

The Great Reset

Public Opinion, Populism, and
the Pandemic



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1. Executive Summary

- In this report, we provide the first global overview of how the pandemic has changed political attitudes and beliefs.
- We use data collected by YouGov from 27 countries and 81,857 individuals during the 2020-21 pandemic, together with data compiled by the HUMAN Surveys project from 79 sources and over 8 million individuals since 1958.
- We find strong evidence that the pandemic has reversed the rise of populism, whether measured using support for populist parties, approval of populist leaders, or agreement with populist attitudes.
- However, we also find a disturbing erosion of support for core democratic beliefs and principles, including less liberal attitudes with respect to basic civil rights and liberties and weaker preference for democratic government.

2. Key Findings

Globally, we find that support for populism has collapsed during the 2020-21 coronavirus pandemic. This includes support for populist parties, agreement with populist attitudes, and the approval ratings of individual populist leaders.

On average, populist leaders saw a 10 percentage point drop in their approval ratings from the second quarter of 2020 to the final quarter of this year. Meanwhile, support for key populist attitudes – such as belief in the “will of the people” or that society is divided between ordinary people and a “corrupt elite” – has declined in almost every country.

We suggest three reasons for the collapse of the populist wave.

First, populist leaders have mishandled the coronavirus crisis. On average such leaders are rated worse by their citizens for their management of the pandemic, and are less trusted by their citizens as a source of information about it. Meanwhile, support for anti-establishment outsiders has declined as public trust in government and in experts have recovered.

Second, there is evidence that political polarisation has declined. The experience of facing a common crisis has proven to be a unifying event for citizens in many societies. Just as divided societies provide fertile ground for populists to flourish, it is more difficult for such politicians to mobilise support when inter-group resentments have attenuated.

Third, the pandemic has reduced the economic divide. “Left behind” regions such as the American Midwest, northern England, or southern Italy show the largest declines in support for populist attitudes between 2019 and 2021, and this may reflect differences in regional economic performance during the pandemic.

Overall, we suggest these findings are reassuring for the future of western democracy. Across the world, the populist wave appears to be passing. Some figures, such as Donald Trump, have already left office. Others, including Viktor Orbán, Recep Tayyip Erdoğan, and Jair Bolsonaro, face a difficult fight for re-election. While support for democracy has weakened and satisfaction with democracy remains fragile, the post-pandemic environment is likely to prove a more difficult environment for populist politicians to mobilise and sustain support.

3. Introduction – The Great Reset

Two years ago, the Cambridge Centre for the Future of Democracy published its inaugural “Global Satisfaction with Democracy 2020” report. This study analysed a global, novel data set combining 25 data sources, 3,500 country surveys, and 4 million respondents between 1973 and 2020, and found widespread democratic disillusionment, in particular in developed democracies.¹ In a follow-up report in October, we found evidence of a growing inter-generational divide, as younger generations were not only less satisfied with the performance of democracy than older age cohorts, but also less satisfied than their elders had been at the same stage in life.²

The purpose of the current report is to examine how the global coronavirus pandemic has upended our prior findings. Our first report was published just two months before the World Health Organisation declared a global pandemic in March of 2020. In the two years since, societies have faced a once-in-a-generation event that has disrupted working lives, the role of government, economic conditions, and social relations across the planet. An established body of literature in the study of public opinion suggests that major life events, such as war, revolution, or natural disaster, can have profound and lasting effects upon lifetime beliefs and attitudes.³ Yet as societies gradually return to normal life in 2022, we are still far from understanding what this legacy may be. If there is a “COVID-19 generation,” similar to the “1945” or “1968” generations of the past, what may be its defining attitudes and beliefs? Does the post-pandemic era offer the prospect of more of the same – or will it prove to be a “great reset” event that completely changes the landscape of public opinion and salient societal and political trends?

The Research Background

Until now, there has been no comprehensive analysis of how the pandemic has changed citizen attitudes globally. Our objective is to do so in this report, using the most extensive available data that has been collected from across the world over the past two years. This includes two further rounds of the YouGov-Cambridge Globalism Project, covering over 81,000 respondents in 27 countries, the results of the international YouGov COVID-19 Tracker survey, which covers 678,610 respondents in 28 countries,⁴ and several specially commissioned surveys conducted by YouGov in 2020 and 2021 for the YouGov-Cambridge Centre for Public Opinion Research. In addition, we have updated and extended the publicly available datasets used in our prior reports to take advantage of new survey data collected in 2020 and 2021, including the latest rounds of the Afrobarometer, Latino-barómetro, AmericasBarometer, Eurobarometer, Comparative Study of Electoral Systems, Central Asian Barometer, Caucasus Barometer, EUpinions, and Pew Global Attitudes and Trends survey projects, together with several additional country-surveys conducted by the World Values Survey during the pandemic as part of its seventh wave of fieldwork.

The Research Question

During the past two years, a range of existing studies have assisted in raising questions and tentative answers regarding shifts in public beliefs and attitudes as a result of COVID-19. For example, since the very start of the pandemic, commentators have asked how different countries’ handling of the crisis may have affected the international legitimacy

¹ Roberto Stefan Foa, Andrew Klassen, Micheal Slade, Alex Rand, and Rosie Collins (2020) “The Global Satisfaction with Democracy Report 2020” Cambridge, United Kingdom: Centre for the Future of Democracy.

² Roberto Stefan Foa, Andrew Klassen, Daniella Wenger, Alex Rand and Micheal Slade (2020) “Youth and Satisfaction with Democracy: Reversing the Democratic Disconnect?” Cambridge, United Kingdom: Centre for the Future of Democracy.

³ Ronald Inglehart (1977) *The Silent Revolution: Changing Values and Political Styles Among Western Publics*, Princeton University Press.

⁴ These figures are accurate as of the latest build of the YouGov COVID-19 tracker survey used in this report, though survey fieldwork is ongoing until at least March 2022. See: Sarah Jones, Imperial College London Big Data Analytical Unit and YouGov Plc (2020) *Imperial College London YouGov Covid Data Hub*, v1.0, YouGov.

of western democracy vis-a-vis its alternatives. During the pandemic's early months, it seemed that China's model of authoritarian governance was most at threat, with initial reports of a new strain suppressed by local officials and early efforts at containment failing. Yet as the virus spread globally, by the middle of 2020 the tables had turned. China succeeded in getting its outbreak under control through draconian restrictions, whereas western democracies did not respond either early or comprehensively enough to prevent full-scale epidemics from occurring. Thus far, the evidence regarding the pandemic's effect on democratic legitimacy has been mixed. Surveys by the Pew Research Center in 2021, for example, suggest no increase in the international appeal of authoritarian nations such as China or Russia. However, their findings did suggest that the standing of American democracy had been damaged, with few respondents in either the United States itself or among international survey respondents considering American democracy a good example for others to follow.⁵ All in all, the question of how the pandemic has affected global support for democracy remains an important issue for scholars of public opinion to address in the months and years ahead, and we attempt, in this report, to provide some initial clarification based upon the latest global data.

A second, related issue is whether the experience of confronting a shared challenge has transformed citizen attitudes towards the power and role of government, as well as our collective capacity to confront broader systemic crises such as global climate change, systemic racism, or regional inequality. So far, the evidence appears mixed: the annual Edelman Trust Report, for example, found an increase in trust in government in mid-2020, though when follow-up surveys were

administered in late 2020, this boost seemed to have faded.⁶ In this report, we also examine pooled data on trust in government, together with other measures of societal cohesion, including changes in "affective polarisation" – that is, how politically divided our societies are – with more optimistic findings for the future.

Finally, many commentators have already begun speculating on who may be the political winners and losers from the pandemic, and in particular what effect the pandemic may have had for populist parties and leaders.⁷ Thus far, the evidence has been mixed, though the 2020 and 2021 YouGov-Cambridge Globalism Project has shown a steady decline in support for populist attitudes.⁸ In this report, we provide a more comprehensive analysis of the effect that the pandemic may have had upon populist parties, leaders, and attitudes using a combination of comparative approval data, survey data on vote intention for populist parties, and a "deeper dive" into the YouGov 2020–2021 data on levels of agreement (and disagreement) with core populist beliefs. Overall, our findings contain less ambiguity: the pandemic has reduced support for populism in every meaningful sense.

Our Approach

Our reports are built upon a simple methodological premise: to combine questions on democracy and trust in government from the widest possible range of available sources, in order to generate a global "mega-dataset" – consisting of more than 6,845 unique country surveys – from which to analyse global trends over time. The results suggest that the pandemic has indeed had a profound, and potentially lasting, effect on public beliefs and attitudes.

⁵ Richard Wike, Laura Silver, Janell Fetterolf, Christine Huang and Jerry J. Moncus (2021) "What People Around the World Like – And Dislike – About American Society and Politics" Pew Research Center.

⁶ See: Edelman (2020) "Edelman Trust Barometer Spring Update: Trust and the Covid-19 Pandemic"; and Edelman (2021) "Edelman Trust Barometer 2021".

⁷ E.g. see summary in Antonis Galanopoulos (2020) "Populism" Newsletter, Political Studies Association, Issue 2, July.

⁸ Joel Rogers de Waal (2020) "Globalism Project 2020: Populist Beliefs Down But Conspiracy Beliefs Up?", YouGov-Cambridge Centre.

4. The Data

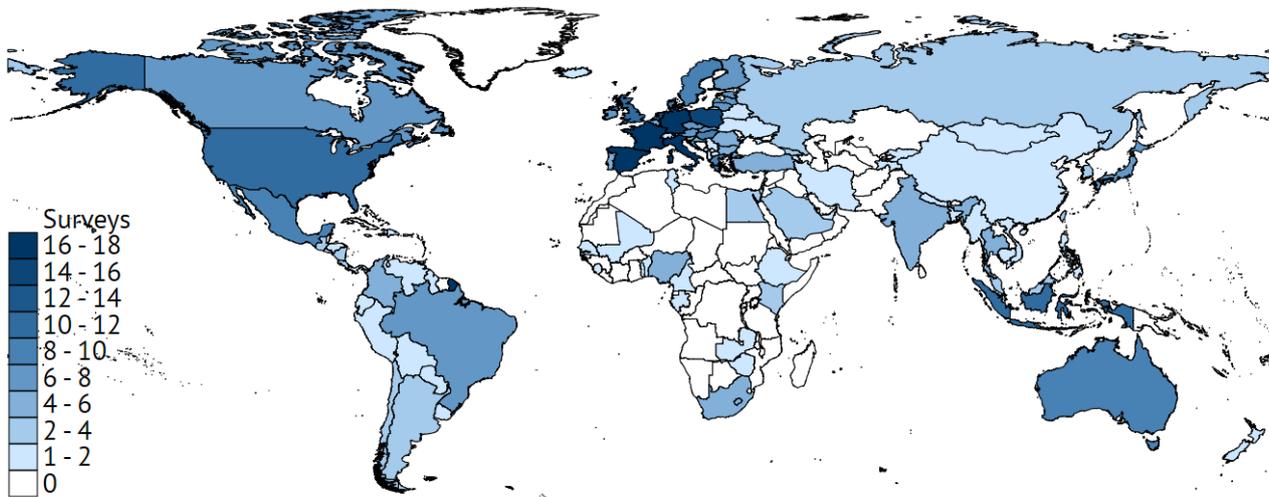


Figure 1: Number of surveys per country since the start of 2020 where one or more of the pooled indicators are present. Source: HUMAN Surveys Project.

From the outset of the global coronavirus pandemic, commentators have speculated on the ways in which the crisis may have changed citizen beliefs and values. Moving from speculation to evidence, however, requires the assessment of comparative data. That is why in this report, we have sought to bring together three sources of public opinion data from around the world that have been collected during the pandemic. First, we use the latest data gathered and standardised by the Human Understanding Measured Across National (HUMAN) Surveys project. Second, we use data from 2019 to 2021 collected by the YouGov Globalism Project. Third, we have integrated bespoke surveys conducted by YouGov on behalf of the YouGov-Cambridge Centre for Public Opinion Research during the pandemic.

With respect to the HUMAN Surveys Project, Figure 1 represents the aggregated responses of half a million pandemic respondents in 109 countries. In forty-two of these, there have been at least four surveys conducted since the start of 2020. Combined with pre-pandemic data, our updated dataset provides unprecedented insight into the effects of the pandemic on public attitudes and beliefs. In total, we draw upon the survey responses of almost eight million survey participants across 169 countries.



www.humansurveys.org

The survey data used in this report draws upon a larger resource containing twenty million respondents and more data sources. The full HUMAN Surveys dataset contains additional indicators such as attitudes towards elections, trust in more institutions, views on the economy, political party identification, and public spending preferences plus other individual demographics such as educational attainment and income level. The table below summarises data used in this report alongside totals for the full dataset.

	Report	Total
Respondents	8 mil	20 mil
Surveys	6,582	16,738
Indicators	3	142
Countries	169	179
Sources	73	86

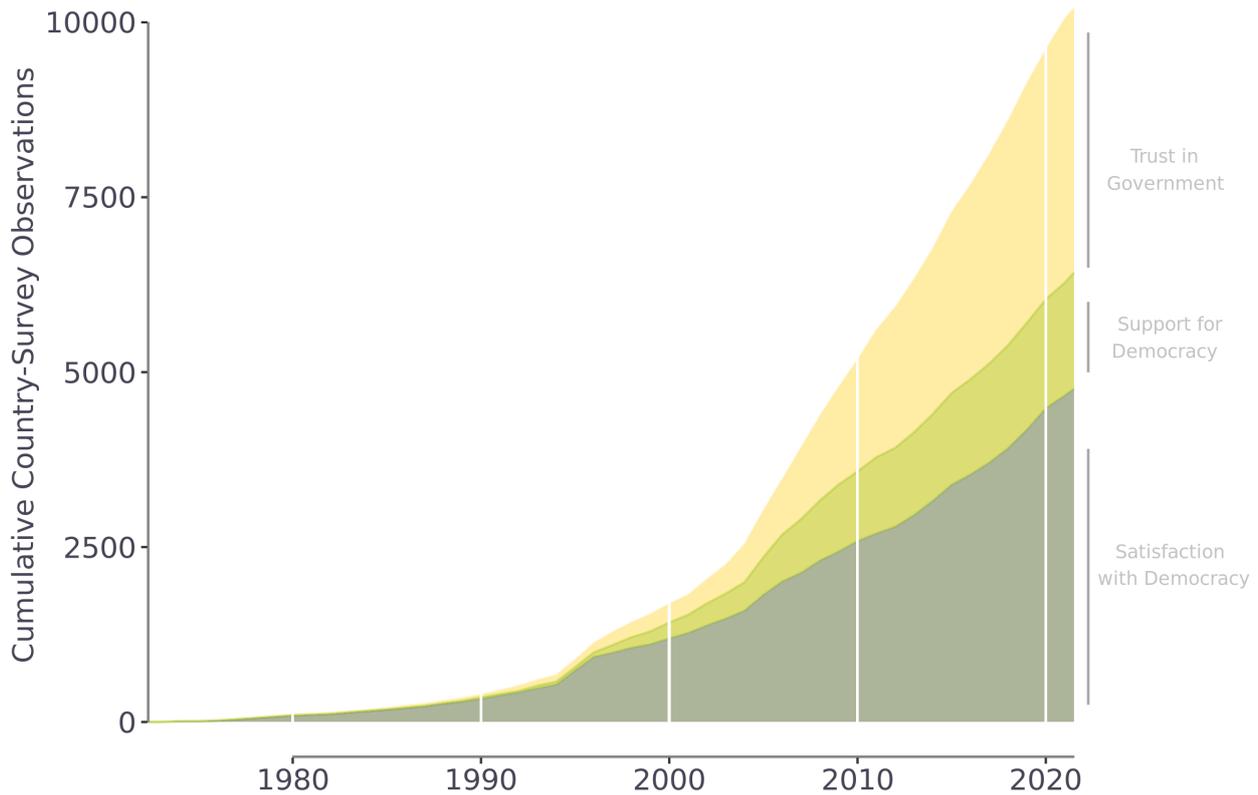


Figure 2: Cumulative number of survey observations per year for the the pooled indicators used in this report.

This report examines three indicators pooled from almost seven thousand separate national surveys – support for democracy, satisfaction with democracy, and trust in government. We analysed 1,708 survey observations measuring support for democracy, 4,765 for satisfaction with democracy, and 3,776 for trust in government. Figure 2 displays the number of surveys observations for each of three indicators:

1. *Support for democracy* questions ask about general support for democratic versus non-democratic forms of governance. These questions prompt respondents to reflect upon they type of government they would prefer to live under rather than the quality of democratic governance they are currently experiencing.
2. The answers to questions about *satisfaction with democracy* primarily tell us how citizens perceive their political system and institutions to be *performing* at present. In

contrast with support for democracy, this indicator is less about the preferred type of regime and more of an evaluation of what the system is currently delivering. One could be supportive of liberal democracy and yet dissatisfied with how its institutions are functioning in practice or, conversely, satisfied with how the system works even though its institutions fall short of accepted democratic standards.

3. Finally, *trust in government* questions are more specific in that they ask respondents to consider a particular institution –the central or federal government– within the political system.

A full list of the questions used to construct each indicator can be found in Appendix Section I, while details on the aggregation methodology can be found in Appendix Section II.

5. Topline Trends

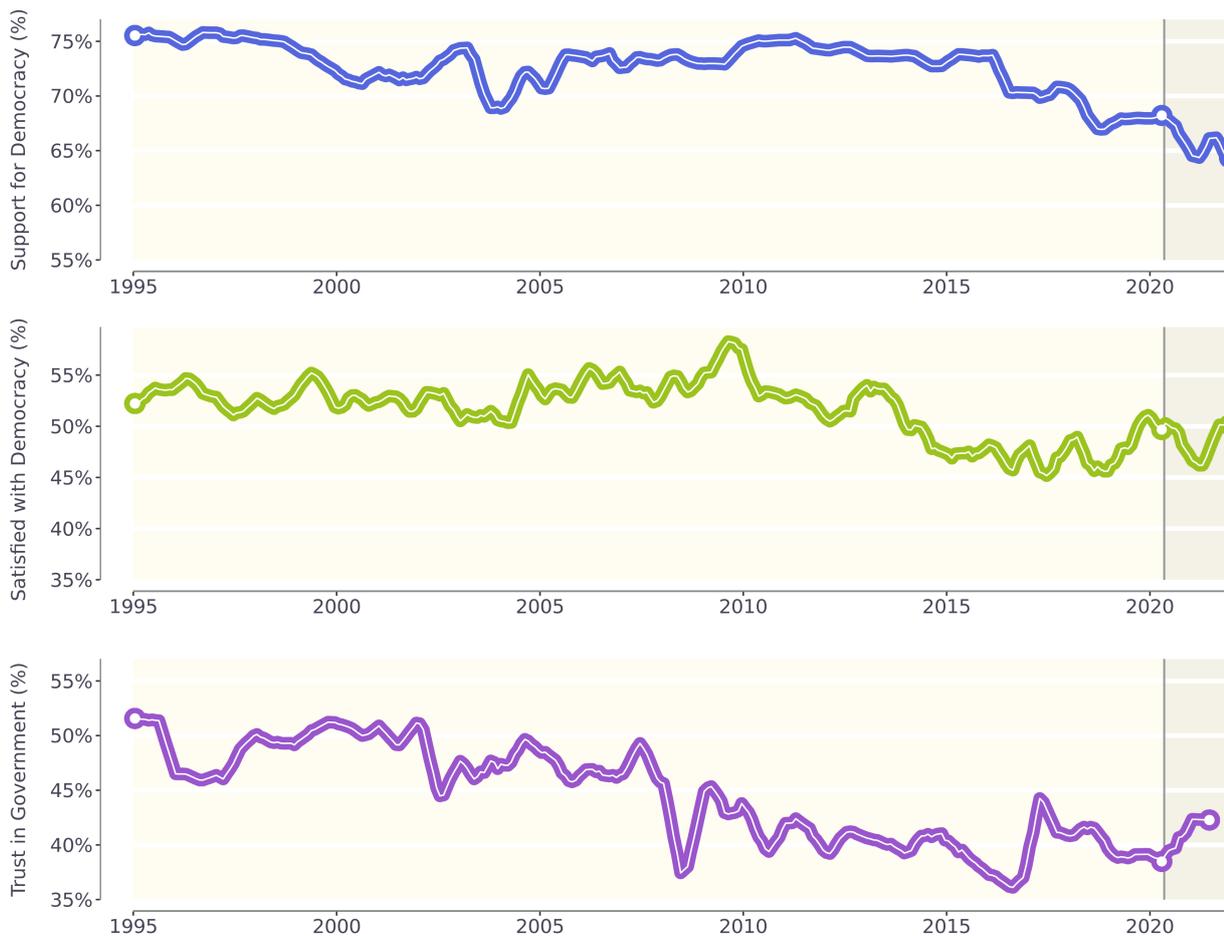


Figure 3: Population-weighted averages among all countries currently rated as full democracies (“free”) by Freedom House. Support for democracy measured by the percentage of respondents stating that “democracy is the best form of government.” Source: HUMAN Surveys Project.

