



What We Know About the Drivers of Policy on Aid

*A DESK REVIEW OF PUBLIC
OPINION DATA AND POLITICAL
ECONOMY LANDSCAPES
IN KEY MARKETS*

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A NOTE ON TERMINOLOGY

Throughout this report we use the term 'aid' to refer to the concept of wealthier countries providing support – financial or otherwise – to lower income countries. We acknowledge that the term 'aid' has been contested in recent years as legitimate questions have been raised around whether it reinforces outdated power dynamics and colonial mindsets, where wealthier countries are seen as 'saviours' of lower income countries rather than equitable partners in development. Many have also raised concerns around how using language like 'aid' implies generosity whilst ignoring the history of exploitation that underpins the very poverty and economic underdevelopment that aid seeks to address.

More modern terms for the concept of aid, such as 'international development cooperation', tend to include a focus on partnership, solidarity, or justice. This language reflects a more equitable approach to development and should continue to be mainstreamed through the sector's messaging.

We have chosen to use the term 'aid' despite its flaws because this review looks at public opinion research dating back to 2000 across many countries, where this language was - and often still is - used as a proxy for all concepts related to international development cooperation. Therefore, we have used the term aid for simplicity and in an attempt to stay consistent across countries and years.

GLOSSARY

Term	Definition
Official Development Assistance (ODA)	The official term for government aid that promotes and specifically targets the economic development and welfare of developing countries.
In-donor Refugee Costs (IDRCs)	The expenses that a donor country incurs when providing assistance to refugees and asylum seekers within its own borders. It is a growing and contentious part of many traditional donors' ODA budgets.
The Organisation for Economic Co-operation and Development (OECD)	An international organisation that fosters cooperation between countries. It serves as a platform for developing international standards and to find solutions to social, economic and environmental challenges.
Development Assistance Committee (DAC)	An international forum within the OECD for the largest donor countries where ODA principles and standards are debated and set.
The Millennium Development Goals (MDGs)	Eight internationally agreed-upon goals adopted by UN member states in 2000, aimed at reducing extreme poverty and improving development by 2015.
The Sustainable Development Goals (SDGs)	Developed in 2015 as the successor to the MDGs, the SDGs set out 17 universal objectives aimed at ending poverty, protecting the planet and ensuring all people enjoy peace and prosperity by 2030.

INTRODUCTION

This document lays out the results of a literature and data review conducted in March and April of 2025. The review examined 10 markets, all which are either historic donors of aid or have the potential to change the future landscape of aid. The review centred on three key objectives:

- **To provide an accessible resource which examines the economic and political trends in each market**, focussing particularly on the areas which could shape attitudes towards aid or multilateralism. This context will be a key part of ensuring future primary research is in line with the challenges facing the market.
- **To identify reliable and accurate data sources on public opinion**, again with a particular focus on aid. We prioritised finding data sources which we felt were of a high standard, meaning that the sampling strategy was reliable and the question items clear. Where data is limited, we aim to provide the available insights alongside the limitations.
- **To identify where new research into attitudes towards aid and multilateralism would be additive**, and would bring new insight rather than replicate existing research. To do this we define some standard tests for high quality research, loosely (1) goes beyond support for aid in the abstract, demonstration why support for aid breaks down (2) includes an ability to segment the data to demonstrate which groups support and oppose aid (and why), and (3) is recent enough to reflect rapidly changing political and economic contexts and includes a longitudinal element. We recognise this is a high watermark for success, but we find few public data sets which pass the threshold.

Overall, the review identifies extensive gaps in the existing data and literature. The research that exists tends to show support for aid in principle, but does not rigorously assess attitudes towards aid in the context of spending trade-offs, or dive deep into views on different approaches to aid. In our view, this represents an urgent threat to the sector's ability to communicate, advocate and build public and political support.

METHODOLOGY & LIMITATIONS

The objective of this research is to review political economy trends and public opinion research over the past 25 years across a number of key countries to better understand the forces that have driven major policy decisions, including on aid and multilateralism.

Due to time and resource constraints, we narrowed the geographical scope of the research to 10 key markets, which were chosen to represent a spread of:

1. **Traditional donor countries**, including a mix of those where aid budgets may be under immediate pressure/threat - i.e. Germany, France, Netherlands - and those where aid budgets appear stable - i.e. Norway, Ireland, Japan, Italy;
2. **Non-traditional donor countries**, including new donors that are increasingly becoming an important part of the landscape - i.e. Qatar; and rapidly growing countries that may reshape the aid landscape over the next decade - i.e. Brazil, China.

We chose to exclude certain countries, such as the US and UK, where we assumed a higher quantity of publicly available research may already exist.

We limited the review to research published between 2000 and 2025 to account for longer-term trends and to explore whether there were changes following major moments of crisis, including the financial crisis of 2008 or the Covid-19 pandemic.

The issues covered in this review include:

1. **Wider political economy trends**, including changes to wealth, inequality, social cohesion and migration. This background information provides context that may help explain any shifts in public opinion, including on attitudes towards aid.
2. **Public opinion research**, including on major policy priorities, political and economic sentiments, attitudes on social and demographic issues, trust in institutions, trust in different messengers and mediums, and views on aid and multilateralism.

The review covers a wide range of sources, including publicly available data from academic journals, research firms and polling agencies, national statistical offices and government agencies, think tanks and research institution reports, and major media outlets.

This review is intended to be comprehensive but not exhaustive. It reflects the findings of an in-depth research approach but is limited by various constraints, including:

1. **Language**. This review primarily focuses on publications in English. There have been some attempts to translate a select number of particularly important sources, however there are almost certainly data sources that have been missed in this review due to language barriers.
2. **Publicly available sources only**. This review only includes research that has been made publicly available. Therefore, we may be missing key insights from research that has been conducted by organisations privately.
3. **Time constraints**. This review was subject to time and capacity constraints, which may mean some sources have been missed. Researchers completed the most in-depth review possible within the project timelines.

KEY FINDINGS

Across the markets investigated, we derive the following themes and areas of interest for future research.

