# POPULISM IN 2024

POPULISM, ANTI-ELITISM AND NATIVISM 28-country Ipsos Global Advisor survey

February 2024

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## GAME CHANGERS Ipsos

## **IPSOS POPULISM SURVEY**

Welcome to the Ipsos Populism survey. This special report is designed to help understand the dynamics of populism and public opinion in a year which will be highlighted in a record number of elections around the world.

We interviewed 20,630 adults in 28 countries around the world between 22 November and 6 December 2023. See appendices for details.

We summarise key findings alongside an analysis of how to measure and understand populism.

Full breakdowns of the findings for each country, including trend data going back to 2016, are also provided.

Please contact **<u>Clifford Young</u>** for more information.

## **Key Findings**



#### **Potential for Populism.**

Anti-establishment sentiment is up slightly from 2022, with many people in many countries holding these views, reflecting widespread frustration with inequality and slower growth.



### Backlash towards immigrants.

59% of people, on average, across the 28 countries polled feel that when jobs are scarce, employers should prioritize hiring people of their country over immigrants.

## In a huge election year, populism is appealing.

An average of 63% across the 28 countries polled feel their country needs a strong leader to take the country back from the rich and powerful. Will autocrats and populists do well in 2024?

## Suspicion of elites is widespread globally.

62% of people on average across the 28 countries polled view elites as a closely connected group of people with similar interests and views. Pluralities in almost all countries surveyed feel elites operate based on their self-interest.

## Pessimism about their country's progress.

Fueling populist sentiment, 58% across the 28 counties polled feel that their country is in decline, and an average of 57% feel their country's society is broken. This is the case in many countries even with good GDP growth.

#### Populists want a different government, not a small government.

Despite support for anti-establishment politics, an average of 75% of those polled support government spending on healthcare, and 67% support spending on reducing poverty and social inequality. Some 74% of people, on average. across the 28 countries polled fear government will do too little to help them in the years ahead – most want activist government of some kind.



## PART 1: MEASURING POPULISM



## 2024 IS A CRUCIAL YEAR

2024 is arguably the largest political experiment in human history, with roughly four billion people going to the polls in 70plus countries. This year will show what works and what doesn't work for voters.

By <u>populism</u>, we mean a political strategy, often harnessing anti-elite sentiment, employed by a political entrepreneur with some specific aim, usually electoral, in mind.

Any successful political entrepreneur depends on two additional pillars: (1) popular support for **anti-establishment actions**, and (2) a **structural opportunity**, such as economic pressures or changing demography, that makes taking political risks palatable. **Public** 

### **CONDITIONS FOR POPULISM** Voice and Leadership POLITICAL **ENTREPRENEUR** PUBLIC **OPPORTUNITY APPEAL STRUCTURE** underlying public underlying conditions that strengthen populist appeal: predisposition to extra-institutional measures institutions · economy · culture Sense of (In)Security

Opinion

## MEASURING POPULIST SUPPORT

At Ipsos, we measure populist support using our "System Is Broken" Index (See slide 22). We first developed the index in Latin America in the early 2000s, redeployed the index to the U.S. in 2015, and have been tracking this sentiment globally since 2016. Critically, the index captures **discontent with the prevailing political establishment** and the **public's willingness for leaders to "break the rules"** in order to fix their country.

Typically, we see long-term **economic and demographic change** as the driving forces behind populist sentiment.

Take, for example, the relatively high percentage of foreign-born people living in the U.S. right now. Politically, former President Donald Trump has taken advantage of these changing demographics by blaming the U.S.' problems on the influx of immigrants. Here, **within a given opportunity structure**, groups like immigrants, elites, experts, and ethnic minorities are blamed for the problems facing the nation. The specific populist target will depend on the **context and country**. But the "blame game" is the hammer of the populist toolbox.

## **The Rise of Populism:** A Global Approach

Entering a new supercycle of uncertainty

lpsos



## MEASURING POPULIST SUPPORT



#### Country in decline

#### On average, across 28 countries polled, two in three say their country is in decline

On average across each of the 28 countries, a majority feel their country's society is in decline, levels that are highest in South Africa (72%), the Netherlands (71%) and Sweden (71%).

In countries with major elections, Great Britain saw an 11-point increase in this sentiment from 2021 (64% in 2023 vs. 52% in 2021). In other countries with major elections in 2024, South Africa had a particularly high feeling that their country is in decline at 72% while the United States hovers just over the average of the 28 countries Ipsos surveyed, at 59%.



#### System is broken

### 28-country average: Three in five say the system is broken

A plurality of respondents (57%) across the 28 countries surveyed feel their country's society is broken, with the exception of Singapore (27%). These levels are highest in South Africa (76%) and Sweden (73%).

A majority of respondents in almost all 28 countries surveyed say their country needs a strong leader to take the country back from the rich and powerful (63% on average across 28 countries). A majority in all 28 countries (67% on average) also believe the main divide in their society is between ordinary citizens and the political and economic elite.



#### Immigration and elites

#### Anti-immigrant sentiment varies widely, as anti-elitism is more uniform

There is a wide disparity between countries when it comes to immigration. Most respondents in Türkiye (77%) say their country would be stronger if it stopped immigration, while Japanese (16%) and South Korean (19%) respondents were the least likely to agree.

A plurality in all 28 countries surveyed feel that the "elites" in their country make decisions based on their own interests over the needs of the of the rest of the people in their country, levels that are highest in Hungary (69%) and Argentina (67%).



## SPOTLIGHT ON SOME KEY 2024 ELECTIONS

Country	Date	Туре	Broken System (28-country average 61%)
Indonesia	February 14	Presidential	62%
India	April to May	Parliamentary	73%
South Africa	May to August	Parliamentary	73%
Mexico	June 2	Presidential	62%
<b>United States</b>	November 5	Presidential	60%
United Kingdom	Latest January 2025	Parliamentary	64%

**Citizens in our 28-country survey are strongly predisposed** to populist and anti-establishment solutions. This sentiment has had a majority leaning in a number of key countries since 2016.

The building blocks of populism are alive and well in 2024. When it comes to select elections this year our survey shows similarly strong tendencies towards populist and anti-system attitudes. <u>Our populism survey</u> points to a loss in faith in many political systems.

"Traditional parties & politicians don't care about people like me" is a case in point. Large majorities in Indonesia, Mexico, South Africa, India, the U.S., and the UK all agree with this statement. Many also believe there is a need for a strong leader to fix their country. Furthermore, large swaths of populations similarly agree that the "system is rigged."

## SPOTLIGHT ON: ANTI-ESTABLISHMENT CONTEXT

Anti-establishment sentiment has been shown to correlate with varying forms of social and political disorganization. This can run the gambit from a breakdown of political norms to violations of constitutional principles, including electoral interference.

Large majorities or pluralities in many countries are suspicious of elites, experts, and immigrants. All these groups are potential scapegoat targets for anti-system, populist leaders. For example, consider "experts." There are large majorities in Indonesia, Mexico, South Africa, India, the U.S., and the UK who view experts in their countries with suspicion. Strong pluralities to majorities in these countries also agree that immigrants should be prohibited from holding a job under certain circumstances. Again, examples of the "other"—a populist ploy—can be found throughout our survey.

**Global citizens are also strongly in favor of government intervention socially and politically**. Supermajorities in Indonesia, Mexico, South Africa, India, the U.S., and the UK believe the government should increase spending on infrastructure, education, healthcare, public safety, create jobs and reduce poverty. Populists are against the prevailing political order, not large, robust government. % who agree that their country needs a strong leader to take the country back from the rich and powerful

63% 28-country average

79% South Africa

38% Germany

See slide 26 for details



## SPOTLIGHT ON: COUNTRY SPECIFICS

Anti-system sentiment has been relatively constant among Americans since 2016. Here, Trump captures the prevailing zeitgeist as the champion of a broken country. Biden, in contrast, is the quintessential establishment candidate. Which worldview will prevail? Establishment or anti-establishment? We will see.

Similarly, anti-system governments in Mexico, Indonesia, and India all are attempting to stay in power. To this end, high levels of anti-system sentiment in these countries reinforce such politics. Modi in India, Subianto in Indonesia, and Sheinbaum in Mexico all are favored to win. But elections are more than just attitudinal leanings. Other mechanisms, like the economy, matter. That said, a sweep here would strengthen the anti-system movement globally—a check on prevailing establishment politics.

In contrast, the UK has a general election later this year. After a rallying-around period during the pandemic, there has been a steep increase in those who feel the country is in decline, with concerns spanning the economy, public services, and immigration. At the moment, Labour is taking advantage of this time-for-change sentiment but is not backed by a lot of public enthusiasm. An establishment party will win in the UK this year against the backdrop of strong anti-system sentiment.

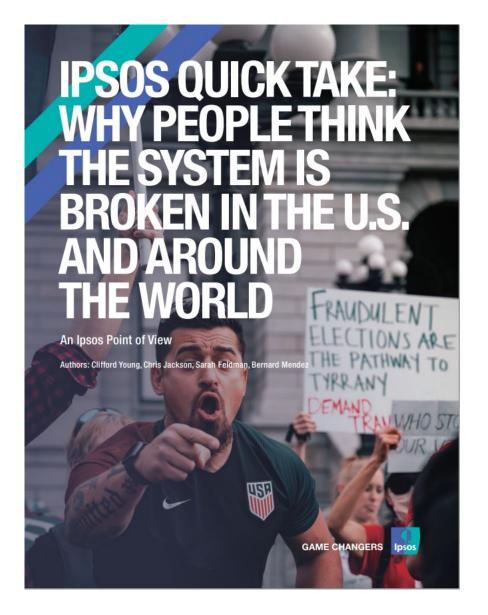
**Finally, South Africa has one dominant establishment party—the ANC**. But cracks are showing, and anti-establishment sentiment is high. The challenges more than likely will come from within the party. We are keeping a special eye on the unique way that anti-system sentiment might manifest itself in South Africa.

