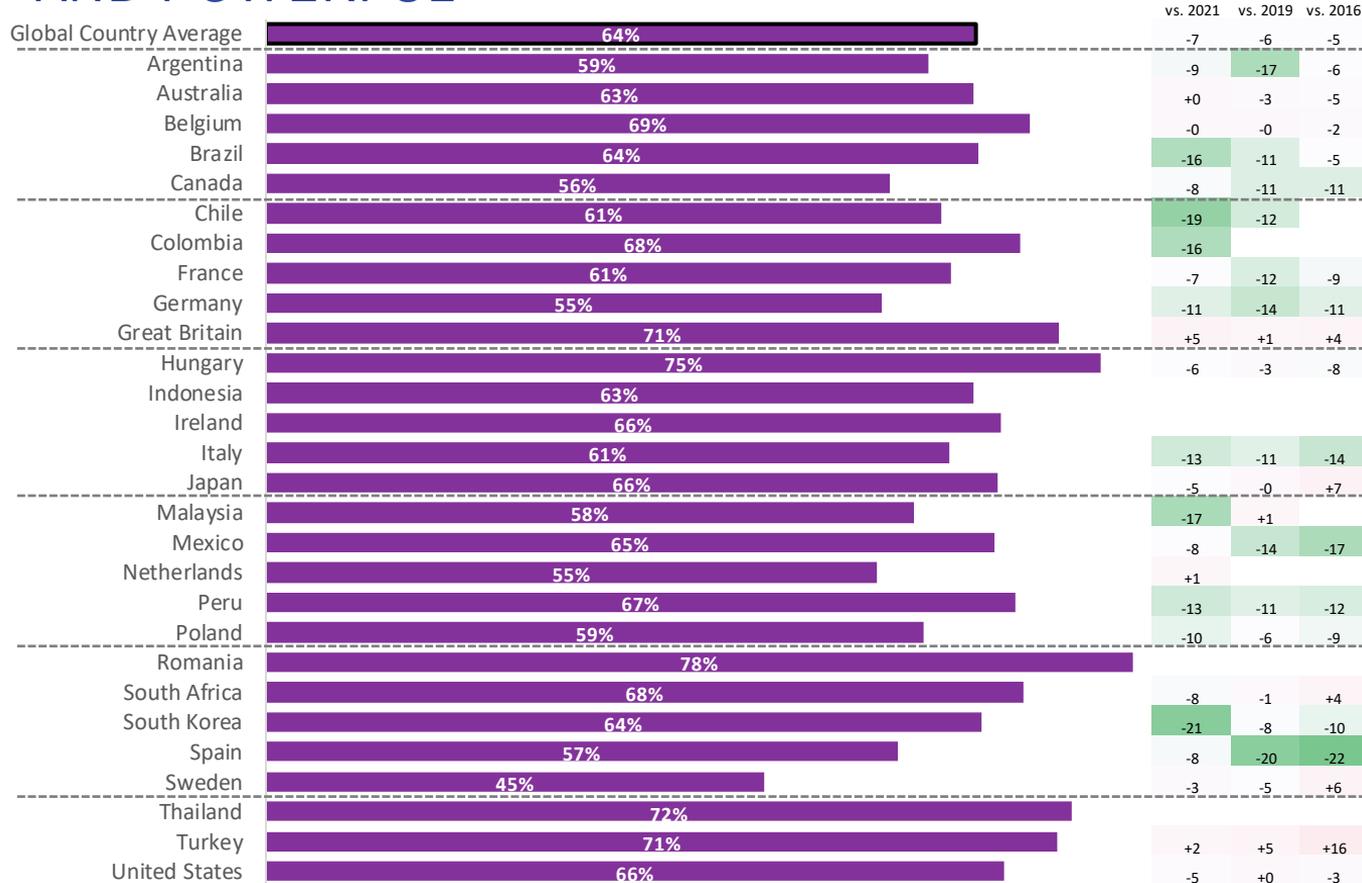
On average, 45% across all 28 countries agree that fixing their country requires a strong leader willing to break the rules.

