

THE STATE OF DEMOCRACY

(SECOND WAVE)

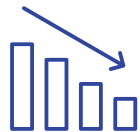
IPSOS KNOWLEDGE PANEL

19 November, 2024

GAME CHANGERS



KEY TAKEAWAYS



Dissatisfaction

Low levels of satisfaction with how democracy is working

Despite a marginal improvement since last year, the public remains largely dissatisfied with how democracy works in their country and more people think the way democracy works has worsened than think it has improved.

Sweden continues to stand out as the only nation where a majority (68%) express satisfaction with their democratic system. At the other end of the spectrum, only 18% say the same in Croatia. Few across all countries think democracy has got better over the last five years, and seven in ten in France say it has gotten worse. In Poland, both dimensions are improving sharply as a result of the change of government.



Local vs national

Democracy seen as working better locally

People tend to be more satisfied with the way democracy works at local level. They feel more adequately represented at local levels than at national or supranational levels. The same holds true for the ability of these various governing bodies to deliver concrete results for citizens.

In Croatia, institutional trust is generally very low.



Desire for change

Strong support for democratic principles despite desire for radical systemic change

In all seven countries surveyed, large numbers want radical change to the political system, believing that it is rigged in favor of political and economic elites, and that leaders do not take citizens' expectations into account. Yet we still find strong support for democratic principles, such as power diffusion and political participation.

People in Italy and Croatia are the most likely to think the economy is rigged for the rich and powerful (77% and 74% respectively), while in Poland opinions are more split.



Citizens' participation

Citizens are ready to make a difference

Citizens expect major, even radical, changes in the way the political system works. While they say that political participation is unlikely to change things, they nevertheless remain very attached to voting in elections. Furthermore, varied modes of political and social action - petitions, boycotts, demonstrations, engagement on social networks - are also widely used by citizens.

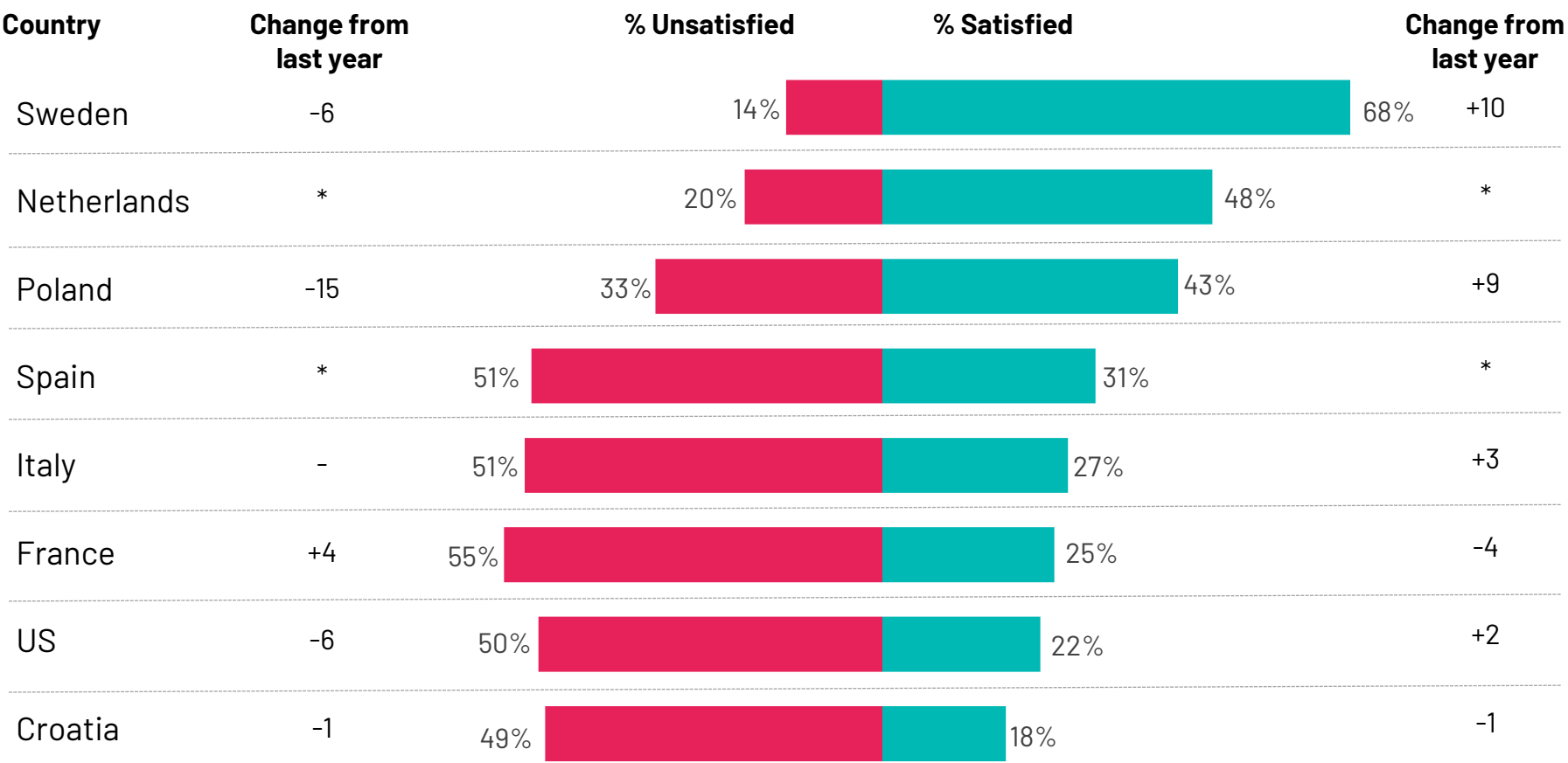
43% of Italians and 37% of Poles have already signed a petition, either online or offline. Boycotting products for political or ethical reasons is more common in France (37%) and Sweden (36%).

PUBLIC PERCEPTION OF DEMOCRATIC FUNCTIONING

Satisfaction with the way democracy works remains low overall, although significant variations exist between countries: high satisfaction in Sweden, massive dissatisfaction in Southern Europe, but also in the USA and Croatia. Compared with last year, satisfaction has further declined in France, reflecting real dissatisfaction with the handling of the recent snap parliamentary election results.

Overall, how satisfied or dissatisfied are you with the way democracy is working in [COUNTRY]?