- 1) **Traditional donor countries are facing a consistent set of economic and demographic challenges.** Many of the countries we looked at are facing ageing populations, poised to put increasing pressure on national resources. Similarly, economic decline and cost of living challenges tend to be widespread in these markets. While there is little research which explicitly links these trends to declining support for aid, many data sources demonstrate that aid fares poorly when presented in trade-offs or in formats that gauge relative support. There is a clear risk that these challenges turn government attention towards domestic problems.
- 2) **There is high but often abstract support for aid.** This review found that data points on aid are often absolute rather than relative. This leaves the sector with insufficient information to tackle the latest challenges to government support for aid. The real challenges to the sector come from large and politically significant groups who hold the view that tackling global poverty is important, yet also believe the government should “prioritise domestic issues”, “keep aid spending level or cut it”, or “prioritise other areas for government spending”. These trade-offs are not sufficiently interrogated in existing research across many of the markets we reviewed.
- 3) **Perceptions of aid effectiveness are a constant challenge across major donor markets.** This tends to stem from a combination of low trust in both donor governments and recipient governments. Positively, often the same data sources which show this challenge show high level support for aid, indicating that while this is a challenge it is not lethal to the principle of aid.
- 4) **There is no clear correlation between public attitudes towards aid and whether a country’s aid budget has recently been at risk - likely due to insufficient rigorous analysis.** Across countries where aid budgets have been threatened and those where aid budgets have been secure, available research tends to say the same thing: the public are highly supportive of aid in principle. Most research does not interrogate attitudes towards aid and multilateralism more rigorously, for example by forcing trade-offs between aid spending and other domestic policy priorities. As a result, we cannot conclude from the research how public attitudes towards aid are influencing the risk or safety of different country’s aid budgets.
- 5) **Across traditional donor countries, there is potential for using multilateralism as an entry point for aid advocacy, though this doesn’t hold true for non-traditional donors.** Across many EU countries, the EU is seen as a more reliable political force than national governments. There is some evidence the public also see aid as a more natural priority for the EU than for their own countries (e.g. 73% in Germany would say EU, 58% would say Germany). However, this doesn’t seem to hold true to the same extent in the non-traditional donor markets studied. The Chinese public, for example, tends to lean

towards believing China alone should resolve international issues rather than working with other countries.

- 6) **Aid as a tool for soft power is understudied in traditional donor markets.** In Brazil and China, there is some evidence that supporting other countries is an important part of geopolitical strategies. In China, the economy is seen to be a key driver of international power, even more so than the military. This aspect of international aid is broadly lacking from research in more traditional donor markets, and could represent an alternative approach to messaging for the sector for reaching new segments of the public.
- 7) **It is likely that a new set of messengers and mediums would be required to reverse some of these trends.** There is limited research that overlaps an analysis of trusted messengers with a rich understanding of attitudes towards aid. Nonetheless, where we could find this, we found evidence that the groups that it would be most important to have defensive messaging are less engaged in traditional media sources. A study in Ireland shows that those who were more opposed to aid on principle were less dependent on TV, paper and radio news, though equally dependent on social media.
- 8) **There are gaps in the existing literature in both traditional donor markets and non-traditional donor markets, though they take slightly different forms.** In traditional donor markets, we would suggest the core gaps in the literature are in relative support measurement, in message testing, and in identifying key groups to move on the issue as well as having up to date research on groups that represent the main challenges on the issue (normally, the populist right political parties). In non-traditional donor countries, the gaps are more fundamental: research is non-existent or unreliable and - as a result of limited research being conducted - relevant attitudes towards aid spending make up just a small part of overall research objectives.

One of our key priorities through this literature review was to identify the extent to which high-quality public opinion on aid and multilateralism exists across our chosen markets. Ultimately, our analysis aligns with a paper from 2012, titled "A Mile Wide and an Inch Deep".¹ This paper makes the case that existing survey instruments used to understand attitudes to global poverty are not fit for purpose. The authors identify a lack of distinction between things like "support for aid spending", "support in principle", "concern for poverty" and other phrases. We would go a step further and suggest that the **majority** of the available data we reviewed depends on positions which are both easy to hold without political ramifications (such as "it is important to help poverty" which has no implications for the extent, nature or urgency of the support), and encourage social desirability bias (where respondents are inclined to indicate support because it is the *nice* thing to do). There are exceptions to this, with notably strong data sources in Ireland, France and Germany in particular.

Our own recent research has demonstrated the challenge with the data sources that exist. Taken at face value, a consistent source of data like Eurobarometer would indicate widespread support for international aid. The data from the question "***In your opinion, is it very important, fairly important, not very important or not at all important to help people in developing countries?***" consistently shows high importance, over time and within specific markets. In

¹ Hudson, D. (2012). 'A mile wide and an inch deep': Surveys of public attitudes towards development aid. *International Journal of Development Education and Global Learning*, 4(1).

research conducted by Public First in early 2025, participants were forced to trade off government spending priorities against one another. This was done by randomly pairing ways the government could save resources, with ways they could use more resources. In France, Germany, the UK and the US, spending on overseas aid was consistently cut to support other expenditures, including reducing taxes, reducing debt, or increasing spending on healthcare.

There is a research methodological point at the core of this challenge. Public opinion research in general often focuses on absolute support, agreement with core principles, and views on the importance of different priorities. The result is attitudes in a vacuum. There is little utility in knowing that everyone supports reducing international poverty in principle, if everyone would also drop aid spending for almost any other policy priority. The end result is that aid advocates in many of the markets we reviewed depend on data sources which are misaligned with the views and attitudes of policymakers. They are therefore unable to make sufficiently convincing arguments to protect aid budgets. This has already become an urgent challenge.

FUTURE RESEARCH IMPLICATIONS

Based on this literature review, our view is that there is a gold-standard of research that the sector is typically falling short on in most markets we reviewed (it is worth noting the highest quality research was found in Ireland, France and Germany). In our view, this is research which:

- Demonstrates why **support for aid breaks down**, not just how high it is in the abstract.
- Provides detail on the **groups who support and oppose aid spending**, but also **why they do**.
- Includes a **longitudinal element**, allowing the results to be understood in the surrounding political and economic context.

Stakeholder & Partner Outreach

The next steps of this research project are to engage with the sector, and explore whether private or forthcoming research plugs some of these gaps. In order to do this, we propose a set of tests to identify the persistent gaps in market-level data during this engagement:

1. Is there data (existing and private, or in progress) which tests support for aid alongside other priorities, rather than in absolute terms?
2. Does this data enable breakdowns by key demographic and attitudinal groups?
3. Is the data recent (since 2021)? Does it encompass the current political trends of the market in question?
4. Is there any exploration of what moves attitudes towards aid, international cooperation and/or tackling global poverty, such as messaging and argument testing, or exploration of successful messengers?

Primary Research

Following this, we will produce primary research with the intention of starting to fill gaps in the literature. We will undergo a full process of survey development, but from this initial review, we would expect the research to cover the following areas:

- **Ideological, political and attitudinal positions.** Including attitudes towards global cooperation, the need for prioritising domestic issues.
- **Relative support for aid.** Comparing the need for spending on aid to the need to spend on other public services, forcing trade-offs between aid spending and things like taxes, defence spending.

