

IPSOS POPULISM SURVEY:

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

February 2024

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Politics and Society

GAME CHANGERS



PART 1: SURVEY HEADLINES



IPSOS POPULISM SURVEY

Key Findings

#1 Potential for Populism
Anti-establishment sentiment is up slightly from 2022, with many people in many countries holding these views.

#2 Elections in 50+ countries - largest natural experiment in history?
Roughly 4 billion people are going to the ballot box this year at a time, when 63% feel their country needs a strong leader to take the country back from the rich and powerful.

#3 Pessimistic about their country's progress.
Fueling populist sentiment, 58% globally feel that their country is in decline, and 57% feel their country's society is broken.

#4 Backlash towards immigrants.
59% of people globally feel that when jobs are scarce, employers should prioritize hiring people of their country over immigrants.

#5 Elite suspicion.
62% view elites as a closely connected group of people with similar interests and views. Pluralities in almost all countries feel elites operate based on their self-interest.

#6 Populists want a different government, not a small government.
Despite support for anti-establishment politics, 75% of those polled support government spending on healthcare, and 67% support spending on reducing poverty and social inequality.

PART 2: MEASURING POPULISM



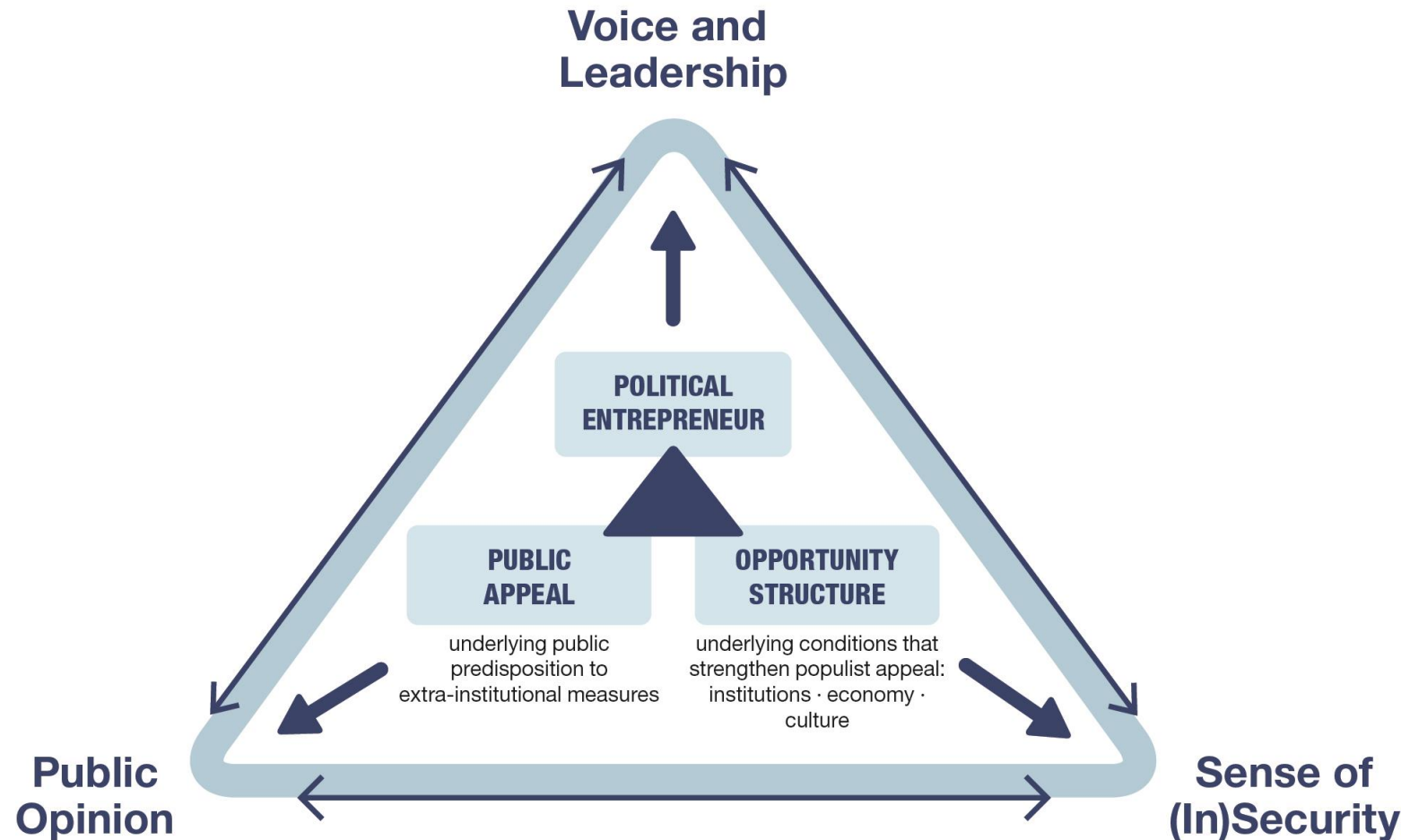
INTRODUCTION

2024 is arguably the largest natural experiment in human history, with roughly four billion people going to the polls in 50-plus countries. This year will show what works and what doesn't work for voters.

By [populism](#), we mean a political strategy 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 of **anti-establishment actions**, and (2) a **structural opportunity**, such as an economic calamity or changing demography, that makes taking political risks palatable.

CONDITIONS FOR POPULISM



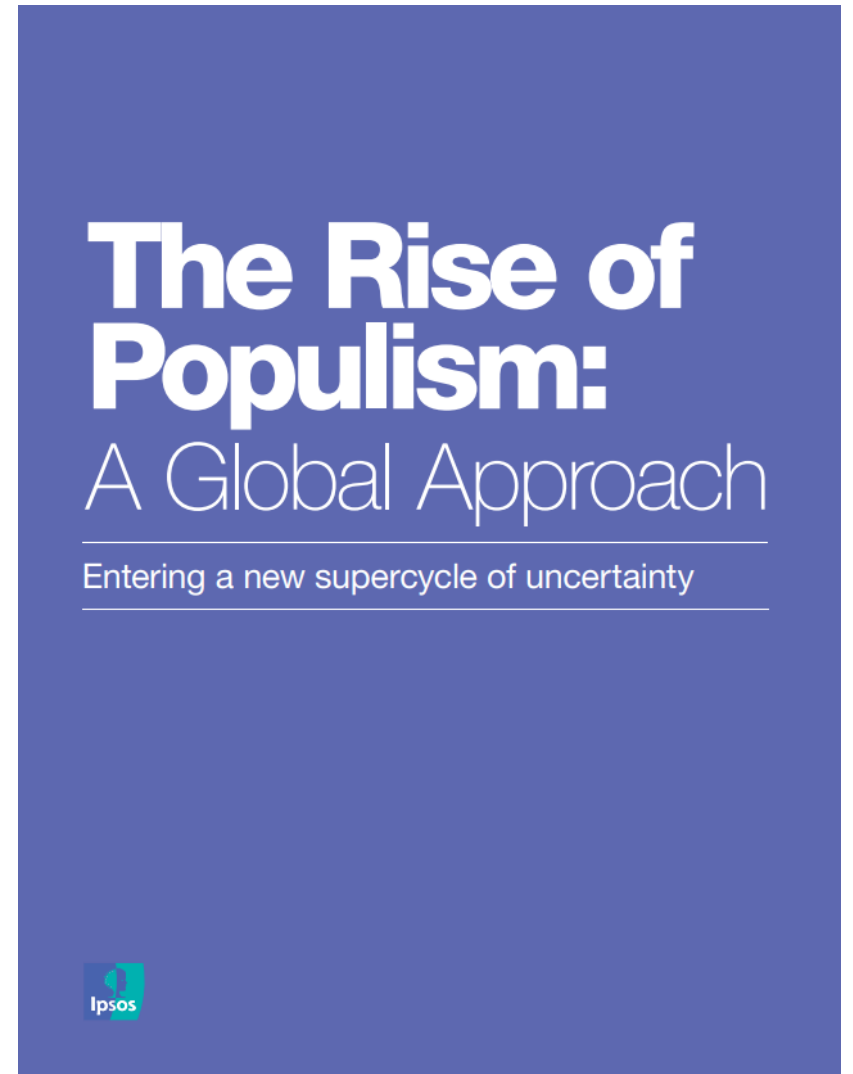
Source: Ipsos

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.





MEASURING POPULIST SUPPORT



Country in decline

Across 28 countries, 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 global average, at 59%.



System is broken

Globally, 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 countries say their country needs a strong leader to take the country back from the rich and powerful (63% on average). 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 globally, 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 countries feel that the "elites" in their country make decisions based on their own interests over the needs of the rest of the people in their country, levels that are highest in Hungary (69%) and Argentina (67%).

SPOTLIGHT ON: 2024 SELECT ELECTIONS

Country	Date	Type	Broken System (Global 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%
United States	November 5	Presidential	60%
United Kingdom	Latest January 2025	Parliamentary	64%

Global citizens are strongly predisposed to populist and anti-establishment solutions. This sentiment has had a majority leaning 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. Global citizens have lost faith in their 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. Strong 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 global 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 anti-establishment 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 3: DATA ON POPULISM



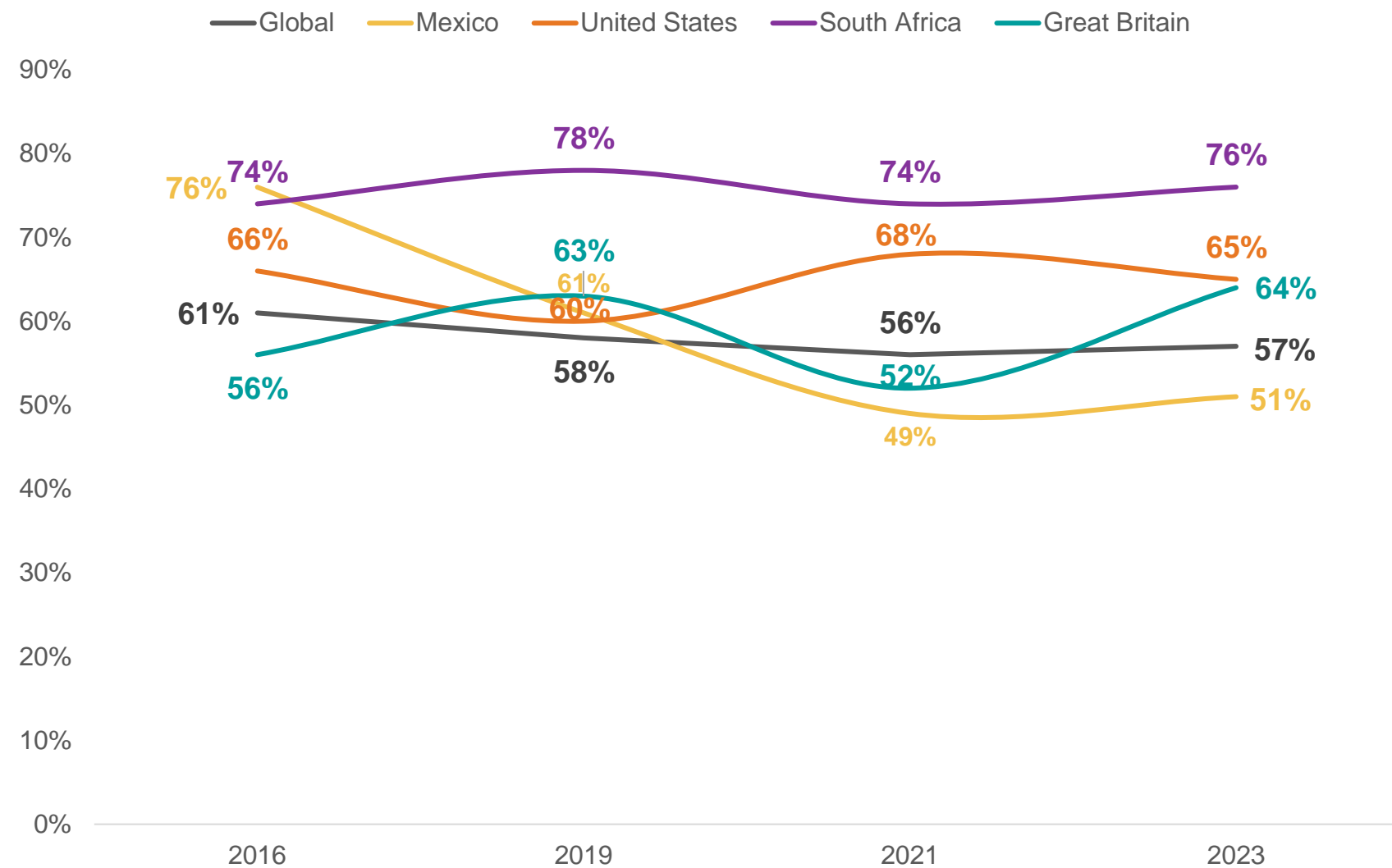
MOST SAY THEIR COUNTRY'S SOCIETY IS BROKEN

Q

Percent who agree that “[Country’s] society is broken” over time

Global Country Average

57% agree



Base: 20,630 online adults under age 75 across 28 countries, interviewed November 22-December 6, 2023

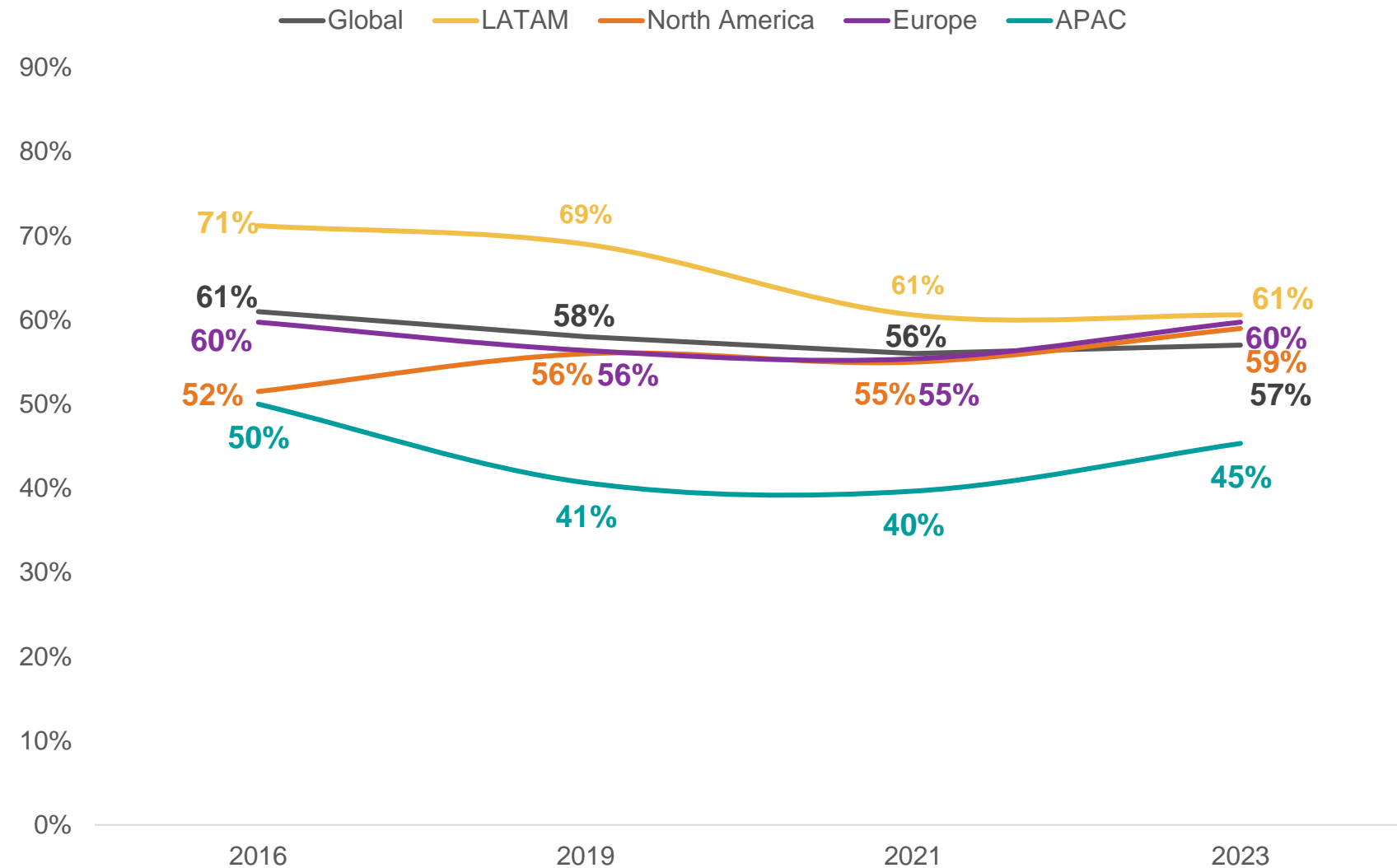
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[Country]'s society is broken