How have attitudes to democracy changed globally during the coronavirus pandemic? First, the proportion of citizens who feel democracy is the “best” form of government has taken a sharp dip lower with the onset of the pandemic. Second, satisfaction with democracy has recovered in part since the 2019 nadir – though remains well below long-term averages. Third, in spite of a shaken confidence in the democratic process, trust in *government* appears to have risen during the pandemic – and for now, this increase appears to have been sustained (Figure 3). In the case of support for democracy, the decline seen during the pandemic seems a continuation of the prior trend in place since the mid-1990s, though in the case of trust in government, this is a trend reversal.

More Trust in Government, Less Trust in Democracy?

We believe there is likely to be a single explanation for these divergent trends, in that they each constitute a logical reaction to the threat of COVID-19. During a pandemic, citizens are less likely to indicate that democracy is always preferable as a form of government, as their attachment to democracy shifts from being “intrinsic” (based upon attachment to democratic principles and freedoms) to being “conditional” – contingent, that is, upon democracy’s perceived effectiveness at disease containment. However, for the same reason, citizen trust in government may have risen, for it is only government action that is capable of implementing and enforcing the rules that can effectively reduce the risk of

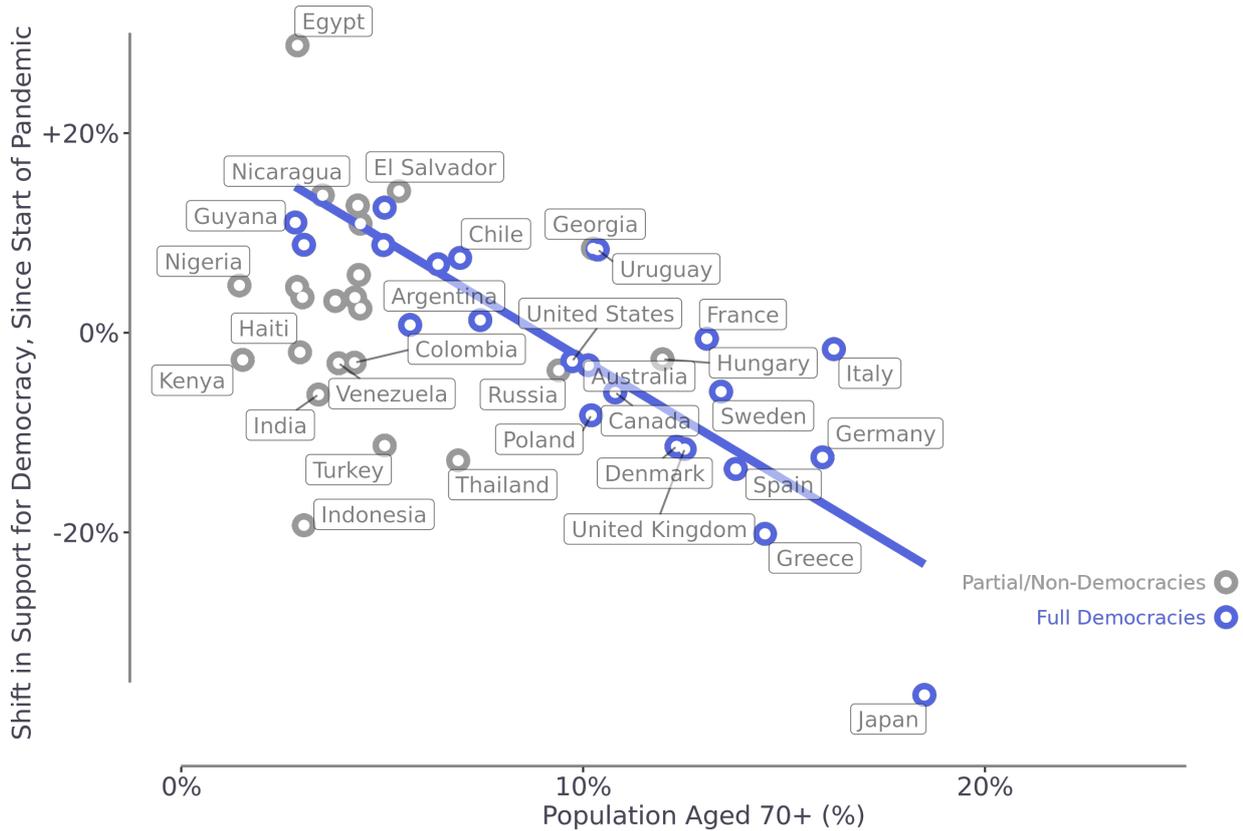


Figure 4: Support for democracy measured by the percentage of respondents stating that “democracy is the best form of government”: for a full list of survey questions and sources, see Appendix Section I. Changes shown are the percentage point shift between March 2020, when the spread of the novel coronavirus was first declared a global pandemic by the World Health Organisation, and November 2021. Countries classified as “full” or “partial/non-” democracies based on the latest Freedom House ratings for whether countries are “Free” or “Partly Free/Not Free”. Source: HUMAN Surveys Project.

disease exposure.

Some evidence for this interpretation comes from the fact that, by country, the largest declines in democratic support have occurred in developed democracies, such as Germany, Greece, or Japan, that were especially vulnerable to the pandemic on account of their large share of elderly population (Figure 4). We also find that within countries, whereas younger respondents had much larger declines in democratic support in the decades *prior* to the pandemic, during the pandemic itself by far the largest drop has occurred among the elderly. More precisely, the proportion of under-35s affirming that democracy is the “best” system of government rose during the pandemic, but among over-55s it collapsed by 7 percentage points

on average across all democracies (Figure 5).

Authority Shift?

If the drop in unconditional support for democracy observed during the pandemic were simply the result of caution among elderly respondents concerned by the threat of COVID-19, this would not prove too concerning. Such attitudes might revert to baseline once the pandemic is over, while a robust attachment to democracy among members of the next generation would promise high levels of democratic support in future. However, a longstanding idea in political science is that when people feel existentially threatened, they are likely to endorse illiberal attitudes across a broader spectrum of beliefs.⁹

⁹ See Ronald Inglehart, Mansoor Moaddel, and Mark Tessler (2006) “Xenophobia and In-Group Solidarity in Iraq: A Natural Experiment on the Impact of Insecurity”, *Perspectives on Politics*, 51 (3), 495-505.

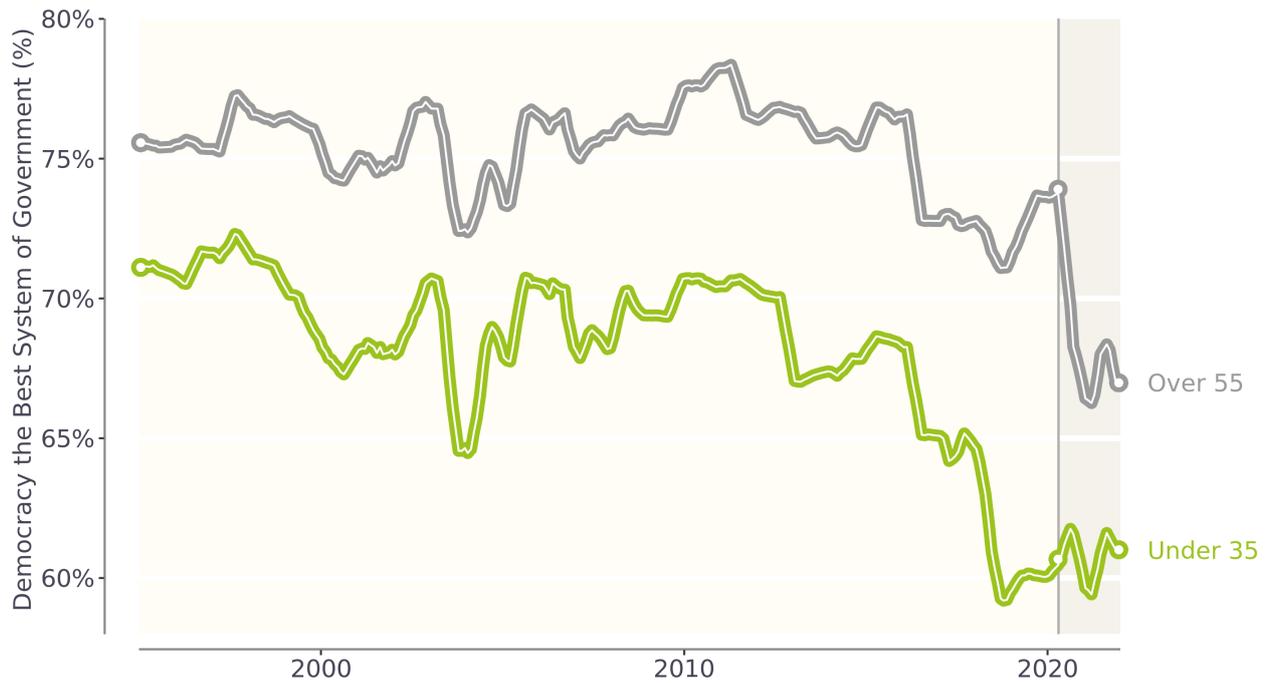


Figure 5: In the decade prior to the global coronavirus pandemic, support for democracy was eroding among younger respondents, yet remained high among older age cohorts. During the pandemic, this has inverted - with a large and immediate fall among the elderly, but youth support for democracy ticking slightly higher. Shown is the population-weighted average for all current democracies from 1995 to 2021. Support for democracy measured by the percentage of respondents stating that “democracy is the best form of government”. Source: HUMAN Surveys Project.

Such beliefs might include stronger in-group attachment to ethnic or national identities, or a greater demand for the protection of authority. Consistent with this theory, a large body of research suggests that when societies confront collective challenges such as wars, earthquakes, fires or floods, citizens tend to “rally around the flag”, that is, to increase their support for political authorities and public institutions.¹⁰ If this theory is correct, then the direct risk that the pandemic has presented to personal health and wellbeing might have resulted not only in a more conditional attachment to democracy, but also in more illiberal political attitudes.

In order to examine whether attitudes to government became less liberal as a result of the pandemic, we re-fielded a standard set of questions included in the World Values

Survey which ask respondents whether they think certain institutions constitute a “very good”, “fairly good”, “fairly bad”, or “very bad” way to run their country. This list includes some obviously illiberal options, such as preferring to have a “strong leader who doesn’t have to bother with parliament and elections”, alongside more subtle deviations from the principle of popular sovereignty, such as preferring that “experts make decisions according to what they think is best for the country” (rather than the elected government of the day). For most of the past few decades, changes on these items have been fairly gradual, allowing us to see whether the pandemic had a more dramatic effect.¹¹

To this end, surveys were conducted by YouGov on behalf of the Centre for the Future of Democracy among eight major west-

¹⁰ Egor Lazarev, Anton Sobolev, Irina V. Soboleva, and Boris Sokolov (2014) “Trial by Fire: a Natural Disaster’s Impact on Support for the Authorities in Rural Russia”, *World Politics*, 66 (4), 641–668.

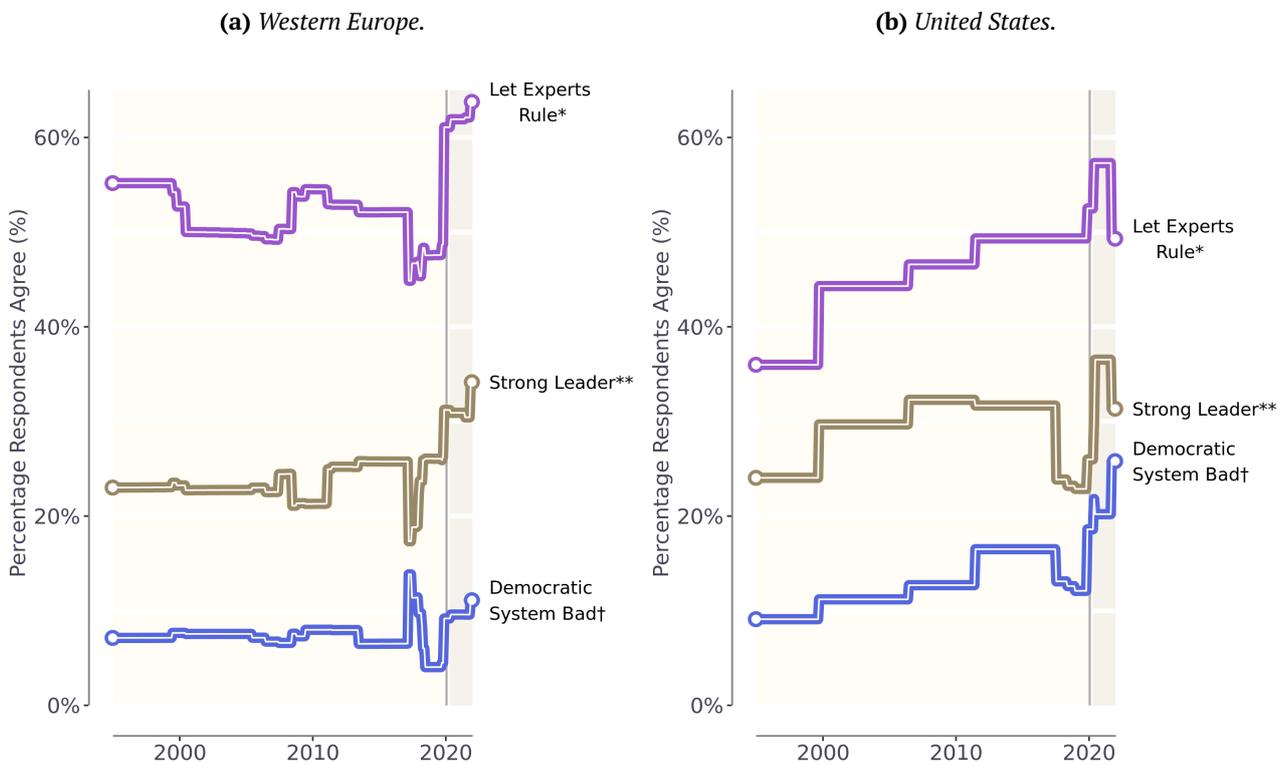
¹¹ See The Economist (2020) “A Rift in Democratic Attitudes is Opening Up Around the World”; and Christopher Claassen and Pedro Magalhaes (2021) “Effective Government and Evaluations of Democracy”, *Comparative Political Studies*, 1–26.

¹² These questions were fielded by YouGov as part of ongoing experimental work being conducted with the Cambridge Centre for the Future of Democracy. The academic interpretation of these findings does not reflect the analysis or interpretation

ern democracies with fieldwork in November 2019 (before the pandemic) and then in May 2020 and October 2021.¹² This allows us to gain a sense of how the pandemic may have affected attitudes towards democracy and democratic government.

The results, shown below in Figure 6, do suggest an illiberal value shift since the onset of the pandemic. In both Western Europe and the United States, the proportion of people in favour of having a “strong leader” rose from less than a quarter to more than a third of respondents at the start of the pandemic, while the proportion supporting a “democratic system” fell, especially in the United States (though this also reflects the aftermath of the 2020 election).

Are such changes the result of the pandemic, or could they be due to differences in question phrasing or the mode of implementation? In all of the country cases, both the 2019 and 2020-21 surveys were conducted by the same survey organisation using the same methodology. Meanwhile, results of a survey experiment which asked respondents about governing in the context of the pandemic, rather than in general, found similar results (see Figure 7). These experimental results suggest that answers to these questions reflect, in part, a “pandemic framing effect” – which also suggests that this illiberal shift in democratic attitudes could return to normal once the pandemic is no longer foremost in survey respondents’ minds.



Percentage of respondents describing as a way to run their country:

* Having experts, not government, make decisions according to what they think best for the country (“good”).

** Having a strong leader, who does not have to bother with parliament and elections (“good”).

† Having a democratic political system (“bad”).

Figure 6: Since the onset of the pandemic, public attitudes have become less supportive of democracy in both Europe and the United States on several survey indicators. “Western Europe” is a population-weighted aggregate of France, Germany, the United Kingdom, Italy, Spain, Sweden, and Denmark. Pre-pandemic survey conducted by YouGov in November 2019, with follow-up surveys in May 2020 and October 2021. Source: World Values Survey/European Values Study; VOTER Study; Nationscape; YouGov.

Investigating The Pandemic “Framing Effect”

Results of a Survey Experiment

Is the increase in public support for un-democratic attitudes such as preferring a “strong leader” or letting “experts make decisions” a result of the COVID-19 Pandemic? In order to shed light on this question, in the summer of 2020, YouGov refielded these questions in a group of countries across the world, this time asking whether these different scenarios were good for “handling a crisis like the coronavirus pandemic” rather than in general.

Perhaps not surprisingly, the framing of the coronavirus pandemic made citizens everywhere more likely to favour having

“experts” take decisions. Yet respondents were also more likely to voice approval for explicitly authoritarian options – such as “having a strong leader who does not have to bother with parliament and elections” – and were less likely to approve of having “a democratic system of government”. There is one silver lining, however. In countries with populist leaders, including Brazil, Mexico, and Turkey, citizens had far greater doubts about the wisdom of letting strong-man leaders guide a coronavirus response and more faith in the democratic process.

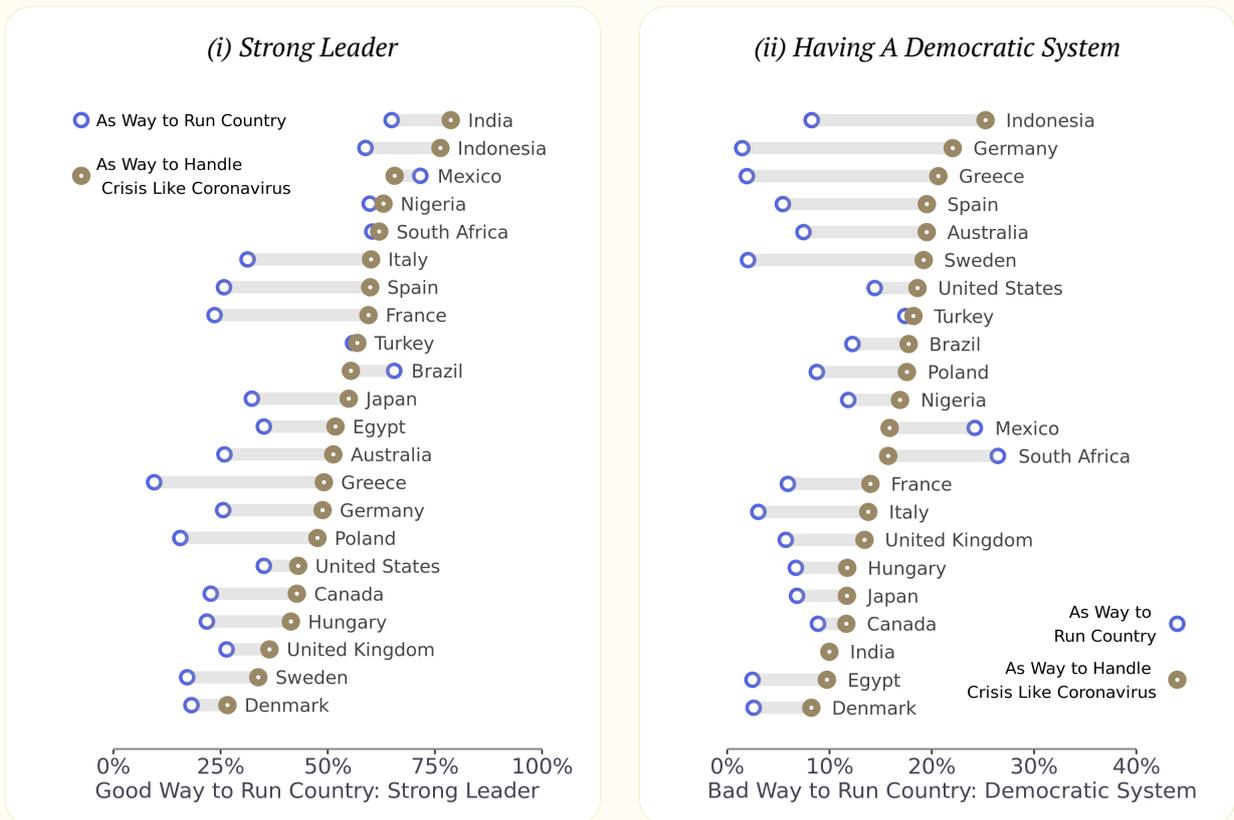


Figure 7: When citizens were asked about democratic attitudes in the context of the coronavirus pandemic, they tended to give less liberal responses. Sources: YouGov-Cambridge Centre for Public Opinion Research; World Values Survey/European Values Study; YouGov-Cambridge Globalism Project, 2020.