## LOOKING AHEAD

**2024 will produce a wide-variety of electoral outcomes.** In some countries, anti-establishment governments have a good chance of staying in power. In others, we can expect a battle between the establishment and anti-establishment.

The U.S. is the classic case of this. Countries like Germany, with its EU parliamentary and district elections this year, will similarly see establishment and anti-establishment candidates face off with uncertain consequences.

Finally, some, like the UK and South Africa, have strong establishment inertia—Britain with its two historical parties and South Africa with the traditionalist party, the ANC. How will antiestablishment fervor show itself across these contexts? It's difficult to say. **But here at Ipsos we will keep the continual pulse of the world in 2024.** 





## PART 2: DATA ON POPULISM



## MOST SAY THEIR COUNTRY'S SOCIETY IS BROKEN



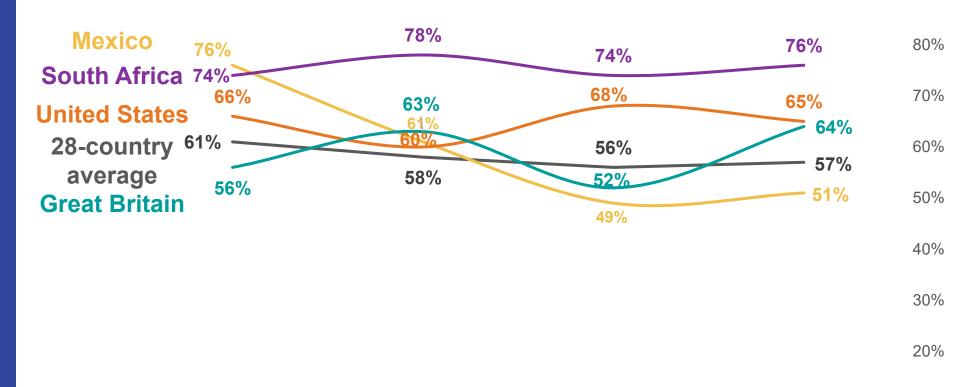


Percent who agree that "[Country's] society is broken" over time

28-country average

57% agree

Base: 20,630 online adults under age 75 across 28 countries, interviewed November 22-December 6, 2023 The "28-country average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result. Samples in Brazil, Chile, Colombia, Indonesia, Malaysia, Mexico, Peru, Philippines, Singapore, South Africa, Thailand, and Turkey are more urban, more educated, and/or more affluent than the general population.



2021

2019

2016



2023

10%

0%

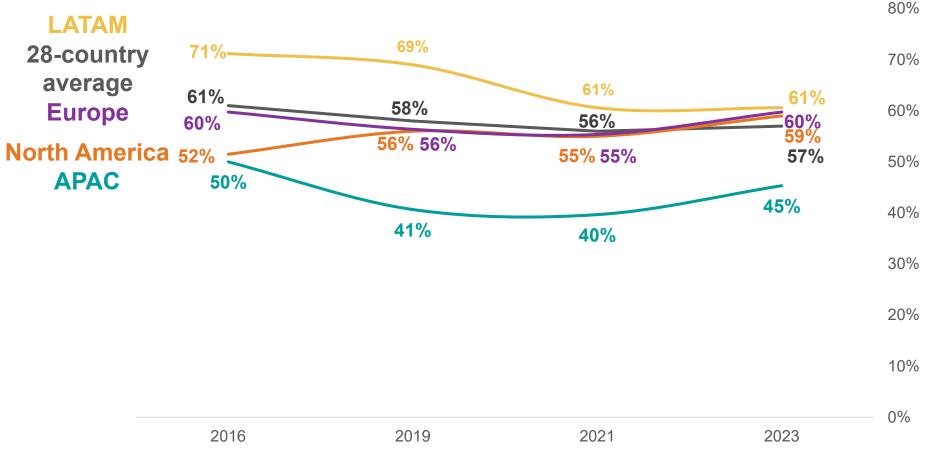
Q Percent who agree that their society is broken

28-country average

57% agree

Countries in regional trend include only those lpsos polled each year of the survey

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•	Agree Neither agree nor disag	gree ■Don't know	W Disagree		2023	2021	2019	2016
28-country average	57%		22% 2%	19%	57%	56%	58%	61%
South Africa	76%		10	<mark>% 2% 13%</mark>	76%	74%	78%	74%
Sweden	73%		13%	1% 13%	73%	60%	49%	51%
Hungary	69%		14%	2% 15%	69%	72%	66%	73%
Germany	67%		20%	2% 11%	67%	61%	63%	61%
Argentina	67%		19%	2% 11%	67%	68%	74%	70%
Netherlands	67%		20%	<mark>2% 11%</mark>	67%	60%	N/A	N/A
Peru	67%		24%	2 <mark>% 7%</mark>	67%	60%	63%	55%
Colombia	66%		22%	1 <mark>% 11%</mark>	66%	64%	N/A	N/A
United States	65%		17%	2% 16%	65%	68%	60%	66%
Chile	64%		21%	2% 13%	64%	69%	57%	%
Great Britain	64%		19%	2% 15%	64%	52%	63%	56%
France	63%		22%	1 <mark>% 14%</mark>	63%	54%	46%	52%
Brazil	62%		19% 19	<b>6 18%</b>	62%	72%	78%	77%
Thailand	61%		20% 1	% 18%	61%	N/A	N/A	N/A
Türkiye	61%		17% 2%	21%	61%	60%	46%	53%
Spain	56%		24% 2%	6 18%	56%	54%	69%	78%
India	54%	9%	7%	30%	54%	N/A	N/A	N/A
Canada	53%		25% 2%	20%	53%	42%	52%	37%
Mexico	51%		33%	3% 13%	51%	49%	61%	76%
Australia	50%	249	<mark>% 2%</mark>	24%	50%	45%	47%	47%
Belgium	50%	3	<b>30%</b> 3%	18%	50%	58%	N/A	N/A
Malaysia	44%	24%	2%	30%	44%	43%	54%	N/A
Japan	44%	29%	3%	25%	44%	41%	32%	31%
South Korea	42%	29%	<mark>2%</mark>	27%	42%	33%	43%	72%
Indonesia	42%	23%	1%    3	5%	42%	N/A	N/A	N/A
Poland	41%	37%	5%	18%	41%	44%	84%	79%
Italy	40%	31%	6%	24%	40%	40%	34%	53%
Singapore	27% 27	'% 1 <mark>%</mark>	45%		27%	N/A	N/A	N/A



28-country average

57% agree

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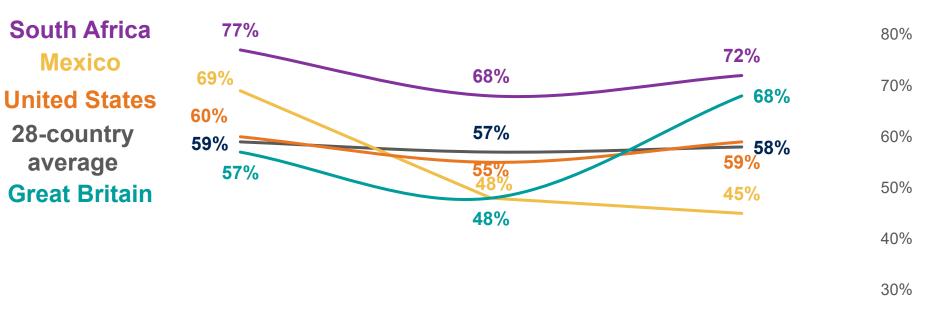