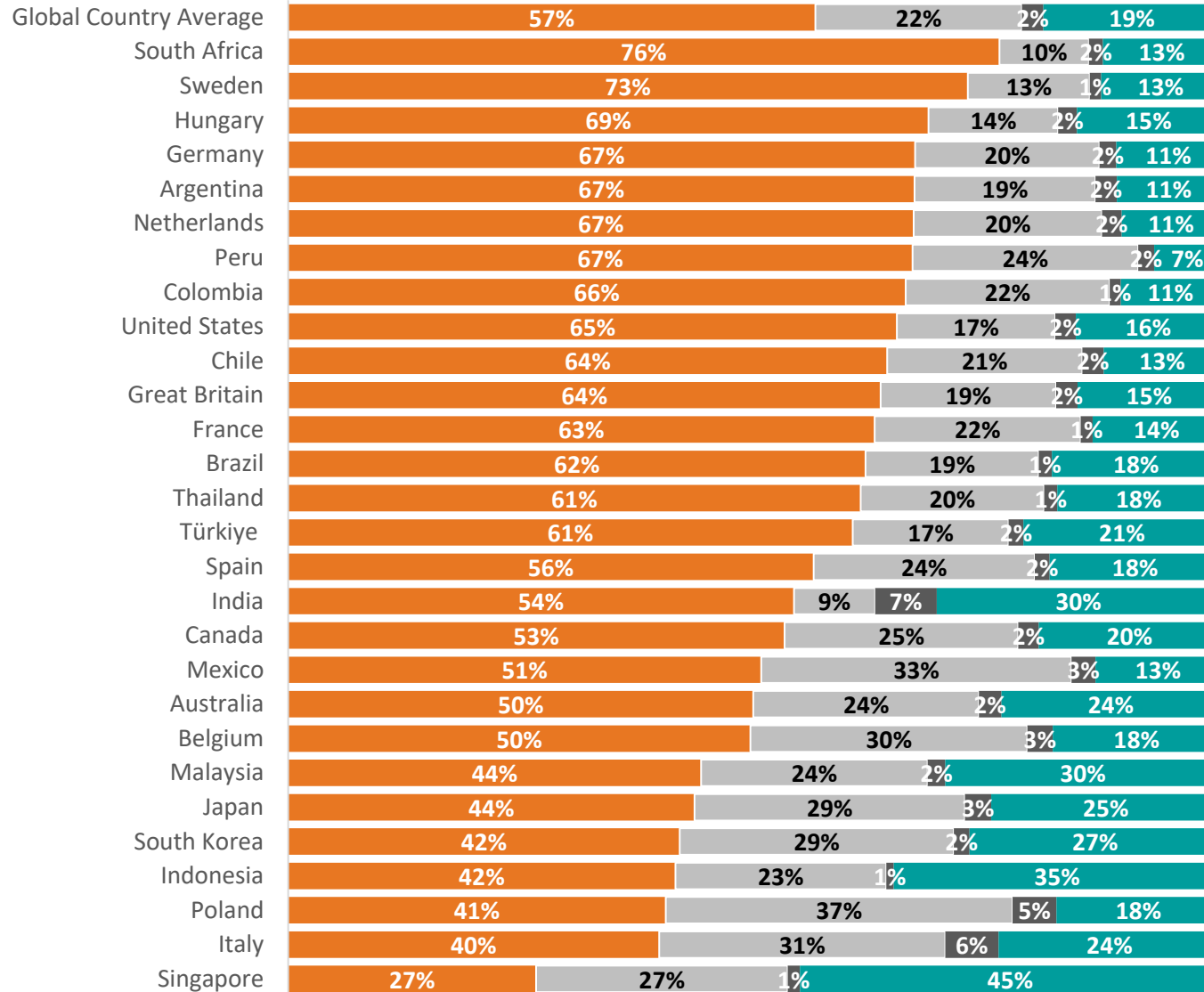
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Agree Neither agree nor disagree Don't know Disagree



% agree

2023	2021	2019	2016
57%	56%	58%	61%
76%	74%	78%	74%
73%	60%	49%	51%
69%	72%	66%	73%
67%	61%	63%	61%
67%	68%	74%	70%
67%	60%	N/A	N/A
67%	60%	63%	55%
66%	64%	N/A	N/A
65%	68%	60%	66%
64%	69%	57%	--%
64%	52%	63%	56%
63%	54%	46%	52%
62%	72%	78%	77%
61%	N/A	N/A	N/A
61%	60%	46%	53%
56%	54%	69%	78%
54%	N/A	N/A	N/A
53%	42%	52%	37%
51%	49%	61%	76%
50%	45%	47%	47%
50%	58%	N/A	N/A
44%	43%	54%	N/A
44%	41%	32%	31%
42%	33%	43%	72%
42%	N/A	N/A	N/A
41%	44%	84%	79%
40%	40%	34%	53%
27%	N/A	N/A	N/A



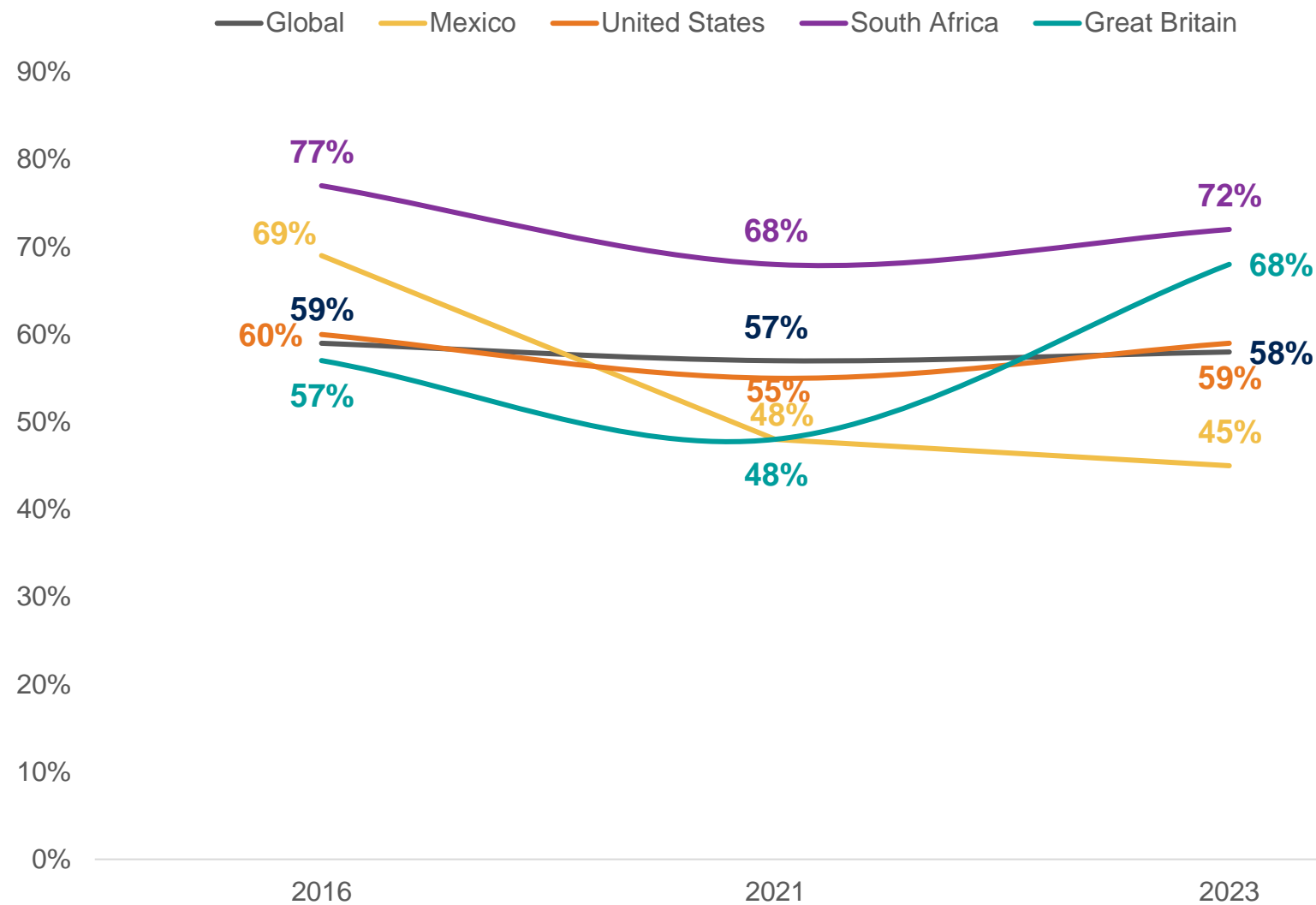
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Percent who agree that “[Country] is in decline” over time

Global Country Average

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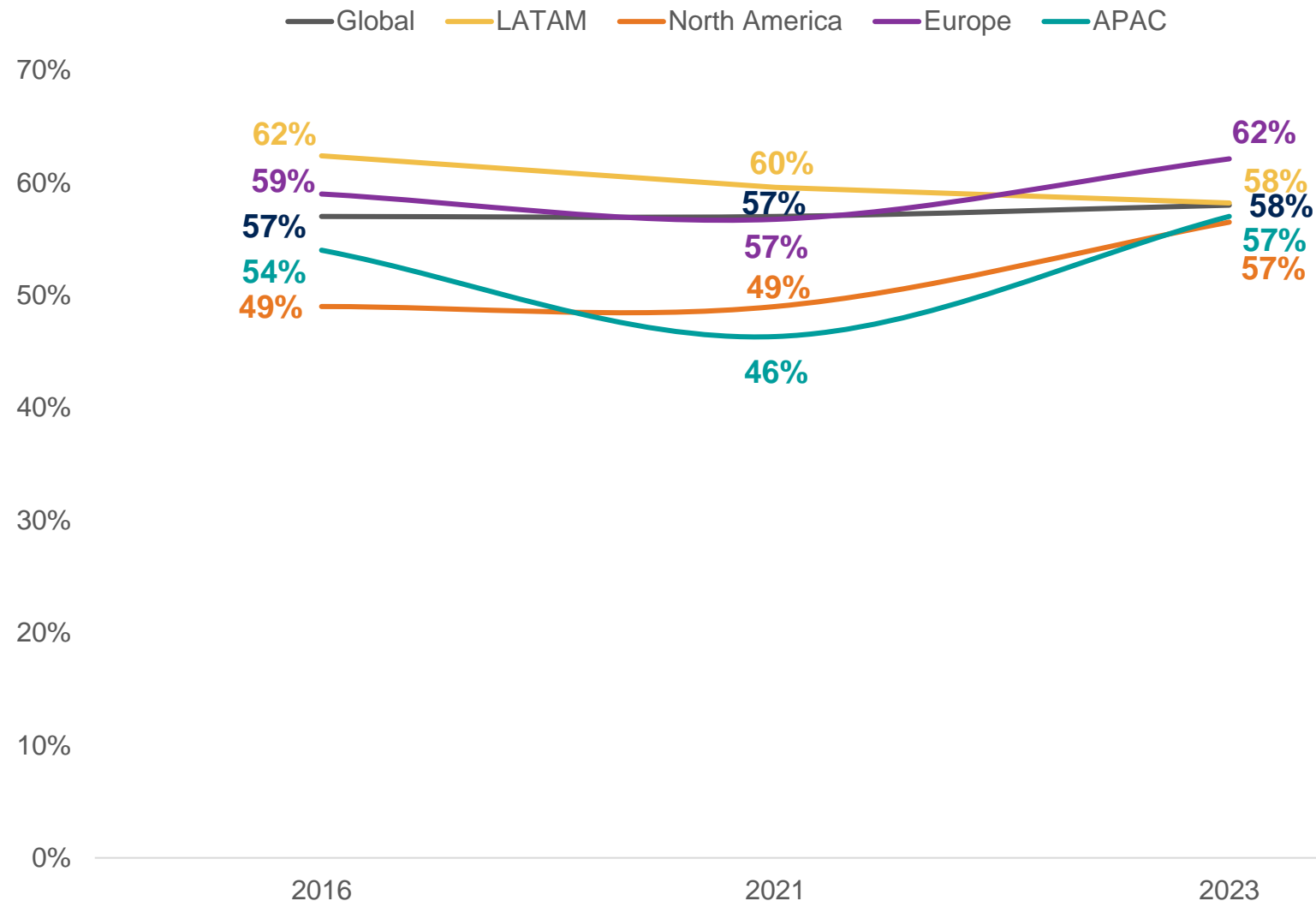


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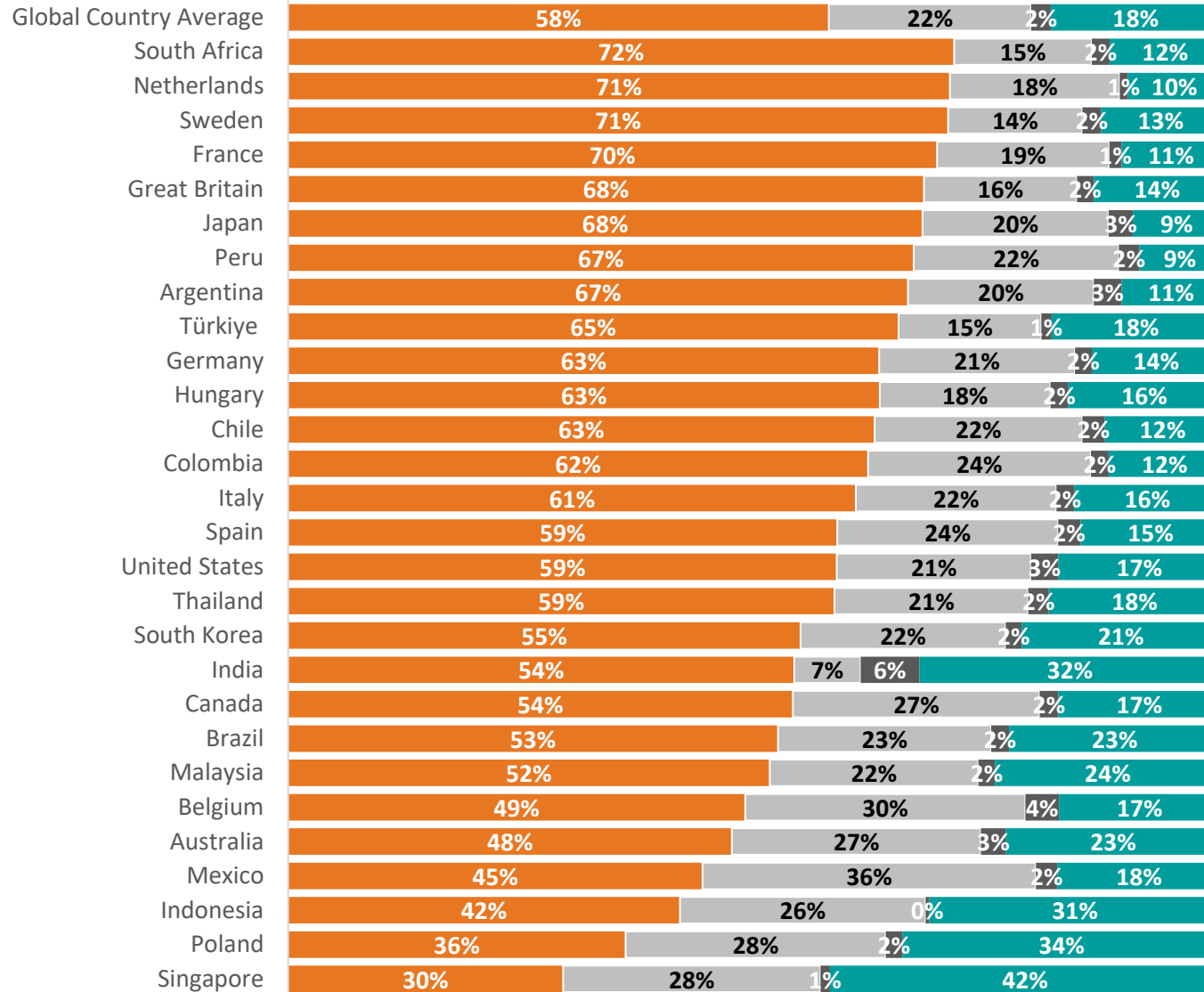
[Country] is in decline