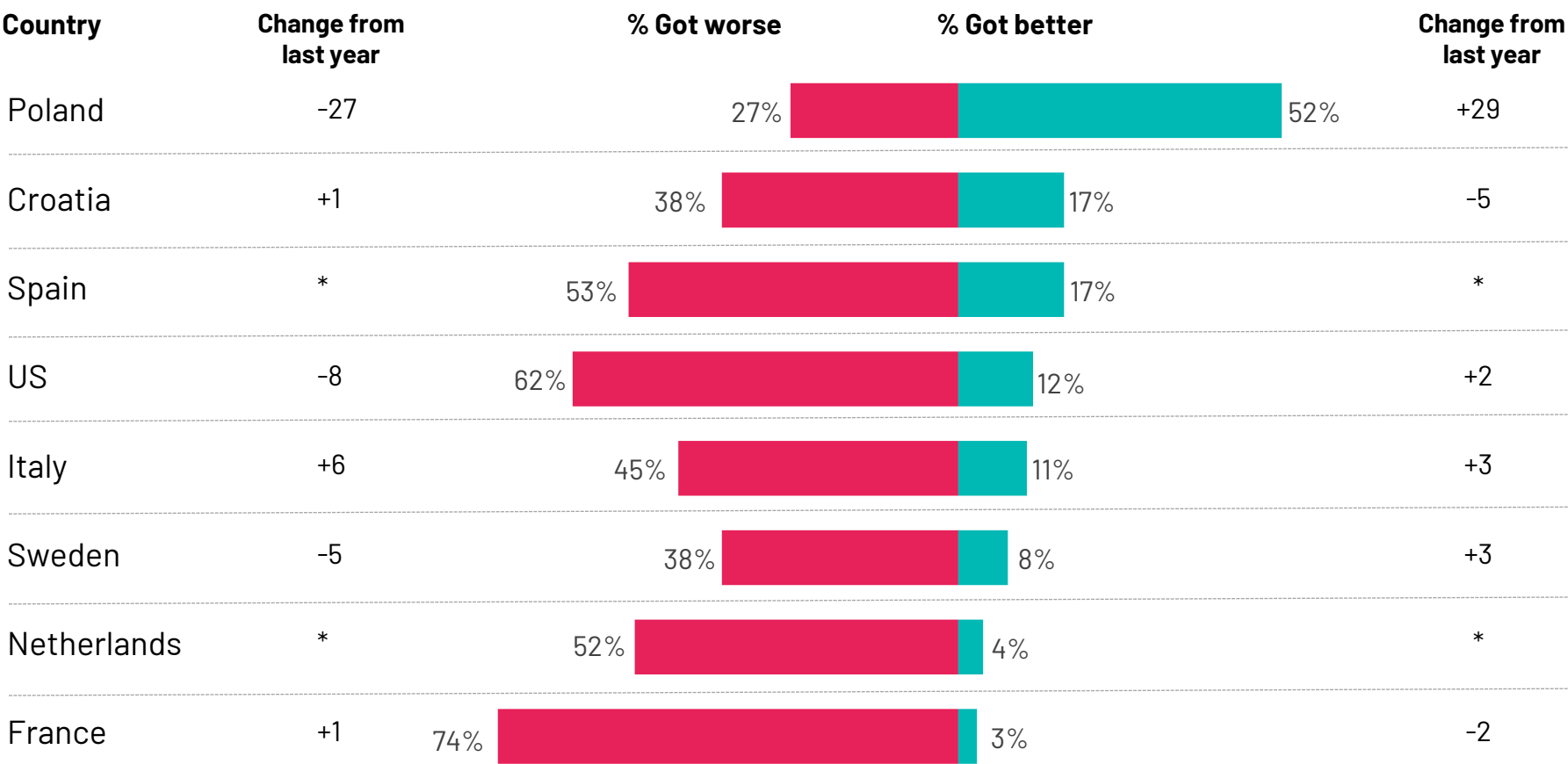
SATISFACTION WITH DEMOCRACY



In most countries, the prevailing sentiment is that the effectiveness of democracy has declined over the past five years. Poland stands out as an exception, experiencing a notable increase in positive views, likely due to the change in government following the autumn 2023 elections.

Compared to 5 years ago, would you say that the way democracy is working in [COUNTRY] today has got better, got worse or stayed the same?

STATE OF DEMOCRACY VS. 5 YEARS AGO

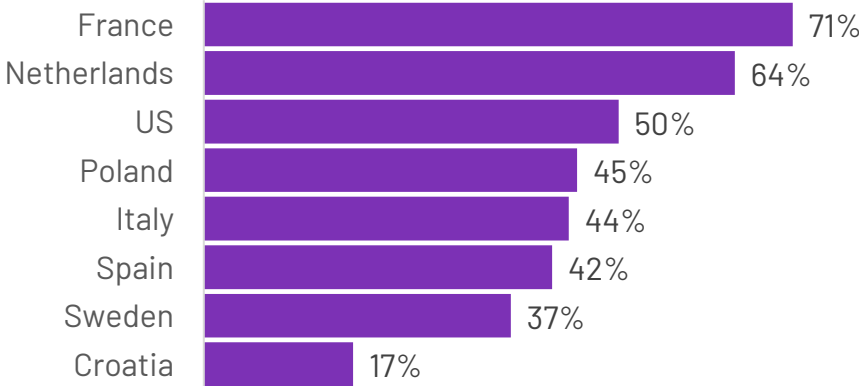


Satisfaction with government representation diminishes as the governing body's geographical distance increases: higher satisfaction at local or regional levels compared to national or supra-national levels. Notably, Croatia deviates from this trend, showing generally low confidence in various institutions, yet its citizens feel most represented by the European Union.

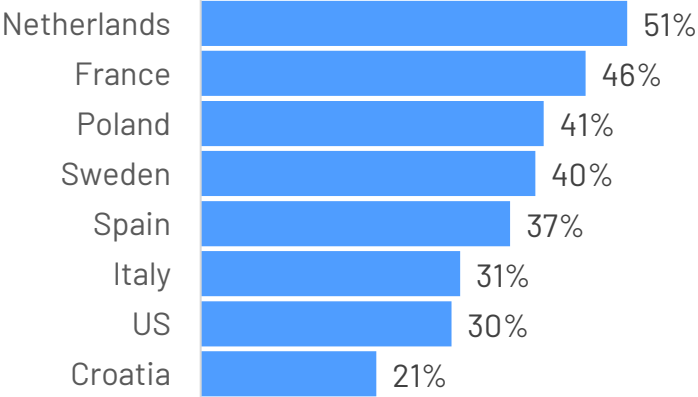
To what extent, if at all, do you feel like the following institutions represent your views and priorities?

FEELING REPRESENTED BY INSTITUTIONS

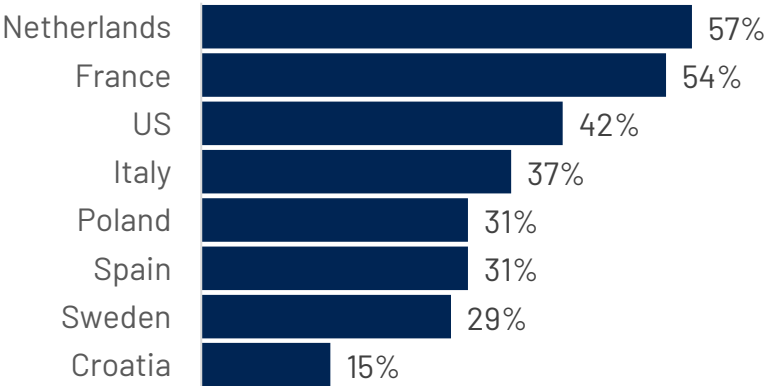
Local/city council



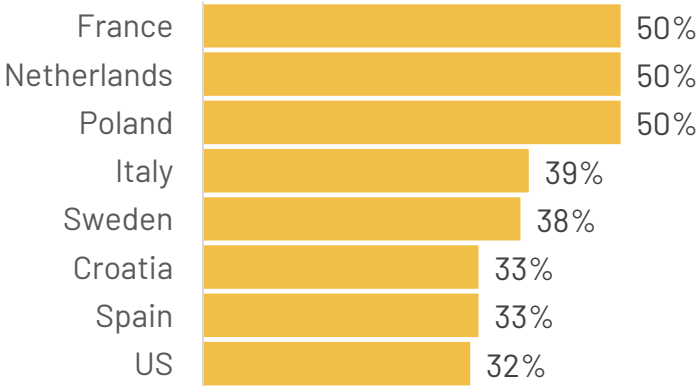
National government



Region/state government



European Union / United Nations



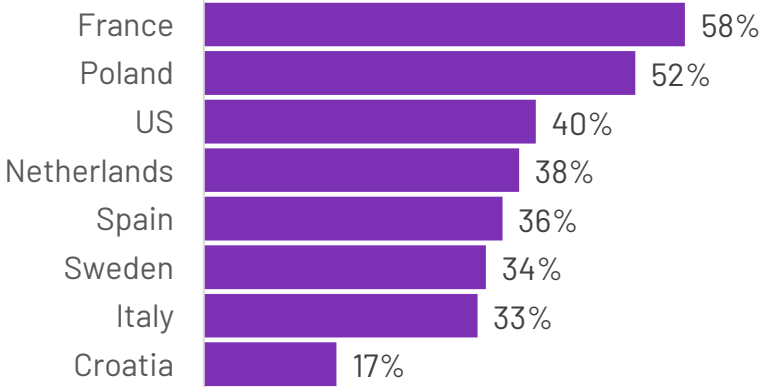
% A great deal / A fair amount

The confidence in regional, national, and supranational institutions to produce tangible outcomes for citizens is generally weak to very weak across most countries. This responsibility is more often attributed to local authorities, especially in France and Poland, where it is a prevailing belief among the majority.