Percent who agree that their country is in decline

28-country average

58% agree

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2021

2016

2023



20%

10%

0%

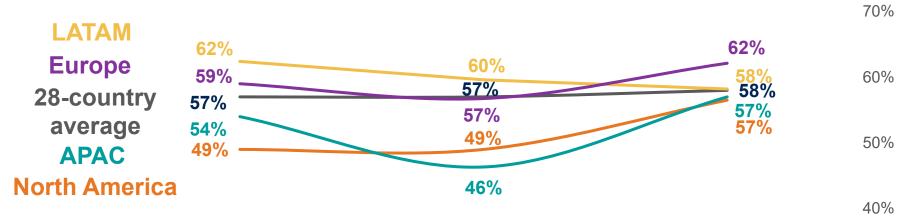
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Agree	e Neither agree nor disagre	e Don	t know 🗖 D	usagree		2023	2021	2016
28-country average	58%		22%	2%	18%	58%	57%	57%
South Africa	72%				2% 12%	72%	68%	77%
Netherlands	71%			18%	1 <mark>% 10%</mark>	71%	58%	N/A
Sweden	71%			<b>14%</b> 2	% 13%	71%	55%	53%
France	70%			19%	1 <mark>% 11%</mark>	70%	58%	67%
Great Britain	68%			16% 29	% 14%	68%	48%	57%
Japan	68%			20%	<mark>3% 9%</mark>	68%	62%	40%
Peru	67%			22%	2% 9%	67%	59%	44%
Argentina	67%			20%	3% 11%	67%	68%	58%
Türkiye	65%		1	5% 1 <mark>%</mark>	18%	65%	61%	55%
Germany	63%		2	21% 29	<b>% 14%</b>	63%	47%	47%
Hungary	63%		18	3% 2%	16%		63%	70%
Chile	63%		2	22%	.% 12%	63%	68%	N/A
Colombia	62%			24%	2% 12%	62%	67%	N/A
Italy	61%		225	% 2%	16%	61%	65%	73%
Spain	59%		24%	6 2 <u>%</u>	15%	59%	54%	69%
United States	59%		21%	3%	17%	59%	55%	60%
Thailand	59%		21%	2%	18%	59%	N/A	N/A
South Korea	55%		22%	2 <mark>%</mark>	21%	55%	41%	73%
India	54%		7% 6%	32%	6	54%	N/A	22%
Canada	54%		27%	2%	17%	54%	43%	38%
Brazil	53%		23%	2 <mark>%</mark>	23%		69%	72%
Malaysia	52%		22%	2%	24%	52%	55%	N/A
Belgium	49%		30%	4%	17%	49%	55%	64%
Australia	48%		27%	3%	23%	48%	36%	49%
Mexico	45%		36%	2%	18%	45%	48%	69%
Indonesia	42%	26%	<b>%</b> 0 <mark>%</mark>	31%	6	42%	N/A	N/A
Poland	36%	28%	2%	34%		36%	57%	50%
Singapore	30% 28	8%	1%	42%		30%	N/A	N/A
	28-country average South Africa Netherlands Sweden France Great Britain Japan Peru Argentina Türkiye Germany Hungary Chile Colombia Italy Spain United States Thailand South Korea India South Korea Brazil Malaysia Belgium Australia Mexico Indonesia Poland	28-country average South Africa58%South Africa72%Netherlands71%Sweden71%France70%Great Britain68%Japan68%Peru67%Argentina67%Türkiye65%Germany63%Hungary63%Chile63%Colombia62%Italy61%Spain59%United States59%Thailand59%South Korea55%India54%Canada54%Brazil53%Malaysia52%Belgium49%Australia48%Mexico45%Indonesia42%Poland36%	28-country average58%South Africa72%Netherlands71%Sweden71%France70%Great Britain68%Japan68%Peru67%Argentina67%Türkiye65%Germany63%Hungary63%Colombia62%Italy61%Spain59%United States59%Thailand59%South Korea55%India54%Brazil53%Malaysia52%Belgium49%Australia48%Mexico45%Indonesia42%26528%	28-country average         58%         22%           South Africa         72%         1           Netherlands         71%         1       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28-country average

58% agree

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## BROKEN SYSTEM INDEX

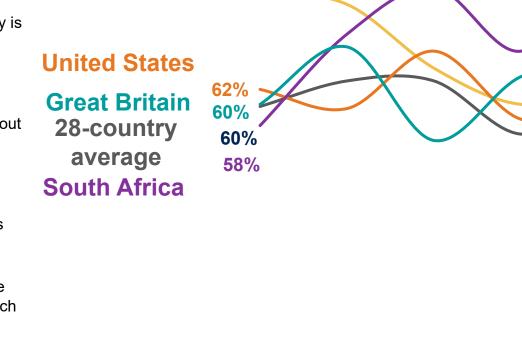


#### Q Ipsos' System Is Broken Index

- 28-country average
- 61% agree

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- 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



2016

2021

2019

2022

71%

Mexico



80%

75%

70%

65%

60%

55%

50%

45%

40%

35%

30%

2023

73%

64%

**62%** 

60%

#### Q TREND System Is Broken Index

28-country average

#### 61% agree

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agree	2023	2022	2021	2019	2016
00					
28-country average	61%	57%	62%	62%	60%
Thailand	76%	69%	N/A	N/A	N/A
South Africa	73%	65%	71%	67%	58%
India	73%	N/A	N/A	N/A	65%
Peru	70%	63%	71%	68%	70%
Brazil	67%	57%	72%	66%	62%
South Korea	66%	56%	71%	64%	66%
Hungary	66%	61%	65%	64%	66%
Türkiye	65%	69%	64%	63%	61%
Argentina	64%	58%	63%	67%	59%
Great Britain	64%	63%	57%	66%	60%
Colombia	63%	60%	74%	N/A	N/A
France	63%	56%	61%	71%	74%
Malaysia	62%	59%	67%	56%	N/A
Mexico	62%	60%	64%	70%	71%
Indonesia	62%	59%	N/A	N/A	N/A
Australia	60%	57%	61%	62%	62%
United States	60%	59%	65%	60%	62%
Japan	59%	56%	61%	52%	45%
Chile	59%	56%	71%	64%	N/A
Canada	58%	51%	54%	59%	56%
Italy	57%	54%	68%	64%	69%
Belgium	56%	60%	60%	64%	63%
Spain	55%	53%	59%	64%	67%
Poland	52%	57%	63%	64%	63%
Singapore	52%	N/A	N/A	N/A	N/A
Sweden	49%	39%	42%	45%	35%
Netherlands	48%	48%	48%	N/A	N/A
Germany	48%	44%	47%	49%	44%



#### Neither agree nor disagree Don't know Disagree Agree 2023 2022 2021 2019 2016 67% 63% 71% 70% 68% 28-country average 67% 3% 18% 11% 80% 68% 76% 69% 64% South Africa 80% 10% 2% 8% 79% 72% N/A N/A N/A Thailand 79% 12% 1% 7% 79% 67% 80% 78% 79% 2% 7% Peru 79% 12% 78% 75% 81% 78% 83% 78% 12% 8% 7% Hungary 76% 64% 85% 72% 74% 76% 3% 6% South Korea 15% 74% 64% 80% 75% 69% 13% Brazil 74% **3% 10%** 72% 71% 69% 66% 55% Türkiye 72% 4% 14% 10% 71% 2% 11% 71% 68% 84% N/A N/A Colombia 15% India 71% 10% 6% 71% N/A N/A N/A 63% 13% 70% 70% 61% 68% 73% 70% France 18% 2% 10% Great Britain 3% 10% 70% 71% 66% 70% 67% 70% 17% 68% 3% 9% 68% 59% 68% 76% 65% 19% Argentina 2% 9% 68% 65% 73% 79% 82% Mexico 68% 21% 4% 9% 67% 66% 71% 66% 55% 67% 20% Japan 3% 11% 67% 61% 74% 72% 67% 19% 75% Italy Indonesia 67% 22% 67% 63% N/A N/A N/A 0% 11% **United States** 66% 5% 9% 20% 66% 66% 71% 66% 69% Chile 65% 5% 17% 13% 65% 61% 80% 73% N/A Malaysia 3% 11% 58% 75% 57% 65% 21% 65% N/A Australia 65% 9% 65% 63% 63% 66% 68% 22% 4% Canada 64% 5% 64% 56% 64% 67% 59% 20% 11% Germany 62% 3% 55% 66% 69% 21% 14% 62% 66% Spain 61% 3% 61% 57% 65% 77% 79% 25% 12% Belgium 5% 61% 21% 14% 61% 69% 69% 69% 71% Poland 58% 25% 4% 13% 58% 59% 69% 65% 68% Sweden 58% 16% 4% 23% 45% 48% 50% 58% 39% 2% Singapore 53% 26% 19% 53% N/A N/A N/A N/A

4%

24%

24%

### Q

## The economy is rigged to advantage the rich and powerful

28-country average

67% agree

Base: 20,630 online adults under age 75 across 28 countries, interviewed November 22-December 6, 2023 The "28-country average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result. Samples in Brazil, Chile, Colombia, Indonesia, Malaysia, Mexico, Peru, Philippines, Singapore, South Africa, Thailand, and Turkey are more urban, more educated, and/or more affluent than the general population.

Netherlands

48%

lpsos

N/A

N/A

55% 54%

N/A

N/A

68%

63% 78%

70%

N/A

N/A

N/A

72%

60%

N/A

69%

67%

16%

26%

17%

21%

20%

22%

23%

25%

21%

22%

25%

24%

23%

3%

2%

23%

26%

5%

26%

22%

25%

31%

3%

4%

3%

3%

0%

4%

5%

24%

23%

27%

3%

4%

4%

2%

12%

1% 6%

11%

14%

3% 11%

2% 11%

2% 11%

12%

13%

13%

11%

11%

15%

12%

14%

2% 9%

N/A

64%

N/A

N/A

69%

61%

#### Neither agree nor disagree Don't know Disagree Agree 2023 2022 2021 2019 2016 64% 62% 68% 67% 64% 28-country average 64% 21% 3% 12% 79% 69% 81% 75% 77% 79% 13% 3% 5% Peru 74% 69% 76% 78% 65% South Africa 74% 14% 1% 11% 73% 66% 70% 73% 73% 73% 2% 11% Hungary 14% 72% 68% 84% 73% 72% 3% 10% Chile 15% 72% India 72% 10% 6% 12% 72% 68% 85% Colombia 72% 18% 3% 7% 71% 65% 66% 75% 76% France 71% 2% 10% 18% Thailand 70% 3% 9% 70% 68% 19% 68% 71% 74% 65% Argentina 69% 19% 3% 10% 69%

69%

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62%

62%

62%

61%

59%

58%

57%

51%

44%

43%

Brazil

Türkiye

Mexico

Spain

Poland

Malaysia

Indonesia

Japan

Canada

Germany

Belgium

Australia

Sweden

Netherlands

Singapore

Italy

Great Britain

United States

South Korea

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

28-country average

64% agree

Q

Base: 20,630 online adults under age 75 across 28 countries, interviewed November 22-December 6, 2023 The "28-country average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result. Samples in Brazil, Chile, Colombia, Indonesia, Malaysia, Mexico, Peru, Philippines, Singapore, South Africa, Thailand, and Turkey are more urban, more educated, and/or more affluent than the general population.