However, a case for a longer-term pandemic effect can be made when examining changes in democratic attitudes by age group, which reveals that younger survey respondents are disproportionately responsible for the illiberal value shift – with a much larger change among respondents aged below 35 than those aged 55 and above. While the “values gap” between the age groups was widening very slowly over the two decades prior to the pandemic, since its start in early 2020 those aged 18-35 have been the most likely to switch towards saying that it would be good to have a “strong leader, who doesn’t have to bother with parliament and elections” and that having a “democratic political system” is a “bad” way to run the country (Figure 8).

This apparent decline in democratic norms among younger respondents is troubling – but also puzzling, given that younger age groups were among the lowest risk of severe

illness or death from COVID-19 infection, and that on another survey item (agreement with the view that democracy is the “best form of government”) we found greater decline in support for democracy among older rather than younger age cohorts. One possible explanation is that this is due to differences in democratic “literacy”, or the depth of a person’s understanding of liberal democratic principles in relation to civil liberties, elections, and political rights. So even though older respondents are less likely to say that democracy is “always” the best form of government, they are still less likely to want to entertain the idea of a strongman leader who can govern without legislative oversight, or abandon the democratic process altogether.¹³ Yet for this same reason, this values-gap among younger generations could prove persistent over time, even after the pandemic itself has ended.

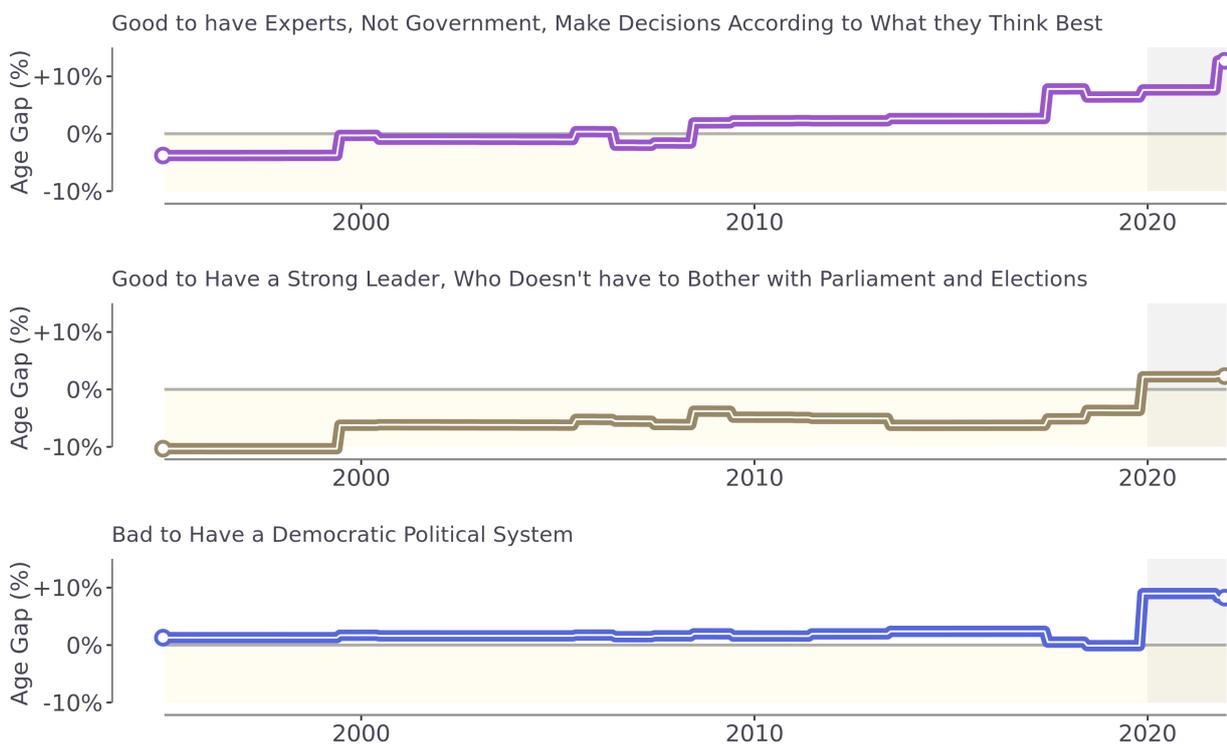


Figure 8: Age gap between selected survey items over time, showing the percentage lead (or lag) among under-35s in agreeing with each question category relative to levels of agreement among the over-55s. Population-weighted mean among eight countries with consistent survey data from the mid-1990s to 2020 and 2021: the United States, Germany, France, the United Kingdom, Italy, Spain, Sweden, and Denmark. In the decades prior to the pandemic, survey responses were becoming steadily less liberal among younger (under-35) respondents vis-a-vis levels among more elderly interviewees (those over age 55). At the outset of the pandemic in early 2020, under-35s saw a sharp jump towards less democratic responses, especially with regard to preference for having a “strong leader who can rule with parliament and elections”.

¹³ See Alexander Wuttke, Konstantin Gavras and Harald Schoen (2020) “Have Europeans Grown Tired of Democracy? New Evidence from Eighteen Consolidated Democracies, 1981–2018”, *British Journal of Political Science*, 1-13.

How Far Will People Go?

Civil Liberties and COVID-19

Across the world, democracies have introduced restrictions on civil rights and liberties to confront the novel coronavirus that would have been unthinkable just two years ago. While there have been sporadic protests against policies such as lockdowns, social distancing, facemask rules, and vaccine mandates, by and large such policies have enjoyed majority public support throughout the pandemic.

But how far are citizens prepared to go to endorse illiberal policy measures for the sake of confronting the threat posed by COVID-19? In its 2020 global survey, YouGov included a series of questions ask-

ing respondents about their support or opposition to conventional policy measures such as requiring the use of facemasks or social distancing, but then added more sweeping interventions such as banning individuals from being allowed to shake hands, or preventing online discussion of the pandemic. In every country a majority approved even a measure as restrictive as banning handshakes – while large proportions of the public in most western democracies, including majorities in Germany and Japan, were supportive of imposing restrictions upon online discussions about the virus.

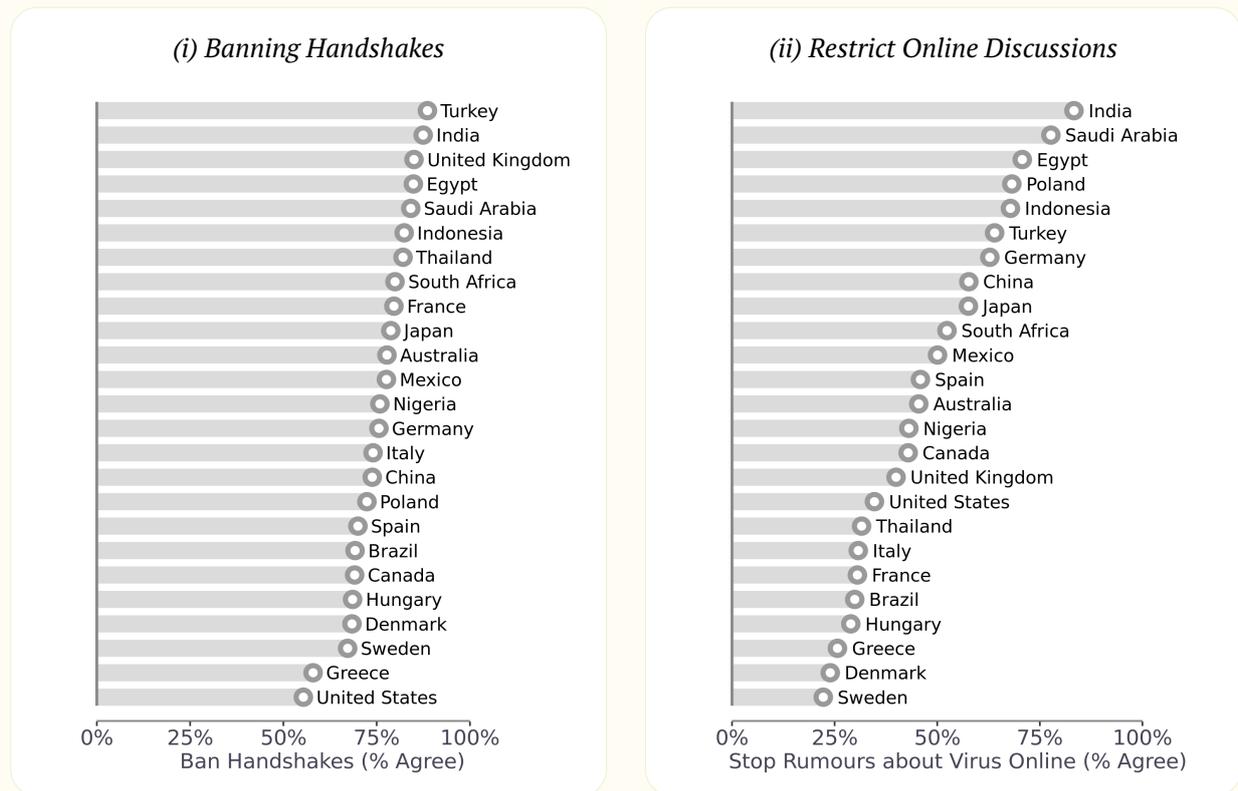


Figure 9: During national emergencies, survey respondents are far more likely to abandon key democratic principles than might otherwise be the case. Exact question wording: "Imagine there was another pandemic in the future, with a virus similar to Coronavirus. In principle, would you support or oppose [country name] doing each of the following for a period of time to tackle a similar pandemic like the Coronavirus in the future?" Percentage who "strongly support" or "tend to support" the measures of (i) "banning handshakes; (ii) "Stopping people from discussing stories or rumours about the virus on social media". Source: YouGov Globalism Project, 2020.



Figure 10: Proportion of respondents in each country who identify politically in between the centre and the centre-right of the political spectrum (values 4-6 on a 7-point scale, where extreme left is "1", and extreme right is "7"). Since the onset of the pandemic, there has been an increase in the proportion of individuals who identify on the centre or the centre-right, with the notable exceptions of the United States and Brazil.

In line with the increase in trust in government and the preference for "strong" leadership and letting "experts" take decisions, there has also been a subtle shift in political identification, with more respondents in most countries now identifying on the centre or centre-right of the political spectrum (Figure 10). This has not, however, been accompanied by any notable conservative shift on other left-right issue dimensions, such as taxation and welfare, migration, or key social issues such as women's rights or religion.

So what is going on? One area where societal attitudes have shifted during the pandemic is the one concerning individuals' relationship to public authority. Respondents in many countries were prepared to endorse restrictions on civil rights and liberties that, prior to the pandemic, would have been unthinkable in many western democracies. This may explain why trust in government has risen, at the same time that support for democracy has apparently declined. In other words, the real winner of the pandemic, politically, is not "Big-C" Conservatism but rather "small-c" conservatism – that is, pragmatism,

caution, and a preference for stability and predictability over bombast and risk. And even though this may be natural ideological territory for centre-right parties, centrist, and even leftwing politicians can also offer the same appeal to voters.

Germany's new centre-left Chancellor, Olaf Scholz, is perhaps the best illustration of this – even going so far as to brand himself as the natural successor to his centre-right predecessor, Angela Merkel. Meanwhile in the United States, Joe Biden's campaign to displace Donald Trump as U.S. president drew up similar themes – highlighting his long record of pragmatism and experience in government, in contrast to his bombastic predecessor – and it is no coincidence that older Americans were among the demographics to show the largest swing in his favour in the 2020 election. In short, it is not so much whether a party or candidate is on the political "left" or the political "right," so much as whether they offer predictability, experience, and stability which determines their electoral appeal in the age of COVID-19.

Lockdowns and Satisfaction with Democracy

Tracking A "Rally Around the Flag" Effect

Is the "authority shift" identified in the survey data – including higher trust in government and support for having a "strong leader" – a consequence of the COVID-19 pandemic? Since July 2019, YouGov has conducted a tracking poll on satisfaction with democracy in the United Kingdom that has asked a nationally representative sample of respondents about their assessment of British democracy several times a week. As a consequence, we can see how democratic satisfaction has evolved over the course of the pandemic.

Such data shows wide variation over time, but especially notable is how satisfaction soared during the country's two major "lockdowns" – in March to June of 2020, and January to March of 2021. Indeed during the first national lockdown, satisfaction with democracy in the United Kingdom rose to among its highest level in several decades – after having reached record lows as recently as late 2019. The increase did not last, however, and revisited the historical lows in late 2020, before somewhat recovering over the last year.

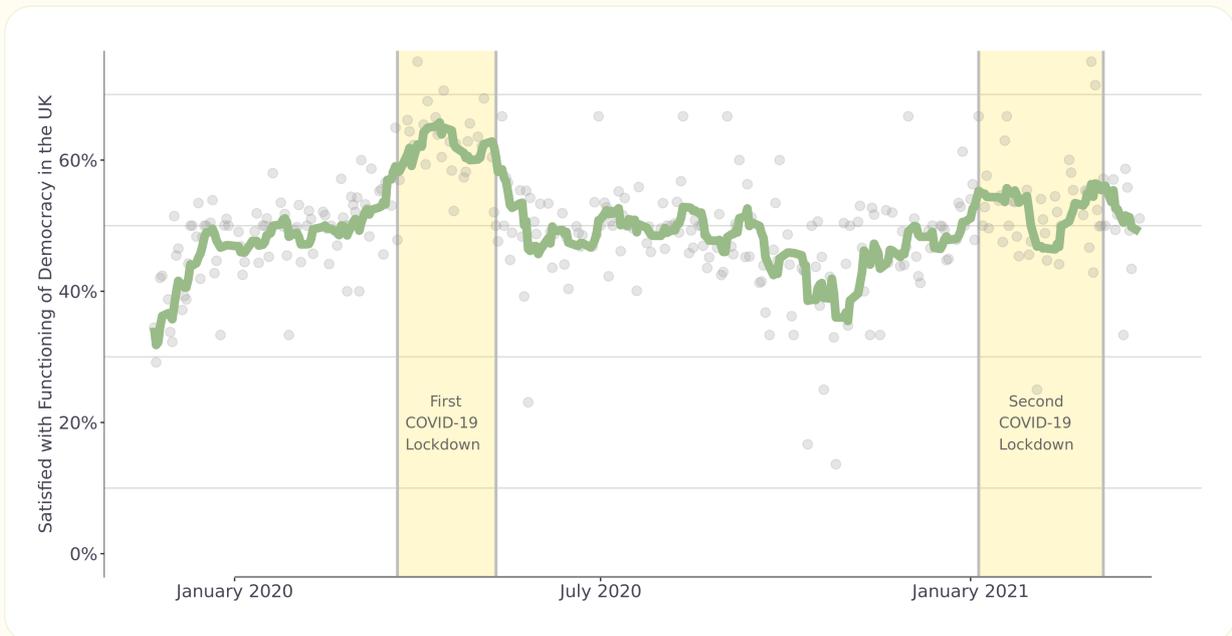


Figure 11: *During the coronavirus pandemic, satisfaction with democracy in the United Kingdom spiked during the country's two national lockdowns – in particular, the first lockdown that occurred from March of 2020 to June. Source: YouGov, 2020-21.*

6. The Decline of Populism

Thus far, the survey evidence suggests that the pandemic has weakened citizens' preference for democratic government. This may be especially true in democracies where a larger share of citizens were vulnerable to the health risks of COVID-19 – for example where there was a large obese or elderly population – and where the actions of democratically elected leaders fell short of what was required in order contain the virus.

This last point, however, highlights the fact that the pandemic has tested not only the adequacy of democratic institutions, but also the capabilities of individual parties and politicians. In some instances, these responses have fallen short. But this is especially the case among those figures, generally described as “populist,” whose initial response was to downplay the threat to public health – and then, to cast doubt on the need and effectiveness of policy responses to it.

As a result, some commentators already discern signs of a shift in the fortune of populist parties and politicians. Some, like Donald Trump and Andrej Babiš, have already lost power, while others, like Jair Bolsonaro, are so unpopular that they are likely to follow suit. And even figures who have effectively cemented their hold on power through undemocratic means, including Viktor Orbán and Recep Tayyip Erdoğan, are less popular than they have been in recent memory.

Populist Boom, Pandemic Bust

In this section, we assess a wide range of survey indicators, and find broad evidence to suggest that populism is indeed in decline. Individual populist leaders exhibit declining approval ratings, electoral support for populist parties is falling, and most tellingly of all, public approval for core populist ideas – such as belief in “will of the people” or that

society is divided between ordinary people and a “corrupt elite” – has fallen dramatically.

That populism has become discredited at a time of eroding support for democracy may initially seem to present us with a paradox. But in reality, these are two sides of the same coin. It is precisely the inadequacy of elected politicians – including, above all, elected populists – to offer solutions to the pandemic that explains why enthusiasm for democratic government has waned, and why populists have fallen from favour. If the pandemic has damaged the legitimacy of populist leaders the real winners are not “mainstream” politicians, but rather “non-political” sources of authority such as scientists and civil servants. In short, the consequence of the decline of populism is not so much the restoration of faith in representative democracy as a swing towards “technocratic” legitimacy that is typical of periods that follow populist waves.¹⁴

While it may be too early to proclaim that the populist wave has crested, in this chapter we show how across a wide range of indicators – ranging from the approval ratings of individual populist leaders, surveyed vote intention for populist parties, and agreement with core populist attitudes – the publics of major democracies are souring on populism as a political movement. Though far from inevitable, it now looks as if populism is on the wane. Indeed, already in country after country that has held elections during the pandemic – from the United States, to the Czech Republic, to Germany – we have seen populist parties and leaders failing to hold on to power or to increase their share of the vote. This raises the prospect that in 2022 populists may face further defeats, with incumbents facing difficult re-election campaigns in Hungary and Brazil, and challengers struggling to gain momentum in France and Sweden.

¹⁴ On the similarity between populist and technocratic ideologies, and the alternation from one to the other, see Daniele Caramani (2017) “Will vs. Reason: The Populist and Technocratic Forms of Political Representation and Their Critique to Party Government”, *American Political Science Review*, 111(1), 54–67.

1. Populists Have Become... Unpopular

During the early months of the global coronavirus pandemic, many political leaders saw a boost in their approval ratings¹⁵, as confrontation with a shared challenge resulted in a classic “rally around the flag effect” (Figure 12). However, there was one major exception. The approval ratings for leaders from populist parties began declining almost immediately, and have continued to do so up until the present. On average, populist leaders saw a 10 percentage point drop in their approval from the second quarter of 2020 to the final quarter of this year.