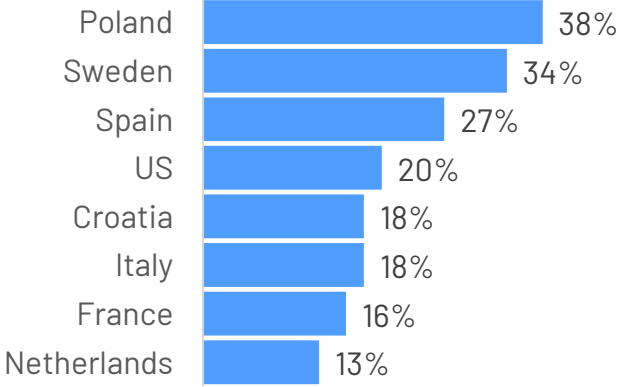
To what extent do you think the following institutions are doing a good or bad job delivering outcomes for their citizens ?

INSTITUTIONS DELIVERING OUTCOMES FOR CITIZENS

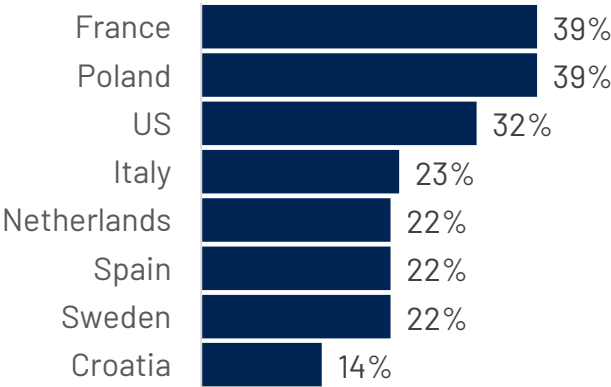
Local/city council



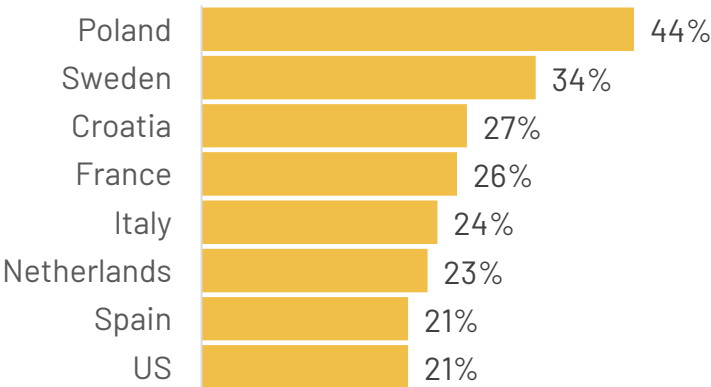
National government



Region/state government



European Union / United Nations

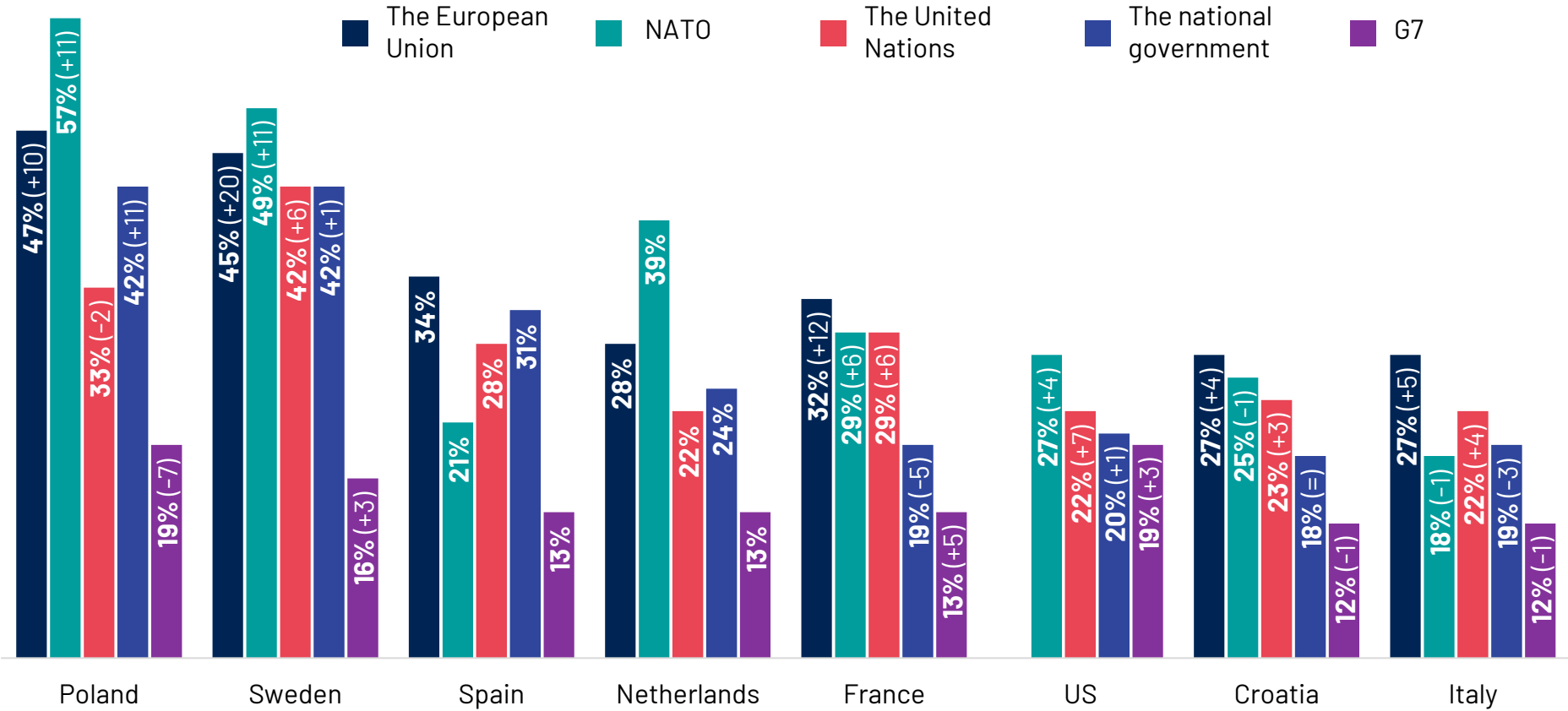


% A very good job / A fairly good job

The public perceives the European Union and NATO as the most effective defenders of democracy, with increasing support in most countries. Poland and Sweden, being geographically closest to Russia, hold particularly favorable views of NATO. In contrast, opinions about the Atlantic alliance are more mixed in Southern Europe, especially in Spain and Italy.

Would you say the following organisations are doing a good or bad job when it comes to helping protect democracy?