Agreement is expressed by more than 50% in 8 of the 28 countries with highest percentages in Thailand, Turkey, and South Africa.

Fewer than one third in Sweden, Germany, and Chile agree.

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THE [COUNTRY'S] ECONOMY IS RIGGED TO ADVANTAGE THE RICH AND POWERFUL



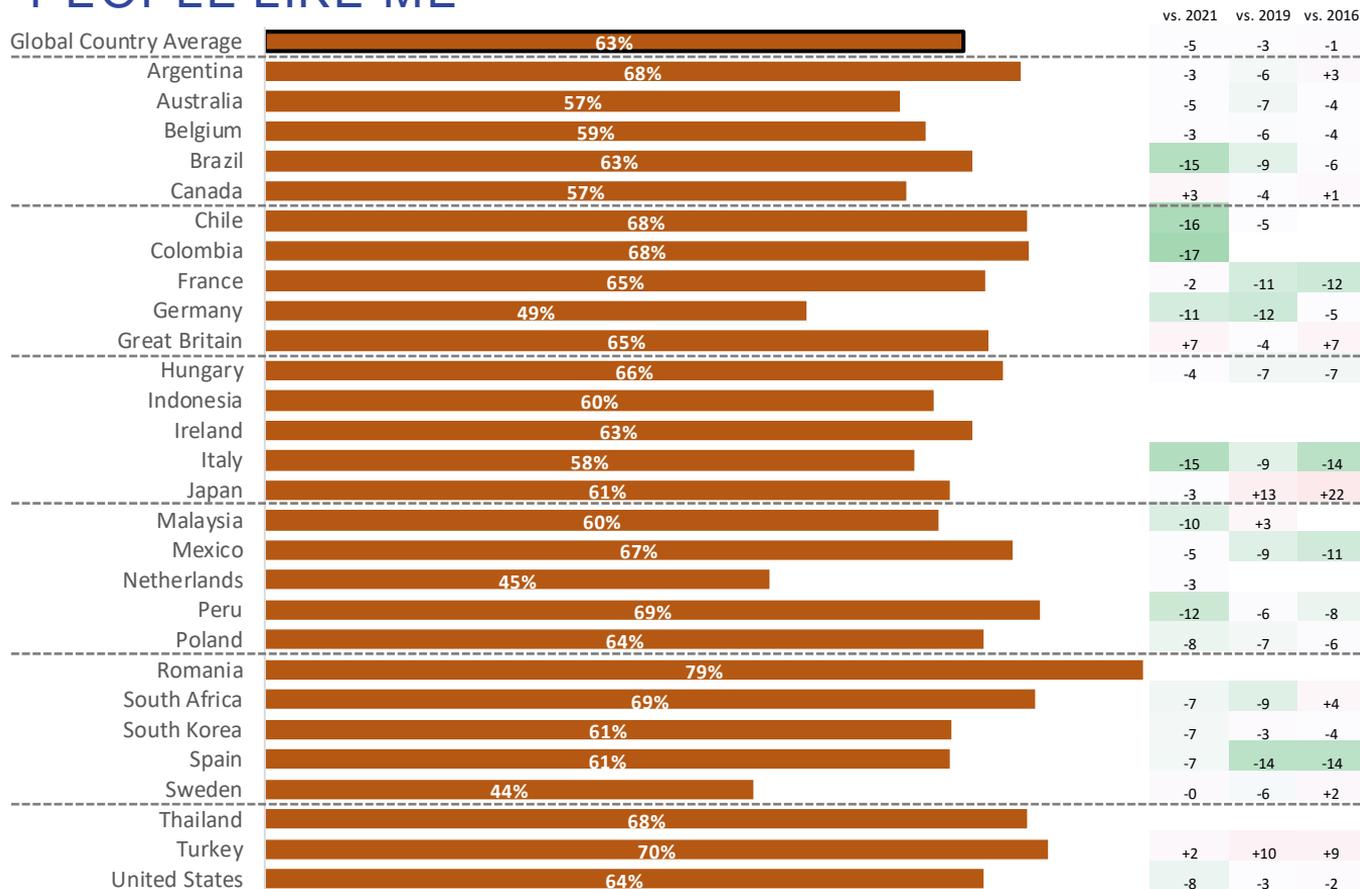
The belief the country's economy is rigged to advantage the rich and powerful has dropped significantly vs. past years in most countries.