- **Benefits of aid, and challenges to aid.** Including soft power and moral arguments, tests around perceived efficacy and corruption.
- **International cooperation and multilateralism.** Particularly exploring whether international framings are more effective, whether international institutions are perceived as more appropriate and trusted, and whether meeting international obligations is of importance.
- **Optimal messages, messengers and mediums.** Exploring whether different language or framing can drive support for aid and identifying trusted messengers and mediums that can shift opinion.
- **Standard demographic and partisan groups.** Enabling the analysis of all the above in terms of key voter groups, and particularly in the context of recent political and electoral trends.

TRADITIONAL DONOR COUNTRIES

We examine literature and data available within 7 markets that can be considered 'traditional' donor countries. They were chosen to represent a mix of donors whose aid budgets have been recently threatened or cut and those where aid budgets have recently appeared to be relatively stable and safe. These are:

Traditional donors where aid budgets have been recently threatened or cut:

1. The Netherlands
2. Germany
3. France

Traditional donors where aid budgets have recently appeared to be relatively stable and safe:

4. Italy
5. Norway
6. Ireland
7. Japan

We found several common themes in the research reviewed across these markets:

- **There are similar political and economic dynamics at play across all countries.** Our review found these countries facing similar pressures from ageing populations, political movements growing against immigration, declining trust in government institutions and media, and sometimes the manifestation of this in policymaking or growing partisan divides. Whilst different countries are experiencing these dynamics to different degrees, they were fairly consistent forces at play across all markets, with Norway the only exception.
- **We found a significant volume of broad public opinion data across all countries,** including some high quality longitudinal data. The quarterly Eurobarometer survey stands out as a high quality source of broad public opinion data across the European countries, allowing for comparisons across countries over time.
- **There are consistent gaps in the public opinion research for aid and multilateralism more specifically.** These markets are key examples of how public opinion research on aid and multilateralism can be "Mile Wide and an Inch Deep". In many of these countries, we found one or two strong resources for analysis, but they are rarely consistent between markets, and often fail at least one element of the gold-standard research goals (such as lacking longitudinal elements, avoiding demographic analysis, or covering surface level attitudes). The strongest data was found in Ireland, France and Germany.
- **The public opinion research that exists tends to show significant in-principle support for aid as well as strong support for multilateralism over individual action.** The research reviewed showed consistently high public support for delivering aid and eradicating poverty since the early 2000s. There is also strong support for working together with other countries, in particular through multilateral organisations like the EU and UN. In fact, trust in the EU outperforms trust in national governments for

Ireland, Germany, Italy and the Netherlands. However, more detailed research would be required to understand whether this accurately reflects a route for messaging, or is simply distancing the problem from national government expenditure.

- **There is no clear correlation between public attitudes towards aid and whether a country's aid budget has been at risk recently, we believe this is due to insufficient rigorous analysis.** Across countries where aid budgets have been threatened and those where aid budgets have been safe, the available public opinion tends to say the same thing: that the public are highly supportive of aid in principle. Most research does not interrogate attitudes towards aid and multilateralism more rigorously, for example by forcing trade-offs between aid spending and other domestic policy priorities. As a result, we cannot conclude from the research how public attitudes towards aid may be driving the risk or safety of different country's aid budgets.

The following public opinion research gaps need to be addressed to improve advocacy for aid and multilateralism across the traditional donor countries reviewed:

1. **Sectoral priorities** within aid across different demographic groups and voter intentions.
2. **Levels of support for new approaches to development finance** beyond Official Development Assistance (ODA), including reforms to international tax systems, sovereign debt markets, trade deals, mobilising private finance, etc.
3. **Public support for aid spending in the context of domestic trade-offs** and competing fiscal priorities.
4. **Trusted messengers** in the aid sector (and whether these differ from the trusted messengers more broadly) across different demographic groups.
5. **Most effective mediums for messages** on aid (and whether these differ from the most effective mediums more broadly) across different demographic groups.



COUNTRY SPECIFIC FINDINGS

NETHERLANDS

- Key political issues have moved from the economy and crime, to housing and immigration, over the last 25 years.
- Trust in government and media has remained relatively high, particularly compared to the other markets reviewed.
- Recent political trends indicate a growing pressure from the populist right, with a more inward facing and anti-immigration platform.
- There is high support for multilateralism, particularly through the EU and UN.
- As with other donor markets, we find limited high quality research which meets the standards we lay out as “gold standard”.

The last 25 years in the Netherlands has seen an ageing population, rising levels of immigration, modest economic growth with relatively equitable income distribution but notable gaps in assets between age groups (particularly tied to housing), and increasingly fragmented politics. After decades of relatively centrist governments, populist and protest parties gained ground in recent years by appealing to growing public anxieties, including around immigration, cost of living, and government accountability.

Our review of the public opinion research in the Netherlands found:

- **The main issues the Dutch care about have shifted significantly over the last 25 years.** The public's priorities have shifted from the economy and crime in the early 2000s, to unemployment and healthcare in the 2010s, to environmental sustainability, housing and immigration concerns in recent years.
- **Trust in government and institutions has remained relatively high, but this doesn't extend to trust in specific politicians.** Longitudinal research across Europe shows high and stable levels of trust in government in the Netherlands compared to other European countries - trust is highest for local governments/institutions. However, this trust doesn't extend to politicians themselves, who are viewed as the least trustworthy messengers.
- **There is relatively high support for multilateralism along with trust in multilateral institutions (e.g. EU, UN),** particularly compared to other European countries.
- **There is limited research on Dutch attitudes towards aid beyond support for the high-level principles.** Research suggests there has been relatively high and consistent support for the principles of aid over the past 25 years, however this has not translated into support for higher spending when compared to domestic priorities. Limited research suggests that the sectors the Dutch want to see prioritised in aid spending are: education, human rights, water and sanitation, economic growth/employment, and more recently climate change.
- **There is a notable gap in research measuring effective messengers and mediums for the aid sector specifically.** More broadly, the Dutch have maintained much higher levels of trust in mainstream media than most of the rest of Europe and the most trusted messengers are coworkers, neighbours and scientists, whilst politicians have consistently been perceived amongst the least trustworthy.

Ultimately, this review found a significant volume of high-quality public opinion data and research in the Netherlands stretching back to the early 2000s. However, the vast majority of this research is on broader topics, such as overarching policy priorities and levels of trust in institutions - there are no consistent in-depth assessments of attitudes towards aid or multilateralism specifically. There is a notable gap in research assessing effective messages, messengers and mediums for the aid sector in the Netherlands, a significant challenge for future advocacy in the sector.