DEFENDING DEMOCRACY



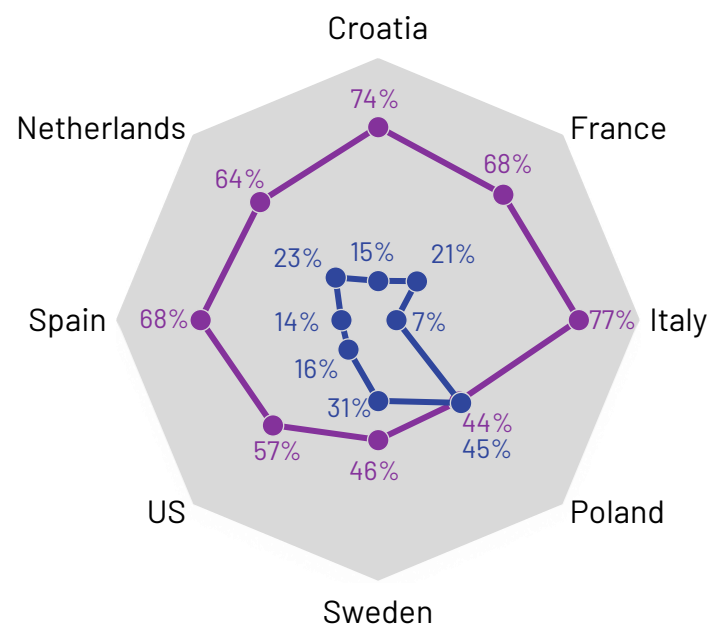
% A very good job / A fairly good job

THE KEYS TO MAKING DEMOCRACY WORK BETTER

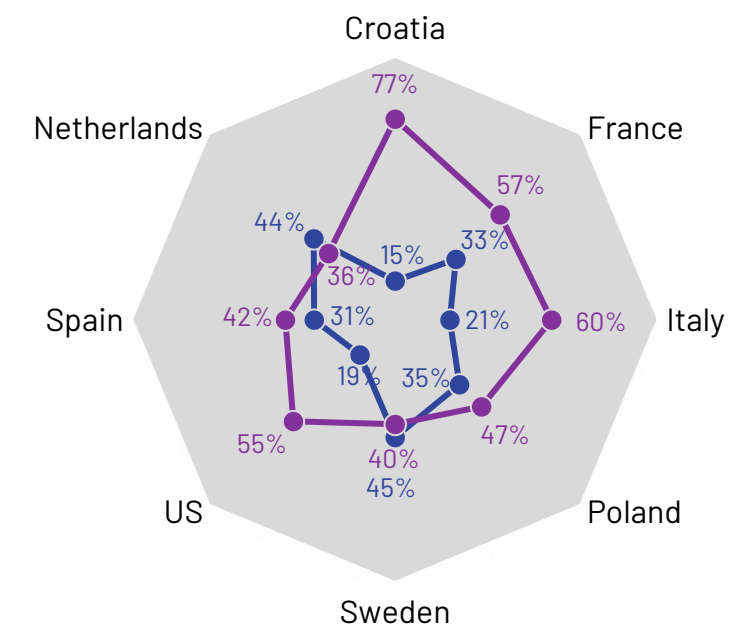
There is a widespread perception among the public that they are distanced from the elites, with the democratic system viewed as primarily benefiting economic and political elites. This “populist” sentiment is particularly strong in Croatia, France, and Italy, where it resonates significantly with the population.

From the pair of statements below, please select the one that best represents your views, even if neither is exactly right.

THE GAP BETWEEN CITIZENS AND ELITES



- The **economy is rigged** to advantage the rich and powerful
- The economy works for the **benefit of everyone** in the country

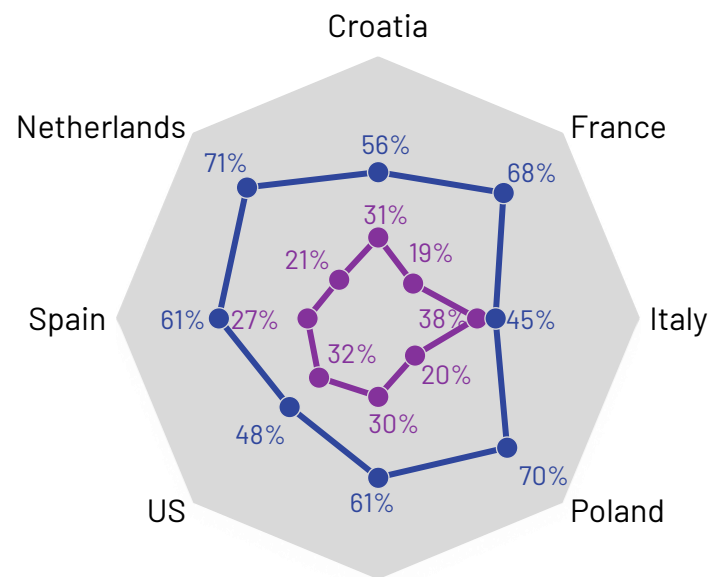


- The people who run the country put the **needs of the rich and powerful first**, they don't care much about everyone else
- The people who run the country are doing their best to **make life better for everybody**, even if they don't always get it

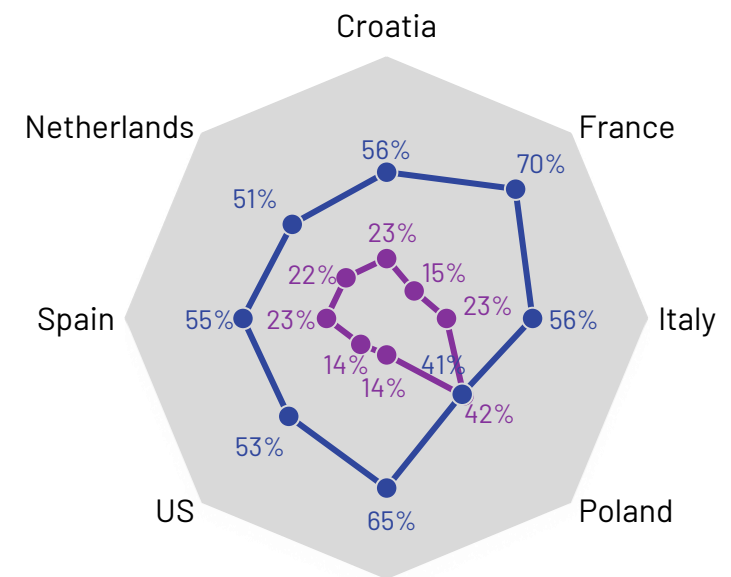
Citizens generally prefer a political environment that encourages compromise between parties over one characterized by strong opposition between leaders with rigid principles. Additionally, there is considerable opposition to centralizing power in a single strong leader, as most citizens view this as too risky.

From the pair of statements below, please select the one that best represents your views, even if neither is exactly right.