Compared to 18 months ago in 2021, it has increased significantly in only one of the 24 countries measured then: Great Britain (by 5 points).

In contrast, it has decreased by at least 5 points in 18 countries; most of all in South Korea, Chile, Malaysia, Brazil, and Colombia – all by more than 15 points.

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TRADITIONAL PARTIES AND POLITICIANS DON'T CARE ABOUT PEOPLE LIKE ME

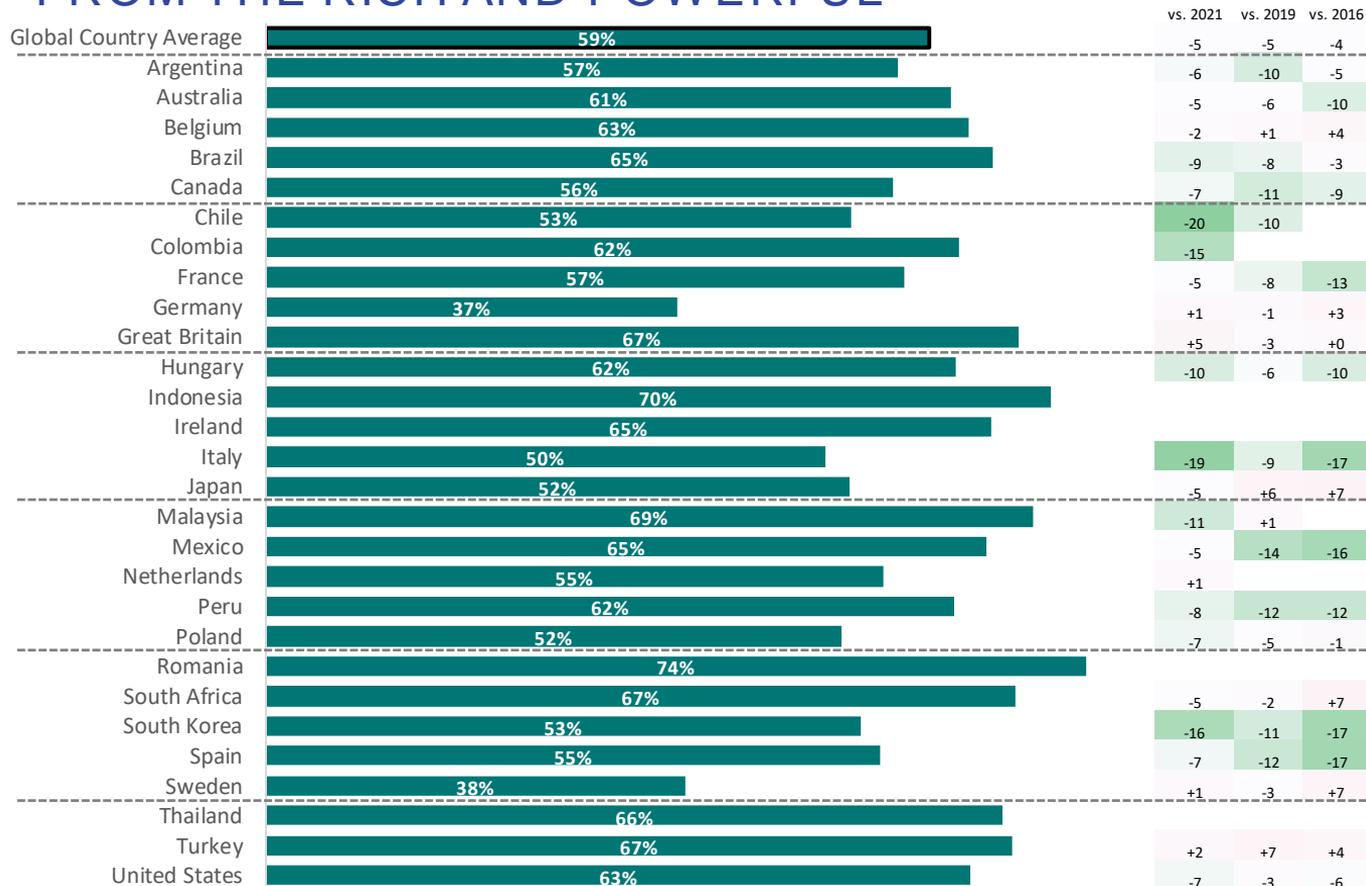


In 14 of the 24 surveyed in March-April 2021, the belief that traditional parties and politicians don't care about the common person is now lower by a significant margin (5 points or more). The drop is steepest in Colombia, Chile, Brazil, Italy, Peru, and Germany – all countries that have had a general or presidential election since then.

Only Great Britain (which has not had a general election in the past 18 months) shows a significant increase.

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[COUNTRY] NEEDS A STRONG LEADER TO TAKE THE COUNTRY BACK FROM THE RICH AND POWERFUL