66%67%72%76%78%66%65%58%69%58%65%64%72%67%66%65%61%68%64%65%64%61%68%75%75%64%58%73%67%72%63%64%72%71%70%62%60%70%57%N/A62%60%N/AN/AN/A62%61%54%61%56%59%49%59%60%53%58%59%62%64%61%51%44%44%50%42%43%N/AN/AN/AN/A					
65%64%72%67%66%65%61%68%64%65%64%61%68%75%75%64%58%73%67%72%63%64%72%71%70%62%60%70%57%N/A62%60%N/AN/AN/A62%61%64%48%39%61%57%54%61%56%59%49%59%60%53%57%57%62%65%63%57%57%62%64%61%51%44%44%50%42%44%45%48%N/AN/A	66%	67%	72%	76%	78%
65%61%68%64%65%64%61%68%75%75%64%58%73%67%72%63%64%72%71%70%62%60%70%57%N/A62%60%N/AN/AN/A62%61%64%48%39%61%57%54%61%56%59%49%59%60%53%58%59%62%65%63%57%57%62%64%61%51%44%44%50%42%44%45%48%N/AN/A	66%	65%	58%	69%	58%
64%61%68%75%75%64%58%73%67%72%63%64%72%71%70%62%60%70%57%N/A62%60%N/AN/AN/A62%61%64%48%39%61%57%54%61%56%59%49%59%60%53%58%59%62%65%63%57%57%62%64%61%51%44%44%50%42%44%45%48%N/AN/A	65%	64%	72%	67%	66%
64%58%73%67%72%63%64%72%71%70%62%60%70%57%N/A62%60%N/AN/AN/A62%61%64%48%39%61%57%54%61%56%59%49%59%60%53%58%59%62%65%63%57%57%62%64%61%51%44%44%50%42%44%45%48%N/AN/A	65%	61%	68%	64%	65%
63%64%72%71%70%62%60%70%57%N/A62%60%N/AN/AN/A62%61%64%48%39%61%57%54%61%56%59%49%59%60%53%58%59%62%65%63%57%57%62%64%61%51%44%44%50%42%44%45%48%N/AN/A	64%	61%	68%	75%	75%
62%60%70%57%N/A62%60%N/AN/AN/A62%61%64%48%39%61%57%54%61%56%59%49%59%60%53%58%59%62%65%63%57%57%62%64%61%51%44%44%50%42%44%45%48%N/AN/A	64%	58%	73%	67%	72%
62%60%N/AN/AN/A62%61%64%48%39%61%57%54%61%56%59%49%59%60%53%58%59%62%65%63%57%57%62%64%61%51%44%44%50%42%44%45%48%N/AN/A	63%	64%	72%	71%	70%
62%61%64%48%39%61%57%54%61%56%59%49%59%60%53%58%59%62%65%63%57%57%62%64%61%51%44%44%50%42%44%45%48%N/AN/A	62%	60%	70%	57%	N/A
61%57%54%61%56%59%49%59%60%53%58%59%62%65%63%57%57%62%64%61%51%44%44%50%42%44%45%48%N/AN/A	62%	60%	N/A	N/A	N/A
59%49%59%60%53%58%59%62%65%63%57%57%62%64%61%51%44%44%50%42%44%45%48%N/AN/A	62%	61%	64%	48%	39%
58%         59%         62%         65%         63%           57%         57%         62%         64%         61%           51%         44%         44%         50%         42%           44%         45%         48%         N/A         N/A	61%	57%	54%	61%	56%
57%         57%         62%         64%         61%           51%         44%         44%         50%         42%           44%         45%         48%         N/A         N/A	59%	49%	59%	60%	53%
51%44%44%50%42%44%45%48%N/AN/A	58%	59%	62%	65%	63%
44% 45% 48% N/A N/A	57%	57%	62%	64%	61%
	51%	44%	44%	50%	42%
43% N/A N/A N/A N/A	44%	45%	48%	N/A	N/A
	43%	N/A	N/A	N/A	N/A

DSO

#### Neither agree nor disagree Don't know Disagree Agree 2023 2022 2021 2019 2016 63% 59% 64% 63% 62% 28-country average 3% 63% 20% 14% 80% 66% 80% 12% 2% 6% N/A N/A N/A Thailand 79% 67% 72% 69% 60% South Africa 79% 11% 1% 9% 77% 70% N/A N/A N/A 77% 19% Indonesia 1%4% 76% 69% 80% 68% N/A Malaysia 76% 16% 2% 7% 74% 71% 74% N/A N/A N/A India 8% 6% 11% 72% 62% 70% 74% 74% 72% Peru 2% 9% 17% 71% 62% 72% 69% 60% 71% 2% 10% 17% Hungary 69% 4% 69% 57% 63% 67% 62% Argentina 13% 14% Great Britain 68% 4% 68% 67% 62% 70% 67% 17% 10% 68% 68% 65% 74% 73% 68% Brazil 18% 3% 12% 67% 3% 10% 67% 61% 66% 67% 71% Australia 21% Türkiye 66% 3% 66% 67% 65% 60% 63% 18% 14% United States 66% 4% 10% 66% 63% 70% 66% 69% 20% 5% 66% 56% 63% 67% 65% Canada 66% 19% 11% 65% 3% 53% 69% South Korea 20% 13% 65% 64% 70% Mexico 65% 2% 12% 65% 65% 70% 79% 81% 21% 64% 3% Colombia 19% 15% 64% 62% 77% N/A N/A 3% 57% 62% 65% France 62% 22% 14% 62% 70% 58% 3% 55% 62% 67% Spain 25% 58% 72% 14% Belgium 58% 4% 58% 63% 65% 62% 59% 24% 15% 3% Singapore 57% 57% N/A N/A 25% N/A N/A 15% 57% 21% 4% Chile 18% 57% 53% 72% 62% N/A 55% 30% 5% 11% 55% 57% Japan 52% 46% 45% 52% 3% Netherlands 23% 23% 52% 55% 54% N/A N/A Italy 51% 24% 4% 21% 51% 50% 69% 59% 67% 48% 30% 4% 17% Poland 48% 52% 59% 57% 53% 4% Sweden 47% 22% 26% 47% 38% 37% 41% 31%

4%

35%

24%

38%

Germany

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

28-country average

63% agree

Q

Base: 20,630 online adults under age 75 across 28 countries, interviewed November 22-December 6, 2023 The "28-country average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result. Samples in Brazil, Chile, Colombia, Indonesia, Malaysia, Mexico, Peru, Philippines, Singapore, South Africa, Thailand, and Turkey are more urban, more educated, and/or more affluent than the general population.



37% 36% 38% 34%

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

28-country average

62% agree

Base: 20,630 online adults under age 75 across 28 countries, interviewed November 22-December 6, 2023 The "28-country average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result. Samples in Brazil, Chile, Colombia, Indonesia, Malaysia, Mexico, Peru, Philippines, Singapore, South Africa, Thailand, and Turkey are more urban, more educated, and/or more affluent than the general population.

<b>–</b> A	Agree Neither agree nor disagree	Don't know	Disagree	0000	-	4 0040 0040
						1 2019 2016
28-country average	62%		<b>22%</b> 3%	<b>13%</b> 62%	58% 65%	
India	73%		8% 6%	<b>13%</b> 73%	N/A N//	
Colombia	72%		17% 2%	<b>10%</b> 72%	66% 819	
South Africa	72%		17% 2%	<b>10%</b> 72%	63% 70%	
France	71%		19% 2	<b>% 8%</b> 71%	62% 689	
Peru	71%		19%	<b>3% 7%</b> 71%	70% 75%	
Argentina	70%		19% 3	<b>% 8%</b> 70%	64% 719	
Thailand	68%		18% 2%	<b>12%</b> 68%	64% N/	
Chile	67%		20% 4%	10% 67%	68% 849	
Mexico	66%		22% 1%	<b>10%</b> 66%	67% 729	
Türkiye	66%		18% 4%	<b>12%</b> 66%	69% 739	
Spain	65%		23% 3%		59% 65%	
Great Britain	64%		20% 4%	<b>12%</b> 64%	61% 569	
United States	63%		23% 4%	10% 63%	61% 70%	
Hungary	63%		20% 4%	<b>13%</b> 63%	65% 649	
Brazil	62%		22% 3%	<b>13%</b> 62%	49% 65%	
Italy	62%		25% 3%	<b>10%</b> 62%	52% 719	
Australia	60%		22% 4%	<b>15%</b> 60%	58% 599	
Malaysia	60%		22% 3%	<b>15%</b> 60%	56% 639	
Japan	59%		26% 4%	<b>10%</b> 59%	53% 60%	
South Korea	58%		27% 3%	<b>13%</b> 58%	46% 619	
Canada	56%		27% 4%	<b>13%</b> 56%	52% 519	
Belgium	56%		26% 4%	<b>14%</b> 56%	62% 57	
Indonesia	56%		<b>29%</b> 0 <mark>%</mark>	<b>15%</b> 56%	57% N/	
Poland	53%	3	0% 4%	14% 53%	56% 679	
Germany	53%	27	<mark>% 3%</mark> 1	.6% 53%	48% 539	
Sweden	50%	24%	4% 229		42% 499	
Singapore	50%	28%	2% 20		N/A N/	
Netherlands	50%	25%	4% 219	<b>6</b> 50%	45% 449	% N/A N/A





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

28-country average

49% agree

Base: 20,630 online adults under age 75 across 28 countries, interviewed November 22-December 6, 2023 The "28-country average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result. Samples in Brazil, Chile, Colombia, Indonesia, Malaysia, Mexico, Peru, Philippines, Singapore, South Africa, Thailand, and Turkey are more urban, more educated, and/or more affluent than the general population.