THE ROLE OF POLITICAL LEADERS



- I prefer a **political leader who sticks to their principles** regardless of what others think
- I prefer a **political leader who is prepared to compromise** to build consensus with others

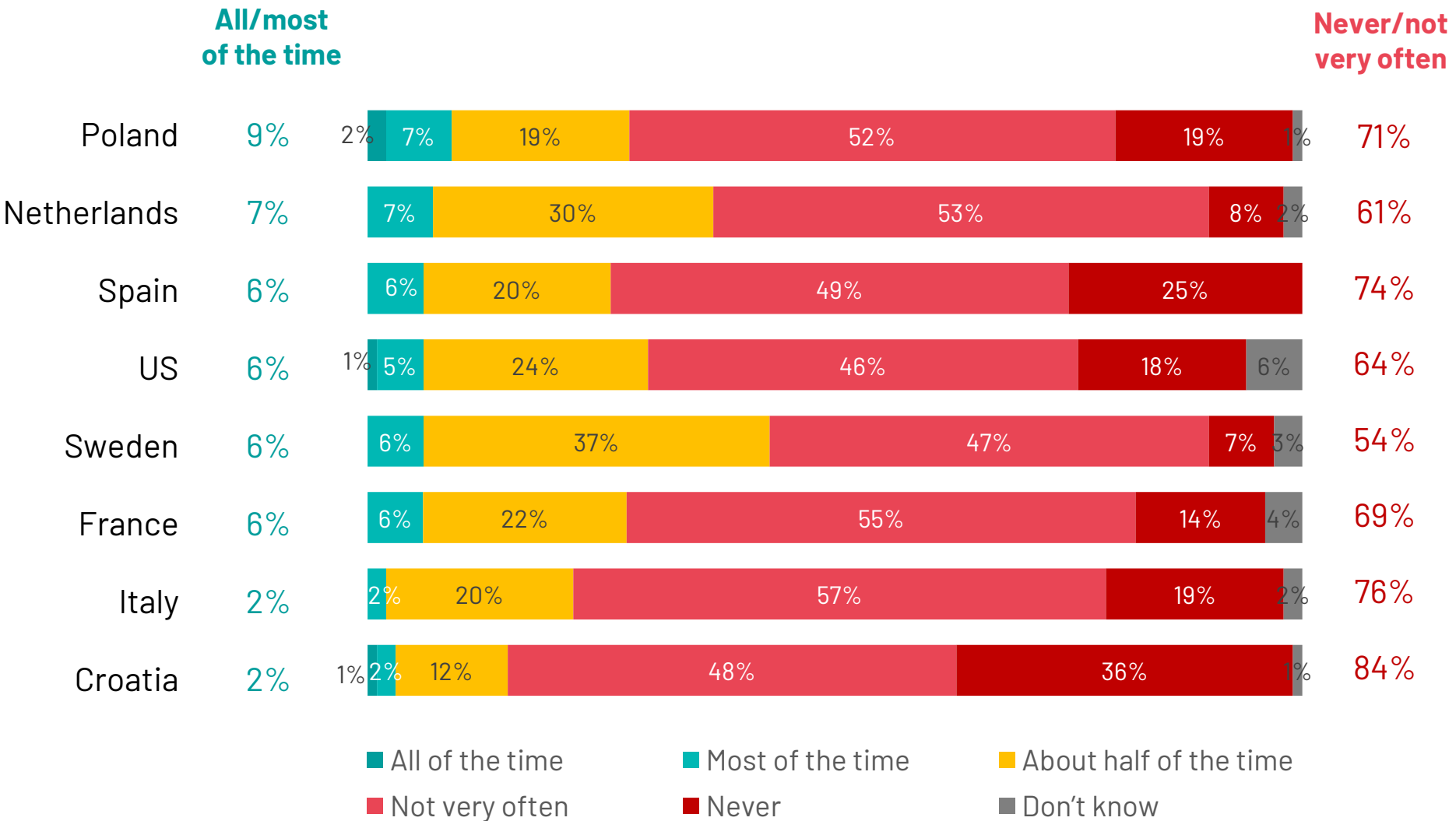


- Many of the country's problems could be dealt with more effectively if the Prime Minister/ President didn't have to **worry so much about votes** in Parliament/Congress
- It would be too risky to give the Prime Minister / President **more power** to deal directly with many of the country's problems

Trust in political leaders is generally low, with a significant majority of citizens across various countries believing that elected officials seldom keep their promises. This sentiment is especially pronounced in Croatia and Italy. In contrast, Swedes are somewhat less critical of their political leaders overall.

On the whole, how often do you trust politicians to keep their promises?

TRUST IN POLITICAL LEADERS

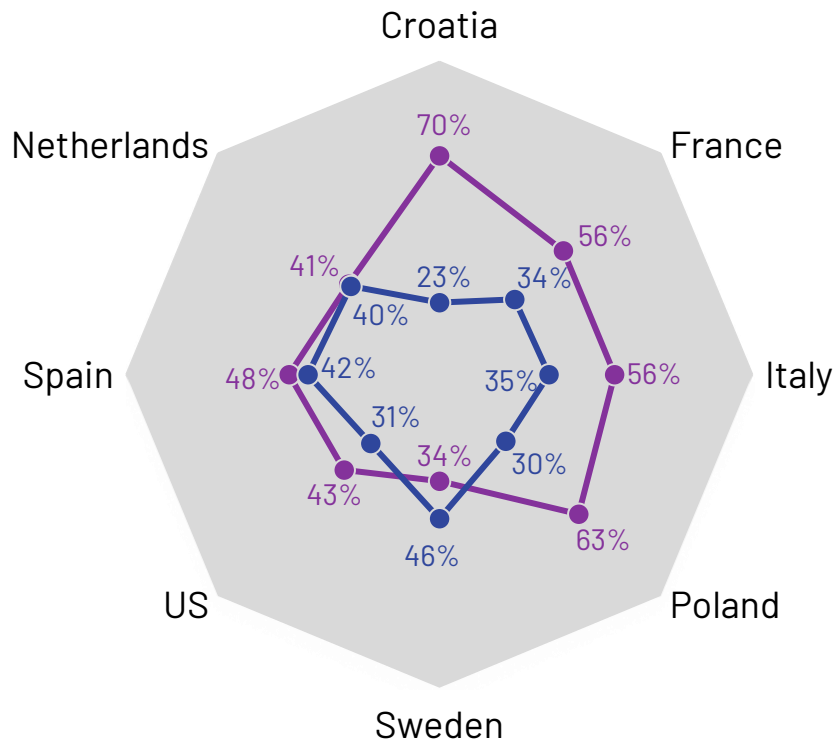


DESIRED CHANGES IN THE WAY DEMOCRACY WORKS

DESIRE FOR A RADICAL CHANGE IN THE POLITICAL SYSTEM

In several countries, including Croatia, Poland, France, and Italy, citizens clearly express a desire for a radical change in the functioning of the political system. In contrast, the United States, Spain, the Netherlands, and Sweden exhibit more varied opinions, with a notable segment of the population favoring gradual or measured institutional reforms.

From the pair of statements below, please select the one that best represents your views, even if neither is exactly right.

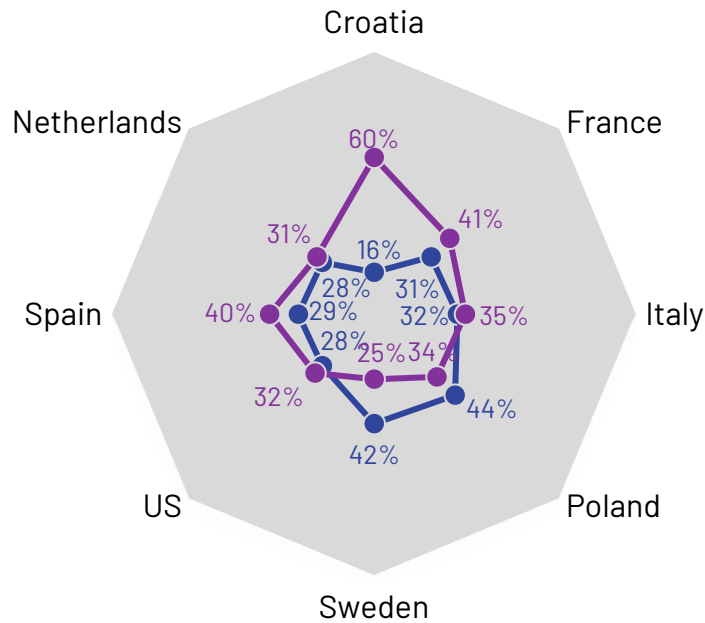


- Radical change is needed** to improve the current political system in [COUNTRY]
- It's too risky to make radical changes** – we can still improve things through more measured reform