POLITICAL ECONOMY LANDSCAPE

Summary

There is a significant amount of data and research available on the Netherlands' political economy landscape over the past 25 years. It shows that 2000–2025 in the Netherlands was an era of demographic ageing, rising levels of immigration, and modest economic growth with relatively equitable income distribution. Despite this, there has been notable and growing gaps in assets between age groups (particularly tied to housing), and increasingly fragmented politics. After decades of relatively centrist governments, populist and protest parties gained ground in recent years by appealing to growing public anxieties, including around immigration, cost of living, and government accountability.

Demographics/migration

The Netherlands experienced steady population growth over the last quarter-century, from roughly 16 million in 2000 to over 18 million in 2025.² Immigration has been the main engine of population growth as fertility rates have been steadily falling since 2010 and have remained persistently below the replacement level of 2.1.³ The Netherlands also has an ageing population: the share of people aged 65+ rose from around 14% in 2000 to 21% by 2025.⁴

Non-Dutch citizens make up around 8% of the population of the Netherlands,⁵ with Ukraine, Poland and Syria representing the top three nationalities of immigrants in 2022.⁶ Despite attempts to improve the integration of immigrants into Dutch society, immigration has remained a hot topic of debate throughout the past 25 years. As far back as 2005, researchers found that “several surveys have shown that public opinion in the Netherlands is tending towards growing impatience with immigrants and the progress of their adaptation to Dutch culture”.⁷ These sentiments have been persistent - according to the 2020 European Social Survey, only 38% of the Dutch population have a positive opinion of immigrants.⁸

² <https://www.cbs.nl/en-gb/visualisations/dashboard-population/population-counter>

³ <https://www.cbs.nl/en-gb/news/2024/01/population-growth-slower-in-2023>

⁴ <https://www.cbs.nl/en-gb/visualisations/dashboard-population/population-pyramid>

⁵ https://migrant-integration.ec.europa.eu/country-governance/governance-migrant-integration-netherlands_en

⁶ https://www.oecd.org/en/publications/2024/11/international-migration-outlook-2024_c6f3e803/full-report/netherlands_da19d34e.html

⁷ <https://www.sciencedirect.com/science/article/abs/pii/S0147176705000477>

⁸ <https://www.cbs.nl/en-gb/dossier/well-being-and-the-sustainable-development-goals/monitor-of-well-being-and-the-sustainable-development-goals-2023/the-sustainable-development-goals-in-the-monitor-of-well-being/sdq-s/sdq-10-1-social-cohesion-and-inequality>

Wealth/inequality

GDP per capita has grown from around \$40,000 in 2000 to over \$51,000 in 2023, remaining higher than the average across the European Union.⁹ By international standards, the Netherlands has a modest poverty rate,¹⁰ low income inequality¹¹ and a generous social welfare system, but relatively high asset/wealth inequality.

The Netherlands' household income inequality rate has consistently remained one of the lowest in the EU over the last 25 years.¹² There are some regional income and inequality differences, though they are not extreme – generally, the Randstad region has higher average incomes, employment opportunities, and levels of income inequality.

In contrast, wealth (asset) inequality is much more pronounced,¹³ mostly driven by housing market dynamics. By the mid-2020s, the Netherlands was facing a well-documented housing crisis characterised by rapid price increases, widening wealth gaps, and insufficient housing supply, especially in urban centers.¹⁴

Despite these challenges, social outcomes in the Netherlands remain relatively equal on many fronts. The country consistently ranks high on human development indices and there is considerable intergenerational mobility (though concerns exist that mobility could erode if wealth and housing inequalities continue to rise).¹⁵

Trends in politics

The period 2000–2025 saw significant shifts in Dutch politics, marked by the decline of traditional parties and the rise of new populist movements tapping into voter discontent. In the late 20th century, Dutch politics was dominated by mainstream center-left and center-right parties such as the Labour Party (PvdA), the Christian Democrats (CDA), and the Liberals (VVD), typically governing in coalition. Around 2000 this began to change: popular dissatisfaction with the status quo (over issues like immigration, integration, and crime) fueled the dramatic rise of Pim Fortuyn in 2002, a charismatic anti-establishment politician. Fortuyn's sudden ascent and assassination shook the political system and influenced the following decade of Dutch politics.

Through the 2000s and 2010s, populist movements on the left and right grew in prominence. Geert Wilders founded the Party for Freedom (PVV) in 2006 on a platform including anti-immigration and anti-Islam messages. The PVV steadily gained support, becoming the third-largest party in the 2010 and 2017 elections. At the same time, left-wing discontent was evident in the Socialist Party (SP) surge in 2006 and GreenLeft's growth among young progressive voters.

Under Prime Minister Mark Rutte (VVD), who held power from 2010 until 2024, the Netherlands had a series of multi-party coalitions. Rutte's long tenure provided stability, but also increasingly drew criticism by the end of the 2010s due to scandals (most notably the "toeslagenaffaire" child benefits scandal in 2019–2020). By the early 2020s, new protest-driven parties gained

⁹ <https://data.worldbank.org/indicator/NY.GDP.PCAP.CD?locations=NL>

¹⁰ <https://www.oecd.org/en/data/indicators/poverty-rate.html>

¹¹ <https://www.cbs.nl/en-gb/news/2024/27/income-inequality-in-the-netherlands-is-well-below-the-eu-average>

¹² Ibid.

¹³ Ibid; <https://apq.nl/en/publication/is-wealth-inequality-in-the-netherlands-increasing>

¹⁴ [theguardian.com](https://www.theguardian.com)

¹⁵ <https://link.springer.com/article/10.1007/s10888-023-09569-7>

prominence. For example, the Farmer–Citizen Movement (BoerBurgerBeweging, BBB) was founded in 2019 amid a backlash against environmental regulations,¹⁶ Thierry Baudet’s Forum for Democracy (FvD) centered on anti-establishment and anti-vaccine rhetoric; and a new centrist party called New Social Contract (NSC) launched in 2023 focused on governmental transparency and social welfare.

The cumulative effect of these trends was fully apparent in the November 2023 general election. Geert Wilders’ PVV won a plurality with 23.5% of the vote (37 out of 150 seats) – the party’s best result ever and a “populist victory” that shocked many observers. Wilders’ messaging spoke to the public’s concerns about “mass immigration in an overpopulated country”, fatigue with 13 years of Rutte’s rule, anger over crime and inflation, and opposition to perceived overly green or elite policies. Meanwhile, establishment parties suffered: the once-dominant CDA barely won 5 seats (down from 15 seats in 2021), and the VVD lost ground (from 22% of the vote in 2021 to 15% in 2023).¹⁷ The more populist and protest-driven parties mentioned above, the BBB, FvD, and NSC won 19.8% of the vote share between them in the 2023 election.¹⁸

¹⁶ [reuters.com](https://www.reuters.com)

¹⁷

<https://www.fondapol.org/en/study/victory-for-populism-in-the-netherlands-a-national-phenomenon-or-a-european-pattern> ; <https://www.politico.eu/europe-poll-of-polls/netherlands/>

¹⁸ <https://www.politico.eu/europe-poll-of-polls/netherlands/>

PUBLIC OPINION RESEARCH

Summary

From 2000 to 2025 the Dutch public's priorities have shifted from the economy and crime in the early 2000s, to unemployment and healthcare in the 2010s, to environmental sustainability, housing and immigration concerns in recent years. Trust in government has remained relatively high and stable compared to other European countries and is highest for local governments and institutions. The Dutch generally support the government spending needed to address social and environmental challenges and are willing to accept higher taxes to address these issues.