Global Country Average

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Agree Neither agree nor disagree Don't know Disagree



% agree

	2023	2021	2016
Global Country Average	58%	57%	57%
South Africa	72%	68%	77%
Netherlands	71%	58%	N/A
Sweden	71%	55%	53%
France	70%	58%	67%
Great Britain	68%	48%	57%
Japan	68%	62%	40%
Peru	67%	59%	44%
Argentina	67%	68%	58%
Türkiye	65%	61%	55%
Germany	63%	47%	47%
Hungary	63%	63%	70%
Chile	63%	68%	N/A
Colombia	62%	67%	N/A
Italy	61%	65%	73%
Spain	59%	54%	69%
United States	59%	55%	60%
Thailand	59%	N/A	N/A
South Korea	55%	41%	73%
India	54%	N/A	22%
Canada	54%	43%	38%
Brazil	53%	69%	72%
Malaysia	52%	55%	N/A
Belgium	49%	55%	64%
Australia	48%	36%	49%
Mexico	45%	48%	69%
Indonesia	42%	N/A	N/A
Poland	36%	57%	50%
Singapore	30%	N/A	N/A



BROKEN SYSTEM INDEX



Ipsos' system is broken index

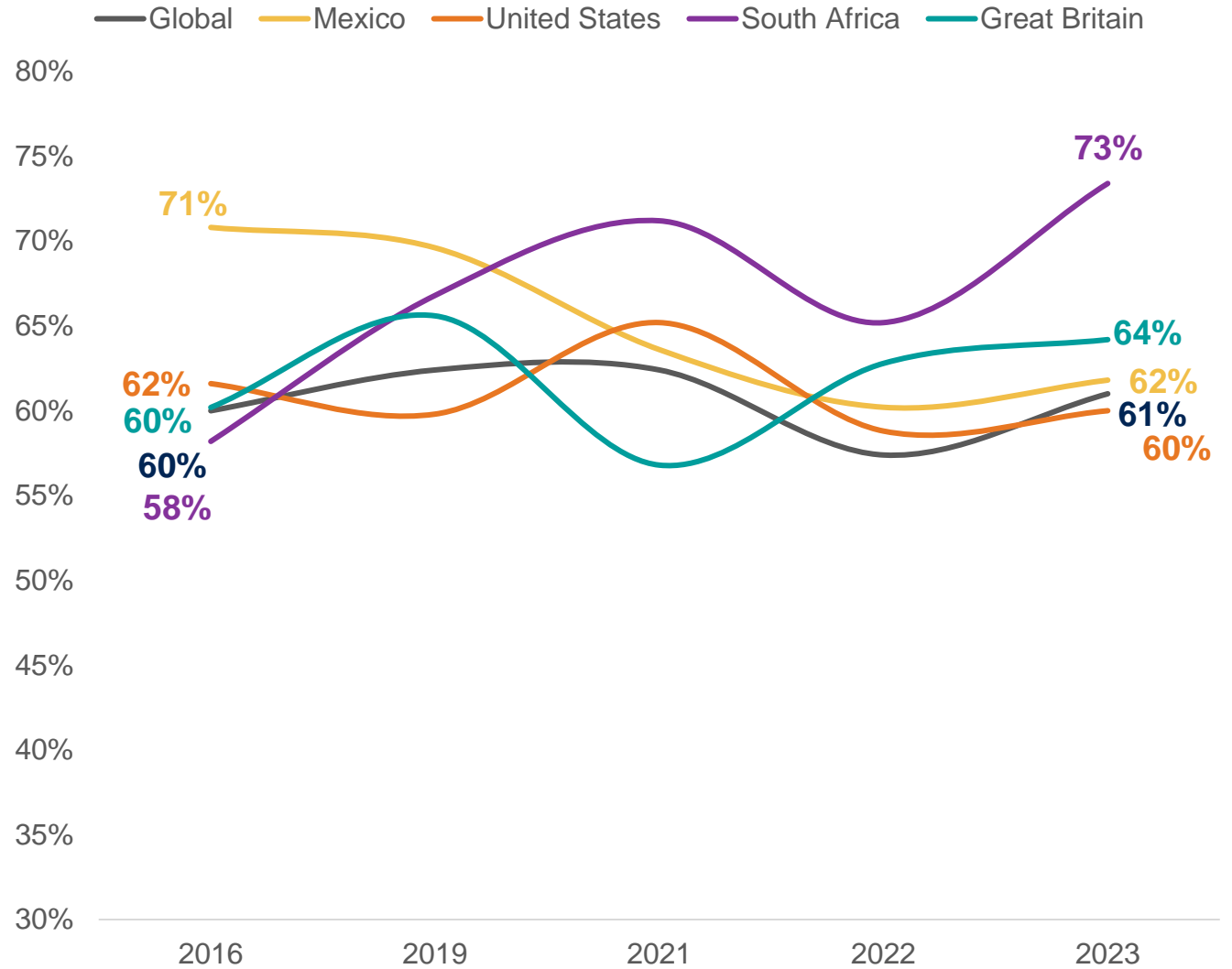
Global Country Average

61% agree

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The system is broken index is made up of the average agreement to the five statements below:

- 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





TREND

System is broken index

Global Country Average

61% agree

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% agree

	2023	2022	2021	2019	2016
Global 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%

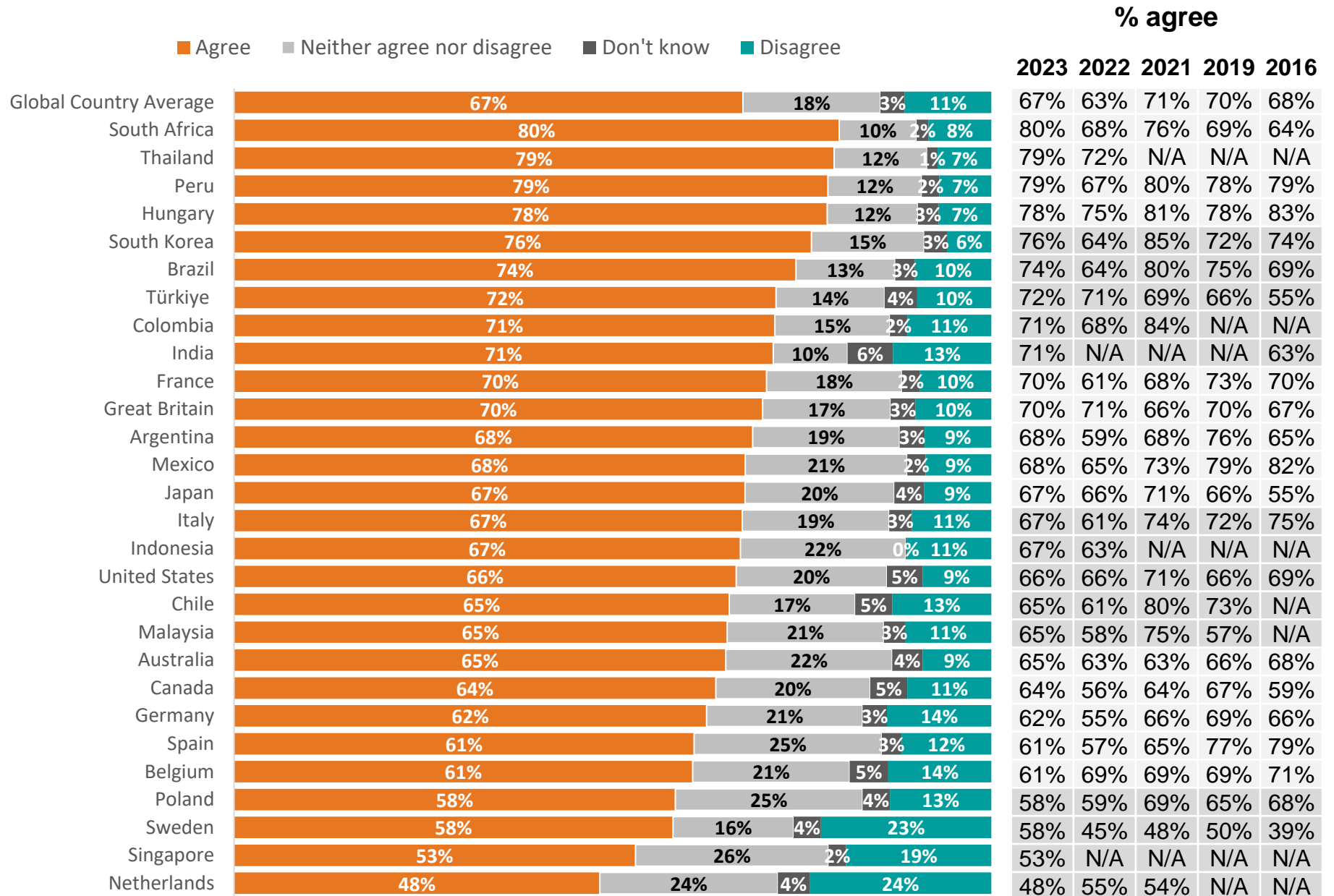


The [country's] economy is rigged to advantage the rich and powerful

Global Country Average

67% agree

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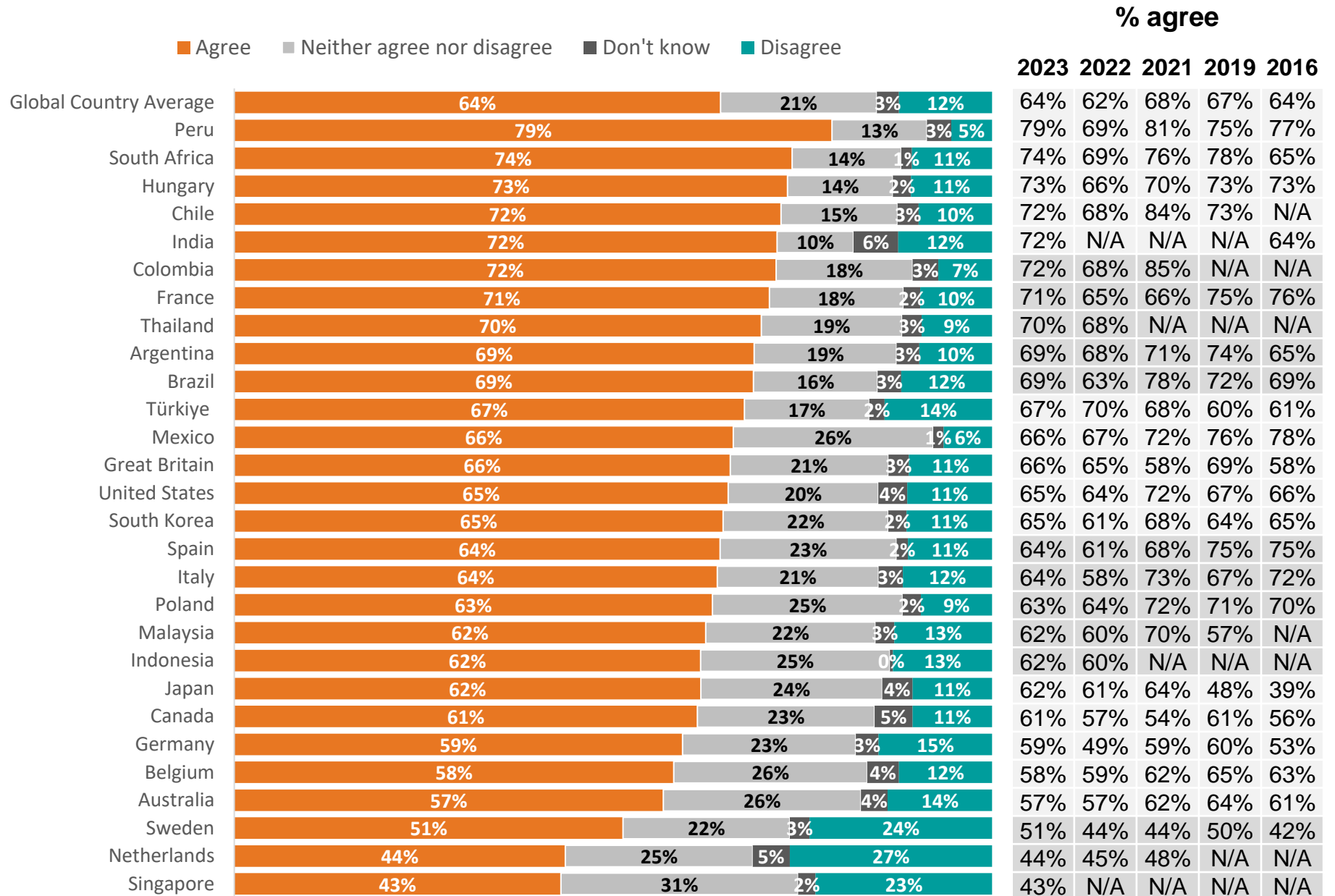