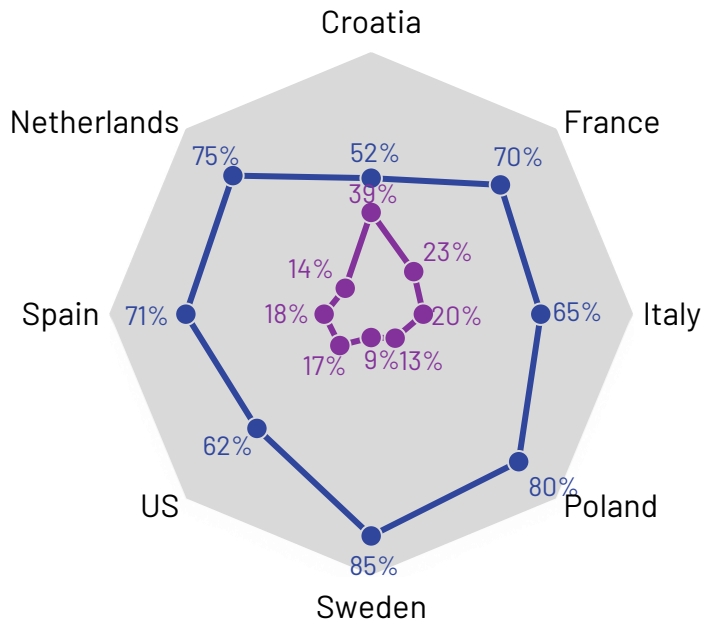
Citizens feel ambivalent about the impact of their participation in political life. In most countries, except for Sweden and Poland, a majority perceive political participation as ineffective in driving change. However, a clear majority in each country still regard voting as crucial, believing it can facilitate change.

From the pair of statements below, please select the one that best represents your views, even if neither is exactly right.

CITIZENS' POLITICAL ENGAGEMENT



- There is **no point getting involved in politics** because nothing ever changes
- I feel **I can change things** by getting involved in politics



- There is **no point voting** because it doesn't change anything
- I can influence things** by voting in elections

Citizens may be skeptical about the way democracy works, but they remain active in political and social spheres at both national and local levels. A significant proportion of the population engages in activities such as signing petitions, boycotting products, voicing political opinions on social media, and participating in demonstrations.

During the last 12 months, have you done any of the following?
Please select all that apply

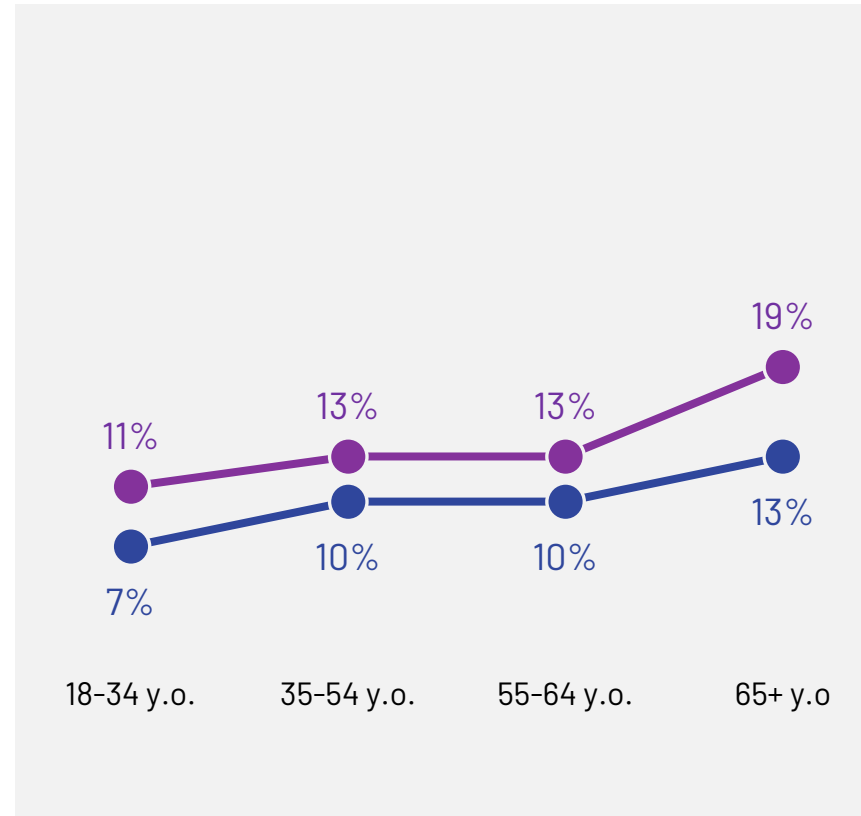
POLITICAL AND SOCIAL PARTICIPATION

	Poland	France	Italy	Spain	Sweden	Nether-lands	US	Croatia
Signed a petition, online or offline	37%	31%	43%	33%	24%	34%	23%	28%
Bought or refused to buy a product for political or ethical reasons	25%	37%	27%	27%	36%	24%	28%	19%
Shared political views on social media (e.g. Facebook, Twitter, YouTube, Instagram etc)	20%	15%	19%	24%	15%	8%	19%	12%
Criticised a politician on social media (e.g. Facebook, Twitter, YouTube, Instagram, etc)	14%	12%	7%	4%	27%	25%	15%	2%
Taken part in a public demonstration/protest	14%	9%	10%	17%	5%	5%	12%	11%
Done any work on behalf of a political party or action group	14%	14%	15%	21%	5%	3%	2%	6%
Given any money to a political party, organisation or cause	16%	11%	10%	12%	5%	6%	11%	12%
Gone on strike or taken industrial action	5%	15%	11%	8%	5%	3%	4%	8%
Contacted a local councillor	8%	4%	8%	2%	3%	4%	3%	4%
Contacted a member of parliament	7%	5%	2%	1%	3%	3%	1%	3%
Did not vote or spoilt my ballot as protest	4%	6%	5%	6%	1%	2%	1%	2%

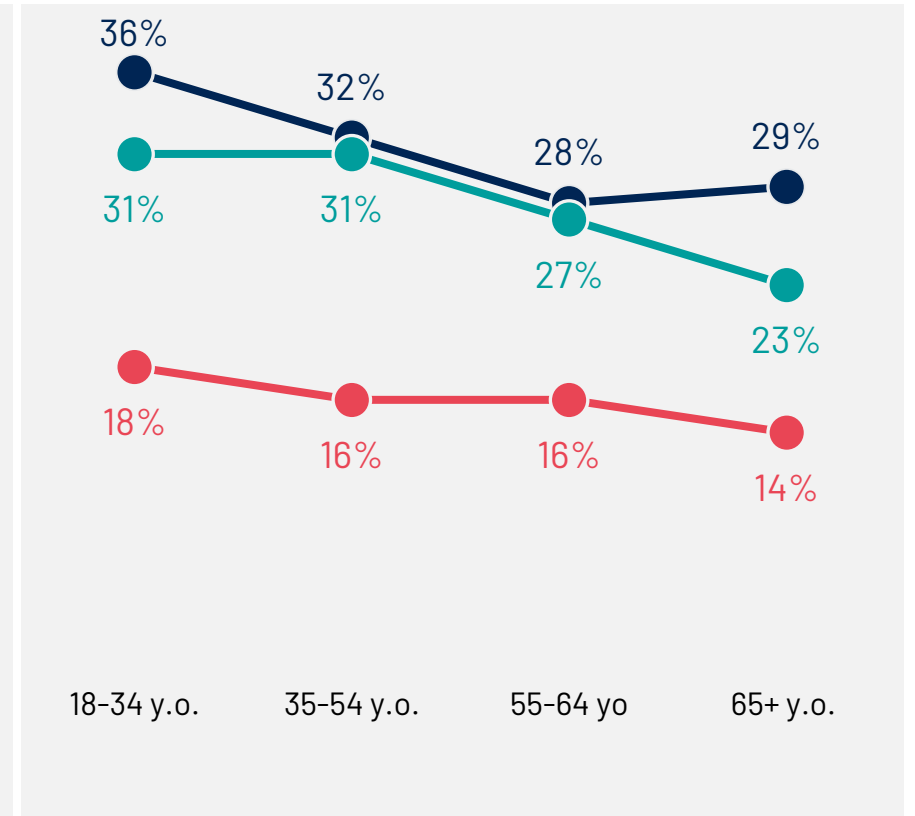
In addition to voting, elderly citizens are more inclined to engage in traditional political activities closely tied to political parties and elected officials. Conversely, younger generations tend to participate in actions beyond party politics, such as signing petitions or boycotting products.