In some countries, the unpopularity of populist leaders has already been put to the electoral test. In November 2020, Donald J. Trump lost his bid to serve a second term as U.S. president. In March of 2021, Benjamin

Netanyahu failed to win enough votes to continue in office in Israel, and then in June of 2021, Mexico’s governing MORENA party lost seats to the opposition in the legislative elections – also falling to secure the two-thirds majority that it hoped for in order to be able to amend the country’s constitution. In October of 2021, Andrej Babiš failed to gain enough seats to continue in office in the Czech Republic and then in December 2021, Chileans rejected the populist presidential candidate Jose Antonio Kast.

In other countries, elections remain on the horizon, but for populist politicians the omens do not portend well. In Brazil, president Jair Bolsonaro will face a difficult reelection fight in October 2022 should he face a competition against Brazil’s former president, Luiz Inácio Lula da Silva. Meanwhile, Hungarian Prime Minister Viktor Orbán faces

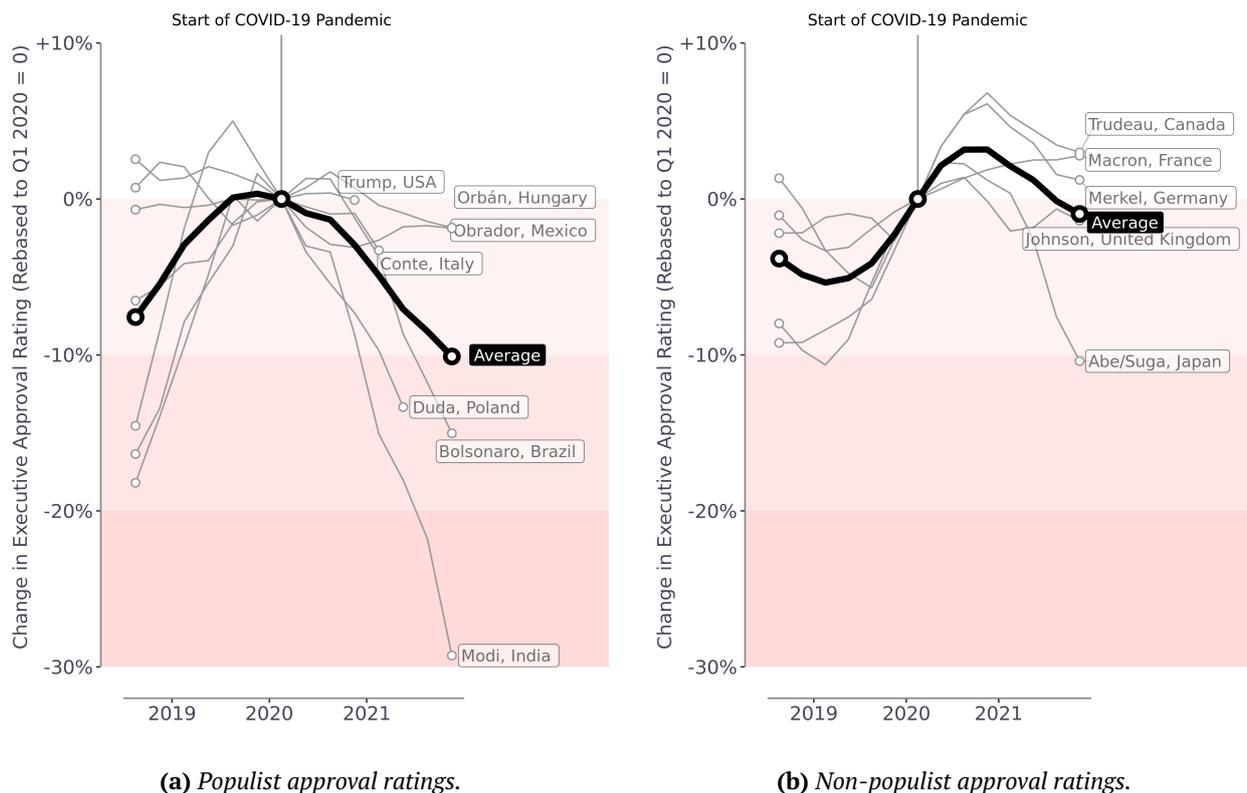


Figure 12: Following the onset of the pandemic, leaders of “mainstream” political parties such as Justin Trudeau or Angela Merkel saw an improvement in their approval ratings, whereas “populist” leaders such as Jair Bolsonaro or Viktor Orbán saw a decline. Shown are the smoothed rolling averages from one quarter to the next, with the onset of the pandemic (the first quarter of 2020) as the baseline. Source: Carlin, Ryan E., Jonathan Hartlyn, Timothy Hellwig, Gregory J. Love, Cecilia Martinez-Gallardo, and Matthew M. Singer. Forthcoming. *Executive Approval Database 3.0*.

¹⁵ For an early account of the boost in approval in the early months of the pandemic see Kai Chi Yam, Joshua Conrad Jackson, Christopher M. Barnes, Jenson Lau, Xin Qin, and Hin Yeung Lee (2020) “The Rise of COVID-19 Cases Is Associated with Support for World Leaders”, *Proceedings of the National Academy of Sciences* 117(41), 25429-25433.

a genuine prospect of losing office in next year’s parliamentary vote.

By contrast, parties in the political centre-ground have had a better run. Justin Trudeau secured a third term as Canadian Prime Minister in September 2021, while Japan’s Liberal Democratic Party increased its share of the vote in an election the following month. In Germany, incumbent Angela Merkel did not contest the election in September 2021, though the main beneficiary of her party’s poor performance was the centre-left SPD – while extremist parties on both the left and right lost votes.

2. Populist Parties Are Losing Voters

Just as populist leaders have seen their personal ratings slip, populist parties have also seen their support decline. This has been clearest of all in Europe, where the populist wave appears to have crested just before the pandemic – after which the electoral fortune of populist parties and movements has started to fade (Figure 13).

In Western Europe, vote intention for the incumbent party increased by about four percentage points following the first lockdowns in March 2020.¹⁶ At the same time, country by country, the largest declines in electoral support have been among populist parties that are currently in government, such as the Five Star Movement in Italy, Fidezs in Hungary, or Law and Justice in Poland.

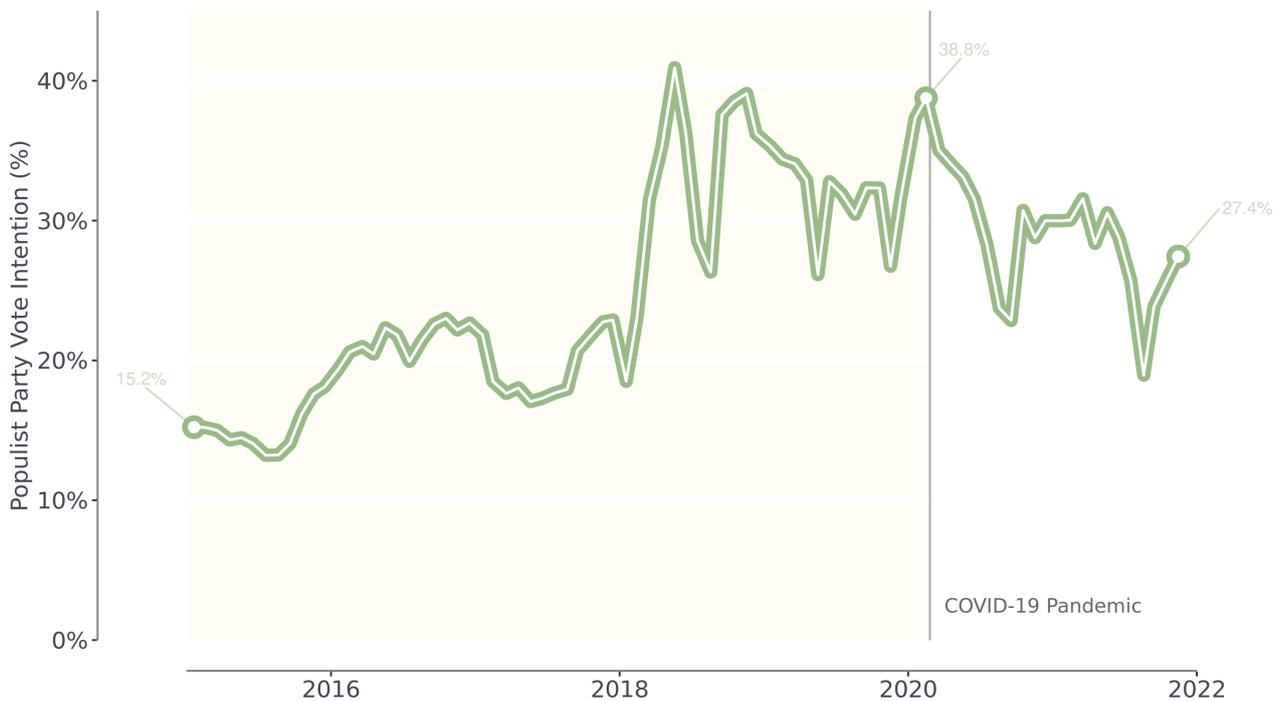


Figure 13: Populist party vote intention in Europe, 2015–2021. Since the start of the global coronavirus pandemic, the share of European voters stating that they intend to vote for a party that is classified as “populist” in the next election has declined by around 11 percentage points. “Europe” is a population-weighted aggregate of all “populist” parties from Austria, Belgium, Bulgaria, Croatia, Cyprus, the Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Lithuania, the Netherlands, Norway, Poland, Portugal, Slovakia, Slovenia, Spain, Sweden, and the United Kingdom. Parties were classified as “populist” according to Matthijs Rooduijn, Stijn van Kessel, Caterina Froio, Andrea Pirro, Sarah de Lange, Daphne Halikiopoulou, Paul Lewis, Cas Mudde and Paul Taggart (2019) “The PopuList: An Overview of Populist, Far Right, Far Left and Eurosceptic Parties in Europe”, www.popu-list.org. Source: Filip Van Laenen. *European Opinion Polls as Open Data*.

¹⁶ Damien Bol, Marco Giani, André Blais and Peter John Loewen (2021) “The Effect of COVID-19 Lockdowns on Political Support: Some Good News for Democracy?”, *European Journal of Political Research* 60(2), 497–505.

Could this therefore reflect a general “pandemic effect” whereby voters have chosen to punish incumbent parties for their handling of the pandemic? While this might seem tempting as an interpretation, we find no general “incumbency penalty” to parties that were in office during the pandemic – or rather, we find it only for populist parties. Since the onset of the pandemic, while vote intention for European countries’ average “moderate” party in government has increased by about eight percentage points, support for the average populist incumbent party has risen by around two percentage points only (Figure 14). Indeed, some ruling centrist and conservative parties have increased their level of vote support during the pandemic, as has the centre-right VVD in the Netherlands or the Croatian CDU.

A similar difference can be seen on the opposition side, as populist parties that are out of government have failed to capitalise on the pandemic as an opportunity to mobilise greater political support, while “moderate” parties, by contrast, have gained greater support. Since the onset of the pandemic, electoral support for European countries’ populist parties in opposition has decreased by around five percentage points on average. During the same period, vote intention for mainstream opposition parties has risen by about three percentage points on average (Figure 14). Thus, to the extent that centre-ground governing parties have lost support during the pandemic, it has been towards moderate parties of the opposition, such as the loss of support for Germany’s CDU-CSU to the centre-left SPD, the governing Social Democrats in Denmark towards the centre-

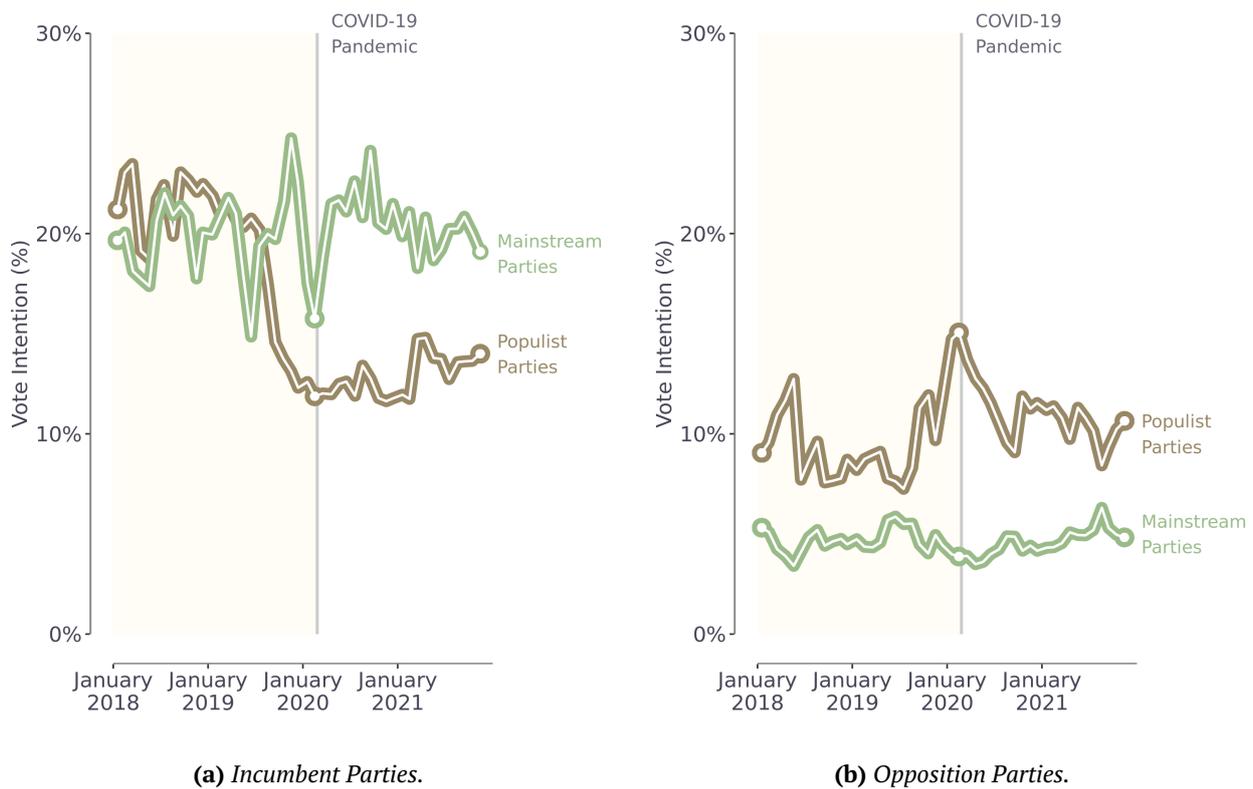


Figure 14: Incumbent and opposition party vote intention in Europe, 2018–2021. Populist parties have lost support, especially those that have served in office. By contrast, mainstream political parties have maintained a steady share of electoral support. “Europe” is a population-weighted aggregate of the mean “populist” or mainstream parties from Austria, Belgium, Bulgaria, Croatia, Cyprus, the Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Lithuania, the Netherlands, Norway, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden and the United Kingdom. Parties were classified as “populist” according to Matthijs Rooduijn, Stijn van Kessel, Caterina Froio, Andrea Pirro, Sarah de Lange, Daphne Halikiopoulou, Paul Lewis, Cas Mudde and Paul Taggart (2019) “The PopuList: An Overview of Populist, Far Right, Far Left and Eurosceptic Parties in Europe”, www.popu-list.org. Source: Filip Van Laenen. *European Opinion Polls as Open Data*.

right Venstre and Conservative parties, or the governing Swedish Social Democratic Party to the centre-right Moderate Party in opposition.

Outside of Europe, we observe a slightly different picture. In the United States, Congressional vote intention for the Republican party has declined by around two percentage points inbetween the onset of the pandemic and the start of Joe Biden’s presidency. This is similar, however, to the equivalent period prior to and at the start of president Donald Trump’s administration.¹⁷ In Mexico, parties opposing the government of Andrés Manuel López Obrador increased their share of electoral support by around six percentage points between January 2020 and June 2021,

but this was not at the expense of the incumbent MORENA and PT, which recovered about four percentage points of electoral support during the same period (Figure 15).

Finally, in Brazil, parties opposing the government of Jair Bolsonaro have clearly capitalised on his unpopularity since the start of the pandemic. While Bolsonaro’s polling improved briefly in the initial months of the pandemic, by October of 2021 he was down around seven percentage points from the peak that he reached 12 months prior. Conversely, from the start of the pandemic to the most recent polling observation in October 2021, opposition parties have collectively increased their share of the potential vote by more than 20 percentage points.

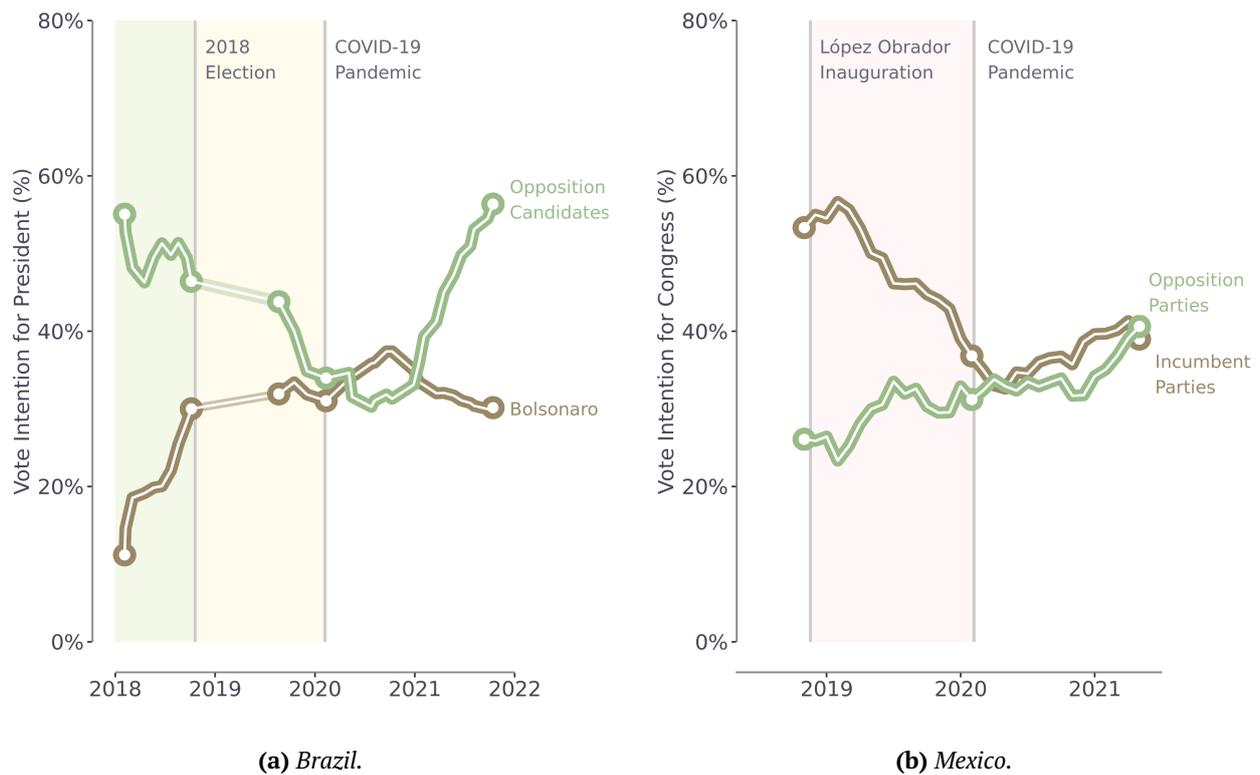


Figure 15: Presidential vote intention in Brazil and Congressional vote intention in Mexico. In the case of Brazil, incumbent parties include PSL, PRTB, DEM, PRB and PL. Source: Poder360. *Agregador de Pesquisas, Filtro Avançado* (Electoral Polls Aggregator, Advanced Filter). In the case of Mexico, incumbent parties include MORENA and PT. Source: Oraculus. *Elección para la Cámara de Diputados 2021* (Chamber of Deputies 2021 Election). Poll of Polls.