28-country average	49%		21	% 4%		27%	
Thailand		85%				9% 2% <mark>4</mark> %	6
India		73%			9%	6% 12%	
South Korea	66%	%			21%	<mark>3% 11%</mark>	
South Africa	62%			15%	4%	19%	
Brazil	62%			16%	3%	20%	
Singapore	57%			26%		2% 15%	
Great Britain	53%			23%	4%	21%	
Australia	52%			26%	3%	20%	
Japan	52%			30%		5% 13%	
Türkiye	52%				4%	24%	
Peru	50%		17%	5 2%		31%	
Malaysia	49%		20	% 4%		27%	
Indonesia	47%		21%	0 <mark>%</mark>		32%	
Netherlands	46%		17%	4%		33%	
Argentina	46%		19%	4%		32%	
Belgium	46%		25%			25%	
Canada	45%		24%	4%		27%	
Hungary	45%		25%		5	27%	
Mexico	44%		21%	<mark>2%</mark>		33%	
France	43%		25%	5%		27%	
Italy	43%		21%	4%		32%	
United States	40%		27%	6%		27%	
Poland	39%		26%	5%		30%	
Colombia	38%	2	2%	4%	37	7%	
Sweden	37%	16%	3%		45%		
Chile	32%	22%	4%		42%		
Spain	29%	25%	5%		41%	6	
Germany	27%	24%	4%		45%		

Neither agree nor disagree
Don't know

Disagree

Agree

% agree

2023 2022 2021 2019 2016

2025	2022	2021	2013	2010
49%	45%	44%	46%	46%
85%	74%	N/A	N/A	N/A
73%	N/A	N/A	N/A	65%
66%	55%	71%	62%	66%
62%	59%	62%	51%	42%
62%	46%	61%	53%	48%
57%	N/A	N/A	N/A	N/A
53%	50%	42%	52%	50%
52%	45%	53%	50%	50%
52%	48%	52%	44%	39%
52%	70%	44%	64%	66%
50%	47%	47%	45%	51%
49%	54%	46%	42%	N/A
47%	46%	N/A	N/A	N/A
46%	40%	38%	N/A	N/A
46%	42%	40%	44%	36%
46%	46%	45%	N/A	N/A
45%	35%	40%	39%	41%
45%	37%	40%	35%	42%
44%	37%	31%	41%	41%
43%	36%	40%	N/A	80%
43%	47%	55%	62%	68%
40%	40%	43%	35%	40%
39%	53%	47%	62%	60%
38%	34%	44%	N/A	N/A
37%	27%	34%	36%	23%
32%	32%	35%	42%	N/A
29%	33%	33%	31%	35%
27%	29%	23%	22%	21%
21/0				



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

2023	2021
58%	60%
74%	N/A
73%	N/A
73%	73%
69%	67%
69%	72%
66%	65%
64%	59%
63%	70%
62%	61%
62%	69%
61%	68%
60%	N/A
59%	70%
59%	58%
56%	56%
55%	49%
54%	61%
52%	63%
51%	45%
51%	57%
51%	63%
50%	53%
50%	54%
50%	49%
48%	N/A
45%	46%
44%	51%
42%	52%



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

28-country average

58% agree

Q

Base: 20,630 online adults under age 75 across 28 countries, interviewed November 22-December 6, 2023 The "28-country average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result. Samples in Brazil, Chile, Colombia, Indonesia, Malaysia, Mexico, Peru, Philippines, Singapore, South Africa, Thailand, and Turkey are more urban, more educated, and/or more affluent than the general population.

			-	
28-country average	58%	24%	4%	15%
India	74%		9% 6	% 11%
Thailand	73%		17%	2% 7%
South Africa	73%		16%	<mark>4% 8%</mark>
Hungary	69%		19%	<mark>3% 10%</mark>
South Korea	69%		20%	<mark>3% 9%</mark>
Peru	66%		19%	4% 11%
France	64%		21% 3	% 13%
Brazil	63%	1	9% 4%	15%
Spain	62%	2	1% 4%	<mark>، 13%</mark>
Malaysia	62%		25%	4% 9%
Colombia	61%	199		15%
Indonesia	60%		30%	1 <mark>% 9%</mark>
Poland	59%	2	7%	3% 11%
Türkiye	59%	23%	6 4%	15%
Belgium	56%	28%	49	% 13%
Canada	55%	23%	7%	15%
United States	54%	30%		6% 10%
Italy	52%	24%	3%	21%
Great Britain	51%	25%	5%	19%
Japan	51%	32%		% 12%
Chile	51%	27%	6%	17%
Germany	50%	29%	3%	17%
Australia	50%	29%	5%	16%
Mexico	50%	30%	4%	17%
Singapore	48%	29%	4%	20%
Netherlands	45%	23% 4%	2	8%
Sweden	44%	22% 3%	319	6
Argentina	42%	27%	9%	22%

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

28-country average

67% agree

Base: 20,630 online adults under age 75 across 28 countries, interviewed November 22-December 6, 2023 The "28-country average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result. Samples in Brazil, Chile, Colombia, Indonesia, Malaysia, Mexico, Peru, Philippines, Singapore, South Africa, Thailand, and Turkey are more urban, more educated, and/or more affluent than the general population.

Agree	Neither agree nor disagree		v 🗖 Disagree		/0	ayree
Agree	Neither agree nor disagree			:	2023	2021
28-country average	67%		18%	<mark>3% 12%</mark>	67%	71%
South Africa	80%			10% 2 <mark>% 8%</mark>	80%	80%
Thailand	78%			13% 2 <mark>% 8%</mark>	78%	N/A
Hungary	77%			13% 2 <mark>% 9%</mark>	77%	79%
Brazil	74%		1	5% 2 <mark>% 9%</mark>	74%	82%
India	74%		8%	6% <b>12%</b>	74%	N/A
Peru	74%		14		74%	78%
France	74%		1	7% 2 <mark>% 8%</mark>	74%	68%
Argentina	73%		149	<mark>% 3% 11%</mark>	73%	82%
Colombia	71%		16%	6 3 <mark>% 10%</mark>	71%	81%
Great Britain	71%		15%		71%	63%
Spain	71%		18%	<mark>6 2% 10%</mark>	71%	71%
Chile	69%		17%	3% 10%	69%	82%
United States	69%		16%	4% 11%	69%	78%
Türkiye	68%		15%	4% 13%	68%	71%
Malaysia	67%		19%	2% 11%	67%	73%
Mexico	67%		21%	1 <mark>% 11%</mark>	67%	73%
Italy	66%		20%	<mark>3% 12%</mark>	66%	76%
Belgium	65%		22%	2% 11%	65%	69%
Poland	65%		21%	3% 11%	65%	77%
Canada	64%		21%	4% 12%	64%	60%
Germany	63%		21%	3% 13%	63%	64%
Australia	63%		22%	4% 11%	63%	66%
Indonesia	63%		21%	2% 15%	63%	N/A
Japan	60%		25%	3% 11%	60%	66%
South Korea	58%		26%	3% 14%	58%	60%
Sweden	58%		18% 4%	20%	58%	55%
Netherlands	51%	21%	3%	25%	51%	53%
Singapore	49%	26%	3%	22%	49%	N/A



% agree

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

28-country average

67% agree

Base: 20,630 online adults under age 75 across 28 countries, interviewed November 22-December 6, 2023 The "28-country average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result. Samples in Brazil, Chile, Colombia, Indonesia, Malaysia, Mexico, Peru, Philippines, Singapore, South Africa, Thailand, and Turkey are more urban, more educated, and/or more affluent than the general population.

Ag	gree ■ Neither agree nor disagree ■ Dor	n't know 🗖 Disagree	% au	jree
<b>-</b> Λε			2023	2021
28-country average	67%	19% 4% 10%	67%	70%
Hungary	80%	12% 1% 7%	80%	77%
South Africa	79%	14% 8% 5%	79%	77%
France	77%	14% 2% 7%	77%	75%
Thailand	76%	14% 3% 7%	76%	N/A
Japan	75%	15% 4% 7%	75%	78%
Indonesia	74%	19% 1 <mark>%6%</mark>	74%	N/A
India	73%	10% 6% 11%	73%	N/A
Peru	72%	18% 4% 7%	72%	73%
Colombia	71%	16% 4% 9%	71%	80%
Malaysia	71%	<b>18%</b> 3% 8%	71%	79%
Chile	71%	19% 4% 6%	71%	84%
Spain	69%	<b>21% 3% 7%</b>	69%	68%
Brazil	69%	18% 5% 9%	69%	76%
Argentina	68%	17% 6% 9%	68%	70%
Poland	67%	<b>20%</b> 3 <mark>% 10%</mark>	67%	79%
Italy	66%	21% 3% <u>9%</u>	66%	73%
Türkiye	66%	17% 3% 14%	66%	65%
Mexico	64%	23% 4% 9%	64%	62%
Great Britain	63%	21% 4% 12%	63%	62%
Australia	61%	23% 5% 11%	61%	63%
South Korea	60%	26% 3% 11%	60%	68%
United States	60%	23% 6% 10%	60%	68%
Canada	60%	23% 6% 12%	60%	60%
Belgium	59%	24% 5% 12%	59%	68%
Germany	58%	26% 4% 13%	58%	64%
Sweden	56%	15% 4% 26%	56%	58%
Singapore	55%	27% 2% 15%	55%	N/A
Netherlands	53%	22% 4% 21%	53%	57%



% agree

## **IMMIGRATION AND NATIVISM**

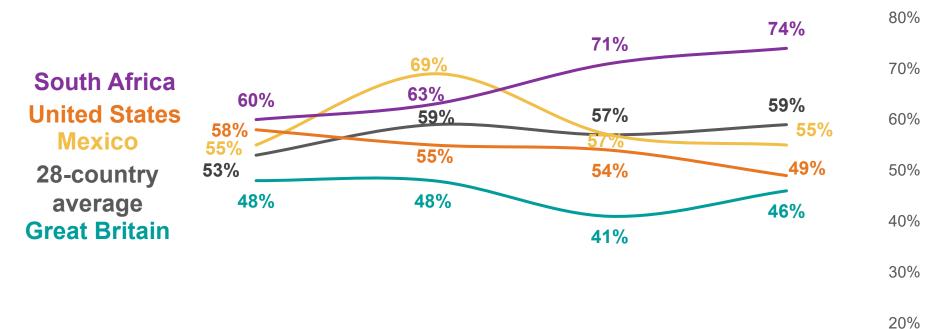


When jobs are scarce, employers should prioritize hiring people of this country over immigrants

28-country average

59% agree

Base: 20,630 online adults under age 75 across 28 countries, interviewed November 22-December 6, 2023 The "28-country average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result. Samples in Brazil, Chile, Colombia, Indonesia, Malaysia, Mexico, Peru, Philippines, Singapore, South Africa, Thailand, and Turkey are more urban, more educated, and/or more affluent than the general population.