During the last 12 months, have you done any of the following?
Please select all that apply

POLITICAL AND SOCIAL PARTICIPATION BY GENERATION



- Contacted a local councillor
- Given any money to a political party, organisation or cause



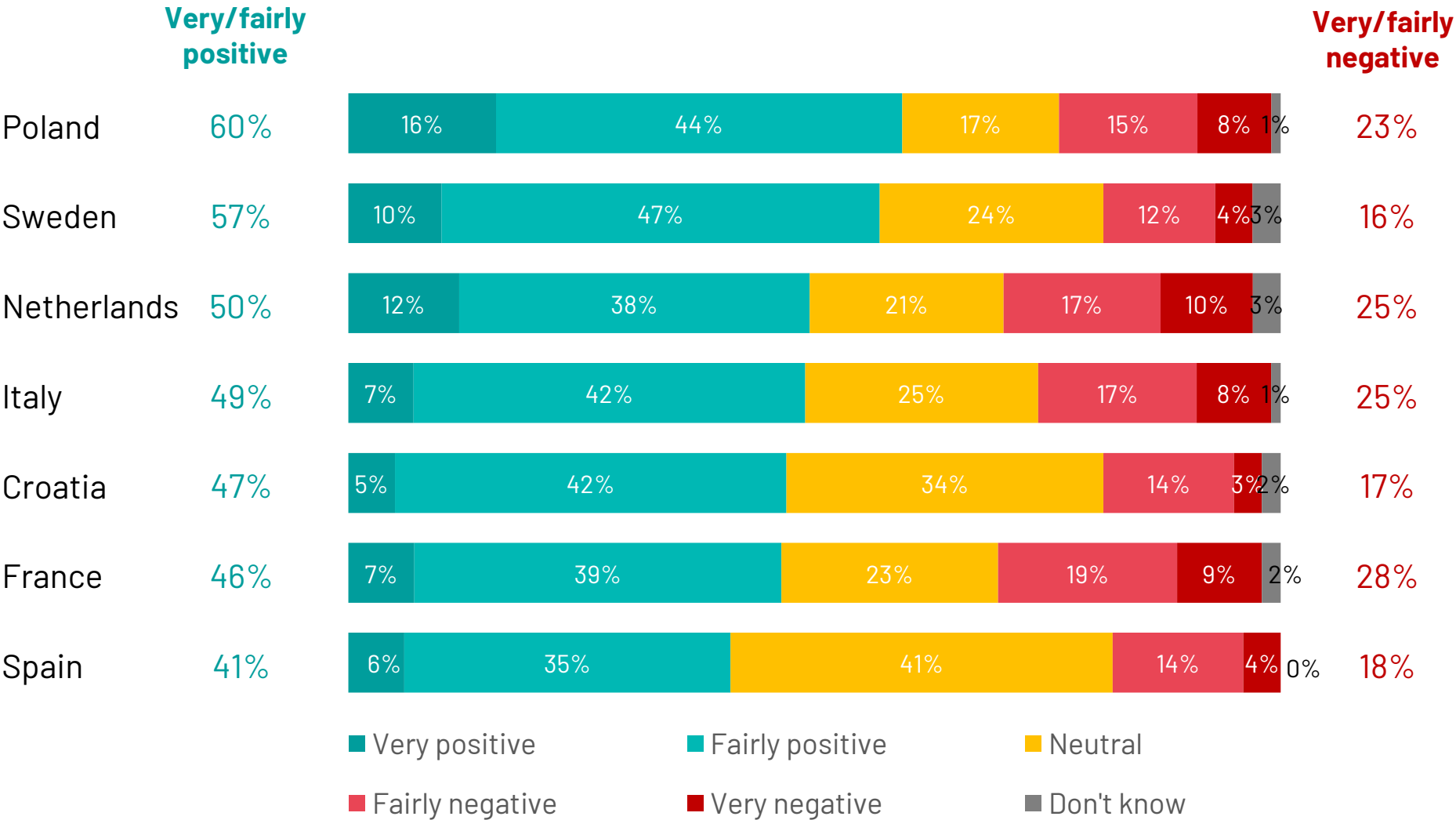
- Shared political views on social media
- Bought or refused to buy a product for political or ethical reasons
- Signed a petition, online or offline

OPINION ON THE EUROPEAN UNION

VIEWS ON THE EUROPEAN UNION

Citizens of the European Union countries included in the study hold mostly a positive view of the EU. This sentiment is especially strong in Poland and Sweden, where over 50% of citizens express favorable opinions. Conversely, skepticism is more prevalent in Croatia, with nearly 60% of citizens holding negative or neutral views of the EU.

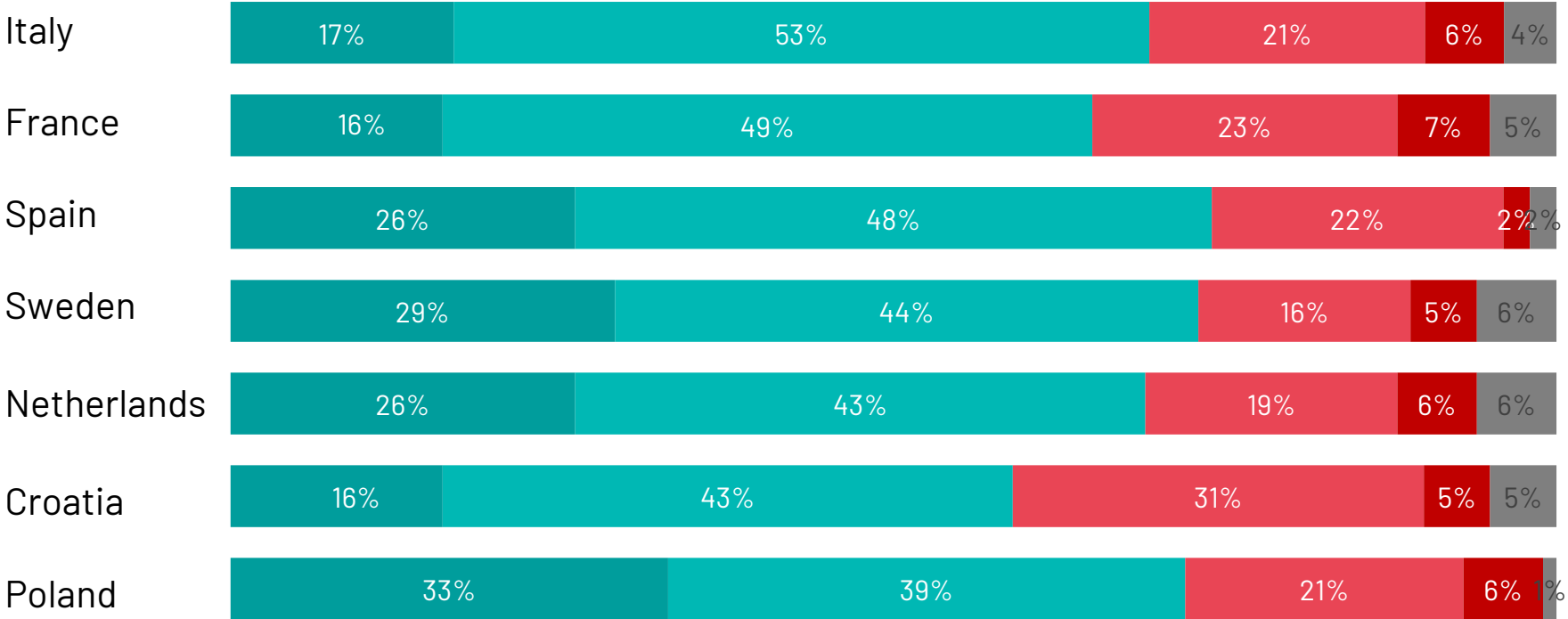
In general, do you have a very positive, fairly positive, neutral, fairly negative or very negative image of the European Union?