There has been relatively consistent and strong support for the principles of aid over the past 25 years, however domestic spending and priorities tend to take precedence over international spending. Support for multilateralism along with trust in multilateral institutions (e.g. EU, UN) have remained high over time.

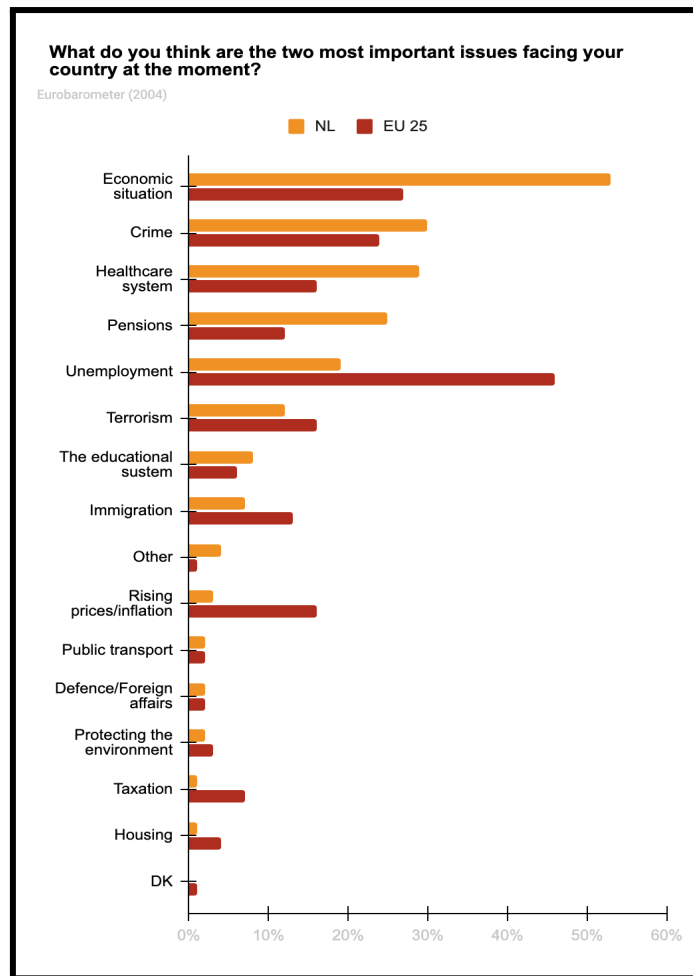
Further, the Dutch public have maintained much higher levels of trust in mainstream media than most of the rest of Europe, with written press still the leading source of news and journalists being generally viewed as trustworthy. The most trusted messengers for the public are coworkers, neighbors and scientists, whilst politicians have consistently been perceived amongst the least trustworthy.

Messages

Top issues driving the debate

In the early 2000s, the vast majority of the Dutch public reported being satisfied with the life they lead (92% in 2004), higher than the European average (81%). Most Dutch people were concerned that the Dutch economy and employment may worsen, however most didn't expect this to have much of a personal impact - with expectations about their life and their work situation to largely stay the same.

The most important issues facing the public in the early 2000s were the economy, crime and healthcare - relatively similar to the top issues across the rest of Europe. One notable exception was unemployment, which topped the charts across many other European countries but was less of a concern identified by the Dutch public.



By the 2010s, these priorities shifted. The impact of the eurozone debt crisis was felt widely across Europe and it is perhaps unsurprising that by 2014, unemployment (45%) and the economy (24%) dominated public worry across Europe. Interestingly, for the Netherlands, health and social security was the top issue of the day - making it an outlier across Europe. Unemployment (31%) and the economy (28%) were the second and third top issues.¹⁹ The Dutch public were also more optimistic than the rest of Europe about the future, with 66% of the public thinking that the economic crisis had reached its peak and things would start to recover (vs. 44% for the rest of Europe).

By the 2020s, the economy and unemployment had fallen down the list of the Dutch public's priorities, with housing, immigration and climate change dominating some of the most recent Eurobarometer polls.²⁰ These findings have been consistent across a number of recent polls, with an SCP survey reporting the most commonly mentioned problems as "stijgende prijzen" (soaring prices and growing income inequalities), societal cohesion, immigration, the lack of affordable housing, and climate change and pollution.²¹ The 2023 European Investment Bank (EIB) Climate Survey found that inflation and the cost of living were considered the top challenges by 69% of Dutch respondents, closely followed by climate change and environmental degradation (53% mentioning it in their top three).²²

¹⁹ Eurobarometer (2014)

²⁰ Eurobarometer (2024)

²¹ [scp.nl](https://www.scp.nl).

²² [eib.org](https://www.eib.org).

Trust

Dutch surveys regularly measure *vertrouwen* (trust) in institutions like parliament, government, the judicial system, police, the EU and more. Overall trust in government in the Netherlands has remained relatively stable over the long run²³ and is slightly above the OECD average (in 2023 about 44% of Dutch reported trusting the national government, vs ~39% OECD average).²⁴ Trust in local government and institutions, like the police and judiciary, tends to be higher than trust in the national government or international bodies.²⁵

The Dutch public's trust in the European Union has tended to exceed their trust in their own national government over the past 25 years. In 2004, 49% reported trusting the EU vs. 38% reported trusting their national government. This reversed in the 2010s following the Eurozone debt crisis but, by 2019, this trend returned²⁶ and currently trust in the EU remains higher than the national government.

Government spending & fiscal policies

The Netherlands has a relatively high-tax, high-service public model, and there is broad acceptance of that bargain - with surveys consistently showing the public values social spending in sectors such as housing, healthcare and education over the past 25 years.²⁷ In recent years, the Continu Onderzoek Burgerperspectieven has repeatedly found that Dutch citizens worry the government isn't doing enough on issues like affordable housing or poverty,²⁸ suggesting they would back spending to tackle these problems.