2016

2023

10%

0%

			Neither agree nor disagree		■ Don't know ■ Disagree		% agree		
	A A	gree Neither agree r					2023	2021	2016
	28-country average	43%		25%	4%	28%	43%	38%	32%
be stronger			77%			13% 2% 9%	77%	70%	61%
e	India				8% 7% 11%	76%	N/A	N/A	
	Chile	60	%		25%	2% 13%	60%	47%	N/A
	Thailand	60%			25%	5% 11%	60%	N/A	N/A
	Malaysia	56%		26% 4% 14%			56%	56%	N/A
	Peru	54%		27% 2% 17%			54%	52%	19%
	Netherlands	52%		20%	3%	25%	52%	44%	N/A
	Hungary	52%		20% 5% 23%			52%	41%	49%
	South Africa	51%		25%	ы́ 1%	<b>6 23%</b>	51%	48%	37%
	Colombia	50%		28%	/ 0	3% 19%	50%	53%	N/A
	Sweden	48%		15% 49	%	33%	48%	43%	27%
	Indonesia	47%		35	%	1% 17%	47%	N/A	N/A
	Germany	46%		23%	4%	27%	46%	36%	37%
	Belgium	44%		25%	4%	27%	44%	38%	47%
	France	41%		24%	4%	31%	41%	40%	40%
	Mexico	41%		33%	5%	22%	41%	30%	19%
	Italy	39%		25% 3	%	33%	39%	40%	46%
	Poland	39%		29%	4%	29%	39%	27%	31%
	Great Britain	34%	22%	3%	Ĺ	42%	34%	31%	31%
	Australia	34%	279	% 4%		36%	34%	30%	30%
across 28 countries, 023 erage result for all rey was conducted. I size of each suggest a total I, Indonesia, apore, South Africa, ore educated, and/or	United States	33%	24%	4%		39%	33%	31%	38%
	Spain	32%	26%	3%		39%	32%	30%	28%
	Canada	29%	22%	4%	46	%	29%	20%	24%
	Singapore	29%	33%	3%		36%	29%	N/A	N/A
	Argentina	29%	27%	7%		37%	29%	37%	34%
	Brazil	28%	24%	5%	4	3%	28%	26%	17%
	South Korea	19%	35%	4%	4	2%	19%	24%	12%

39%

8%

37%

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

28-country average

43% agree

Q

Base: 20,630 online adults under age 75 across 28 countries, interviewed November 22-December 6, 2023 The "28-country average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result. Samples in Brazil, Chile, Colombia, Indonesia, Malaysia, Mexico, Peru, Philippines, Singapore, South Africa, Thailand, and Turkey are more urban, more educated, and/or more affluent than the general population.

Japan

16%

lpsos

14%

16%

_	Naroo Noithor agree por dicegre	o Don't k	■ Don't know ■ Disagree		,° • 9. ° °				
• ·	Agree Neither agree nor disagre		IOW DISa	gree		2023	2021	2019	2016
28-country average	59%		22%	3%	16%	59%	56%	58%	53%
Indonesia	849	6			12% 0 <mark>%%</mark>	84%	N/A	N/A	N/A
Hungary	81%			1	0% 3% <mark>6%</mark>	81%	71%	75%	76%
Thailand	80%			1	<b>3% 3%5%</b>	80%	N/A	N/A	N/A
Malaysia	78%			13	% 3 <mark>% 6%</mark>	78%	88%	81%	N/A
India	77%			8%	6% 10%	77%	N/A	N/A	N/A
Türkiye	76%			13%	2% 9%	76%	78%	73%	74%
South Africa	74%			14%	2% 11%	74%	71%	63%	60%
Singapore	72%			18%	1% 8%	72%	N/A	N/A	N/A
Colombia	70%			19%	2% 8%	70%	75%	N/A	N/A
Peru	66%		2:	1%	2% 12%	66%	65%	62%	64%
Poland	61%		25%	•	3% 11%	61%	60%	65%	57%
South Korea	56%		27%	49	<mark>% 14%</mark>	56%	63%	60%	54%
Chile	55%		26%	2%	17%	55%	58%	55%	N/A
Mexico	55%		27%	4%	<b>14%</b>	55%	57%	69%	55%
France	54%		25%	3%	19%	54%	48%	54%	51%
Japan	53%		30%	5	<mark>% 12%</mark>	53%	55%	53%	38%
Argentina	53%		25%	4%	19%	53%	58%	65%	63%
Brazil	52%		22% 4	%	22%	52%	53%	60%	56%
Australia	51%		25%	<mark>3%</mark>	21%	51%	52%	53%	51%
United States	49%		27%	4%	20%	49%	54%	55%	58%
Belgium	47%	2	8%	1%	22%	47%	48%	51%	46%
Great Britain	46%	27	% 3%		24%	46%	41%	48%	48%
Italy	46%	27	% 3%		24%	46%	54%	53%	60%
Netherlands	45%	23%	4%	2	8%	45%	44%	N/A	N/A
Germany	45%	3	1%	4%	20%	45%	38%	49%	45%
Canada	45%	279	6 3%		24%	45%	39%	50%	45%
Spain	43%	30%	5 2%		25%	43%	42%	52%	50%
Sweden	38%	20% 2%	5	40%		38%	30%	34%	17%

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

28-country average

59% Agree

Q

Base: 20,630 online adults under age 75 across 28 countries, interviewed November 22-December 6, 2023 The "28-country average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result. Samples in Brazil, Chile, Colombia, Indonesia, Malaysia, Mexico, Peru, Philippines, Singapore, South Africa, Thailand, and Turkey are more urban, more educated, and/or more affluent than the general population.

pso

#### Immigrants take jobs away from real [NOUN FOR **PEOPLE FROM** COUNTRY, PLURAL]

28-country average

42% agree

Base: 20,630 online adults under age 75 across 28 countries, interviewed November 22-December 6, 2023 The "28-country average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result. Samples in Brazil, Chile, Colombia, Indonesia, Malaysia, Mexico, Peru, Philippines, Singapore, South Africa, Thailand, and Turkey are more urban, more educated, and/or more affluent than the general population.

						% agree			
-	Agree Neither agree no	r disagree Don	't know 🗖 Dis	agree	2023	2021	2016		
28-country average	42%	24%	6 3%	31%	42%	37%	34%		
India		75%		8% 6% 11%	75%	N/A	N/A		
Türkiye		74%		12% 3% 12%	74%	71%	62%		
Malaysia	649	18		64%	65%	N/A			
Thailand	649		1% 3% 11%	64%	N/A	N/A			
Colombia	59%	24%	3% 14%	59%	62%	N/A			
South Africa	55%		17% 1%		55%	53%	47%		
Indonesia	54%		26%	0% 20%	54%	N/A	N/A		
Hungary	52%			3% 23%	52%	35%	36%		
Peru	51%		27%	2% 20%	51%	53%	41%		
Singapore	47%		26% 19		47%	N/A	N/A		
Chile	41%	289	~	29%	41%	40%	N/A		
Poland	39%	25%	4%	31%	39%	29%	23%		
United States	36%	22%	3%	39%	36%	37%	43%		
Australia	36%	25%	3%	36%	36%	36%	37%		
Mexico	35%	35%	4%	27%	35%	24%	26%		
Argentina	34%	28%	4%	35%	34%	37%	48%		
Belgium	33%	30%	4%	33%	33%	31%	37%		
Italy	33%	26%	2%	38%	33%	37%	40%		
Brazil	32%	22%	4%	41%	32%	34%	32%		
France	32%	26%	3%	39%	32%	29%	33%		
Netherlands	31%	25%	4%	40%	31%	29%	N/A		
Japan	31%	36%	6%	27%	31%	29%	12%		
Canada	30%	22% 3%		45%	30%	26%	32%		
Great Britain	30%	<b>22% 3%</b>		46%	30%	27%	32%		
South Korea	29%	38%	3%	30%	29%	36%	34%		
Spain	26%	28% 3%	6	44%	26%	26%	35%		
Sweden	25% 14	% 3%	57%		25%	22%	9%		
Germany	23%	26% 4%		47%	23%	22%	22%		



## OPINIONS OF ELITES



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

#### % closely connected

2023 2021 62% 64% 77% 79% 71% N/A 70% 68% 69% 77% 68% 69% 68% 67% 68% N/A 73% 67% 66% 68% 66% 65% 66% 70% 64% 66% 64% 63% 63% 67% 62% 64% 62% 72% 61% 64% 59% 62% 58% 63% 58% 59% 58% 51% 55% 71% 54% N/A 54% 64% 53% 52% 58% 51% 43% 47% 51% 44%

The people who exercise power or influence in politics, business, the media, technology, science, and academia are often called the elite. Which of these two statements is closest to your opinion of the "elite" in [Country]