¹⁷See YouGov America, “Congressional Ballot Voting Intention”.

4. Populist Ideas Losing Ground

Voters are not only distancing themselves from populist parties and leaders, but also the worldview they espouse. Since 2019, the YouGov Globalism Survey has asked citizens around the world whether they agree or disagree with key populist ideas, such as the notion that one’s country is “divided between ordinary people and the corrupt elites” or that the “will of the people” should govern one’s country’s politics. Since the start of the pandemic, there has been almost universal rejection of such beliefs. Respondents in almost every country are less likely to support such views now as compared with the past (Figure 16). This change began in 2020, and has accelerated in 2021. The only countries in which populist attitudes are more commonplace today than in 2019 are Japan, Indonesia, and Thailand – with every other country showing a steady disillusionment with populist ideas.

How We Measure Populist Attitudes

In this report, we measure “populist attitudes” using average agreement with four items that tap core populist beliefs according to the conventional literature.

- 1. My country is divided between ordinary people and the corrupt elites who exploit them.**
- 2. The will of the people should be the highest principle in this country’s politics.**
- 3. The power of a few special interests prevents our country from making progress.**
- 4. A lot of important information is deliberately concealed from the public out of self-interest.**

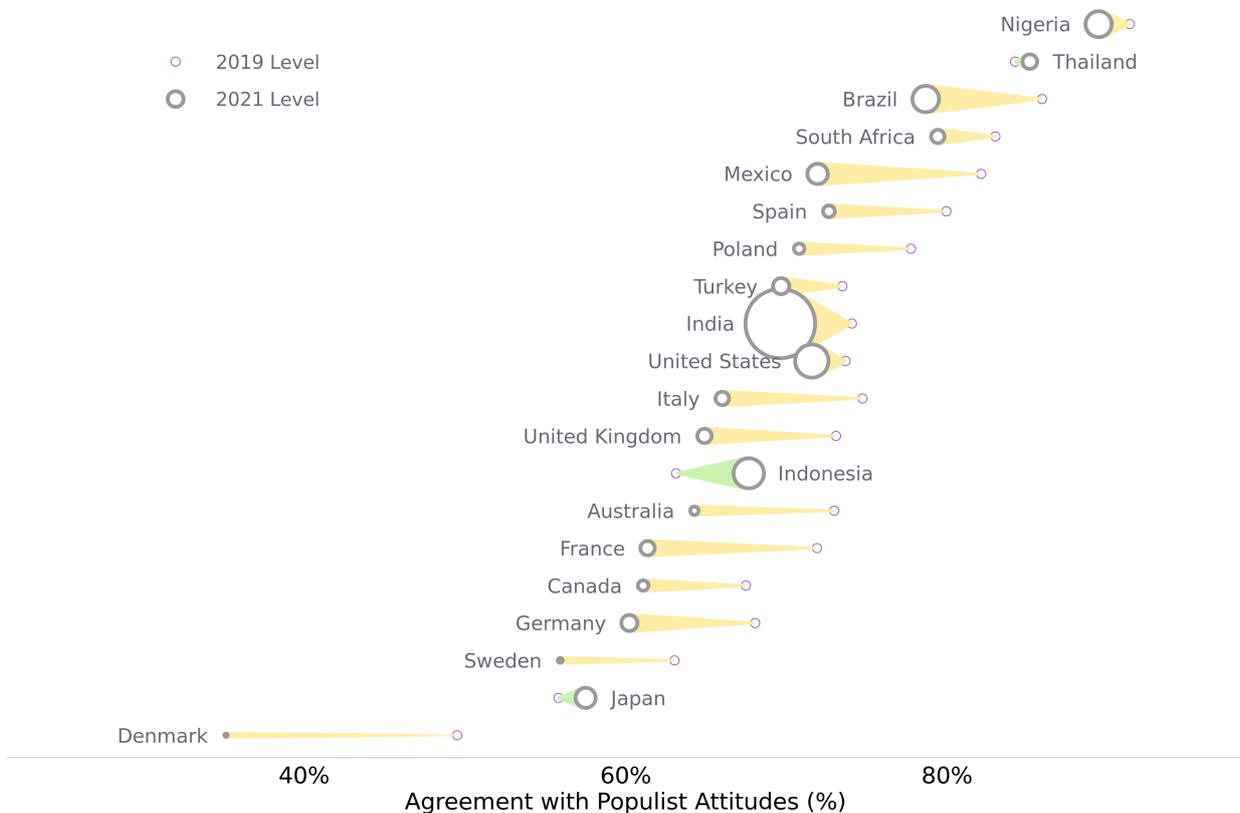


Figure 16: Shift in the average agreement of survey respondents with 4 populist attitudes survey questions between 2019 and 2021. The four items are belief that the country is divided between the people and corrupt elites, belief that “the will of the people” should guide politics, that special interests block progress, and that information is deliberately concealed from the public. Source: YouGov Globalism Survey.

Not only has the proportion of respondents agreeing with populist attitudes declined, such as the importance of the "will of the people" in political life or demonisation of elites, but also the *strength* of commitment to populist beliefs among such respondents appears to be waning. In almost every single country, among respondents who agree with populist attitudes, a smaller proportion now "strongly agree" than did so in 2019, before the pandemic (Figure 17). Even amongst those open to populist ideas, it seems, there is a lack of conviction today as compared with

the past.

Meanwhile, there also appear to be distinct age pattern effects in the decline in support for populist ideas. Among developed democracies in Western Europe, Asia, and North America, the largest decline in support for populism appears to be among older respondents. In a crisis that has disproportionately endangered the lives of the elderly, populist agitation may be especially unappealing to those most at risk. However, the same pattern is not found among developing democracies (Figure 18).

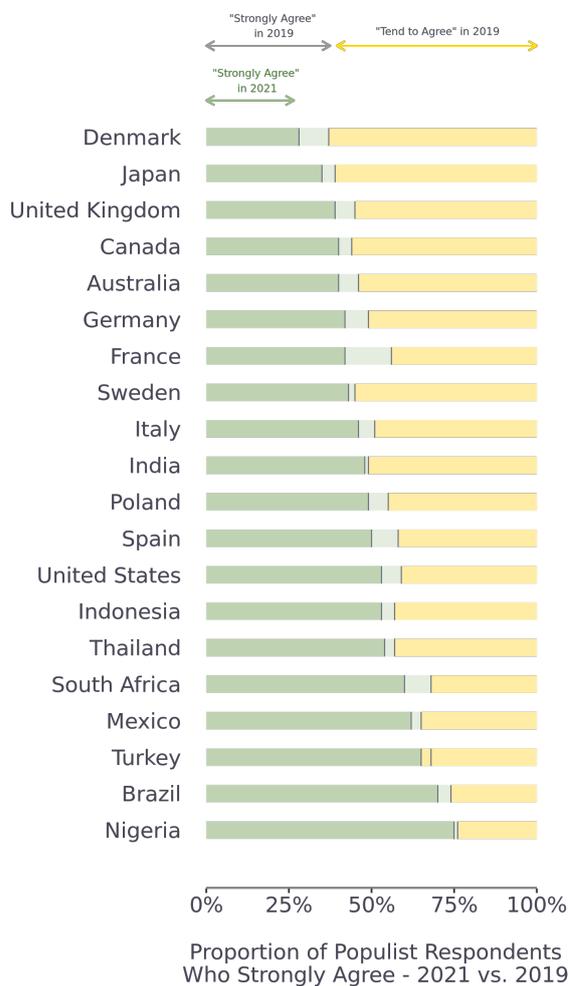


Figure 17: Waning strength of populist sentiment, 2019–21. Among respondents who voice agreement with populist survey items, the proportion who "strongly agree" was lower in 2021 than in 2019 in almost every country. Source: YouGov Globalism Survey, 2019–21.



Figure 18: In developed democracies, the decline in "strong" agreement with populist survey items has mainly occurred among elderly respondents, aged 55 and above. In developing democracies, however, the decline in agreement with populist attitudes is skewed towards the young. Source: YouGov Globalism Survey, 2019–21.

Populist Attitudes Wane Among the Less-Educated...
 ...Now More Common Among University Graduates

Since the onset of the “populist wave”, the charismatic appeal of firebrand politicians has been attributed to their reach among “less-educated” voters, who lack the professional skills and credentials required to thrive in the information age. And indeed, to some extent this has been true: in most developed democracies, agreement with populist attitudes was more common among those with incomplete secondary or post-secondary education than among those with graduate degrees (Figure 19).¹⁸

It is, however, no longer true today – as in most major democracies agreement with populist attitudes is now more common among the university-educated. The education-populism relationship has therefore inverted, with university-educated respondents far more likely to voice belief in populist attitudes such as that their country is divided between ordinary people and a corrupt elite, or belief in the primacy of the “will of the people.”

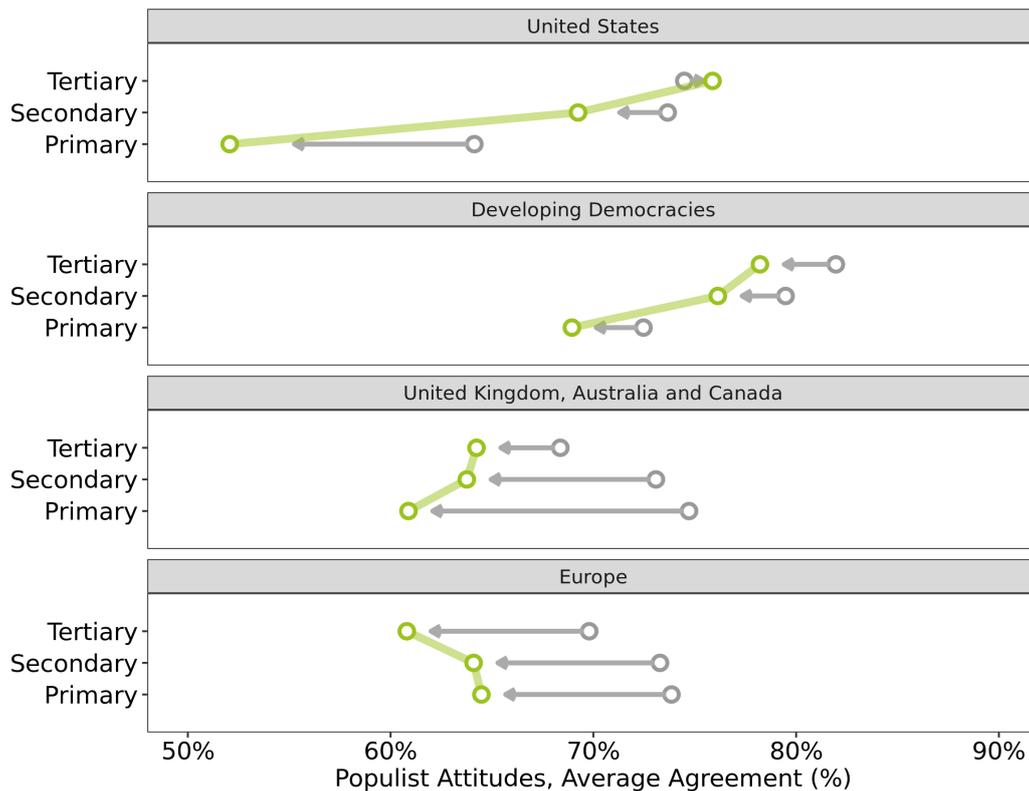


Figure 19: Since the onset of the pandemic, populist values have declined among the less educated – and in many countries, are now more prevalent among university-educated individuals than among the general public. The four items are belief that the country is divided between the people and corrupt elites, belief that “the will of the people” should guide politics, that special interests block progress, and that information is deliberately concealed from the public. Source: YouGov Globalism Survey 2019-21.

¹⁸ See Bram Spruyt, Gil Keppens, and Filip Van Droogenbroeck (2016) “Who Supports Populism and What Attracts People to It?” *Political Research Quarterly*, 69(2), 335–346.

Why is Populism in Decline?

1. Populist (Mis)Handling of the Pandemic

Why have populists lost their popular appeal? Perhaps the simplest, but also the most important factor, is how populists handled the COVID-19 crisis. Though some, such as Narendra Modi or Viktor Orbán, responded early with wide-ranging and far-reaching policies, on average populist leaders acted less, acted later, and saw an excess mortality rate 10 percentage points higher than in countries with non-populist governments.¹⁹

This record of poor responsiveness to the threat posed by the novel coronavirus likely explains much of the gap in the public’s evaluation of policy responses by populist governments. In countries where populists were

in government, approval of the government’s handling of the pandemic was -11% lower, on average, when polling began in June 2020. By the end of the year, this “approval deficit” had widened to reach -16%, as ratings of populist governments’ pandemic responses continued to deteriorate, while among mainstream governments ratings had stabilised (Figure 20).

Just as populists are rated worse by their citizens on their management of coronavirus, they are also less trusted as a source of information about it. In 2021, YouGov asked citizens around the world who they trust as an accurate source of information about coronavirus. The results show quite clearly that while mainstream politicians are given high trust ratings by their citizens, populist leaders tend to attract much lower ratings (Figure 21).

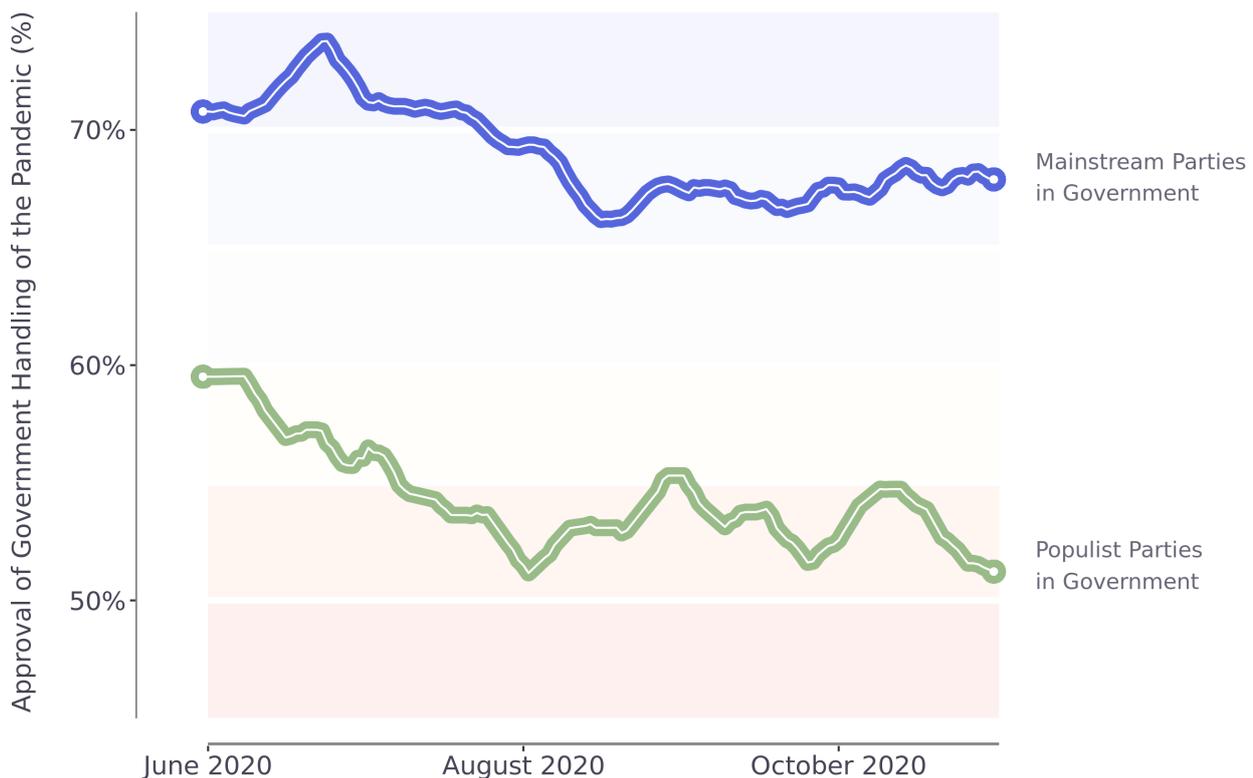


Figure 20: In countries where populist parties were in government, approval of the government’s handling of the pandemic started lower, and declined further, than in countries where mainstream parties held office. Countries with populists in government: United States (Donald J. Trump), Brazil (Jair Bolsonaro), Philippines (Rodrigo Duterte), Italy (Five Star Movement), Spain (Podemos), and India (Narendra Modi). Countries with mainstream parties in office: France, Germany, Sweden, Denmark, United Kingdom, Australia, Canada, Finland, Japan, Malaysia, Netherlands, Singapore, South Korea, Taiwan, and Norway. Source: YouGov COVID-19 Tracking Survey, 2020-1.

¹⁹ Michael Bayerlein, Vanessa Boese, Scott Gates, Katrin Kamin, Syed Murshed (2021) “Populism and COVID-19: How Populist Governments (Mis) Handle the Pandemic”, *V-Dem Working Paper 121*.

The lack of trust in populist leaders should not be especially surprising. Throughout the pandemic, populists have blustered, obfuscated, and misled. In Brazil, for example, president Jair Bolsonaro initially called the disease “a light flu,” and then vetoed legislation to make mask use mandatory.²⁰ In Mexico, president López Obrador commended his supporters to continue to “hug” because “nothing happens” and then claimed that religious amulets were protecting him from the virus (he later tested positive). In the United States, president Donald Trump entertained offbeat hypotheses such as that coronavirus infection might be cured by “injecting bleach” or that the virus was “going to go away without a vaccine.”

Even where populists have been less cavalier in their claims, they have struggled to

maintain public trust due to a lack of consistent positioning. In Poland, for example, the Law and Justice government initially prevaricated in its pandemic response, then implemented two national lockdowns, and now states that restrictions are “not a very effective means of limiting the pandemic.” Meanwhile in Italy, the governing Five Star Movement has engaged in perhaps the most dramatic pivot of any government during the pandemic. After having swung to power in 2018 by embracing the “anti-vax” movement and removing mandatory vaccination for schoolchildren, it ended up implementing stringent “vaccine passport” laws that prevent those who refuse inoculation from entering restaurants and bars, or using public transport.

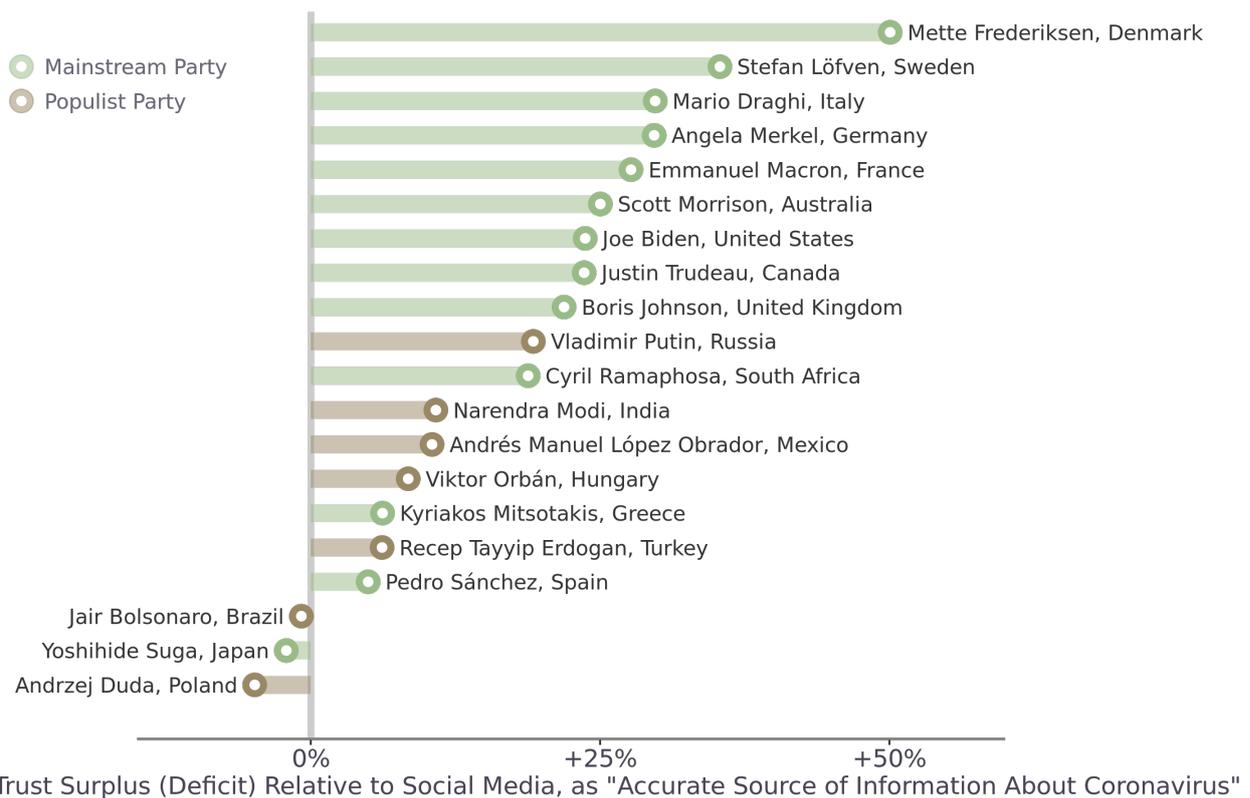


Figure 21: When citizens are asked who they trust as a “source of information about coronavirus”, populist leaders perform poorly compared to moderates. Trust deficit (surplus) calculated as the percentage reporting that they trust the (named leader) as a source of information about coronavirus, minus the percentage who trust social media as a source of information about coronavirus. Source: YouGov Globalism Project, 2021.