When it comes to taxes, there is limited appetite for across-the-board tax hikes, but people do support certain targeted taxes or closing tax loopholes - particularly if they can help serve a clear purpose, such as tackling environmental issues or supporting social sectors. For example, an EIB Climate Survey (2023) found nearly three-quarters of Dutch people favour eliminating tax breaks/subsidies for polluting sectors like aviation and heavy fossil-fuel users. Moreover, a majority of Dutch respondents said they would accept an income tax increase if the revenue is used to help the lowest-income groups adapt to climate policies.²⁹

Aid & multilateralism

Public support for the principles of aid has remained persistently high since the early 2000s. As early as 1998, 87.8% of the Dutch reported it was important or very important to 'help people in poor countries in Africa, South America, Asia, etc to develop'³⁰ - this finding has been replicated through several EU-wide Eurobarometer surveys that have taken place in the years since. Further, a 2004 survey found the Dutch were the most likely across the EU to think aid is making

²³ [uu.nl](https://www.uu.nl)

²⁴ [oecd.org](https://www.oecd.org)

²⁵ [uu.nl](https://www.uu.nl); [cbs.nl](https://www.cbs.nl)

²⁶ [denederlandsegrondwet.nl](https://www.denederlandsegrondwet.nl); [cbs.nl](https://www.cbs.nl)

²⁷ Eurobarometer (2004, 2014, 2024).

²⁸ [scp.nl](https://www.scp.nl)

²⁹ [eib.org](https://www.eib.org)

³⁰ Eurobarometer (1999) Europeans and Development Aid.

a difference to the lives of people in developing countries (77% agreed, compared to 51% on average across the EU).³¹

There is very limited research into the Dutch public's sectoral priorities for aid, particularly before 2010. Later Eurobarometer surveys in 2012 and 2016 found education, human rights, peace and security, and health topped the list of the Dutch public's sectoral priorities. A 2023 version of the report found similar results, with the addition of climate change and economic growth/employment into the top priorities.

Despite this support for the principles of aid, it became a hotly debated issue in the 2010 general election, and the new government moved to cut the aid budget by EUR400 million, from 0.8% of gross national income to 0.7%.³² Many voters in 2010 felt that cuts to the aid budget were acceptable – with one survey finding 54% of voters supported the cuts.³³

Support for aid cuts hasn't come from a lack of support for aid in principle, but rather a shifting focus on domestic priorities.³⁴ Despite 90% of people in the Netherlands thinking it is important or very important to partner with countries outside the European Union to reduce global poverty,³⁵ only 54% agree that aid should be a priority of the national government - far below the EU average of 67%.³⁶ Research has shown consistently over the past 10 years that a majority of Dutch people feel the government should put more focus on domestic problems and less on international matters.³⁷ More recently, 63% of the public said the government pays too much attention abroad and should concentrate on issues at home in 2024 (similar majorities said this in 2011 and 2018).³⁸

Despite a desire to focus on domestic issues, the public recognises the importance of international cooperation and multilateralism. For example, 70% support EU membership and there is little appetite for a "Nexit".³⁹ Eurobarometer surveys consistently show high trust in the EU⁴⁰ and a majority of the public have a favorable view of the United Nations.⁴¹ Further, a Pew Research report in 2016 showed that Dutch citizens tend to agree that the country should take allies' interests into account even if it means compromising (50% vs. 46% who believe the country should follow its national interests even when allies strongly disagree) - this is higher than the average across European countries studied.⁴²

Younger Dutch citizens tend to be more supportive of aid - 71% of Dutch young people (under 35) consider aid important, compared to 64% of the general public.⁴³ More generally, supporters of left-leaning and progressive parties (e.g. GroenLinks, PvdA, and D66) are the most supportive

³¹ Special Eurobarometer (2005) Attitudes towards Development Aid

<https://europa.eu/eurobarometer/surveys/detail/410>

³² <https://www.devex.com/news/netherlands-plans-aid-budget-cut-71318>

³³ <https://www.euractiv.com/section/elections/news/majority-of-dutch-support-halving-eu-budget-contribution/>

³⁴ European Commission (2022), Special Eurobarometer 521: EU citizens and development cooperation, <https://europa.eu/eurobarometer/surveys/detail/2673>.

³⁵ Eurobarometer special edition (2011, 2022)

³⁶

https://www.oecd.org/content/dam/oecd/en/publications/reports/2023/10/oecd-development-co-operation-peer-review-s-netherlands-2023_fc6a3795/67b0a326-en.pdf

³⁷ stukroodvlees.nl/scp.nl.

³⁸ stukroodvlees.nl

³⁹ scp.nl

⁴⁰ Eurobarometer (2004, 2014, 2024)

⁴¹ <https://www.statista.com/statistics/1085743/public-opinion-on-the-un-in-the-netherlands/>

⁴² <https://www.pewresearch.org/global/2016/06/13/europeans-question-global-engagement/>

⁴³ partos.nl

of aid, while right-wing populist supporters (e.g. PVV, FvD) are more skeptical.⁴⁴ Mainstream right-leaning voters (e.g. VVD, CDA) occupy a middle ground – they are somewhat less enthusiastic about aid than left-wing voters, but still show considerable support for international help, especially in specific contexts. A 2021 “Land van Helpers” survey of VVD and CDA members found 71% agreed that the Netherlands “is a nation of helpers” that should look after other countries.⁴⁵

Messengers

As is true in most countries, the most trusted messengers in the Netherlands are people they know. Coworkers (83% trusted), neighbours (75% trusted) and people in my local community (71% trusted) are at the top of the list. The only other messenger that ranks as high as these groups is scientists (76% trusted).⁴⁶ Politicians are among the least trusted by the Dutch public, with data from 2023 showing government leaders are trusted by just 34% of the population.⁴⁷ Social media influencers are also not trusted - a 2019 survey found that 86% of internet users in the Netherlands do not trust influencers.⁴⁸

The Dutch consistently place greater trust in apolitical institutions (judiciary, police, military, etc.) than in the political institutions. For example, through 2020–2022 about 80% of people trusted the courts and police, while barely a quarter trusted Parliament.⁴⁹ Further, trust in Dutch news media remains among the highest worldwide,⁵⁰ and only a small minority of people identify journalists as untrustworthy or spreaders of misinformation.⁵¹ Politicians are viewed as more likely to spread false or biased information than journalists.⁵²

Businesses have enjoyed high levels of trust, and by the 2020s had become the most trusted of the four major institution categories (government, business, NGOs, media) in Edelman's surveys. In 2023, 61% of Dutch people said they trust businesses – notably higher than the trust in government (51%). Public trust in NGOs has also remained fairly high. There have been periodic dips if an NGO was involved in a scandal, but no pervasive loss of faith. In earlier Edelman surveys (2019–2020), the trust in NGOs in the Netherlands was likely in the high-50s to low-60s (%) – roughly comparable to trust in business, and higher than trust in government at that time.