Traditional parties and politicians don't care about people like me

Global Country Average

64% agree

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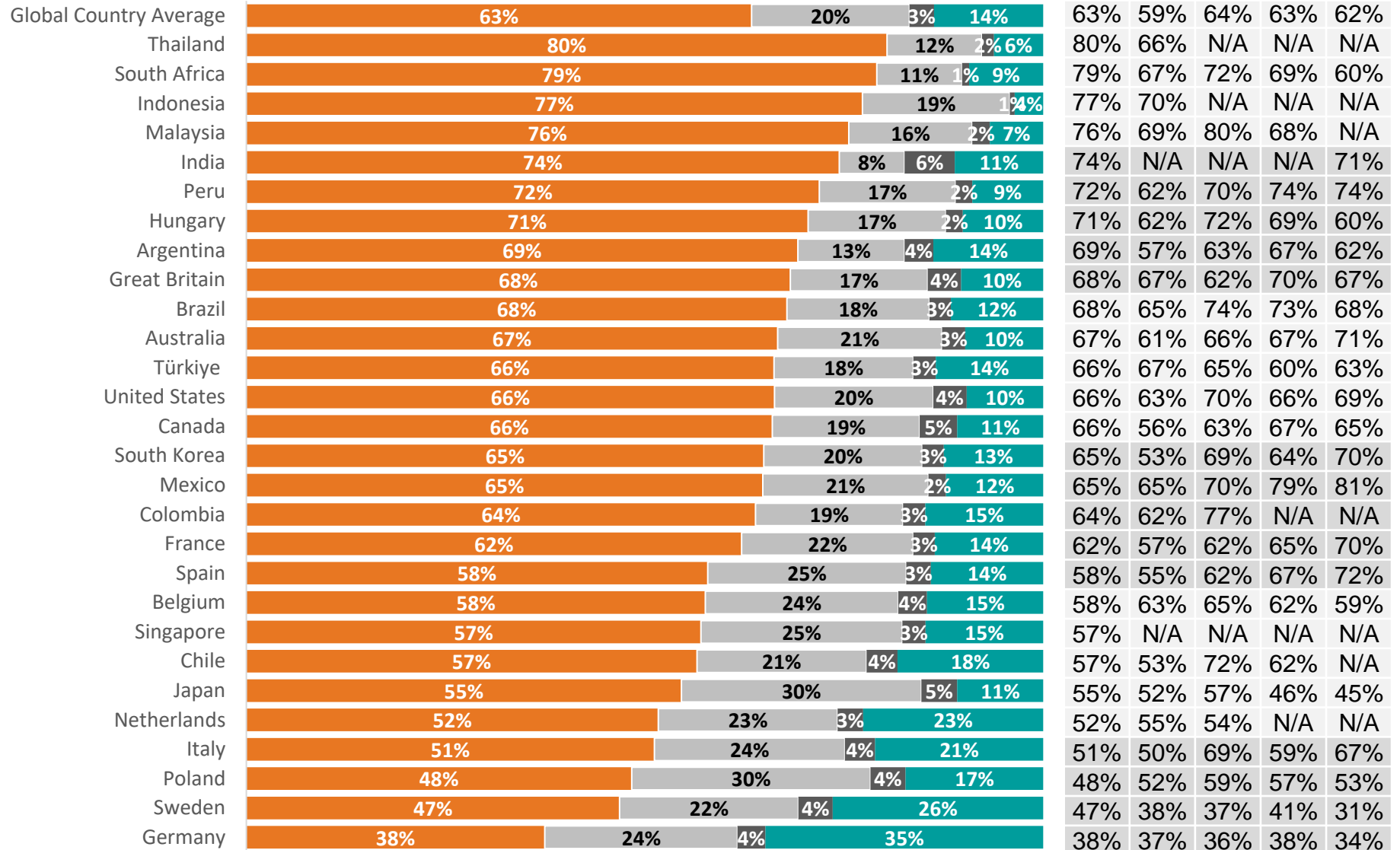
[Country] needs a strong leader to take the country back from the rich and powerful

Global Country Average

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Agree Neither agree nor disagree Don't know Disagree





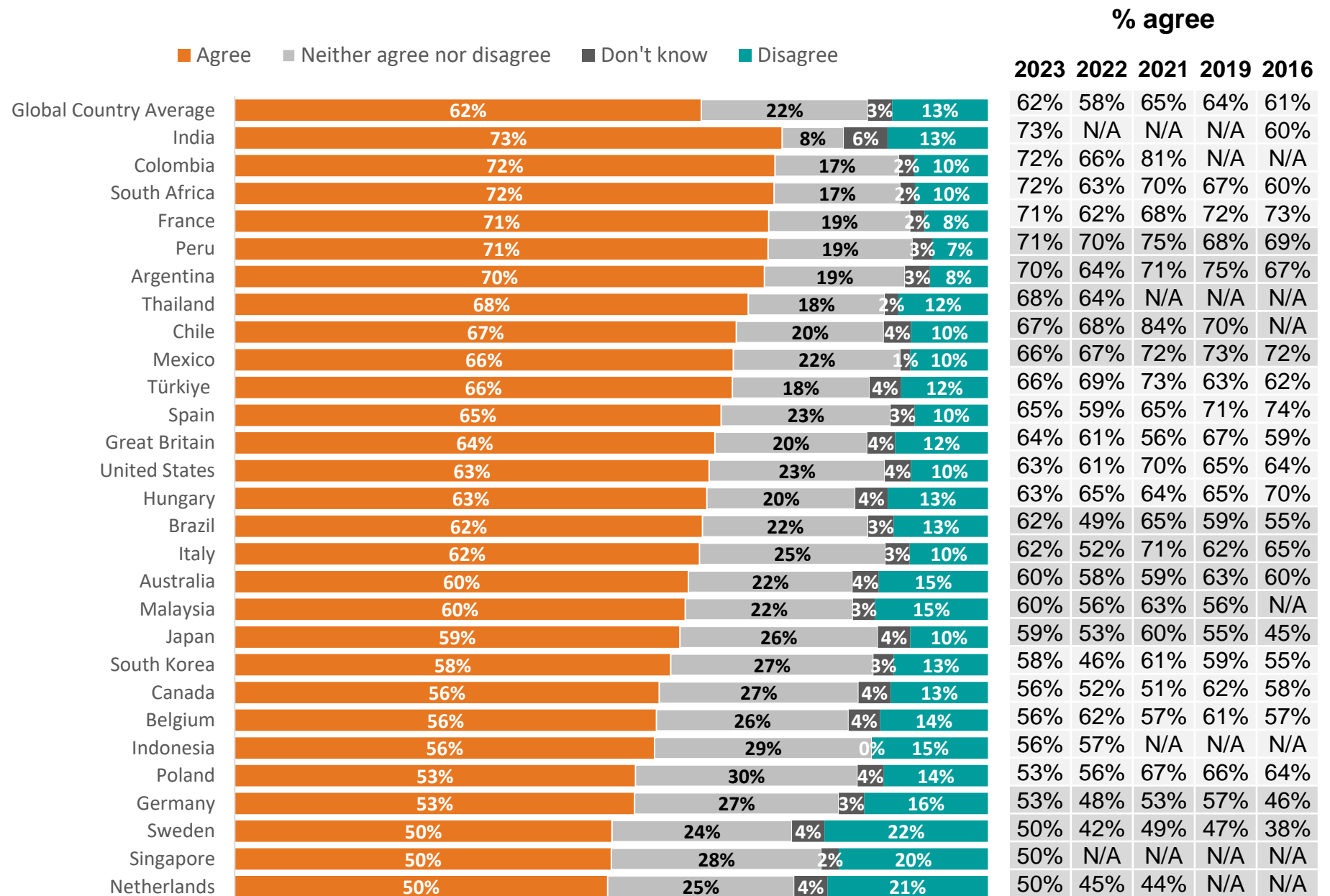
Experts in this country don't understand the lives of people like me

Global Country Average

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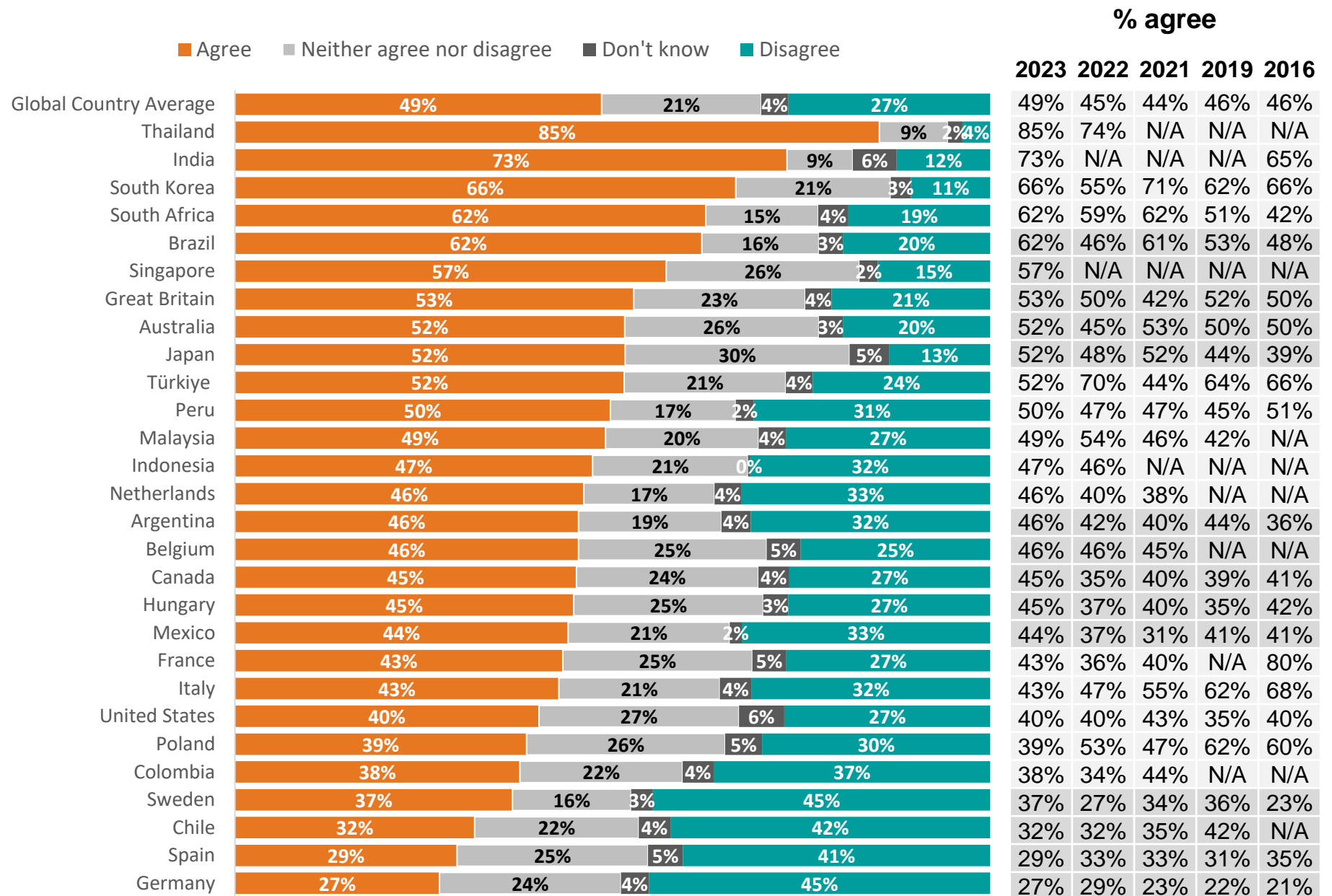


To fix [Country], we need a strong leader willing to break the rules

Global Country Average

49% agree

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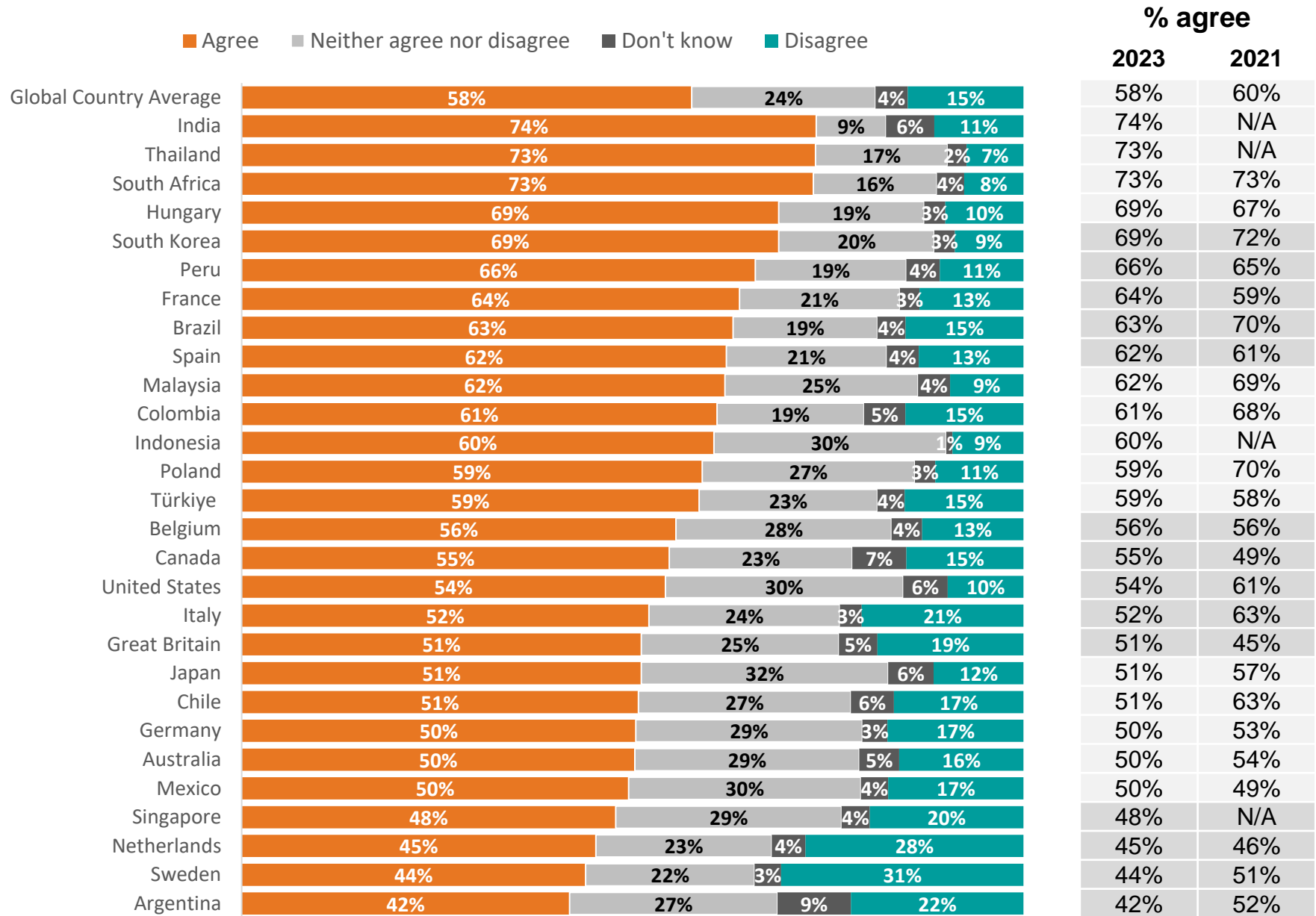




The most important political issues in [Country] should be decided directly by the people through referendums, not by the elected officials