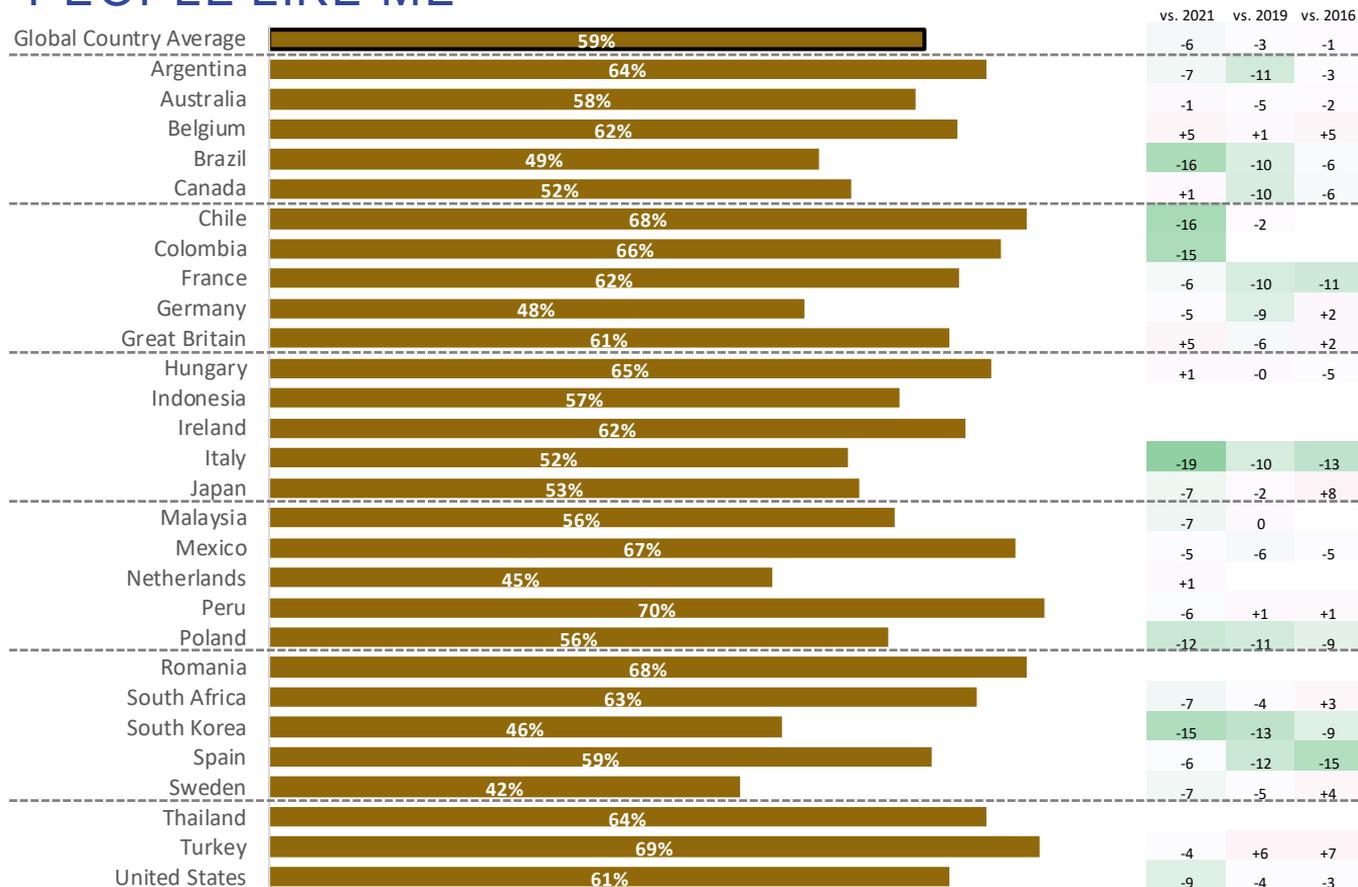


Over the past 18 months, the perceived need for a strong leader to take back the country from the rich and powerful has receded by 5 points or more in 18 of the 24 countries already surveyed in early 2021 – most of all in Chile, Italy, South Korea, and Colombia.

It has become significantly more prevalent in only one country – Great Britain, by 5 points.

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EXPERTS IN THIS COUNTRY DON'T UNDERSTAND THE LIVES OF PEOPLE LIKE ME