Mediums

Most people in the Netherlands report getting their news from the written press, followed by information websites and then television news channels. The reliance on written press in the

⁴⁴ blogs.lse.ac.uk

⁴⁵ partos.nl

⁴⁶ https://www.edelman.amsterdam/sites/g/files/aatuss321/files/2023-03/2023%20Edelman%20Trust%20Barometer_The%20Netherlands%20Report.pdf

⁴⁷ [Edelman.amsterdam](https://www.edelman.amsterdam)

⁴⁸ fonkmagazine.nl

⁴⁹ [cbs.nl](https://www.cbs.nl)

⁵⁰ [svdj.nl](https://www.svdj.nl)

⁵¹ [nos.nl](https://www.nos.nl);

⁵² [parool.nl](https://www.parool.nl)

Netherlands is much higher than the average across Europe, who tend to get their information from general television channels.⁵³

The Dutch public has maintained a relatively high trust in mainstream news media over the past two decades.⁵⁴ In 2024, 54% of Dutch people agreed they can trust “most news most of the time”, one of the highest levels in Europe.⁵⁵ The national public broadcaster NOS is especially respected – over 80% of the public give NOS a positive trust rating.⁵⁶ But most major Dutch news brands also receive strong confidence scores.

However, there is a difference across age groups, with younger audiences (under 25) having somewhat less trust in news and journalism than older ones⁵⁷ and more likely to get their news from digital sources.⁵⁸ 78% percent of young people (16-22) say that social media keeps them informed about what is going on in the world - including Instagram, TikTok and YouTube - and 66% say they (also) keep informed about what is going on through family, friends and other acquaintances.⁵⁹ If these trends continue, the information landscape may change significantly in the coming years.

⁵³ Eurobarometer 2024

⁵⁴ svdj.nl ; pewresearch.org

⁵⁵ https://reutersinstitute.politics.ox.ac.uk/sites/default/files/2024-06/RISI_DNR_2024_Digital_v10%20lr.pdf

⁵⁶ svdj.nl

⁵⁷ nos.nl

⁵⁸ <https://www.meltwater.com/en/blog/dutch-media-landscape-netherlands>

⁵⁹ <https://www.cvdn.nl/wp-content/uploads/2024/12/Youth-news-and-social-media-summary.pdf>



COUNTRY SPECIFIC FINDINGS

GERMANY

- Key political issues have moved from crime, unemployment and debt, to housing and immigration, over the last 25 years.
- Trust in government and institutions has remained relatively stable, though below OECD averages.
- Recent political results indicate a growing pressure from the populist right.
- We see some support for multilateralism, particularly through the EU, which Germans tend to view as a more natural home for aid spending.
- Public opinion data on aid and international cooperation in Germany is stronger than many other traditional donor markets, however there is limited high quality and longitudinal research beyond the Development Engagement Lab.

Between 2000 and 2025, Germany saw economic growth, increased immigration, and the first signs of an ageing society. While the income distribution remains relatively equitable by international standards, significant wealth inequalities persist. Politically, after decades of centrist governance, the right-wing populist AfD has gained growing influence. This shift has been driven by public concerns over immigration, the cost of living, and national security, shaped by key events such as the European migrant crisis, the COVID-19 pandemic, and the Russian invasion of Ukraine.

Our review of the public opinion research in Germany found:

- **Public priorities in Germany have shifted significantly over the past 25 years.** While the public's concerns revolved around crime, unemployment and national debt, these issues have increasingly given way to other topics such as immigration, peace, social cohesion and climate change.
- **Trust in political institutions in Germany has remained stable but slightly below the OECD average.** Germans tend to place greater trust in the police, judiciary, and fellow citizens and there is also substantial trust in multilateral institutions (e.g. EU, UN).
- **After being more concerned about government debt, Germans have become more supportive of domestic and defence spending.** Public concern over debt has declined, and while investment in education, health, and housing remains a priority, there is a broader acceptance of higher defence spending and increased national debt.
- **Aside from personal networks as trusted messengers, traditional media remains the primary source of news.** Scientists, teachers, and NGOs are also seen as trustworthy messengers, while political leaders and journalists are viewed as more divisive. Traditional media like television, radio, and print remain the most used news sources, but overall news interest has declined. Trust in social media as a news source remains low despite its growing use.
- **There is limited research on German attitudes towards aid beyond support for the high-level principles.** Research suggests there has been relatively high and consistent support for the principles of aid however, support for aid spending declines when compared to domestic priorities. Similarly to the Netherlands, limited research suggests that the prioritised sectors in aid spending are education, human rights, water and sanitation, and more recently climate change.

Overall, there is a substantial amount of high-quality public opinion research in Germany since the early 2000s, but these are mostly focused on broad topics like policy priorities and trust in institutions. High quality and in-depth research into public attitudes and opinions on aid remain limited.

POLITICAL ECONOMY LANDSCAPE

Summary

There is a significant body of data and research on Germany's political and economic landscape over the past 25 years. Between 2000 and 2025, Germany experienced economic growth, rising levels of immigration, and the first clear signs of an ageing society. While income distribution is relatively equitable in international comparisons, asset and wealth inequalities—especially tied to housing—remain. Politically, after decades of centrist governance, the right-wing populist AfD has gained significant influence in recent years, fueled by public anxieties over immigration, the cost of living, and national security. Key events such as the European migrant crisis, the COVID-19 pandemic, and the Russian invasion of Ukraine played a major role in reshaping public opinion and Germany's political landscape.

Demographics/migration

Germany witnessed a modest decline in its population from 82.5 million in the mid-2000s to 80 million by 2011.⁶⁰ Since then, it has steadily increased, reaching approximately 83.5 million by 2025.⁶¹ Immigration has been the main driver of this population growth.⁶² While fertility rates increased between 2012 and 2016 after stagnating throughout the 2000s, they began to decline again post-2020, and have been consistently below the replacement threshold of 2.1.⁶³ The population in Germany is also ageing: currently, one in two people is over 45 and one in five is over 65.⁶⁴

Non-German citizens constitute approximately 15% of Germany's population,⁶⁵ with the largest groups being from Turkey, Ukraine, and Syria.⁶⁶ After an increase in migration in the early 2010s and a spike in 2015, migration rates consistently declined until a notable uptick in 2022 due to the Russian invasion of Ukraine, again followed by a subsequent decrease.⁶⁷ Immigration has remained a contentious issue, particularly since 2015. According to the 2020 European Social Survey, nearly half of Germans recognised economic benefits from immigration,⁶⁸ however, only 27% believed that immigration is making Germany a better country, and only two-fifths felt that