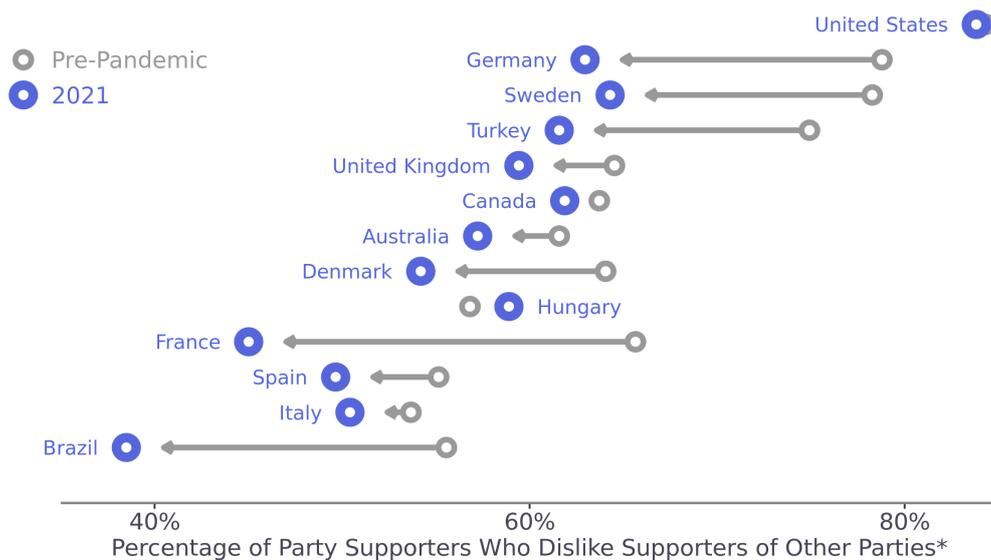
²⁰ Leonardo Avritzer and Lucio Rennó (2021) “The Pandemic and the Crisis of Democracy in Brazil”, *Journal of Politics in Latin America*, 13(3), 442-457.

2. Political Tribalism has Declined

Populists can be characterised as much by what (and who) they oppose as by what they support. Political scientists call such tribalism “affective polarisation” – which, roughly stated, is the degree of animosity that supporters of different parties feel towards one another. In recent decades, this type of antipathy has increased in many countries alongside the uptake of social media, rising resentments driven by growing inequality, and new divides over “cultural politics”.²¹ Populists typically contribute to political tribalism by politicising divisive issues and emphasising a polarising discourse of ‘us (the people) versus them (the establishment)’.

However, divided societies are also an excellent place for populists to flourish. They can mobilise large segments of people at the more extreme ends of the political spectrum that are susceptible to their polarising discourse.²²

A year and a half since the onset of the coronavirus pandemic, affective polarisation appears to have declined across most democracies, which may explain why populists are having difficulty mobilising support. Using thermometer rankings, which ask respondents to rate parties from 0 (“strongly dislike”) to 10 (“strongly like”), we found that the proportion of respondents having a high liking (above 7) and high disliking (below 3) towards one or more political parties has de-



* The proportion of supporters of each party (those whose favourability towards a party is 7 out of 10 or higher) who also express a strong *dislike* (less than 3 out of 10 favourability) for other parties, taking the four main parties in each country.

Figure 22: Affective polarisation has declined in most democracies since the onset of the coronavirus pandemic, with an especially large fall among countries in Western Europe. Pre-pandemic observations: United States - 11/2016, Germany - 01/2020, Sweden - 09/2018, Turkey - 08/2018, United Kingdom - 01/2020, Canada - 10/2019, Australia - 06/2019, Denmark - 06/2019, Hungary - 05/2018, France - 05/2017, Spain - 05/2019, Italy - 03/2018, Brazil - 11/2018. Sources: YouGov Globalism Survey 2021; Comparative Study of Electoral Systems, Module 5; British Election Study, Wave 20; Politbarometer 2020; Danish National Election Study 2019; E-Dem Panel Survey, Wave 4.

²¹ See Noam Gidron, James Adams and Will Horne (2020) *American Affective Polarization in Comparative Perspective*, Cambridge University Press; Markus Wagner (2021) “Affective Polarization in Multiparty Systems”, *Electoral Studies*, 69, 102199.

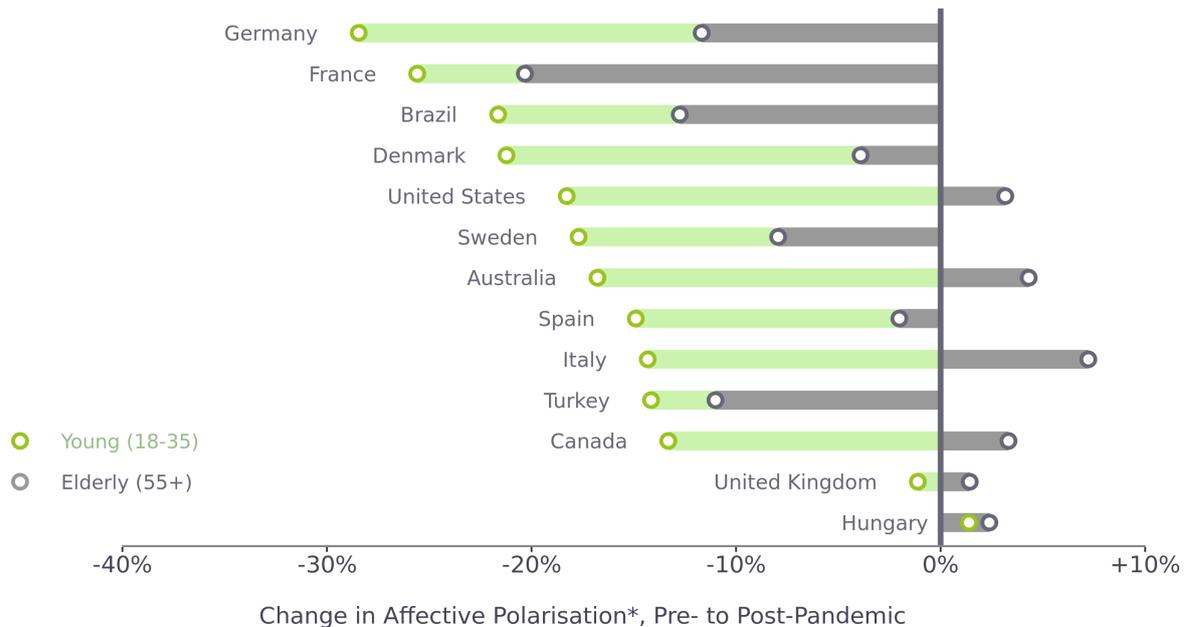
²² See Jennifer McCoy and Murat Somer (2019) “Toward a Theory of Pernicious Polarization and how it Harms Democracies: Comparative Evidence and Possible Remedies” *The Annals of the American Academy of Political and Social Science*, 681(1), 234-271.

²³ See also Levi Boxell, Jacob Conway, James N. Druckman and Matthew Gentzkow (2020) “Affective Polarization did not Increase during the Coronavirus Pandemic” *National Bureau of Economic Research*, Working Paper No. w28036; and More

creased – in most countries – since the beginning of the pandemic (Figure 22).²³ We also observe that this decline is particularly driven by younger age-groups (18-35 years old) (Figure 23).

How might the pandemic have induced a decline in political tribalism? One explanation is that the experience of facing a shared societal challenge, such as a pandemic, can foster a greater sense of unity and common purpose. Such a shared feeling helps to overcome differences in political identity and values.²⁴ During the early weeks of the pandemic in Europe, evidence shows that opposition parties spoke more positively about their political opponents in parliamentary de-

bates.²⁵ Such differences could also be found in media discussions and debates. With a majority of citizens united in the goal of overcoming the pandemic, fewer voters were susceptible to the divisive discourse and ideology of populist politicians, further reducing polarisation in society. Such a positive feedback loop may explain why populist leaders and parties are having difficulty mobilising support during the pandemic, and why many, such as Matteo Salvini in Italy or France’s Marine Le Pen, have moderated their tone. This is especially notable given that younger voters, once the most likely to support populist parties, have seen the largest declines in affective polarisation (Figure 23)



* The proportion of supporters of each party (those whose favourability towards a party is 7 out of 10 or higher) who also express a strong *dislike* (less than 3 out of 10 favourability) for other parties, taking the four main parties in each country.

Figure 23: Younger age-groups seem to drive the decline in affective polarisation throughout the pandemic. Pre-pandemic observations: United States - 11/2016, Germany - 01/2020, Sweden - 09/2018, Turkey - 08/2018, United Kingdom - 01/2020, Canada - 10/2019, Australia - 06/2019, Denmark - 06/2019, Hungary - 05/2018, France - 05/2017, Spain - 05/2019, Italy - 03/2018, Brazil - 11/2018. Sources: YouGov Globalism Survey 2021; Comparative Study of Electoral Systems, Module 5; British Election Study, Wave 20; Politbarometer 2020; Danish National Election Study 2019; E-Dem Panel, Wave 4.

in Common (2020), “Polarization and the Pandemic: How COVID-19 is Changing Us”.

²⁴ See Samuel L. Gaertner, Jeffrey Mann, Audrey Murrell and John F. Dovidio (1989) “Reducing intergroup bias: The benefits of recategorization”. *Journal of personality and social psychology*, 57(2), 239-249; Matthew S. Levendusky (2018) “Americans, not partisans: Can priming American national identity reduce affective polarization?.” *The Journal of Politics*, 80(1), 59-70.

²⁵ Tom Louwerse, Ulrich Sieberer, Or Tuttnauer and Rudy B. Andeweg (2021) “Opposition in Times of Crisis: COVID-19 in Parliamentary Debates”, *West European Politics* 44(5-6), 1025-51

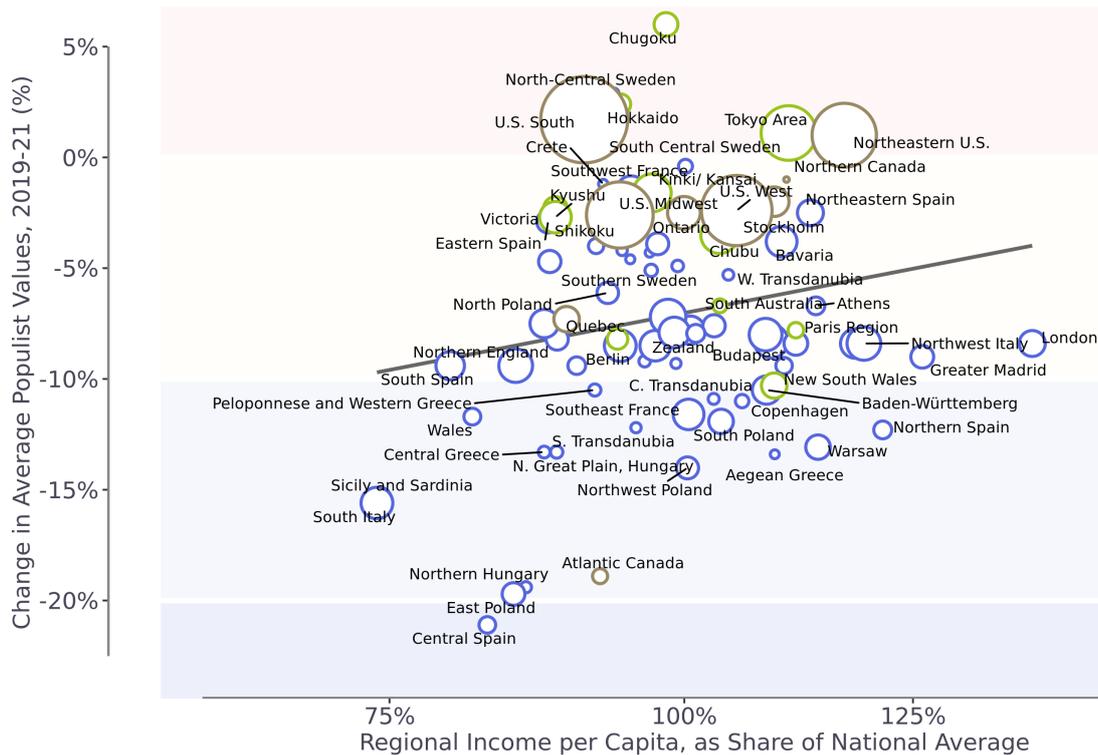


Figure 24: Since the onset of the pandemic, populist attitudes have declined the most in “left-behind” regions of developed countries, defined here as those with income per capita below the national average. The four items used to measure populist attitudes are: belief that the country is divided between ordinary people and corrupt elites, belief that “the will of the people” should guide politics, that special interests block progress, and that information is deliberately concealed from the public. Source: OECD Regional Economy dataset, YouGov Globalism Survey 2019-21.

3. Is the Spatial Divide Narrowing?

Across western democracies, populist, anti-establishment challengers have had the greatest electoral appeal in regions “left behind” by the global economy, such as the “rustbelt” of the American Midwest, former industrial towns in northern England, the underdeveloped provinces of southern Italy, or the former communist states of East Germany.²⁶ Data from YouGov show that before the pandemic, these regions were by far the gloomiest about prospects for their local area, with less than a quarter of respondents expressing optimism for the future of their region in southern Italy, northeast France, and central Spain. They also remain the least satisfied with how democracy in their country is performing – unless populists are in

charge (Figure 25).

However, just as such regions led the emergence of the populist wave, it now seems they are sending the tide back out. In the past eighteen months, the poorest areas of the developed world have seen a marked drop in populist attitudes (Figure 24). In region after region – from Wales to Eastern Poland, from Central Spain to Central Greece, and from Southern Italy to Northern Hungary – the poorest areas are those now most turned off by populism.

What is the reason for this turnaround? Perhaps the simplest theory is that this shift in political attitudes corresponds to a turnaround in economic fortunes. During the pandemic, the brunt of the economic impact hit major urban centres such as London, Paris, or New York.²⁷ On the other hand,

²⁶ See Will Wilkenson (2019) “The Density Divide: Urbanization, Polarization, and Populist Backlash”, Niskanen Center; Roberto Stefan Foa and Jonathan Wiltom (2019) “The West has a Resentment Epidemic”, *Foreign Policy*; or David Adler and Ben Ansell (2020) “Housing and Populism”, *West European Politics*, 43:2, 344-365.

²⁷ Philipp Meinen and Roberta Serafini (2021) “The Economic Impact of the Pandemic – Drivers of Regional Differences,” ECB Economic Bulletin, Issue 1/2021.

inland destinations may even have benefited from the growth of domestic tourism and relocation by businesses and professionals out of wealthy urban centres.²⁸ In the United Kingdom, house prices in northern regions rose by 15-20% from June 2020 to June 2021, whereas in London they rose by just six percent. Similarly, in the United States in the year to October 2021 home prices rose by just 3.2% in New York City and 6.5% in San Francisco, compared to 18% nationwide and even more inland.²⁹

Second, of course – and in part as a response to the populist wave – governments around the world have been doing more in recent years to address the spatial divide within their countries. In the United Kingdom, where northern regions voted overwhelmingly in favour of leaving the European Union in a referendum five years ago, £5 billion has been allocated to a “levelling-up” fund to redistribute growth. In the United States, the twin incentives of less restric-

tive pandemic laws in the South and West, together with a cap on state and local tax deduction introduced in 2018, has resulted in a significant movement of people, businesses, and jobs out of major metropolitan areas in California or New York towards new hubs in places like Florida, Texas, or Colorado.

Meanwhile in Europe, where the decade of austerity that followed the eurozone crisis had hit especially hard upon poorer regions in Spain, Italy, or Greece that are dependent on government largesse, the pandemic brought a suspension of the bloc’s Stability and Growth Pact, allowing countries to respond with tax relief and income support. And now the Next Generation EU fund is providing large resources to the states hit hardest by the pandemic, primarily in southern Europe, with the largest recipient, Italy, dedicating 40% of its resources to poorer regions in the south of the country.³⁰