28-country average

# 62% say the "elite" are a closely connected group of people

**Base:** 20,630 online adults under age 75 across 28 countries, interviewed November 22-December 6, 2023 The "28-country average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result. Samples in Brazil, Chile, Colombia, Indonesia, Malaysia, Mexico, Peru, Philippines, Singapore, South Africa, Thailand, and Turkey are more urban, more educated, and/or more affluent than the general population.

country average	62%	39%
South Korea	77%	24%
Singapore	71%	29%
Hungary	70%	30%
Chile	69%	31%
Spain	68%	32%
South Africa	68%	32%
Indonesia	68%	32%
Argentina	67%	33%
Peru	66%	34%
Great Britain	66%	34%
Italy	66%	35%
Türkiye	64%	36%
France	64%	36%
Canada	63%	37%
Germany	62%	38%
Colombia	62%	38%
United States	61%	39%
Australia	59%	41%
Poland	58%	42%
Brazil	58%	42%
Sweden	58%	42%
Mexico	55%	45%
Thailand	54%	46%
India	54%	46%
Japan	53%	47%
Belgium	51%	49%
Malaysia	47%	53%
Netherlands	44%	56%



Q

#### And which of these three statements is closest to your opinion of the "elite" in [Country]

#### 28-country average

49% say the "elite" tend to make decisions based on their own interests and the needs of the rest of the people in [Country] do not matter

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

- 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 based on their own interests and the needs of the rest of the people in [Country] do not matter

None of these

28-country average	11%	30%		49%		10%
India		24%	24%	25%	27	%
Singapore		22%	43%		28%	7%
Türkiye	17	<b>% 26%</b>	<b>49%</b>			9%
Japan	15%	32	%	23% 30		
South Korea	14%		39%	39%		8%
Thailand	14%	33%		5	60%	4%
Indonesia	13%		40%		43%	4%
Netherlands	13%		40%		37%	10%
Malaysia	12%	32%		44%		11%
South Africa	12%	31%		54%	6	4%
Brazil	11%	29%		54%		7%
Belgium	10%	39%		43	%	9%
Great Britain	10%	31%		50%		9%
Mexico	10%	28%		56%		7%
Australia	10%	32%		49%		9%
Colombia	9%	25%		61%		6%
Italy	9%	36%		45%		10%
Germany	9%	32%		43%		16%
Sweden	9%	38%		43%		11%
Poland	8%	28%		54%		9%
Chile	8%	25%		59%		8%
Peru	8%	23%		64%		6%
Hungary	8%	17%		69%		6%
France	7%	32%		53%		8%
United States	7%	26%		54%		13%
Argentina	7%	19%		67%		7%
Canada	7%	30%		51%		12%
Spain	7%	26%		60%		8%



# **OPINIONS OF GOVERNMENTS**



Do you agree or disagree that the [Country] government should increase taxes to pay for any additional public spending?

28-country average

19% agree

**Base:** 20,630 online adults under age 75 across 28 countries, interviewed November 22-December 6, 2023 The "28-country average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result. Samples in Brazil, Chile, Colombia, Indonesia, Malaysia, Mexico, Peru, Philippines, Singapore, South Africa, Thailand, and Turkey are more urban, more educated, and/or more affluent than the general population.

28-country average	19%		20%		7%		55%		
India		40%			13%		15% 32%	6	
Thailand		31%		19	%	6%	45%		
Sweden		30%		21	.%	7%	42%		
Great Britain	2	28%	23%		9%	9% 40%			
Chile	24	%		20%	7%		49%		
South Korea	23%	6		30%		4%	43%		
Singapore	23%	/ 0		27%		5%	46%		
Australia	21%		2	3%	109	%	46%		
Spain	21%		22	2%	6%		51%		
Netherlands	21%		18%		6%		55%		
Malaysia	21%		20%		8%		52%		
Mexico	21%		20%	/ D	3%		56%		
United States	20%		20%	, )	11% 49%				
Türkiye	18%		16%	6%			59%		
Indonesia	17%		24%		2%		57%		
Peru	16%		20%	6%			58%		
Italy	16%		21%		%		57%		
Germany	15%		21%	3%			60%		
Brazil	14%	14%	6 7%	5			66%		
Japan	14%		22%		12%		52%		
Canada	14%		21%	8%			58%		
Belgium	14%		20%	6%			60%		
Poland	13%		22%		8% 57%				
France	12%	189		5%			65%		
South Africa	12%	13%	3%				72%		
Colombia	12%	14%	6%		68%				
Hungary	9%		5%				74%		
Argentina	8%	16%	10%				66%		



■ Agree ■ Neither agree nor disagree ■ Not sure ■ Disagree

To what extent do you think the [Country] government should increase or lower its spending in each of the following: Infrastructure (e.g., roads and bridges, rail and air networks, water, electricity, broadband)

28-country average

#### 62% say should increase spending on infrastructure

Base: 20,630 online adults under age 75 across 28 countries, interviewed November 22-December 6, 2023 The "28-country average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result. Samples in Brazil, Chile, Colombia, Indonesia, Malaysia, Mexico, Peru, Philippines, Singapore, South Africa, Thailand, and Turkey are more urban, more educated, and/or more affluent than the general population.

Should increase Should keep at its current level Should Lower Not sure

28-country average	62%			25%	4%	9%
South Africa	84%				8%	2 <mark>%</mark> 7%
Peru	84%				10%	1 <mark>% 6%</mark>
Hungary	78%			1	L4%	3% 5%
Colombia	76%			13%	6 2%	8%
Indonesia	76%				20%	0 <mark>%4%</mark>
Mexico	75%			16%	6 19	<b>% 8%</b>
Malaysia	73%			19%		3% 5%
Italy	72%			18%	49	% <b>7%</b>
Thailand	70%			18%	2%	10%
Brazil	69%			16%	5%	11%
Germany	66%			24%	5	% 6%
Chile	63%			23%	3%	10%
India	63%		9%	8%	20%	ó
Great Britain	62%			25%	6%	6%
Sweden	61%			29%	4%	6 7%
Spain	61%			28%	3%	8%
Argentina	60%		239	%	4%	13%
Türkiye	59%		269	%	4%	11%
Canada	58%		29	%	6%	8%
United States	56%		28%		7%	9%
Poland	55%		33	%	6%	6%
Belgium	54%		29%		5%	11%
Australia	53%		33%		5%	9%
France	47%		36%		6%	11%
South Korea	46%		40%		3%	11%
Netherlands	43%		40%		5%	12%
Singapore	40%		47%		3%	10%
Japan	39%	40%		1	0%	11%



To what extent do you think the [Country] government should increase or lower its spending in each of the following: Education (e.g., schools, universities, job training)

28-country average

69% say should increase spending on education

**Base:** 20,630 online adults under age 75 across 28 countries, interviewed November 22-December 6, 2023 The "28-country average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result. Samples in Brazil, Chile, Colombia, Indonesia, Malaysia, Mexico, Peru, Philippines, Singapore, South Africa, Thailand, and Turkey are more urban, more educated, and/or more affluent than the general population.

28-country average	69%		2	.0%	4% 7%
Peru		88%			6% 2 <mark>%4%</mark>
Indonesia	8	6%			<b>11%</b> 0 <mark>2%</mark>
Hungary	8	5%		8	3% <mark>3% 4%</mark>
South Africa	84	1%		79	6   1 <mark>%   7%    </mark>
Mexico	839	%		12	.% 1 <mark>% 5%</mark>
Colombia	829	6		9%	2% 8%
Chile	81%			12%	2% 5%
Argentina	80%			13%	4% 4%
Thailand	79%			12%	<mark>2% 7%</mark>
Türkiye	76%			14%	4% 6%
Brazil	75%	75%			
Spain	74%			17%	<mark>2% 6%</mark>
Italy	73%			17%	4% 6%
Germany	71%			19%	4% 6%
Malaysia	69%		1	9%	3% 9%
India	65%		9% 8'	%	18%
Sweden	65%		2	7%	<mark>2% 6%</mark>
Poland	63%		27%	•	5% 6%
Great Britain	63%		27%	ı	5% 6%
France	63%		22%	6%	<b>10%</b>
Belgium	61%		25%	59	<b>6 10%</b>
United States	60%		22%	7%	11%
Canada	58%		29%		7% 7%
Australia	58%		31%		5% 7%
Netherlands	55%		33%	4	4% 9%
Singapore	46%		41%	4	% 10%
Japan	43%	37%		10%	10%
South Korea	42%	40%	•	3%	15%



To what extent do you think the [Country] government should increase or lower its spending in each of the following: Healthcare (e.g. disease prevention, diagnosis, treatment, research)

28-country average

# 75% say should increase spending on healthcare

**Base:** 20,630 online adults under age 75 across 28 countries, interviewed November 22-December 6, 2023 The "28-country average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result. Samples in Brazil, Chile, Colombia, Indonesia, Malaysia, Mexico, Peru, Philippines, Singapore, South Africa, Thailand, and Turkey are more urban, more educated, and/or more affluent than the general population.