Global Country Average

58% agree



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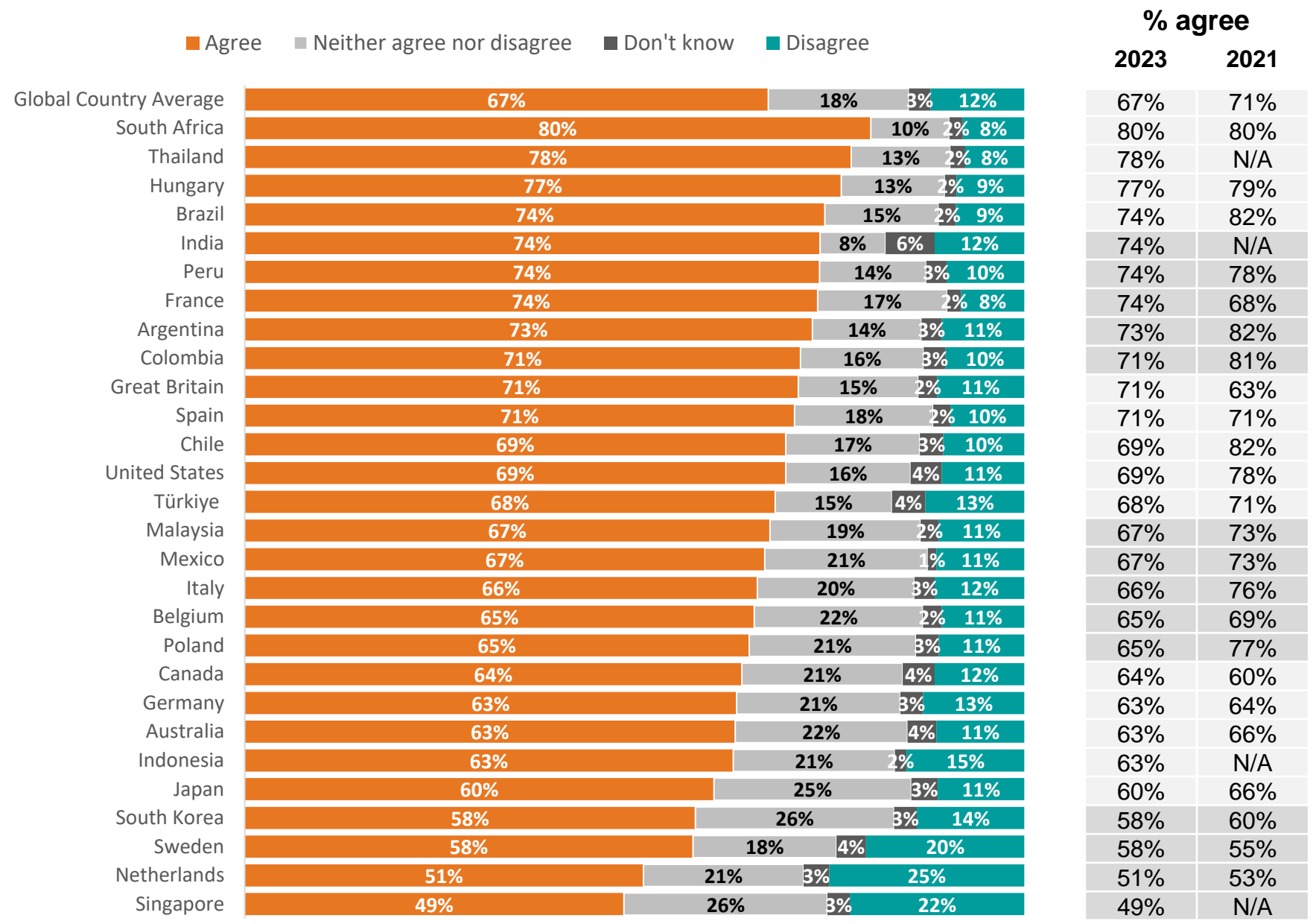




The political and economic elite don't care about hard-working people

Global Country Average

67% agree



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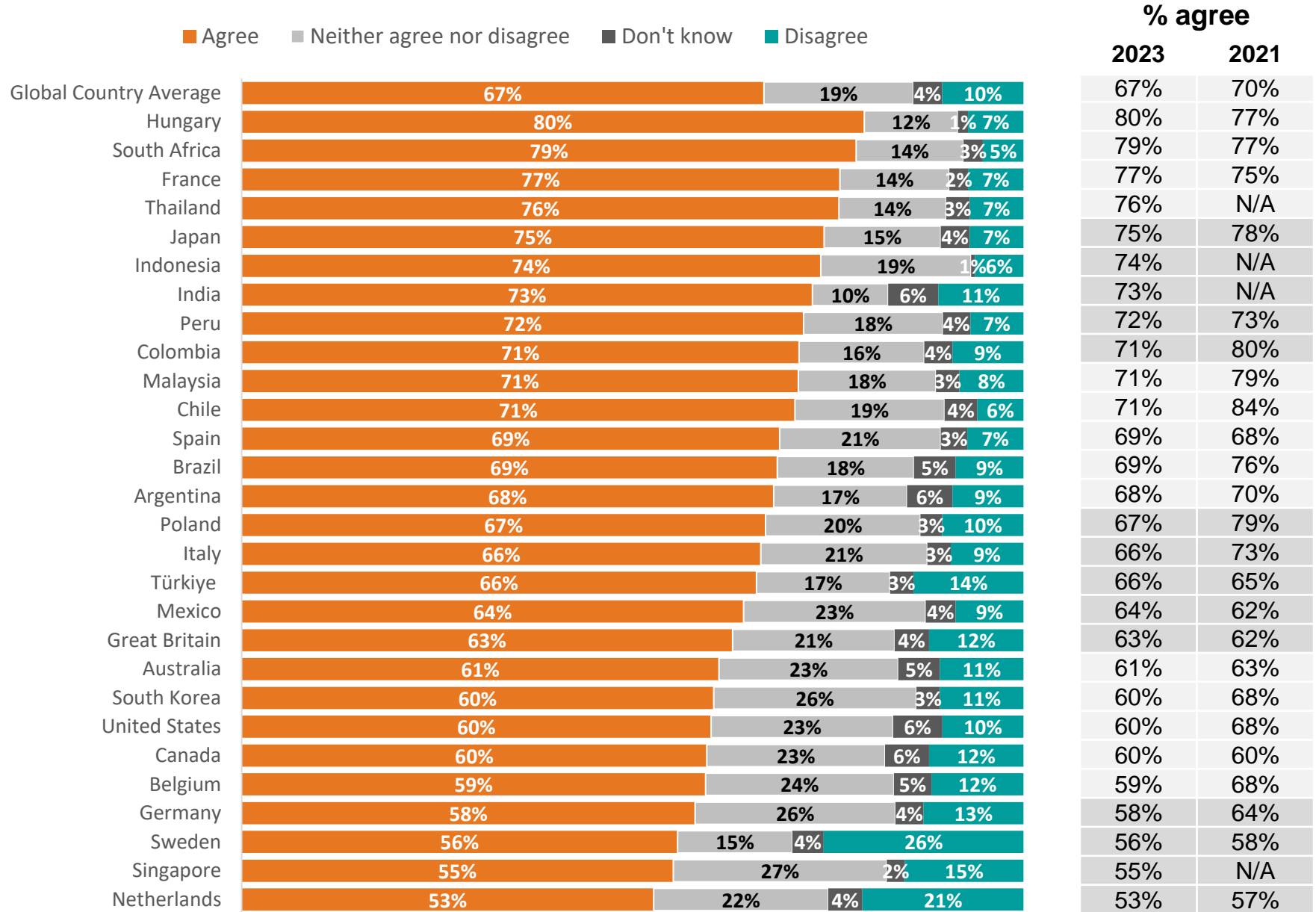




The main divide in our society is between ordinary citizens and the political and economic elite

Global Country Average

67% agree



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IMMIGRATION AND NATIVISM



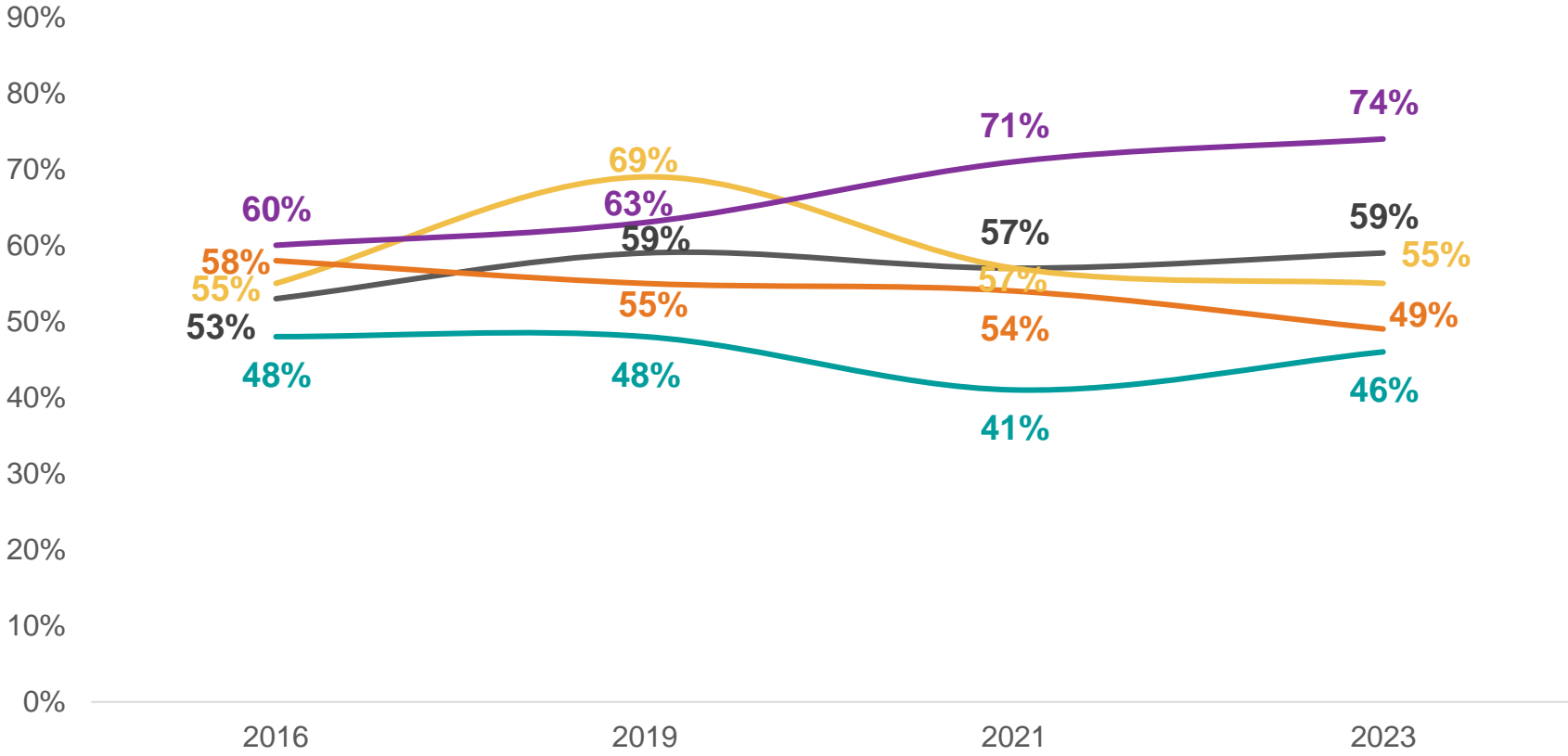
When jobs are scarce, employers should prioritize hiring people of this country over immigrants

Global Country Average

59% agree

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Global Mexico United States South Africa Great Britain





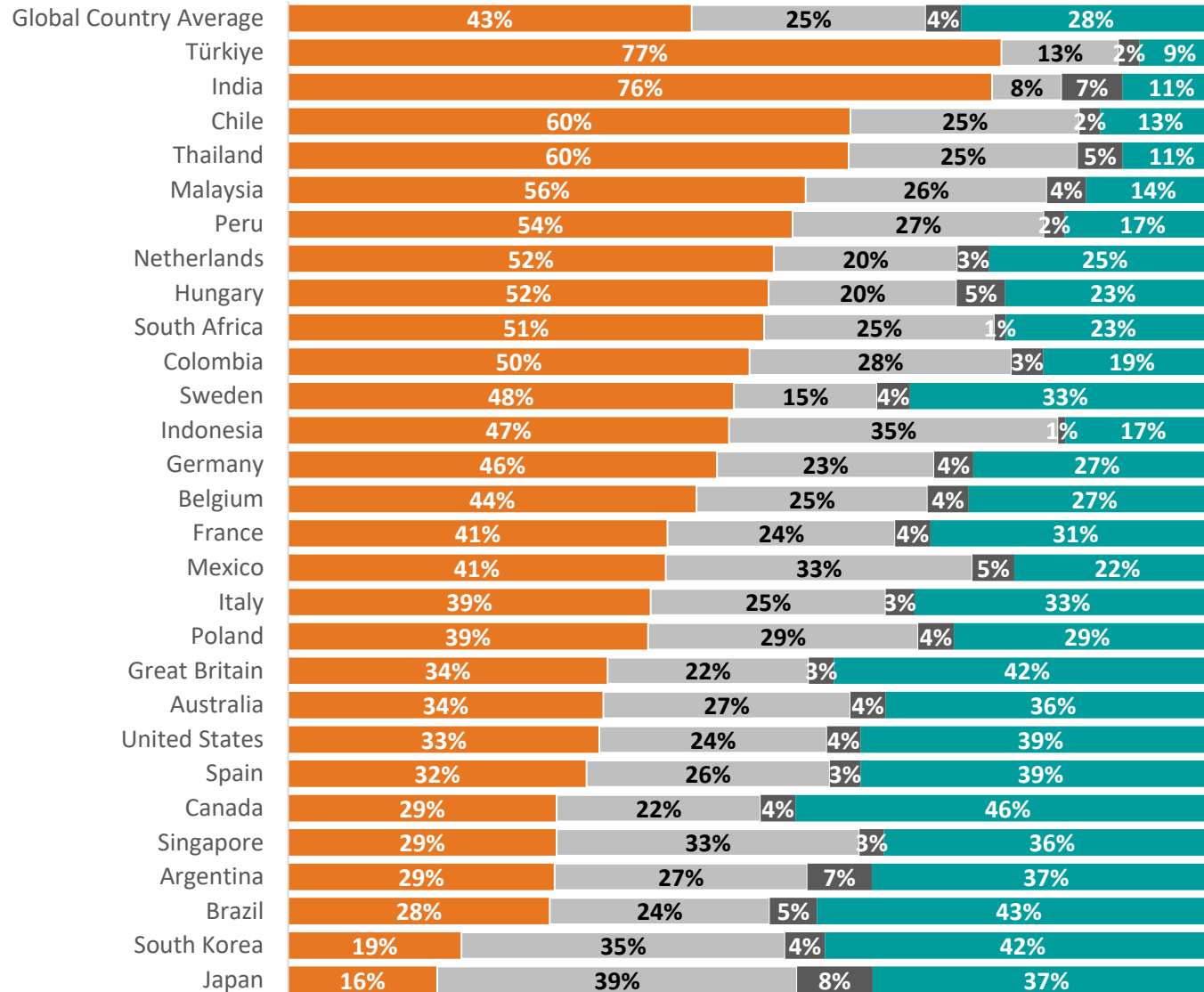
[Country] would be stronger if we stopped immigration

Global Country Average

43% agree

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Agree Neither agree nor disagree Don't know Disagree



% agree

2023	2021	2016
43%	38%	32%
77%	70%	61%
76%	N/A	N/A
60%	47%	N/A
60%	N/A	N/A
56%	56%	N/A
54%	52%	19%
52%	44%	N/A
52%	41%	49%
51%	48%	37%
50%	53%	N/A
48%	43%	27%
47%	N/A	N/A
46%	36%	37%
44%	38%	47%
41%	40%	40%
41%	30%	19%
39%	40%	46%
39%	27%	31%
34%	31%	31%
34%	30%	30%
33%	31%	38%
32%	30%	28%
29%	20%	24%
29%	N/A	N/A
29%	37%	34%
28%	26%	17%
19%	24%	12%
16%	15%	14%