While opinions of the European Union are generally positive, the vast majority of citizens feel that it needs to change the way it operates. This feeling is very strong across all countries surveyed. On the other hand, only a small proportion of citizens are opposed to the EU even if it were to change the way it operates in the future.

Which of the following statements regarding the European Union is closest to your opinion?

THE WAY THE EUROPEAN UNION WORKS



- I'm in favour of the European Union and the way it is working at present
- I'm rather in favour of the European Union, but not the way it is working at present
- I'm rather sceptical of the European Union, but could change my opinion if the way it works was really changed
- I'm opposed to the idea of the European Union in general
- Don't know

METHODOLOGICAL APPENDIX

About the Study

This survey was conducted September 13 to 27, 2024 using **KnowledgePanel**, Ipsos' probability-based panels in Croatia, France, Italy, the Netherlands, Poland, Spain, Sweden, and the US.

The survey was based on nationally representative probability samples of 18+ y.o. The study was conducted in the official language of each European country and in English in the United States. Two reminder emails were sent for this study. No prenotification for this study was sent prior to field.

Data was weighted to match the profile of the respective country population. All polls are subject to a wide range of potential sources of error.

Base 2024: Adults aged 18+, Croatia = 1,002, France = 1,005, Italy = 1,006 Netherlands = 1,001, Poland = 1,001, Spain = 500, Sweden = 1,002, US = 1,091, Ipsos KnowledgePanel, 13-27 September 2024

Base 2023: Adults aged 18+ Croatia = 998, France = 1310, Italy = 1224, Poland = 1151, Sweden = 1413, US = 1053, Ipsos KnowledgePanel, 21-30 September 2023

About KnowledgePanel

KnowledgePanel® is Ipsos' random probability panel and a source of statistically-valid, nationally representative data at speed. Recruitment process for the KnowledgePanel® employs scientifically developed sampling methodologies.

In the Netherlands, Spain, Sweden and the United States, panelists are recruited via address-based sampling methods using databases with full coverage of the population:

- BAG, the official cadaster register in the Netherlands,
- Catastro inmobiliario, the official cadaster register in Spain,
- SPAR, the Swedish state personal address register in Sweden,
- and the Delivery Sequence File of the USPS in the U.S.

In these countries, letters are sent to selected individuals or addresses inviting them to become members of the panel. Invited persons can sign up to the panel by completing a short online survey or by returning a paper form.

In Croatia, France, Italy and Poland, panelists are recruited via random probability telephone-based sampling method. Telephone numbers are randomly generated using an algorithm that conforms to the properties of valid phone numbers in a country to obtain a representative sample of the country population. A dual frame design ensures coverage of households with only a landline phone and maximises contact with dual phone owners. People are called for the short recruitment survey.

Those who join the panel and who are selected to participate in a survey are sent a unique log-in and are only able to complete it one time. KnowledgePanel members receive a per survey incentive in points, that can be redeemed for cash or prizes.

In the US, panelists who do not already have internet access are provided a tablet and internet connection at no cost to the panel member. In the other countries, those who are digitally excluded are able to register to the KnowledgePanel by telephone and are then interviewed for surveys via telephone.

**For more information on this release,
please contact:**

Mathieu Gallard
Client Director, Ipsos France
Mathieu.Gallard@ipsos.com

Chris Jackson
Senior VicePresident, Ipsos US
Chris.Jackson@ipsos.com

Cristina Tudose
Head of Ipsos KnowledgePanel Europe
Cristina.Tudose@ipsos.com

Weighting procedures

For each country, the data were weighting to adjust for unequal probabilities of selection. Additionally, calibration weights were applied as follows:

Croatia

Gender by Age (based on 2023 population statistics, Eurostat)
Region and urbanicity (based on 2021 Population Census, Croatian Bureau of Statistics)
Education (based on 2023, Eurostat)
Employment status (based on 2023, Eurostat)

France

Gender by Age (based on 2023 population statistics, Eurostat)
Region and urbanicity (based on 2020 Population Census, INSEE)
Education (based on 2023, Eurostat)
Employment status (based on 2023, Eurostat)

Italy

Gender by Age (based on 2023 population statistics, Eurostat)
Region (based on 2023 population statistics, Eurostat)
Education (based on 2023, Eurostat)
Employment status (based on 2023, Eurostat)

Netherlands

Gender by Age (based on 2023 population statistics, Eurostat)
Region (based on 2023 population statistics, Eurostat)
Education (based on 2023, Eurostat)
Employment status (based on 2023, Eurostat)

Poland

Gender by Age (based on 2023 population statistics, Eurostat)
Region (based on 2023 population statistics, Eurostat)
Education (based on 2023, Eurostat)
Employment status (based on 2023, Eurostat)

Spain

Gender by Age (based on 2023 population statistics, Eurostat)
Region (based on 2023 population statistics, Eurostat)
Education (based on 2023, Eurostat)
Employment status (based on 2023, Eurostat)

Sweden

Gender by Age (based on 2023 population statistics, Eurostat)
Region (based on 2023 population statistics, Eurostat)
Education (based on 2023, Eurostat)
Employment status (based on 2023, Eurostat)

US

Gender by Age (based on 2024 Current Population Survey, US Census Bureau)
Race/Hispanic Ethnicity (based on 2024 Current Population Survey, US Census Bureau)
Education (based on 2024 Current Population Survey, US Census Bureau)
Census Region (based on 2024 Current Population Survey, US Census Bureau)
Metropolitan status (based on 2024 Current Population Survey, US Census Bureau)
Household Income (based on 2024 Current Population Survey, US Census Bureau)
Party ID (based on 2024 National Public Opinion Reference Survey)

ABOUT IPSOS

Ipsos is the third largest market research company in the world, present in 90 markets and employing more than 18,000 people.

Our research professionals, analysts and scientists have built unique multi-specialist capabilities that provide powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. We serve more than 5000 clients across the world with 75 business solutions.

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg IPS:FP
www.ipsos.com

GAME CHANGERS

In our world of rapid change, the need of reliable information to make confident decisions has never been greater.

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder.
Ultimately, success comes down to a simple truth:
You act better when you are sure.

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



THANK
YOU

GAME CHANGERS