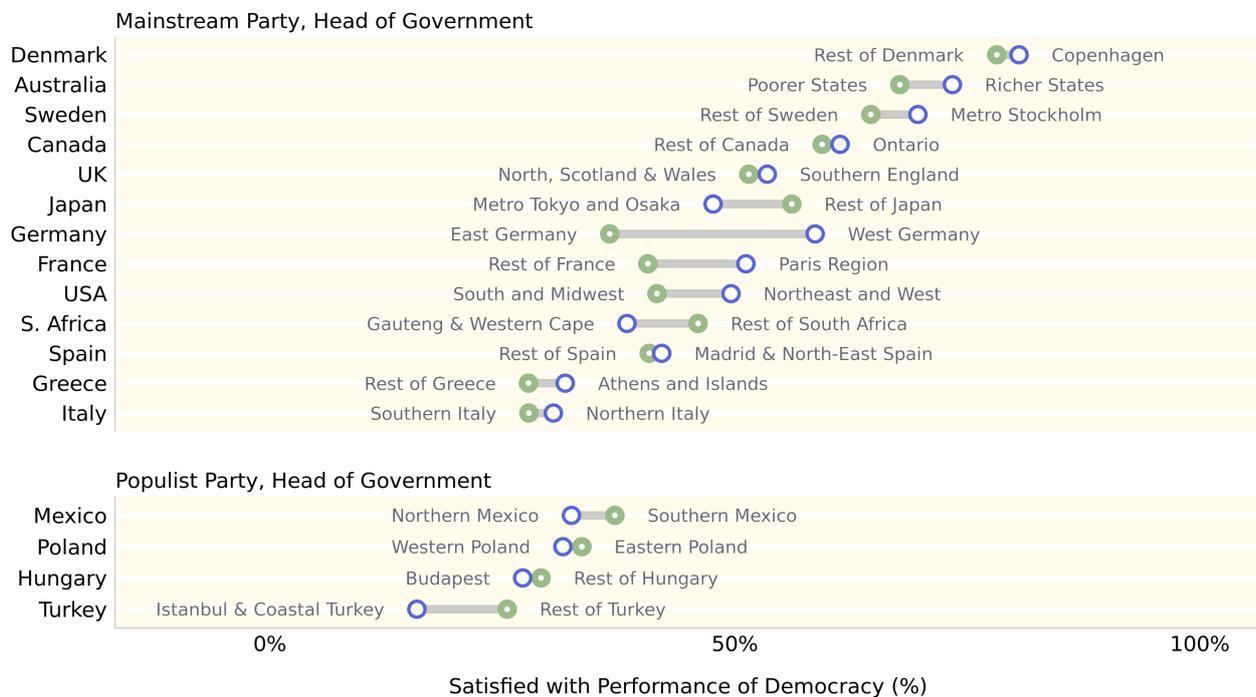
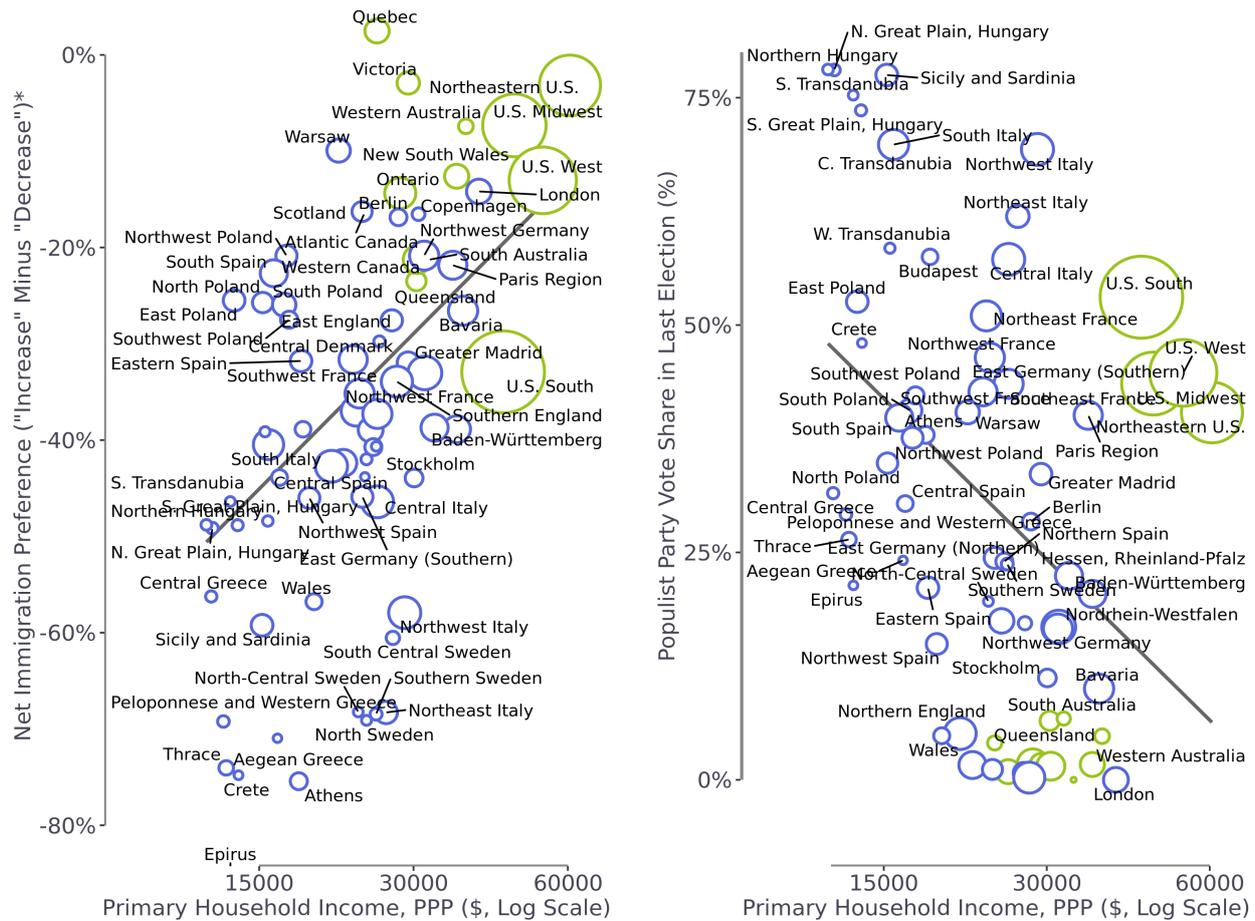


Figure 25: Across the world, “left-behind” regions are less satisfied with the performance of their democracy – though when populists are in charge, this relationship is reversed. Survey data from September 2021. Source: YouGov Globalism Project.

²⁸ Joakim A. Weill, Matthieu Stigler, Olivier Deschenes and Michael R. Springborn (2020) “Social Distancing Responses to COVID-19 Emergency Declarations Strongly Differentiated by Income”, *Proceedings of the National Academy of Sciences*.

²⁹ Data from the Federal Reserve Bank of New York (2021) “Mapping Home Price Changes”.

³⁰ Details as listed in the “Piano Nazionale di Ripresa e Resilienza” found on the Italian government website.



(a) Poorer regions express stronger opposition to immigration...

(b) ..., and prefer to vote for populist parties.

Figure 26: Net immigration preference measured as the percentage responding "should be increased" minus the percentage responding "should be decreased" to the question: "Thinking about the future, do you think the number of immigrants coming to this country should be increased or decreased or remain about the same as now?" Source: Survey data from the YouGov Globalism Survey; data on regional disposable income from the OECD Regional Economy Dataset.

Beyond this reversal of economic fortunes, there may be one further reason why the populist momentum has halted. That, ironically, is the fact that core populist demands have now been met. Populists across the spectrum, from the leftwing *Syriza* in Greece to the rightwing *Rassemblement National* in France, have railed against the ills of globalisation, calling for an end to unrestricted trade and migration across countries. This message has proven especially attractive in "left-behind" regions struggling with high unemployment and the relocation of domestic manufacturing, where attitudes to free trade and immigration are significantly more hostile (Figure 26).

Yet now, at a stroke, the pandemic has delivered precisely the outcome for which populists had long clamoured. Migration has slowed to a trickle, while trade flows –especially in services– were radically disrupted. Perhaps most symbolic of this fact is that when the United Kingdom finally left the European Union at the start of 2021, the occasion passed almost unnoticed. The pandemic had already delivered a far more dramatic suspension of trade, tourism, and migration flows than any change in visa or import regulations would ever accomplish. As a result, western labour markets have a shortfall of candidates to fill vacancies in sectors such as healthcare, logistics, and construction.

7. Conclusion

As the dust settles on the global coronavirus pandemic, we are finally beginning to make out the shape of the future that awaits just beyond it. But, based on the evidence we can observe thus far, what are its likely contours? Will it be, in the words of the World Economic Forum, a "Great Reset" that reflects the extensive changes brought by the crisis, including adoption of new technologies and a greater awareness of the existential risks we as a society face beyond COVID-19?³¹ Or will we soon forget the lessons of the pandemic in a bid to restore some semblance of normality?

"New Normal" Or "Back to Normal?"

Only one prediction that is certain to be false: that the world after the pandemic will be the same as that before. Just as the "populist wave" took many years to emerge in the wake of the global financial crisis of 2008 and the eurozone crises that followed, so too the legacy of the pandemic will only very gradually come into focus in the years to come. As always, impatient pundits will over-estimate the effect of events in the short run, while under-estimating how the pandemic will reshape political life over the longer term. A year or two from now, the legacy of the pandemic may still be ambiguous, but its ultimate effects are likely already to be found in the public opinion trends we can observe today.

Of these, the most significant is the possibility that the pandemic will bring to a close the "populist wave" of 2015-20. Across the world, it is now clear that support for both populist attitudes and individual populist leaders have declined. Already several populist leaders, including Donald J. Trump in the United States and Andrej Babiš in the Czech Republic, have been ejected from office. In the years ahead other key figures, including Jair Bolsonaro in Brazil, Viktor Orbán in Hungary, and Recep Tayyip Erdoğan in Turkey, face stiff competition from electoral challengers who are rising in the polls.

Of course, this will not be the end of populism, as some degree of populism is inherent in democratic life, and will exist for as long as politicians are competing for public favour. But the pandemic may mark the point at which we stop talking about populism, because populist energies have begun to dissipate. As voters lose faith in such leaders' bombastic promises, and value a more civic, consensual, and evidentially-informed approach to politics and policy making, even today's populists may evolve in to more moderate political figures.

This points to a second possibility, which is with respect to how the pandemic has affected our sense of shared belonging and identity. In the face of a major crisis, more citizens have pulled together than pulled apart. This is especially so in countries where a cross-party consensus on the need for economic and social pandemic response measures helped to reduce levels of "affective polarisation" – that is, the dislike of people from opposing political factions. A stronger commitment to overcome the exclusion of marginalised communities, so long as it endures beyond the pandemic, will further help to drain the resentment that has been the source of populist anger.

A Post-Populist Equilibrium?

So are we heading for a less tumultuous civic life in the years ahead as compared to the events that preceded the pandemic? It is unwise to make strong predictions on the basis of survey indicators, or to draw too certain conclusions about the political future. Societal change is chaotic and contingent rather than determinate. Perhaps the outcome of the pandemic will be to reinforce rather than bridge divisions in society; perhaps the cycle of partisan polarisation and division will return once the common cause of containing the pandemic recedes in to the background. Perhaps, as has occurred so many times in countries such as Argentina, Turkey, or Thailand, the swing from populist wave to the

³¹ Klaus Schwab, (2020) "Now is the Time for a 'Great Reset'," *World Economic Forum*.

governance of technocrats will prove a mere temporary swing of the pendulum, as the inevitable sense of popular disillusionment with “expert rule” leads to even more vigorous populist counter-mobilisation. Meanwhile, there is the risk that the pandemic has merely “frozen” major sources of economic and political conflict, that very shortly will thaw once more – as a turn to fiscal tightening will re-ignite distributional conflicts, while in Europe, a struggle looms over the bloc’s post-pandemic fiscal and monetary framework.

That said, there is a chance that the the post-pandemic environment offers the chance for a new consensus. In the past, ma-

major societal crises – such as the two World Wars, the Cold War, or for that matter, prior pandemics such as the 1918-20 Spanish Flu – have resulted in greater social cohesion and support for collective welfare. As a result, they have been followed by at least a decade, if not more, of relative societal peace and prosperity. It is entirely possible that the same could be true in the aftermath of the global coronavirus pandemic. If so, it would mark the end, politically, socially, and economically, of the decade of strife that followed in the wake of the global financial crisis – and for western democracies, the start of a surprisingly more prosperous, peaceful and cohesive decade to come.

Methodological Annex

Methodology I: Survey Sources

Public opinion on support for democracy, satisfaction with democracy, and trust in government comes from seventy-nine different survey sources combined and standardized by the HUMAN Surveys Project. This includes observations supplemented from thirteen sources where respondent data was not publicly available at the time of publication, as well as national surveys commissioned by the YouGov-Cambridge Centre for Public Opinion Research. In total, this report draws upon the aggregated answers of about eight million respondents in almost seven thousand surveys across 169 countries between 1958 and 2021.

The following overview of survey items includes minor adjustments from the original survey questionnaires, such as replacing the names of countries, capitals, or institutions with generic markers to display just one version of each question. Numerical answer values were reordered for consistency and may not be in the order asked in surveys, but all valid responses were maintained. Non-valid, unusable, or missing answers were coded using four standard values (do not know, refused to answer, not applicable, and missing), but these values are all treated as missing data when aggregating national scores for analysis.

Support for Democracy

Questions asking about support for democracy come from thirty-eight different survey sources. These questions were asked in 1,608 national surveys across 161 countries between 1981 and 2021.

AmericasBarometer: *Some people prefer to live under a democracy because it protects human and individual rights, even though it can be inefficient and messy at times. Others prefer to live under a dictatorship because of its order and efficiency. What do you prefer more a democracy or a dictatorship? 1 = dictatorship; 2 = democracy*

Afrobarometer, AmericasBarometer, Arab Barometer, AsiaBarometer, Asian Barometer Survey, Caucasus Barometer, Comparative National Elections Project, European Election Studies - Voter Study, Latinobarometro, Life in Transition Survey, Lowy Institute Poll, New Europe Barometer, New Zealand Election Study, South African Social Attitudes

Survey, Standard and Special Eurobarometer, Views of the Electorate Research Survey: *Which of these three statements is closest to your own opinion? 1 = in some circumstances, a non-democratic government can be preferable; 2 = for people like me, it does not matter what kind of government we have; 3 = democracy is preferable to any other kind of government*

Consolidation of Democracy in Central and Eastern Europe: *Do you believe that democracy is the best form of government or is there another form of government which is better? 1 = other better, 2 = undecided, 3 = democracy best*

Comparative National Elections Project: *I would like you read you some statements. Please tell me if you agree or disagree with each statement. Democracy is the best system for a country like ours: 1 = disagree, 2 = it depends or don't know, 3 = agree*

The Political Culture of Southern Europe: *Now we are going to ask about different types of political regimes. I would like you to tell me with which of the following statements you agree. 1 = in some cases and authoritarian regime, a dictatorship, can be preferable, 2 = for people like me it is all the same, 3 = democracy is preferable to any other regime*

Asian Barometer Survey, New Russia Barometer: *Which of the following statements comes closest to your own opinion? 1 = under some circumstances, an authoritarian government can be preferable to a democratic one; 2 = for people like me, it does not matter whether we have a democratic or a nondemocratic regime; 3 = democracy is always preferable to any other kind of government*

American National Election Studies, Arab Barometer, Arab Transformations Project, Australian Election Study, British Social Attitudes, Canadian Election Study, Comparative Study of Electoral Systems, European Values Study, Icelandic National Election Study, Irish National Election Study, Israel National Election Studies, Survey of the Afghan People, Voice of the People, World Values Survey: *To what extent do you agree or disagree with the following statements? Democracy may have problems, but it's better than any other form of government.*

1 = strongly disagree, 2 = disagree, 3 = agree, 4 = strongly agree

Comparative National Elections Project: *I would like you read you some statements. Please tell me if you agree or disagree with each statement. To what extent do you agree or disagree with the following statements? Democracy is the best system for a country like ours. 1 = strongly disagree, 2 = disagree, 3 = agree, 4 = strongly agree*

Australian Election Study, Australian Social Cohesion Survey, New Zealand Election Study: *How strongly do you agree or disagree with each of the following statements? Democracy may have problems but it's better than any other form of government. 1 = strongly disagree, 2 = disagree, 3 = neither agree nor disagree, 4 = agree, 5 = strongly agree*

Israel National Election Studies: *Below are some statements made by people on issues concerning society and state. To what extent do you agree or disagree with each? Democracy is the best form of rule. 1 = definitely disagree, 2 = disagree, 3 = not certain, 4 = agree, 5 = definitely agree*

AmericasBarometer: *Democracy may have problems, but it is better than any other form of government. To what extent do you agree or disagree with this statement? 1 = strongly disagree, 7 = strongly agree*

Satisfaction with Democracy

Questions asking about satisfaction with democracy come from sixty different survey sources. These questions were asked in 4,765 national surveys across 158 countries between 1973 and 2021.

Politbarometer: *What would you say about democracy in [Country] in general? Are you. . . 0 = rather dissatisfied, 1 = rather satisfied*

AmericasBarometer, IntUne (Integrated and United) Mass Survey, Survey of the Afghan People, British Election Study, Israel National Election Studies: *In general, would you say you are very satisfied, satisfied, unsatisfied, or very unsatisfied with the way democracy works in [Country]? 0 = very dissatisfied, 1 = dissatisfied, 2 = satisfied, 3 = very satisfied*

American National Election Studies, ANU Poll, Asian Barometer Survey, Australian Election Study, British Social Attitudes, Canadian Election Study, Candidate Countries Eurobarometer, Central and Eastern Eurobarometer, Citizenship, Involvement, Democracy, Comparative National Elections Project, Comparative Study of Electoral Systems, EU Neighbourhood Barometer, European Election Studies - Voter Study, European Values Study, Flash Eurobarometer, Icelandic National Election Study, Irish National Election Study, Kenya Democratization Survey Project, Latinobarometro, New Europe Barometer, New Zealand Election Study, Pew Global Attitudes and Trends, Political Support in Canada Study, Standard and Special Eurobarometer, United States General Social Survey, Views of the Electorate Research Survey, World Values Survey, YouGov: *On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the way democracy works in [Country]? 0 = not at all satisfied, 1 = not very satisfied, 2 = fairly satisfied, 3 = very satisfied*

Voice of the People Series: *Please tell me whether you agree or disagree with the following statement. Is that strongly or slightly? In general, I am satisfied with democracy. 0 = disagree strongly, 1 = disagree slightly, 2 = agree slightly, 3 = agree strongly*

American National Election Studies, British Election Study: *On the whole, are you satisfied, fairly satisfied, not very satisfied, or not at all satisfied with the way democracy works in [Country]? 0 = not at all satisfied, 1 = not very satisfied, 2 = fairly satisfied, 3 = satisfied*

Arab Transformations Project: *How satisfied are you with the following? The way democracy is developing in our country? 0 = definitely dissatisfied, 1 = rather dissatisfied, 2 = quite satisfied, 3 = definitely satisfied*

European Election Studies - Voter Study: *Some people are for the present government of your country. Others are against it. Putting aside whether you are for or against the present government, on the whole are you very satisfied, fairly satisfied, not very satisfied, or not at all satisfied with the way democracy works in your country?? 0*

= not at all satisfied, 1 = not very satisfied, 2 = fairly satisfied, 3 = very satisfied

Israel National Election Studies: In general, to what extent are you satisfied with [Country's] democracy? 0 = not satisfied at all, 1 = not so satisfied, 2 = quite satisfied, 3 = very satisfied

Politbarometer: What would you say about democracy in [Country]? For example, regarding our political parties and whole political system? Are you... 0 = very dissatisfied, 1 = dissatisfied, 2 = satisfied, 3 = very satisfied

Pew Global Attitudes and Trends: How satisfied are you with the way democracy is working in our country—very satisfied, somewhat satisfied, not too satisfied, or not at all satisfied? 0 = not at all satisfied, 1 = not too satisfied, 2 = somewhat satisfied, 3 = very satisfied

Afrobarometer: Overall, how satisfied or dissatisfied are you with the way democracy works in [Country]? 0 = very dissatisfied, 1 = somewhat dissatisfied, 2 = somewhat satisfied, 3 = very satisfied

Central and Eastern Eurobarometer: On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the way democracy is developing in [Country]? 0 = not at all satisfied, 1 = not very satisfied, 2 = fairly satisfied, 3 = very satisfied

EUpinions: How satisfied are you with the way democracy works in [your Country]? 0 = not at all satisfied, 1 = somewhat not satisfied, 2 = somewhat satisfied, 3 = very satisfied

Voices of Central and Eastern Europe: Now, I will ask you a few questions about the satisfaction with your current situation. If you take all circumstances into account, to what extent are you overall satisfied with how democracy works in [your country]? 0 = very dissatisfied, 1 = rather dissatisfied, 2 = rather satisfied, 3 = very satisfied

Afrobarometer, Comparative National Elections Project, Comparative Study of Electoral Systems: Overall, how satisfied are you with the way democracy works in [Country]? 0 = [Country] is not a democracy, 1 = not at all satisfied, 2 = not very satisfied, 3 = fairly satisfied, 4 = very satisfied

AsiaBarometer, Australian Voter Experience: Please tell me how satisfied or dissatisfied you are with the following aspects of your life. The democratic system. 0 = very dissatisfied, 1 = somewhat dissatisfied, 2 = neither satisfied nor dissatisfied, 3 = somewhat satisfied, 4 = very satisfied

Comparative Study of Electoral Systems, European Election Studies - Voter Study: On the whole, how satisfied are you with the way democracy works in [Country]? 0 = not at all satisfied, 1 = not very satisfied, 2 = neither, 3 = fairly satisfied, 4 = very satisfied

Afrobarometer, South African Social Attitudes Survey: How satisfied or dissatisfied are you with the way democracy is working in [Country]? 0 = very dissatisfied, 1 = dissatisfied, 2 = neither satisfied nor dissatisfied, 3 = satisfied, 4 = very satisfied

Afrobarometer: Generally, how satisfied are you with the way democracy works in [Country]? 0 = [Country] is not a democracy, 1 = very dissatisfied, 2 = somewhat dissatisfied, 3 = somewhat satisfied, 4 = very satisfied

Polish General Social Survey: Now I would like to ask you about democracy in [Country]. Taking everything into consideration, how satisfied or dissatisfied are you with the kind of democracy that exists in [Country]? 0 = there is no democracy in [Country], 1 = very unsatisfied, 2 = unsatisfied, 3 = rather unsatisfied, 4 = rather satisfied, 5 = satisfied, 6 = very satisfied

Consolidation of Democracy in Central and Eastern Europe: Are you completely satisfied or completely dissatisfied with the way in which democracy is working in [Country] today? 0 = completely dissatisfied, 9 = completely satisfied

European Election Studies - Voter Study, Standard and Special Eurobarometer: On the whole, to what extent would you say you are satisfied with the way democracy works in [Country]? 0 = completely dissatisfied, 9 = completely satisfied

European Quality of Life Surveys: On the whole, how satisfied are you with the way democracy works in [country]? Please tell me on a scale of 0 to 9, where 0 means very dissatisfied and 9 means very satisfied. 0 = very dissatisfied, 9 = very satisfied

Israel National Election Studies, World Values Survey: *On a scale from 0 to 9 where “0” is “not satisfied at all” and “9” is “completely satisfied”, how satisfied are you with how the political system is functioning in your country these days? 0 = not satisfied at all, 9 = completely satisfied*

European Social Survey: *And on the whole, how satisfied are you with the way democracy works in [Country]? 0 = extremely dissatisfied, 10 = extremely satisfied*

Australian Survey of Social Attitudes, British Social Attitudes, International Social Survey Programme, United States General Social Survey: *On the whole, on a scale of 0 to 10 where 0 is very poorly and 10 is very well: How well does democracy work in [Country] today? 0 = very poorly, 10 = very well*

Comparative National Elections Project, Standard and Special Eurobarometer: *Now I would like you to indicate on this scale to what extent you are satisfied with your present situation in the following respects: The way democracy is functioning in [Country]? 0 = completely dissatisfied, 10 = completely satisfied*

Trust in Government

Questions asking about trust in government come from fifty different survey sources. These questions were asked in 3,776 national surveys across 144 countries between 1958 and 2021.