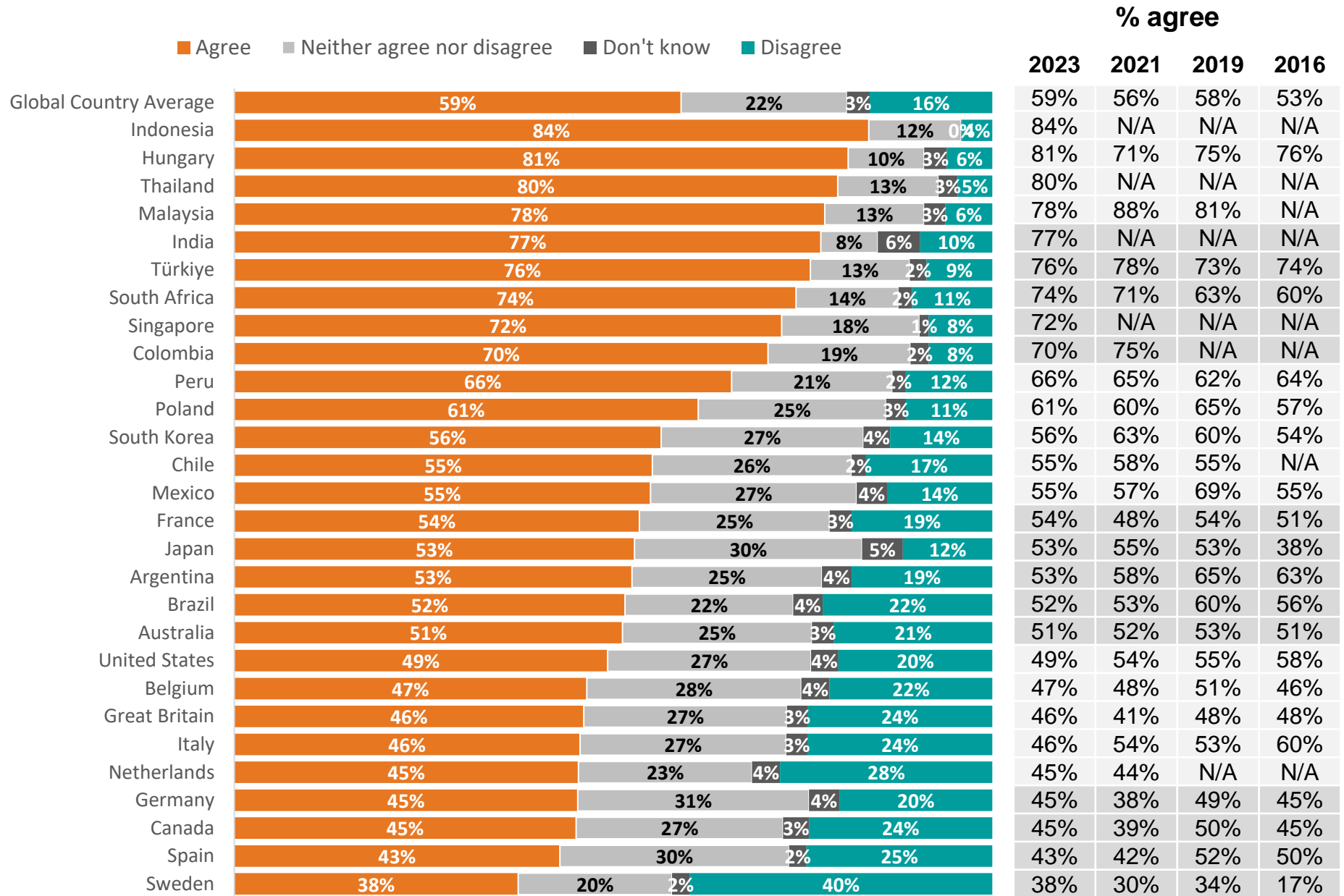




When jobs are scarce, employers should prioritize hiring people of this country over immigrants

Global Country Average

59% Agree



Base: 20,630 online adults under age 75 across 28 countries, interviewed November 22-December 6, 2023

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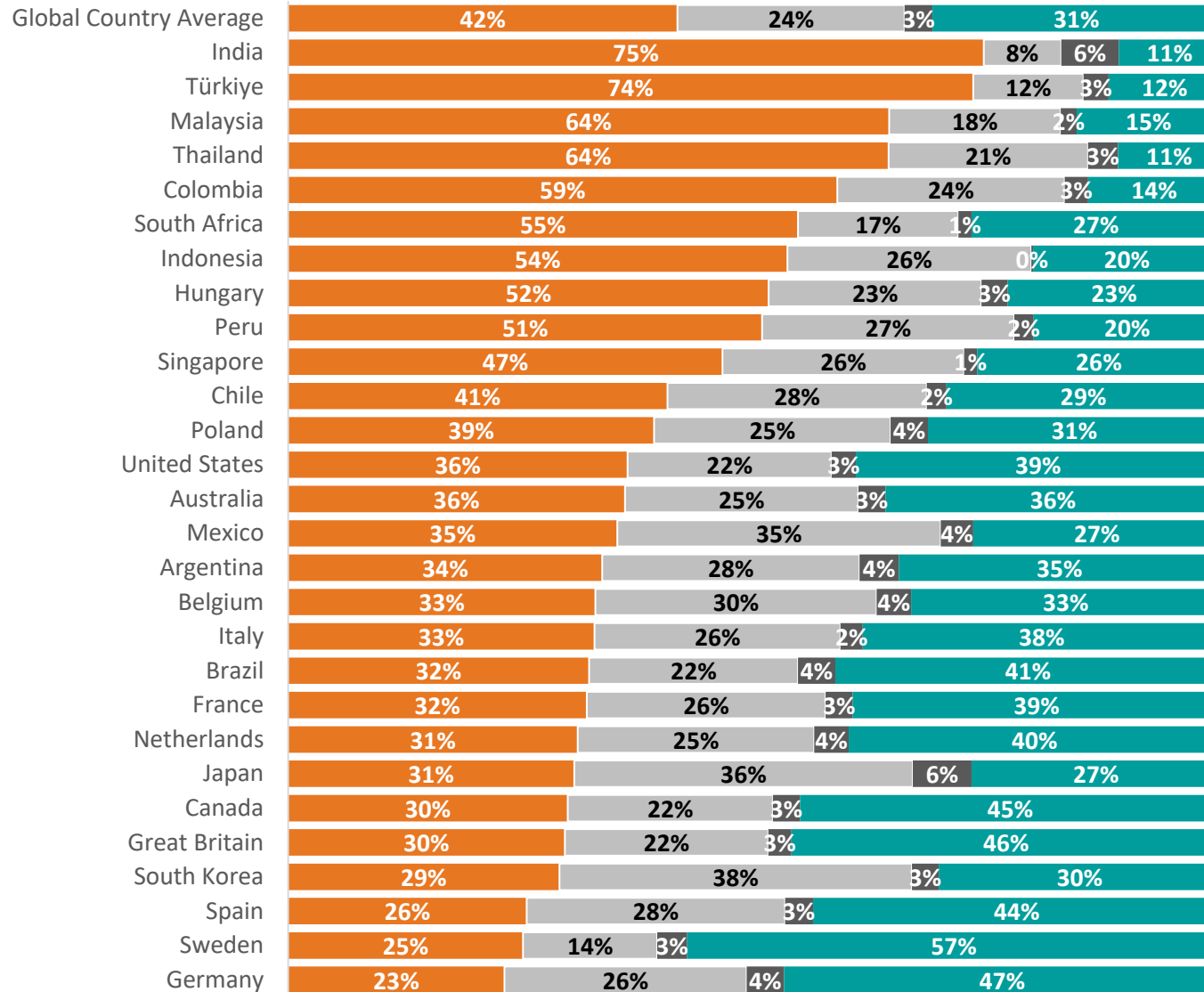
Immigrants take jobs away from real [NOUN FOR PEOPLE FROM COUNTRY, PLURAL]

Global Country Average

42% agree

Base: 20,630 online adults under age 75 across 28 countries, interviewed November 22-December 6, 2023
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Agree Neither agree nor disagree Don't know Disagree



% agree

2023	2021	2016
42%	37%	34%
75%	N/A	N/A
74%	71%	62%
64%	65%	N/A
64%	N/A	N/A
59%	62%	N/A
55%	53%	47%
54%	N/A	N/A
52%	35%	36%
51%	53%	41%
47%	N/A	N/A
41%	40%	N/A
39%	29%	23%
36%	37%	43%
36%	36%	37%
35%	24%	26%
34%	37%	48%
33%	31%	37%
33%	37%	40%
32%	34%	32%
32%	29%	33%
31%	29%	N/A
31%	29%	12%
30%	26%	32%
30%	27%	32%
29%	36%	34%
26%	26%	35%
25%	22%	9%
23%	22%	22%



OPINIONS OF ELITES



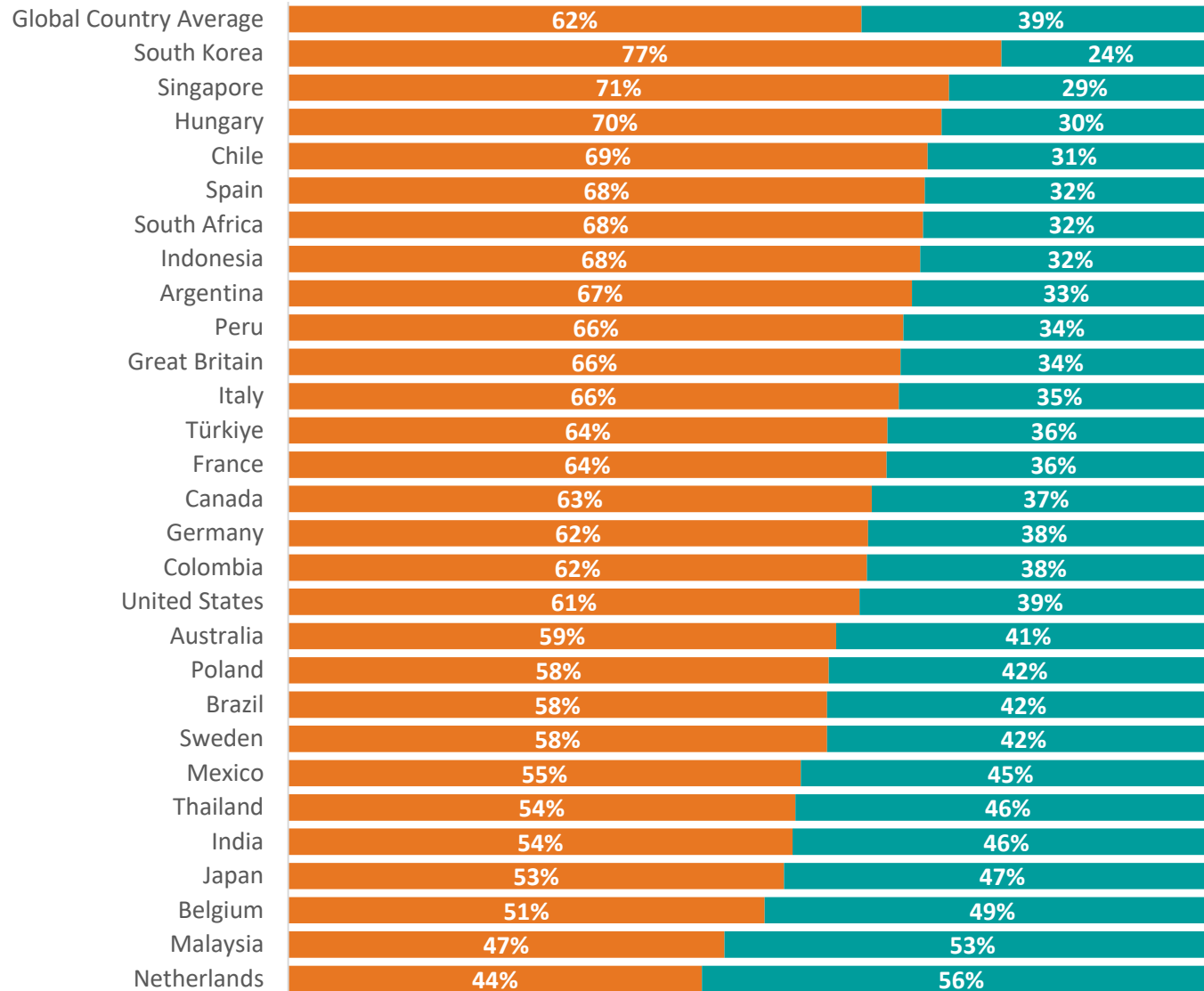
The people who exercise power or influence in politics, business, the media, technology, science, and academia are often called the elite. Which of these two statements is closest to your opinion of the "elite" in [Country]

Global Country Average

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

■ 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
67%	73%
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%
51%	58%
47%	43%
44%	51%

Base: 20,630 online adults under age 75 across 28 countries, interviewed November 22–December 6, 2023. The "Global 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.



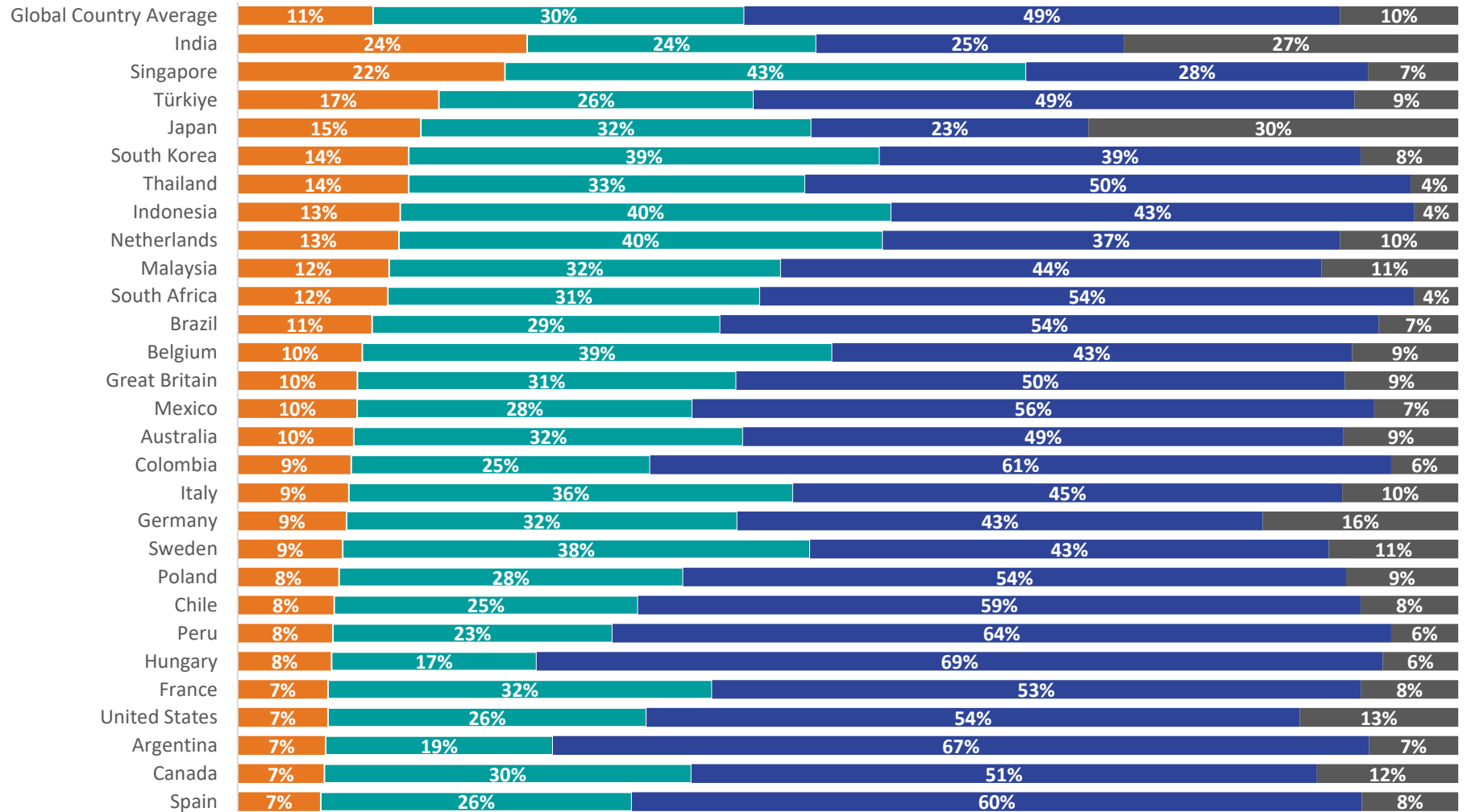
And which of these three statements is closest to your opinion of the "elite" in [Country]

Global 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

Base: 20,630 online adults under age 75 across 28 countries, interviewed November 22-December 6, 2023. The "Global 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.