28-country average	75%	1	5% 4% 7%
Peru	90%		5% 1% <mark>4%</mark>
Indonesia	89%		8% 1 <mark>%8%</mark>
Hungary	87%		7% 2 <mark>% 4%</mark>
South Africa	86%		7% 2 <mark>% 5%</mark>
Colombia	84%		7% 2% 7%
Chile	83%		7% 3% <u>6%</u>
Mexico	83%		8% 1 <mark>% 8%</mark>
Spain	80%		<b>13%</b> 2 <mark>% 5%</mark>
Sweden	79%		14% 3% <mark>5%</mark>
Thailand	78%		14% 2 <mark>% 6%</mark>
Argentina	78%		<b>12% 4% 6%</b>
Italy	78%		<b>12% 4% 6%</b>
Türkiye	78%		14% 3% 5%
Brazil	77%	10	<b>1% 4% 9%</b>
Malaysia	77%		13% 3% 7%
Great Britain	77%		15% 4% 4%
Canada	75%	1	5% 5% <mark>5%</mark>
Netherlands	73%	169	<mark>% 3% 8%</mark>
Australia	72%	189	<b>6%</b>
Poland	72%	18%	6 5% <mark>5%</mark>
Germany	71%	17%	<b>5% 7%</b>
France	66%	22%	5% 7%
India	66%	8% 8%	18%
Belgium	65%	20%	4% 11%
Singapore	64%	27%	<mark>2% 7%</mark>
South Korea	63%	28%	<b>3%</b> 6%
United States	62%	21%	6% 11%
Japan	52%	31%	9% 8%



To what extent do you think the [Country] government should increase or lower its spending in each of the following: Public safety (e.g., law enforcement, fire and emergency medical services)

28-country average

# 69% say should increase spending on public safety

**Base:** 20,630 online adults under age 75 across 28 countries, interviewed November 22-December 6, 2023 The "28-country average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result. Samples in Brazil, Chile, Colombia, Indonesia, Malaysia, Mexico, Peru, Philippines, Singapore, South Africa, Thailand, and Turkey are more urban, more educated, and/or more affluent than the general population.

28-country average	69%		21%	4% 7%
Peru	89%			7% 2% <mark>2%</mark>
Indonesia	85%			12% 1 <mark>%%</mark>
South Africa	84%		10% 2 <mark>% 5%</mark>	
Hungary	83%			12% 3% <mark>2%</mark>
Chile	82%			12% 3% 4%
Mexico	82%			12% 1 <mark>% 6%</mark>
Colombia	80%			11% 2 <mark>% 6%</mark>
Argentina	78%			13% 4% <mark>5%</mark>
Sweden	75%		1	.8% 2% <u>5%</u>
Brazil	74%		13%	5% 9%
Malaysia	72%			3% 9%
Thailand	70%			<mark>2% 7%</mark>
Great Britain	69%		22%	<b>5% 4%</b>
Netherlands	68%		24%	<b>4%</b>
Germany	68%		22%	<b>5%</b> 6%
Spain	66%		25%	<mark>2% 6%</mark>
Italy	66%		22%	<b>5% 7%</b>
India	65%		9% 8%	18%
France	63%		23%	6% 8%
Australia	62%		27%	<b>5%</b> 6%
Belgium	62%		24%	4% 10%
Türkiye	61% 2			5% 10%
South Korea	61%			4% 7%
United States	59%		25%	6% 10%
Canada	57%		31%	5% 7%
Poland	52%		4%	6% 9%
Singapore	49%		41%	3% 7%
Japan	45%	39%		10% 6%



To what extent do you think the [Country] government should increase or lower its spending in each of the following: Defense and national security (e.g., the military)

#### 28-country average

#### 51% say should increase spending on defense and national security

**Base:** 20,630 online adults under age 75 across 28 countries, interviewed November 22-December 6, 2023 The "28-country average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result. Samples in Brazil, Chile, Colombia, Indonesia, Malaysia, Mexico, Peru, Philippines, Singapore, South Africa, Thailand, and Turkey are more urban, more educated, and/or more affluent than the general population.

28-country average	51%		28%	5%	16%
Indonesia	73%			23	% 1 <mark>%%</mark>
Peru	73%			15%	2% 10%
Argentina	66%			20%	5% 9%
India	66%		10%	8%	17%
Malaysia	65%			22%	4% 9%
Mexico	65%			22%	2% 11%
Türkiye	64%			23%	5% 8%
Colombia	60%		21%		16%
South Africa	60%		239		
Brazil	59%		23%	5%	
Chile	57%		21%	4%	17%
Sweden	57%		25%	4%	
Poland	52%		30%	69	
France	50%		29%	7%	
Netherlands	50%		31%	5%	15%
Hungary	48%		29%	5%	18%
Germany	48%		30%	6%	16%
South Korea	45%		39%		3% 13%
United States	42%		.%	8%	19%
Thailand	42%	32		3%	24%
Canada	41%		5%	8%	16%
Great Britain	40%	35		7%	17%
Australia	39%	37		6%	18%
Italy	38%	31%	6%		26%
Belgium	37%	37%		6%	21%
Singapore	37%		4%	4%	16%
Spain	35%	32%	4%		9%
Japan	32%	36%	1	12%	21%



To what extent do you think the [Country] government should increase or lower its spending in each of the following: Creating jobs

#### 28-country average

# 69% say should increase spending on creating jobs

**Base:** 20,630 online adults under age 75 across 28 countries, interviewed November 22-December 6, 2023 The "28-country average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result. Samples in Brazil, Chile, Colombia, Indonesia, Malaysia, Mexico, Peru, Philippines, Singapore, South Africa, Thailand, and Turkey are more urban, more educated, and/or more affluent than the general population.

28-country average	69%		20% 5% 7%
Indonesia	91%		<b>5% 1%3%</b>
South Africa	90%		<b>4% 2% 4%</b>
Peru	84%		8% 3% <mark>5%</mark>
Colombia	83%		8% 3% 7%
Argentina	82%		9% 3% 5%
Mexico	81%		12% 2% 6%
Thailand	79%		11% 2% 8%
Spain	79%		14% 4% 4%
Malaysia	78%		13% 4% 5%
Chile	78%		12% 4% 6%
Türkiye	77%		<b>13%</b> 6% <mark>4%</mark>
Brazil	76%		11% 6% 8%
Hungary	75%		16% 3% 6%
Italy	74%		16% 5% <mark>5%</mark>
South Korea	69%		21% 3% 7%
Singapore	67%		25% 2% 6%
India	66%	9%	8% 18%
Germany	59%	29%	6% <mark>6%</mark>
Canada	58%	29%	7% 6%
United States	58%	26%	8% 9%
Sweden	57%	30%	5% 9%
Australia	56%	32%	5% 7%
Great Britain	56%	30%	8% 5%
Poland	56%	31%	7% 7%
Belgium	54%	31%	7% 9%
Japan	52%	30%	11% 7%
France	49%	33%	7% 11%
Netherlands	45%	40%	4% 10%



To what extent do you think the [Country] government should increase or lower its spending in each of the following: Reducing poverty and social inequality

#### 28-country average

67% say should increase spending on reducing poverty and social inequality

**Base:** 20,630 online adults under age 75 across 28 countries, interviewed November 22-December 6, 2023 The "28-country average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result. Samples in Brazil, Chile, Colombia, Indonesia, Malaysia, Mexico, Peru, Philippines, Singapore, South Africa, Thailand, and Turkey are more urban, more educated, and/or more affluent than the general population.

28-country average	67%		16%	5%	13%
Indonesia	85%			9	% 1 <mark>% 5%</mark>
South Africa	83%			5% 2	% 10%
Hungary	79%			8% 3%	<mark>% 10%</mark>
Thailand	75%			11% 2%	12%
Türkiye	75%		1	L1% 5%	10%
Peru	73%		7%	3%	18%
Chile	72%		119	6 4%	13%
Netherlands	72%			18%	4% 6%
Malaysia	72%		13	% 4%	11%
Italy	70%		1	9%	5% 6%
Brazil	70%		12%	5%	14%
Mexico	70%		12%	1 <mark>%</mark>	17%
Colombia	69%		11%	3%	18%
Spain	66%		18%	4%	12%
Great Britain	64%		22%		6% 7%
Australia	64%		23%	5	8%
Canada	63%		20%	6%	11%
South Korea	62%		22%	4%	12%
Germany	62%	1	L9%	5%	14%
Sweden	61%		21%	5%	13%
Argentina	60%	10%	6%	249	%
India	60%	8%	8%	249	%
Singapore	60%		27%	5	% 9%
United States	60%	21	.%	6%	13%
Belgium	57%	23%		7%	14%
Japan	56%	23%		10%	11%
France	54%	22%		8%	16%
Poland	51%	29%		7%	13%



# METHODOLOGY



## Methodology

These are the results of a 28-country survey conducted by Ipsos on its Global Advisor online platform and, in India, on its IndiaBus platform, between Friday, November 22 and Friday, December 6, 2023. For this survey, Ipsos interviewed a total of 20,630 adults aged 18 years and older in India, 18-74 in Canada, Malaysia, South Africa, Turkey, and the United States, 20-74 in Thailand, 21-74 in Indonesia and Singapore, and 16-74 in all other countries.

The sample consists of approximately 1,000 individuals each in Australia, Brazil, Canada, France, Germany, Great Britain, Italy, Japan, Spain, and the U.S., and 500 individuals each in Argentina, Belgium, Chile, Colombia, Hungary, Indonesia, Malaysia, Mexico, the Netherlands, Peru, Poland, Singapore, South Africa, South Korea, Sweden, Thailand, and Turkey. The sample in India consists of approximately 2,200 individuals, of whom approximately 1,800 were interviewed face-to-face and 400 were interviewed online.

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 considered representative of their general adult populations under the age of 75. Samples in Brazil, Chile, Colombia, Indonesia, Malaysia, Mexico, Peru, Philippines, Singapore, South Africa, Thailand, 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.

Some of the analysis refers to a "28-country average". This reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result.

India's sample represents a large subset of its urban population — social economic classes A, B and C in metros and tier 1-3 town classes across all four zones.

The data is weighted so that the composition of each country's sample best reflects the demographic profile of the adult population according to the most recent census data. The "28-country average" reflects the average result for all the countries and markets in which the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result.

When percentages do not sum up to 100 or the 'difference' appears to be +/-1 percentage point more/less than the actual result, 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 where N=1,000 being accurate to +/- 3.5 percentage points and of where N=500 being accurate to +/- 5.0 percentage points. For more information on Ipsos' use of credibility intervals, please visit the Ipsos website.

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

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