Candidate Countries Eurobarometer, EU Neighbourhood Barometer, Flash Eurobarometer, Standard and Special Eurobarometer, World Health Survey: *I would like to ask you a question about how much trust you have in certain institutions. For each of the following institutions, please tell me if you tend to trust it or tend not to trust it? The [National] government. 0 = tend to not trust, 1 = tend to trust*

American National Election Studies, Canadian Election Study, Views of the Electorate Research Survey: *How much of the time do you think you can trust the government in [Capital] to do what is right? 0 = only some of the time, 1 = most of the time, 2 = just about always*

Korean General Social Survey, Polish General Social Survey: *I am going to name some institutions in this country. As far as the people running these institutions are concerned, would you say you have a great deal of confidence, only some confidence, or hardly any confidence at all in them? The government. 0 = hardly any confidence, 1 = only some confidence, 2 = great deal of confidence*

Japanese General Social Survey: *How much confidence do you have in the following? Ministries and government agencies. 0 = not very much, 1 = some, 2 = very much*

American National Election Studies, Australian Election Study, Australian Social Cohesion Survey, British Election Study, British Social Attitudes, Canadian Election Study, Central Asia Barometer, Comparative National Elections Project, Consolidation of Democracy in Central a, Indian National Election Study, Political Action - Political Ideology, Standard and Special Eurobarometer, United States General Social Survey: *How much of the time can you trust the government in [Capital] to do what is right? 0 = (almost) never, 1 = only some of the time, 2 = most of the time, 3 = just about always*

Central Asia Barometer: *Generally speaking, to what extent do you trust or distrust the following institutions in our country? The government of [Country] 0 = not trust at all, 1 = rather not trust, 2 = rather trust, 3 = fully trust*

Afrobarometer: *How much do you trust each of the following, or haven't you heard enough about them to say? The government. 0 = not at all, 1 = a little bit, 2 = a lot, 3 = a very great deal*

Standard and Special Eurobarometer: *Please tell me how much you trust each of the following? The national government. 0 = none at all, 1 = not very much, 2 = quite a lot, 3 = a great deal*

ANU Poll, Australian Election Study, Canadian Election Study, European Values Study, World Values Survey: *How much confidence do you have in the following organisations? The [Federal/National] government [in Capital]. 0 = none at all, 1 = not very much, 2 = quite a lot, 3 = a great deal*

Arab Barometer, Arab Transformations

Project: *I am going to name a number of organizations. For each one, please tell me how much trust you have in them. Government. 0 = none at all, 1 = not very much, 2 = quite a lot, 3 = a great deal*

Asian Barometer Survey: *I am going to name a number of organizations. For each one, please tell me how much trust you have in them. The national government in [Capital] city. 0 = none at all, 1 = not very much, 2 = quite a lot, 3 = a great deal*

AsiaBarometer: *Please indicate to what extent you trust the following institutions to operate in the best interests of society. If you don't know what to reply or have no particular opinion, please say so. The central government. 0 = do not trust at all, 1 = do not really trust, 2 = trust to a degree, 3 = trust a lot*

British Social Attitudes: *I will name a list of institutions. For each, please indicate whether you tend to trust it or tend not to trust it. The national government. 0 = distrust it greatly, 1 = tend to distrust it, 2 = tend to trust it, 3 = trust it a great deal*

Latinobarometro: *Please look at this card and tell me how much confidence you have in each of the following groups, institutions or persons mentioned on the list. The national government. 0 = no confidence, 1 = a little, 2 = some, 3 = a lot*

Consolidation of Democracy in Central and Eastern Europe: *In order to get ahead, people need to have confidence and to feel that they can trust themselves and others. To what degree do you feel you trust the following totally, to a certain point, a little or not at all? National government. 0 = not at all, 1 = little, 2 = to a certain point, 3 = totally*

Pew Global Attitudes and Trends: *Now I am going to read you a list of groups and organizations. Please tell me how much confidence you have in each group to do the right thing for [Country]: Our national government. 0 = no confidence at all, 1 = not too much confidence, 2 = some confidence, 3 = a lot of confidence*

Transparency International - Global Corruption Barometer: *How much trust and confidence you have in the following institutions to do a good job in [COUNTRY] whilst carrying out their responsibilities? The national government. 0 = no trust at all, 1 = not very much trust, 2 = a fair amount of trust, 3 = a great deal of trust*

Voices of Central and Eastern Europe: *I would like to ask you, how much trust you personally trust or distrust the following institutions in [your Country]. Government. 0 = completely distrust, 1 = rather distrust, 2 = rather trust, 3 = completely trust*

American National Election Studies: *How often do you trust the government in [Capital] to make a fair decision? 0 = never, 1 = once in a while, 2 = about half the time, 3 = most of the time, 4 = always*

Australian Election Study, Caucasus Barometer: *I will read out a list of social institutions and political unions. Please, assess your trust toward each of them on a 5-point scale, where 0 means fully distrust, and 4 means fully trust. The [Central/National/Federal/Commonwealth] government. 0 = fully distrust, 1 = somewhat distrust, 2 = neither trust nor distrust, 3 = somewhat trust, 4 = fully trust*

American National Election Studies: *How often can you trust the [national/federal] government in [Capital] to do what is right? 0 = never, 1 = some of the time, 2 = about half the time, 3 = most of the time, 4 = always*

United States General Social Survey: *How much confidence do you have in government departments? 0 = no confidence at all, 1 = very little confidence, 2 = some confidence, 3 = a great deal of confidence, 4 = complete confidence*

British Social Attitudes: *I am going to ask you how much trust you have in various people and institutions in [Country]. In each case please choose a phrase from the card. First of all, what about [Country] government in general? How much do you trust it? 0 = not at all, 1 = not very much, 2 = some, 3 = quite a lot, 4 = a great deal*

Values and Political Change in Post-Communist Europe: *Now I'd like to ask how much you feel you can trust some people and other things. Please could you choose the answer that best represents your opinion. The government. 0 = completely distrust, 1 = mostly distrust, 2 = neither, 3 = mostly trust, 4 = completely trust*

South African Social Attitudes Survey: *Indicate the extent to which you trust or distrust the following institutions in [Country] at present. National government. 0 = strongly distrust, 1 = distrust, 2 =*

neither trust nor distrust, 3 = trust, 4 = strongly trust

New Zealand Election Study: And how much do you agree or disagree with these opinions? Please tick one box in each row. You can trust the government to do what is right most of the time. 0 = strongly disagree, 1 = disagree, 2 = neither, 3 = agree, 4 = strongly agree

International Social Justice Project: How much of the time do you think you can trust the government in [Capital] to do what is right? 0 = never, 1 = rarely, 2 = sometimes, 3 = often, 4 = very often

Polish General Social Survey: I am going to name some institutions in this country. Using the answers from the card, would you say you have definitely a great deal of confidence, only some confidence, neither confidence nor lack thereof, not much confidence, or definitely no confidence? The government. 0 = definitely no confidence, 1 = not much confidence, 2 = neither confidence nor lack thereof, 3 = only some confidence, 4 = definitely a great deal of confidence

World Health Survey: How much of the time do you think you can trust the national government to do what is right? 0 = never, 1 = hardly ever, 2 = some of the time, 3 = most of the time, 4 = always

Life in Transition Survey: To what extent do you trust the following institutions? The national government/cabinet of ministers. 0 = complete distrust, 1 = some distrust, 2 = neither trust nor distrust, 3 = some trust, 4 = complete trust

Imperial College London YouGov Covid 19 Behaviour Tracker: The government of your country is (recoded): 0 = not at all trustworthy, 4 = completely trustworthy

Asian Barometer Survey: I am going to name a number of organizations. For each one, please tell me how much trust you have in them. The government in [capital city]. 0 = distrust fully, 1 = distrust a lot, 2 = distrust somewhat, 3 = trust somewhat, 4 = trust a lot, 5 = trust fully

AmericasBarometer, New Europe Barometer: To what extent do you trust each of the following institutions to look after your interests? Please indi-

cate on a scale with 0 indicating no trust at all and 6 for great trust (recoded). The government. 0 = no trust, 6 = great trust

New Europe Barometer, New Russia Barometer: There are various public institutions in [Country] such as legislative and executive bodies, courts, and police. Please indicate your trust in them on this scale, where 0 denotes minimum distrust and 6 indicates maximum trust (recoded). Government. 0 = no trust, 6 = great trust

Authoritarian Elections - The Russian Case 2011-2012: To what extent do you trust each of the following organisations that I am going to list? In your evaluation please use a 7-point scale in which 0 means no trust at all and 6 means complete trust (recoded). Government. 0 = no trust, 6 = complete trust

Edelman Trust Barometer: Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where zero means that you do not trust them at all and eight means that you trust them a great deal (recoded). Government in general. 0 = do not trust at all, 9 = trust a great deal

European Election Studies - Voter Study, European Quality of Life Surveys, Standard and Special Eurobarometer: Please tell me how much you personally trust each of the following institutions using a scale from 0 to 9, where 0 means you do not trust the institution at all and 9 means you trust it completely. The government. 0 = do not trust at all, 9 = trust completely

British Election Study On a scale of 0 to 10 where 0 means no confidence and 10 means a very great deal of confidence, what do you think of the following? The government. 0 = no confidence, 10 = a very great deal

IntUne (Integrated and United) Mass Survey: Using this card, please tell me on a score of 0 to 10 how much you personally trust each of the institutions I read out. 0 means you do not trust an institution at all, and 10 means you have complete trust. The government. 0 = no trust at all, 10 = complete trust

Source	Surveys	Countries	Years
Afrobarometer	195	38	1999–2021
American National Election Studies	32	1	1958–2020
AmericasBarometer	212	34	2004–2021
ANU Poll	8	1	2008–2020
Arab Barometer	46	13	2006–2019
Arab Transformations Project	6	6	2013–2014
AsiaBarometer	41	25	2003–2007
Asian Barometer Survey	61	19	2001–2018
Australian Election Study	13	1	1987–2019
Australian Survey of Social Attitudes	2	1	2005–2015
Australian Social Cohesion Survey	9	1	2016
Australian Voter Experience	3	1	2016
Authoritarian Elections - The Russian Case	1	1	2011–2012
British Election Study	11	1	1987–2020
British Social Attitudes Survey	25	1	1986–2019
Canadian Election Study	20	1	1965–2019
Candidate Countries Eurobarometer	52	13	2002–2004
Caucasus Barometer	24	3	2008–2020
Central and Eastern Eurobarometer	118	22	1990–1997
Central Asia Barometer	5	4	2017–2020
Citizenship, Involvement, Democracy	12	12	1999–2002
Comparative National Elections Project	46	24	1993–2018
Comparative Study of Electoral Systems	176	55	1996–2020
Consolidation of Democracy in Central and Eastern Europe	25	14	1990–2001
Edelman Trust Barometer	220	32	2012–2020
Encuesta Nacional de Cultura Cívica	1	1	2020
EU Neighbourhood Barometer	94	16	2012–2014
EUpinions	150	15	2017–2021
European Election Study - Voter Study	102	28	1988–2019
European Quality of Life Surveys	98	36	2007–2016
European Social Survey	234	38	2002–2020
European Values Study	94	45	1999–2018
Flash Eurobarometer	282	15	1994–2004
Gallup	18	2	2001–2021
Icelandic National Election Study	7	1	1999–2017
Imperial College London YouGov Covid 19 Behaviour Tracker	26	26	2020–2021
Indikator Politik	25	1	2012–2020
Institutional Confidence Poll	1	1	2018
International Republican Institute Surveys	30	4	2004–2021
IntUne (Integrated and United) Mass Survey	35	18	2007–2009
International Social Justice Project	19	12	1991–2006
International Social Survey Programme	82	45	2003–2018
Irish National Election Study	5	1	2002–2007
Israel National Election Studies	16	1	1981–2020
Japanese General Social Survey	9	1	2000–2012
Kenya Democratization Survey Project	1	1	2006
Korean General Social Survey	14	1	2003–2018
Latinobarómetro	392	19	1995–2020
Life in Transition Survey	64	36	2006–2010
Longitudinal Social Study of Chile	1	1	2017
Lowy Institute Poll	10	2	2011–2020
New Europe Barometer	59	16	1992–2005
New Russia Barometer	3	1	1994–2005
New Zealand Election Study	11	1	1993–2017
Organisation for Economic Cooperation and Development - How's Life	573	41	2006–2020
Pew Global Attitudes and Trends	149	51	2007–2020
Polish General Social Survey	7	1	1992–2002
Observatorio de la Democracia	4	1	2005–2020
Polish General Social Survey	7	1	1992–2002

Source (Continued)	Surveys	Countries	Years
Politbarometer	57	1	1977–2019
Political Action - Political Ideology	11	8	1974–1981
Political Support in Canada Study	2	1	2004
South African Social Attitudes Survey	20	1	2003–2017
Standard and Special Eurobarometer	2156	36	1973–2021
Survey of the Afghan People	12	1	2006–2019
Taquion Research	1	1	2021
The Political Culture of Southern Europe	4	4	1985
Transparency International - Global Corruption Barometer	43	43	2019–2020
United States General Social Survey	5	1	1987–2014
University of Nicosia Poll	1	1	2021
Values and Political Change in Post-Communist Europe	5	5	1993
Views of the Electorate Research Survey	4	1	2016–2018
Voice of the People Series	181	74	2004–2007
Voices of Central and Eastern Europe	10	10	2020
World Health Survey	42	42	2003
World Values Survey	262	104	1990–2020
YouGov Surveys and Globalism Project	41	29	2019–2021

Table 1: *Data sources used in this study, showing number of survey observations, countries covered, and years of available data.*

Methodology II: Data Aggregation

We formatted, merged, and then harmonised variables from 6,582 national surveys in seventy-three sources to create the three pooled indicators used in this report. These indicators were constructed from eighty-four different source variables and represent the aggregated opinions of about eight million individuals across 169 countries since 1958.

i) Data Preparation

The process of creating aggregated public opinion indicators started with formatting selected variables at the respondent level within the original source datasets. This involved renaming variables to group them withing each indicator series and then re-coding their values to be consistent, without combining or losing any valid responses. Invalid and missing values were also recoded for consistency, but these invalid or missing responses were not used in the creation of the indicators.

The data formatting process produced thirteen support for democracy variables, thirty-one satisfaction with democracy variables, and forty trust in government variables prior to harmonizing these into common target variables – one for each pooled indicator.

ii) Variable Harmonization

Formatted respondent level datasets were appended together before creating harmonized target variables. The harmonization process transforms variables with different answer scales into binary classifications that can be more meaningfully compared across survey sources.

Support for democracy responses were coded as either "non-democratic" or "democratic", with neutral responses and scale midpoints grouped together with the non-democratic classification. Satisfaction with democracy responses were coded as either "satisfied" or "dissatisfied", with neutral responses and scale midpoints omitted. Trust in government responses were coded as either "distrust" or "trust", with neutral responses and scale midpoints omitted. Omitting neutral responses and scale midpoints was only necessary for some questions and affected a relatively

small number of responses.

Using binary classifications enabled us to estimate the percentage of respondents in a given country who support democracy as the best political system, were satisfied with the current performance of democracy in their country, or who trusted their national governments.

Multiple demographic variables were similarly harmonised to create target variables that were comparable across sources. These variables were employed in the construction of indicators representing the opinions of particular groups, such as age cohorts.

iii) Indicator Construction

The first step was to create a mean score for each indicator within each national survey. Main and group indicators are constructed using harmonised variables – main indicators aggregate the opinions of everyone in a national survey, while group indicators represent a sub-sample of individuals from each survey. For example, an indicator for a particular age group only averages the opinions of people in that age group. The main and group indicators are otherwise constructed using the same approach. We then adjust these scores to control for source effects, which arise from using different sampling methods, survey designs, question wordings, and answer scales.

iv) Data Aggregation

Once harmonised indicators have been created at the respondent level, the data is aggregated to create datasets at different levels of analysis. We first aggregate to the country-survey level, where scores represent the averaged opinions of respondents from each national survey. We then adjust these scores for source effects, but there are often duplicate scores where different sources surveys the same countries in the same period. To address this issue and enable time-series analysis, country-survey scores are subsequently averaged within different each time period. We aggregated adjusted scores to the country-year, country-quarter, and country-month levels to analyse the impact of events over time.

Methodology III: Variable Selection and Validity

i) Semantic Equivalence and Item Selection

The survey questions aggregated in our dataset are subject to strict standards of semantic equivalence to ensure the indicators represent valid measures of support for democracy, satisfaction with democracy, and trust in government.

With support for democracy, questions must allow respondents to express a clear preference for democracy over other systems of government. For satisfaction with democracy, questions must ask citizens about their degree of satisfaction with how democracy is working in their country. For trust in government, questions must ask about either confidence or trust in government – questions were only included if they asked about the government in general or specifically mentioned the national government, with questions about local and regional governments excluded.

To enable testing for semantic equivalence and conducting sensitivity analyses, items were only included if they could be coded on a response scale that allows for *verifiable* equivalence with other survey response scales .

ii) Generalisability

In order to ensure the results that we present are consistent over time and accurately reflect the average citizen, responses were first grouped into binary classifications to obtain percentages for each category (see Methodology II on Data Aggregation). For example, percentages dissatisfied or satisfied with democracy and percentages that distrust or trust the government. To ensure greater consistency over time, rolling averages

are generated by country, while regional averages are generated by merging country surveys to a quarterly or annual data series. For regional averages, we took the population-weighted mean of the most recent observation for all countries in that region over time . The use of population weighting is especially important in regions where a large number of small states would disproportionately affect country averages. All data for regional or global averages are averaged based on population-weighting to ensures that figures reflect an estimated average for the pool of all individuals in a region and do not disproportionately represent trends in small or micro states.

iii) Sample Consistency

Finally, constant-country samples are used when presenting aggregated data across time periods. This helps ensure that changes on charts are not due to countries dropping in and out of the analysis, but are only due to changes in actual collected data. We do this by only including country cases that are covered by survey data for the entire observation period from start to finish. Sometimes this requires “rolling over” survey results for periods in which no new survey data was collected. In these cases we are effectively using the “most recent” survey observation for each country in each time period. Fortunately, because the dataset includes such a large number of survey sources, for many regions there are few countries that lack consistent data. Many countries now report multiple observations per year from multiple survey sources.



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