- 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



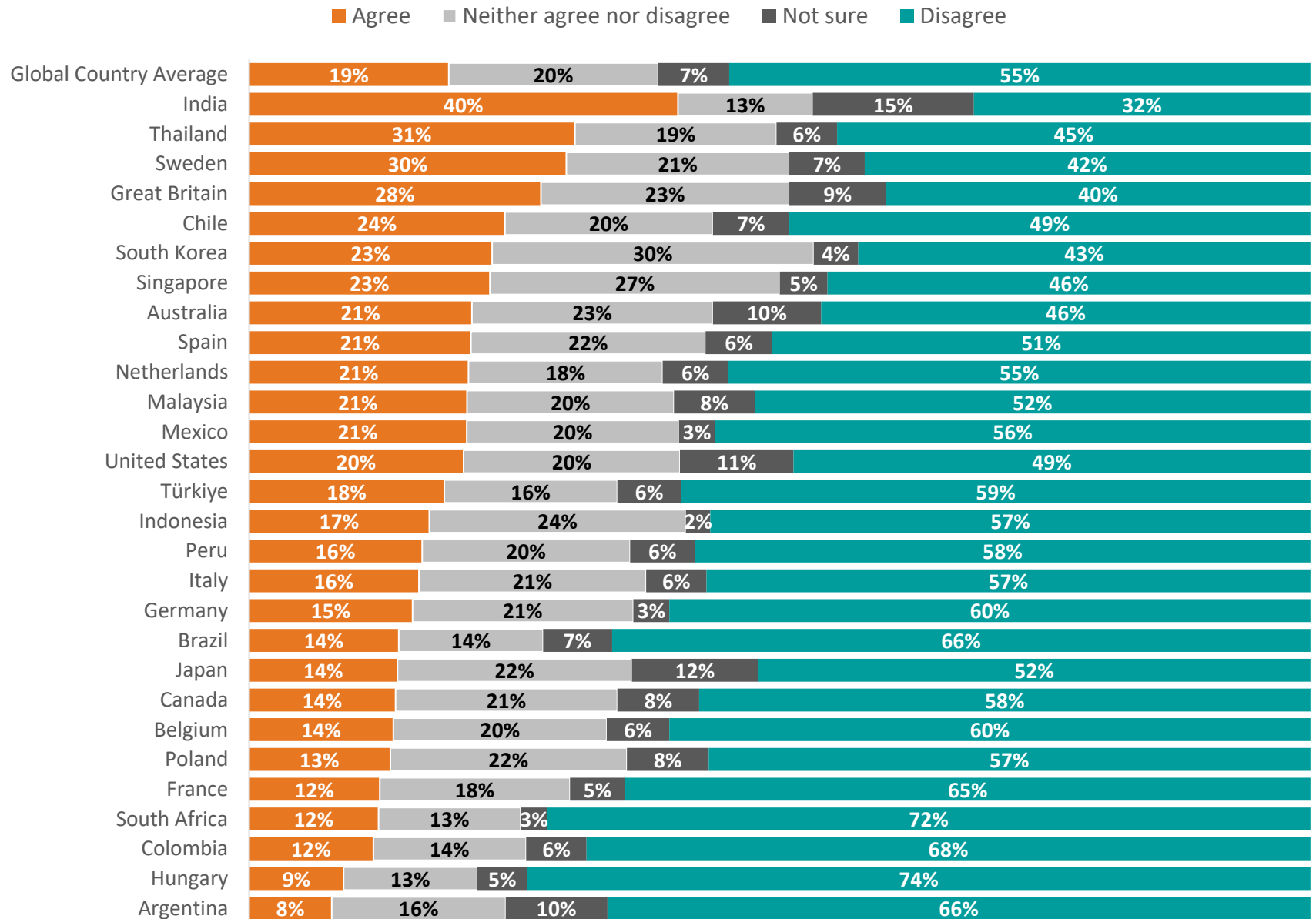
OPINIONS OF GOVERNMENTS



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

Global Country Average

19% agree



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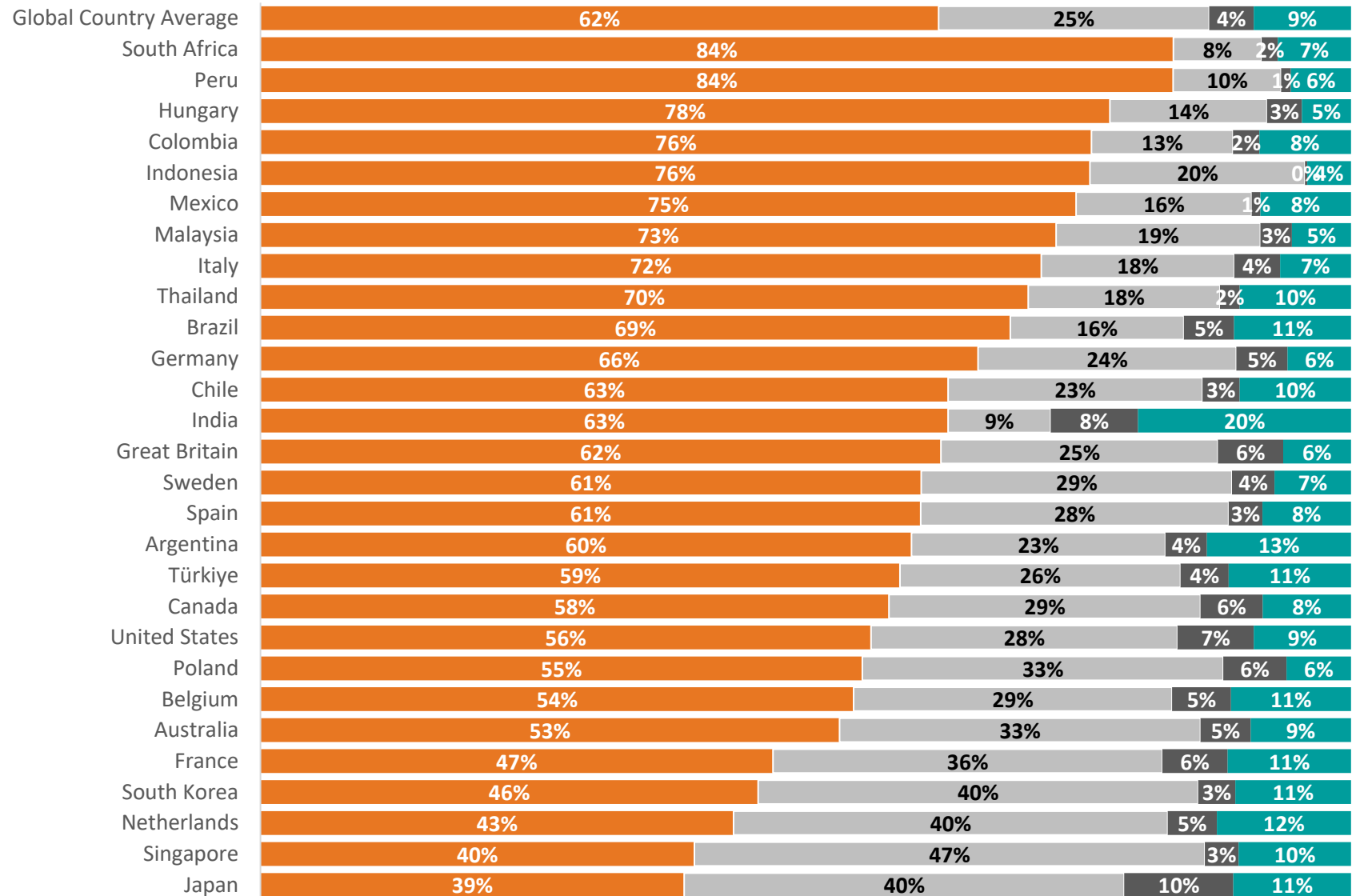
To what extent do you think the [Country] government should increase or lower its spending in each of the following: Infrastructure (e.g., roads and bridges, rail and air networks, water, electricity, broadband)

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

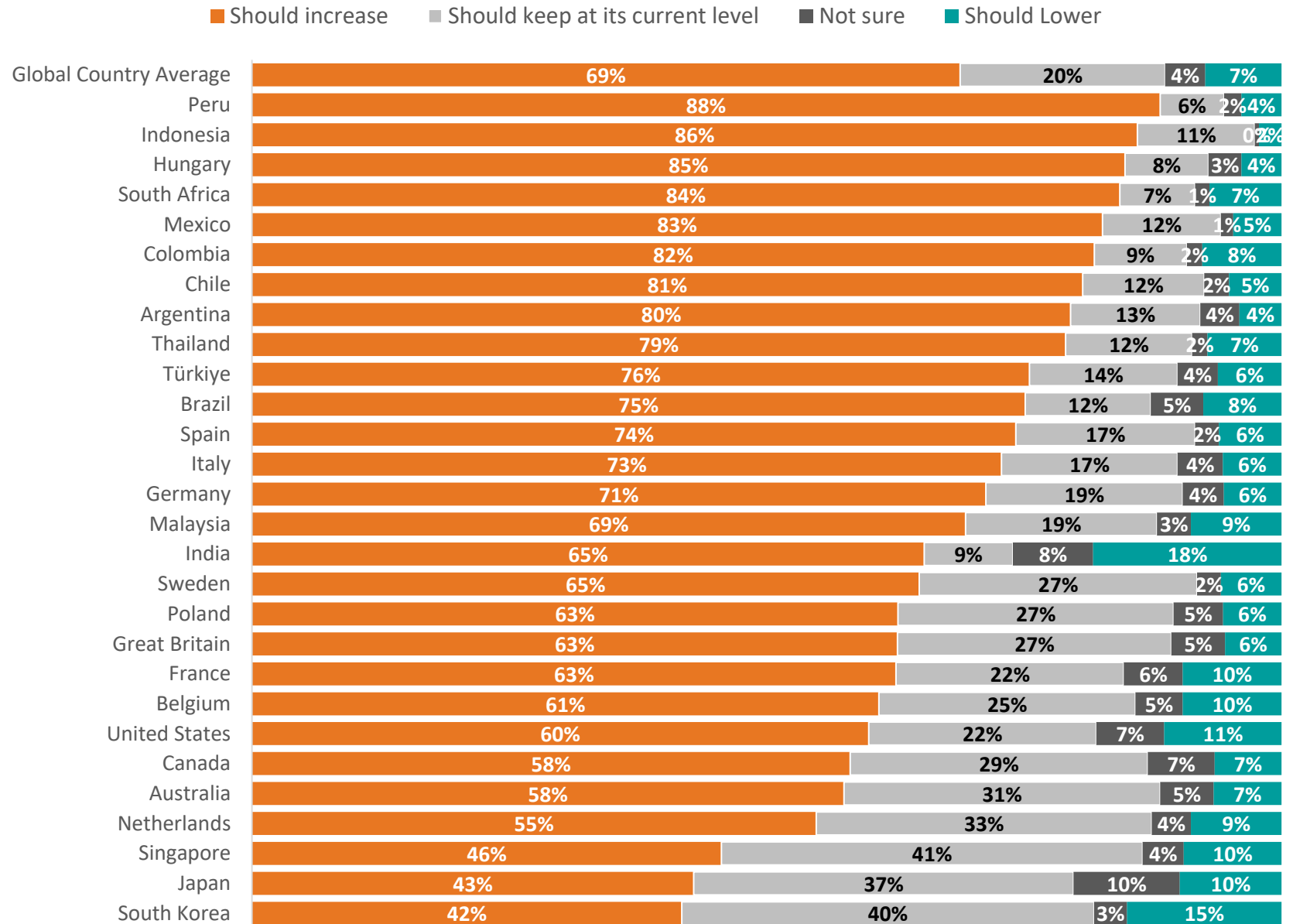


Q

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)

Global Country Average

69% say should increase spending on education



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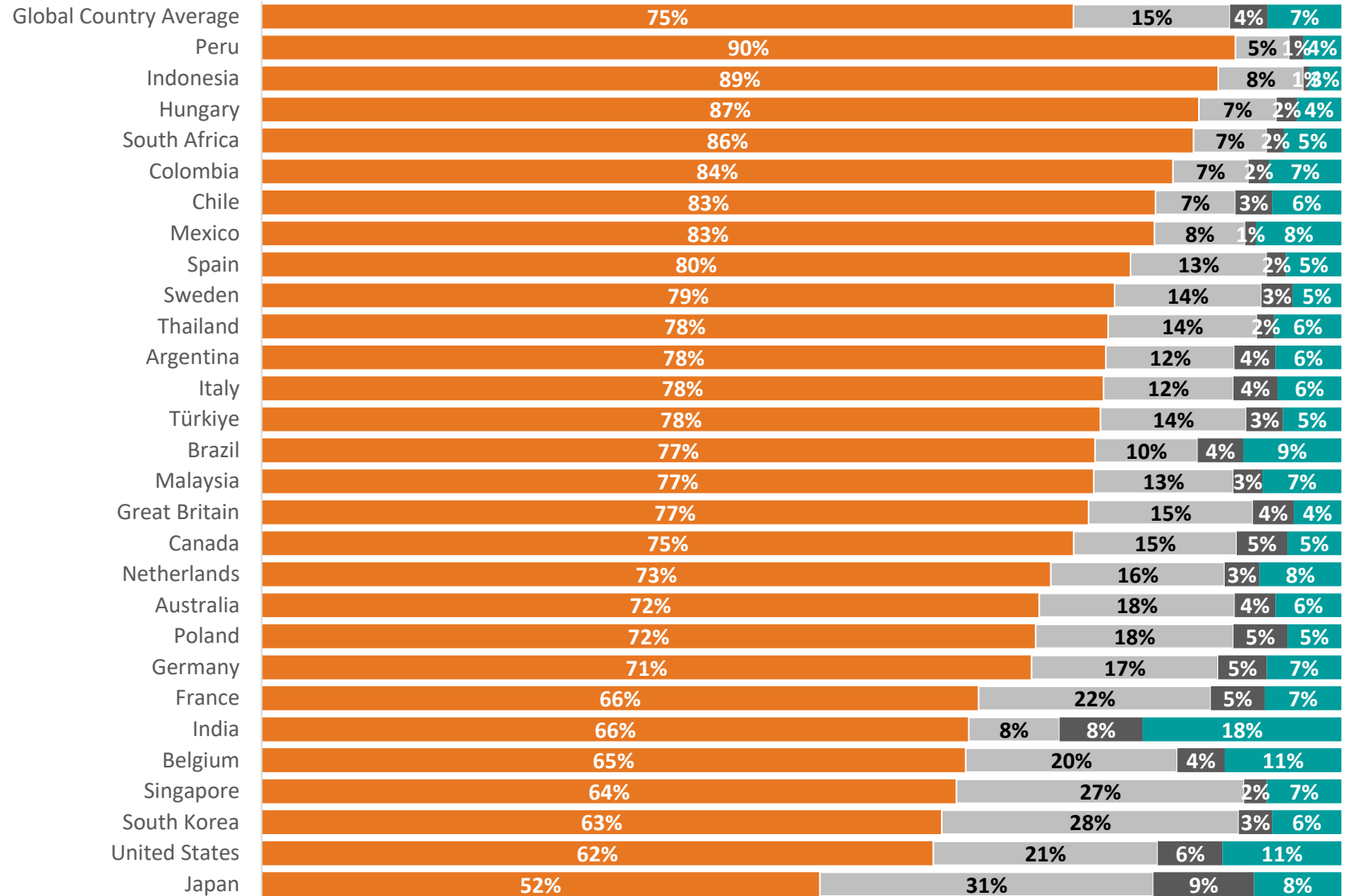
To what extent do you think the [Country] government should increase or lower its spending in each of the following: Healthcare (e.g. disease prevention, diagnosis, treatment, research)

Global Country Average

75% say should increase spending on healthcare

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Should Increase Should keep at its current level Not sure Should lower