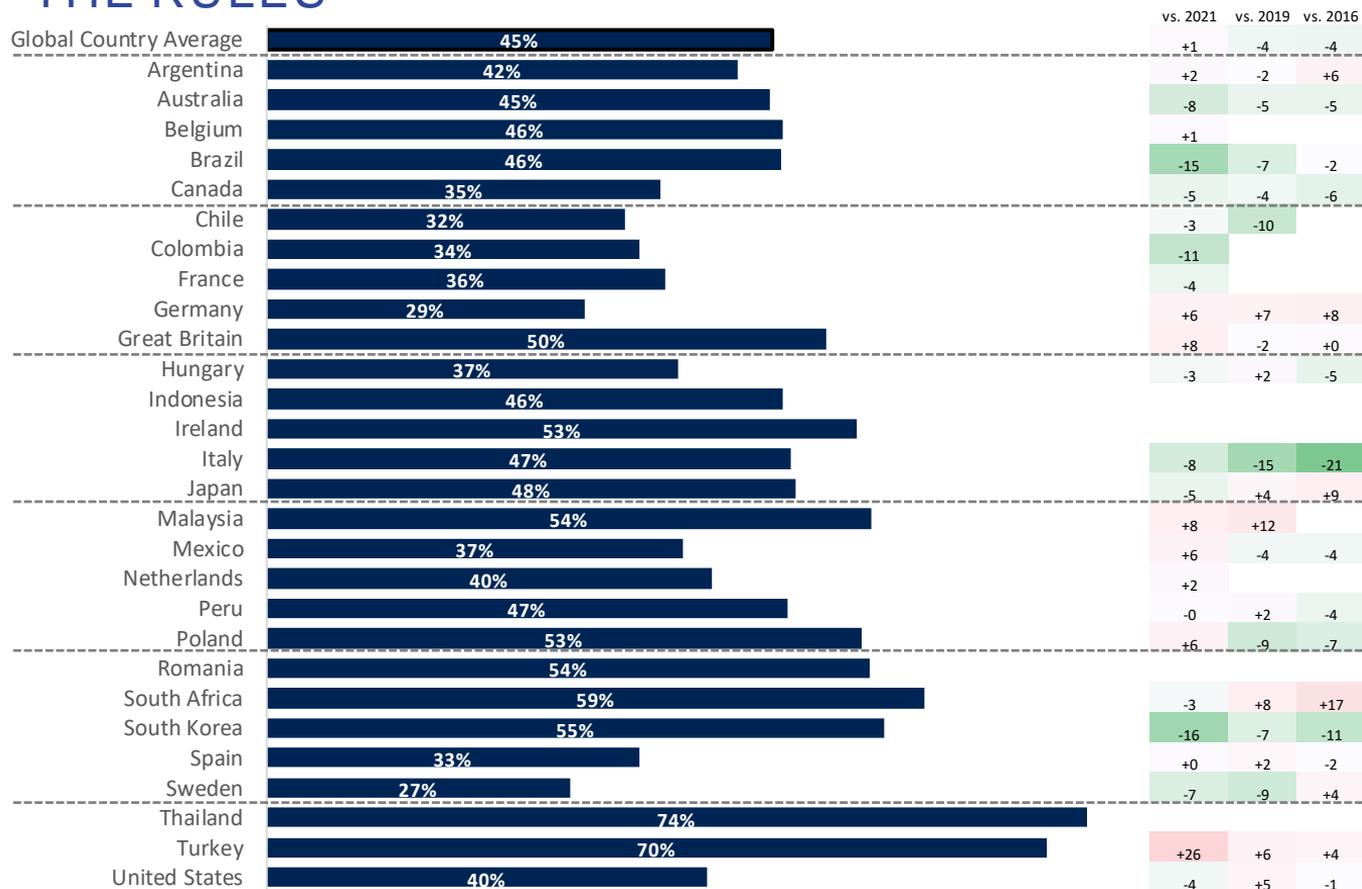


The belief that experts don't understand the lives of the people is down significantly at a global level. It has dropped by 5 points or more in 17 of the 24 countries measured in 2021; by very large margins in Italy, Colombia, Chile, Turkey, South Korea, and Brazil.

Only Great Britain and Belgium are ducking the global trend as the only two countries where the feeling that experts are disconnected from the people is up significantly (both by 5 points).

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TO FIX [COUNTRY], WE NEED A STRONG LEADER WILLING TO BREAK THE RULES



The view that one's country needs a strong leader willing to break the rules is significantly more prevalent than in early 2021 in 6 of the 24 countries measured then – most of all in Turkey (after greatly receding between 2019 and 2021), but also in Great Britain, Malaysia, Germany, Mexico, and Poland.

However, it is significantly less common in 8 other countries, especially South Korea and Brazil.

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Methodology

These are the findings of a 28-country Ipsos survey conducted September 23 – November 4, 2022, among 26,007 adults aged 18-74 in Canada, Malaysia, South Africa, Turkey, and the United States, 20-74 in Thailand, 21-74 in Indonesia, and 16-74 in 21 other countries, via Ipsos's Global Advisor online survey platform.

Each country's sample consists of ca. 1,000 individuals in Argentina, Australia, Brazil, Canada, Chile, Colombia, France, Germany, Great Britain, Indonesia, Italy, Japan, Malaysia, Mexico, the Netherlands, Peru, Poland, Romania, South Africa, South Korea, Spain, Sweden, Thailand and the U.S., and ca. 500 individuals in Belgium, Hungary, Ireland (Republic), and Turkey.

The samples in Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, Italy, Japan, the Netherlands, Poland, Romania, 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, Indonesia, Ireland, Malaysia, Mexico, Peru, South Africa, Thailand, and Turkey are more urban, more educated, and/or more affluent than the general population. The survey results for these markets should be viewed as reflecting the views of the more "connected" segment of their population.

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

The Global average reflects the average result of all the countries and markets where the survey was conducted that year. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result.

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 knows 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.

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

Our tagline "Game Changers" sums up our ambition to help our 5,000 customers move confidently through a rapidly changing world.

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