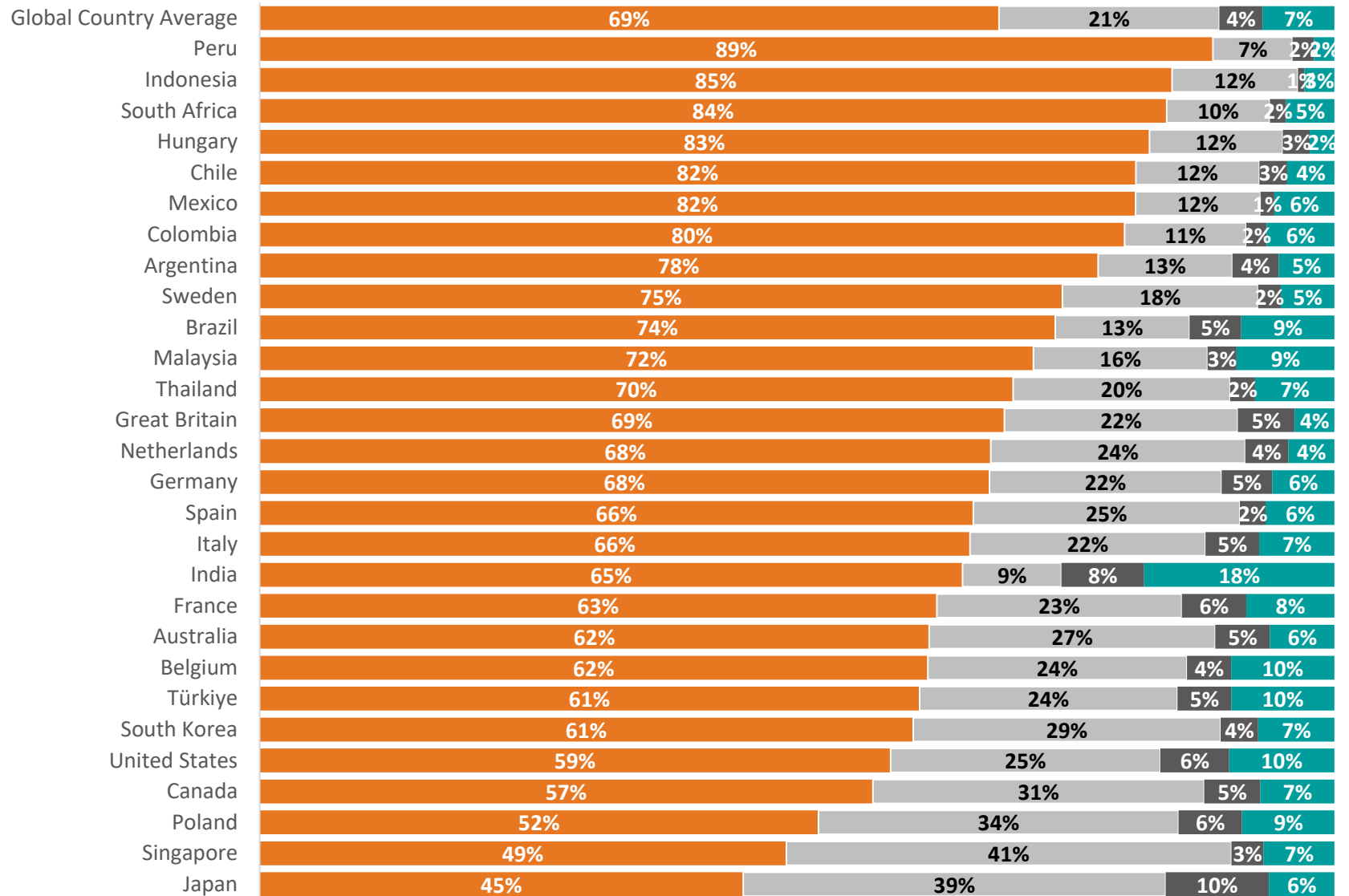
To what extent do you think the [Country] government should increase or lower its spending in each of the following: Public safety (e.g., law enforcement, fire and emergency medical services)

Global Country Average

69% say should increase spending on public safety

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





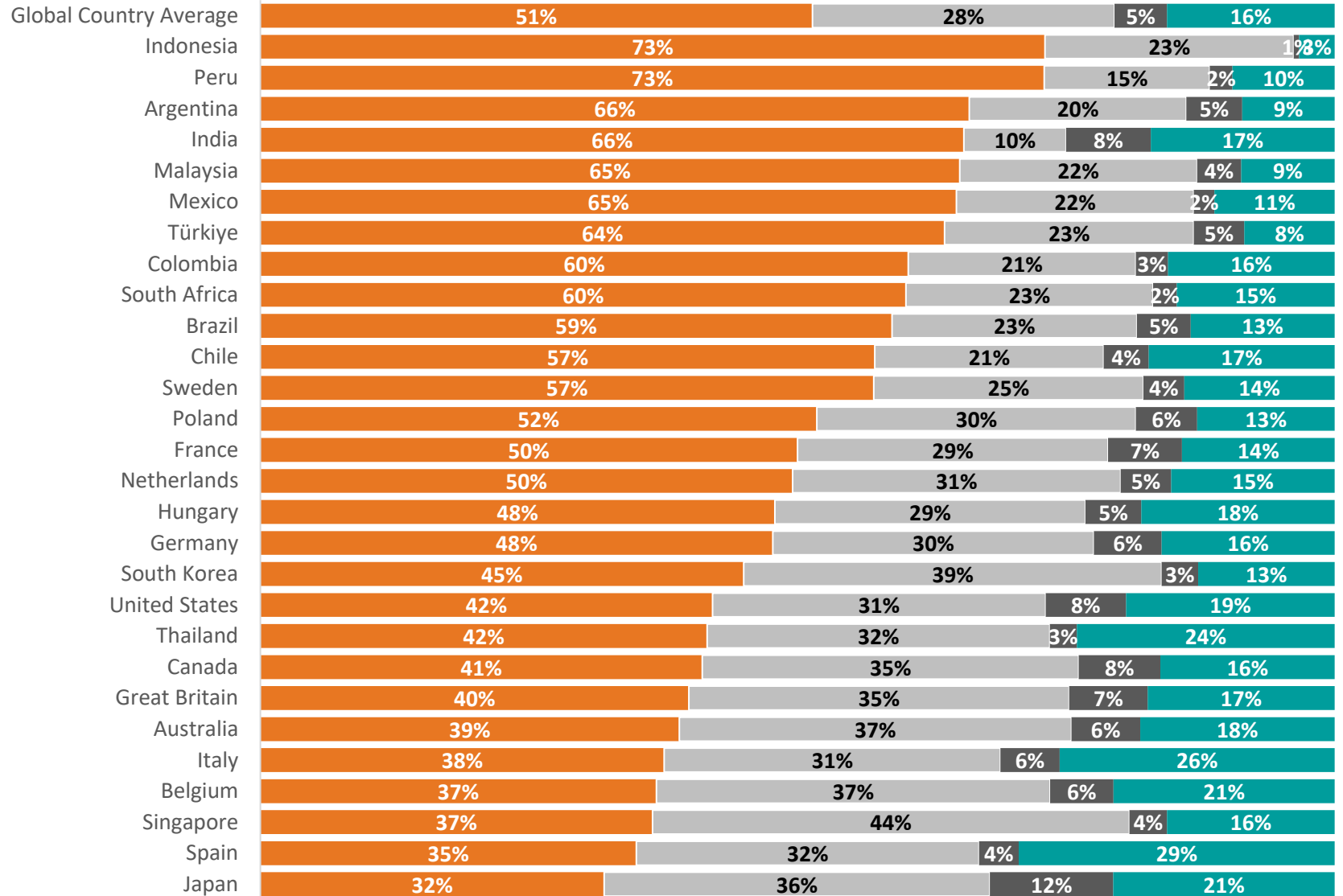
To what extent do you think the [Country] government should increase or lower its spending in each of the following: Defense and national security (e.g., the military)

Global Country Average

51% say should increase spending on defense and national security

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



Q

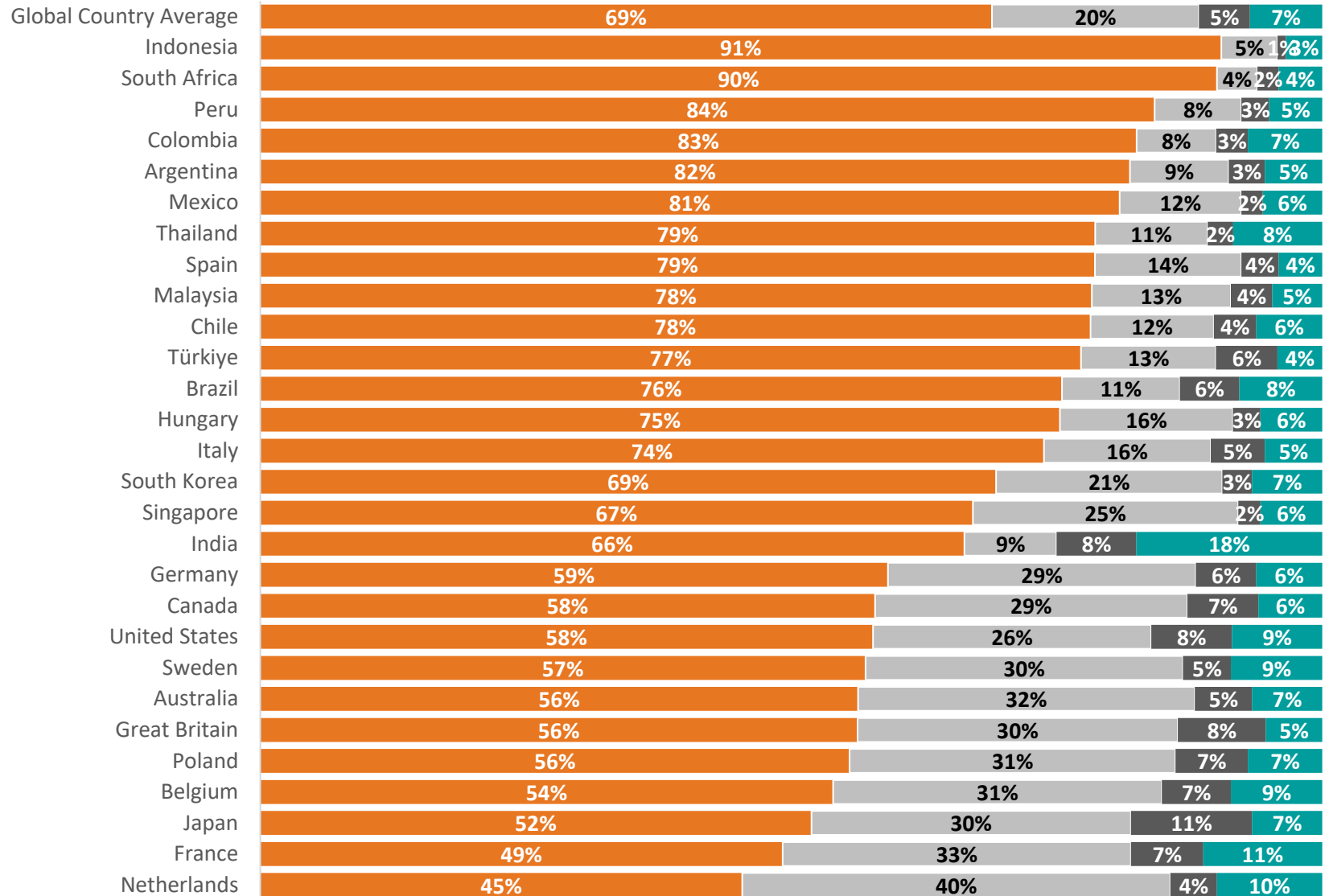
To what extent do you think the [Country] government should increase or lower its spending in each of the following: Creating jobs

Global Country Average

69% say should increase spending on creating jobs

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





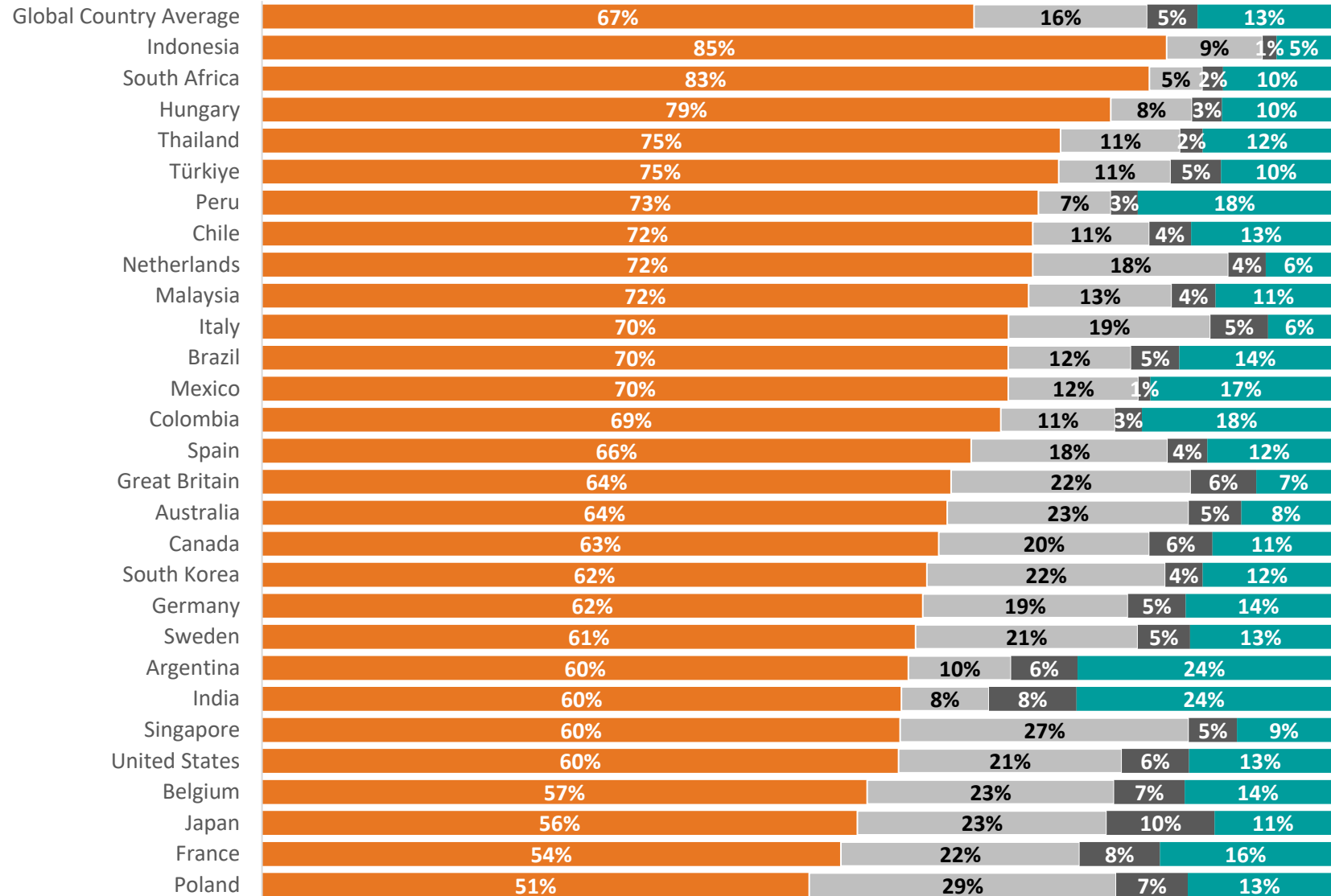
To what extent do you think the [Country] government should increase or lower its spending in each of the following: Reducing poverty and social inequality

Global Country Average

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

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



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.

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 Global 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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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, countries and People.

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So that our clients can act faster, smarter and bolder.

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SURE.
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SMARTER.**

GAME CHANGERS