⁶⁰<https://www-genesis.destatis.de/datenbank/online/statistic/12411/table/12411-0001>

⁶¹<https://www.destatis.de/DE/Themen/Gesellschaft-Umwelt/Bevoelkerung/Bevoelkerungsstand/inhalt.html>

⁶²https://www.destatis.de/DE/Presse/Pressemitteilungen/2025/01/PD25_030_124.html

⁶³<https://www.destatis.de/DE/Themen/Gesellschaft-Umwelt/Bevoelkerung/Geburten/geburtenrueckgang-deutschland.html>

⁶⁴<https://www.destatis.de/DE/Themen/Querschnitt/Demografischer-Wandel/demografie-mitten-im-wandel.html>

⁶⁵<https://www.destatis.de/DE/Themen/Gesellschaft-Umwelt/Bevoelkerung/Bevoelkerungsstand/Tabellen/zensus-geslecht-staatsangehoerigkeit-2024-basis-2022.html#fussnote-1-1396674>

⁶⁶<https://www.destatis.de/DE/Themen/Gesellschaft-Umwelt/Bevoelkerung/Migration-Integration/Tabellen/rohdaten-auslaendische-bevoelkerung-zeitreihe.html>

⁶⁷<https://www.destatis.de/EN/Themes/Society-Environment/Population/Migration/Tables/migration-year-01.html#fussnote-3-1129474>

⁶⁸[https://www.oecd.org/content/dam/oecd/en/topics/policy-issues/migration/Sii2024--Germany%20\(ENG\)%20E2%80%93%20v6%20\(FINAL%20with%20bookmarks\).pdf](https://www.oecd.org/content/dam/oecd/en/topics/policy-issues/migration/Sii2024--Germany%20(ENG)%20E2%80%93%20v6%20(FINAL%20with%20bookmarks).pdf)

integration has been successful. Immigration also emerged as one of the key issues during the 2025 parliamentary elections.⁶⁹

Wealth/inequality

GDP per capita has grown from around \$24,000 in 2000 to over \$54,000 in 2023,⁷⁰ remaining higher than the average across the European Union. According to international standards, Germany has a modest poverty rate⁷¹ and relatively low income inequality,⁷² but a relatively high asset/wealth inequality.⁷³

Rising house prices and the expansion of financial assets were crucial drivers of wealth growth in Germany.⁷⁴ The average housing wealth approximately doubled among the middle and upper segments of the wealth distribution between 1993 and 2018.⁷⁵ But the rate of home ownership in Germany is the lowest in the EU, with 52% of the population living in rented housing in 2023.⁷⁶ Since 2008, there has been a noticeable increase in housing and rental prices, particularly in densely-populated, high-priced regions such as Berlin and Munich,⁷⁷ leading to an increase in the overall proportion of income spent on rent.⁷⁸ Additionally, recent studies indicate a shortage of available housing, particularly in the social housing sector.⁷⁹

There are still considerable economic discrepancies between former East and West Germany three decades after the reunification. In 2018, average household wealth in West Germany was more than twice as high as in East Germany.⁸⁰ Further, social mobility in Germany is generally lower compared to many other developed nations,⁸¹ this is particularly true in East Germany.⁸²

Despite these socioeconomic challenges, Germany maintains a high ranking on the Human Development Index, reflecting strong achievements in essential areas of human development such as health, education, and living standards, even when adjusted for inequality.⁸³ Germany also scores well on the Gender Development Index, which measures gender equality across the same dimensions.⁸⁴

Trends in politics

Over the past 25 years, Germany's political landscape has undergone profound transformations. The period was marked by important reforms, the impact of major global

⁶⁹<https://www.tagesschau.de/wahl/archiv/2025-02-23-BT-DE/umfrage-wahlentscheidend.shtml>

⁷⁰<https://data.worldbank.org/indicator/NY.GDP.PCAP.CD?locations=DE>

⁷¹https://data.worldbank.org/indicator/SI.POV.NAHC?locations=DE&most_recent_value_desc=true

⁷²<https://ourworldindata.org/grapher/economic-inequality-gini-index>

⁷³https://www.econtribute.de/RePEc/ajk/ajkpbs/ECONtribute_PB_001_2020.pdf

⁷⁴ Ibid.

⁷⁵ Ibid.

⁷⁶<https://www.bpb.de/kurz-knapp/hintergrund-aktuell/559435/mangel-an-wohnraum/>

⁷⁷<https://www.degruyterbrill.com/document/doi/10.1515/jbnst-2020-0001/html>

⁷⁸<https://www.bpb.de/kurz-knapp/hintergrund-aktuell/559435/mangel-an-wohnraum/>

⁷⁹ Ibid.

⁸⁰https://www.econtribute.de/RePEc/ajk/ajkpbs/ECONtribute_PB_001_2020.pdf

⁸¹https://www.diw.de/de/diw_01.c.679909.de/publikationen/wochenberichte/2019_40_1/vermoegensungleichheit_in_deutschland_bleibt_trotz_deutlich_steigender_nettovermoegen_anhaltend_hoch.html

⁸²https://www.oecd.org/en/publications/broken-elevator-how-to-promote-social-mobility_9789264301085-en.html

⁸³<https://cepr.org/voxeu/columns/new-evidence-social-mobility-germany>

⁸⁴<https://hdr.undp.org/data-center/documentation-and-downloads>

⁸⁴<https://hdr.undp.org/data-center/documentation-and-downloads>

events like the COVID-19 pandemic, and the emergence of new political forces, most notably the Alternative for Germany (AfD), a right-wing populist party, partly classified as right-wing extremist by the German domestic intelligence service.⁸⁵

After a long tenure of coalition governments led by the Christian Democratic Union (CDU) under Chancellor Helmut Kohl, the early 2000s began with two consecutive coalitions of the Social Democratic Party (SPD) and the Green Party under Gerhard Schröder (1998-2005). The period was notable for a series of new labour market reforms (“Agenda 2010”) initiated in response to economic stagnation and high unemployment.⁸⁶ These reforms included deregulation of labour laws and a reduction of unemployment benefits, aimed at activating the workforce and fostering economic growth. The government also emphasised a shift from fossil fuels to renewable energy, marking the beginning of Germany’s energy transition.⁸⁷

A new era of German politics began in 2005 with Angela Merkel’s first of four tenures as German chancellor in a coalition with the SPD. Her first term was marked by the 2008 financial crisis, prompting the implementation of a set of stimulus packages to stabilize the economy and banking system, both of which recovered quickly in international comparisons.⁸⁸ Merkel’s second term, starting in 2009 in a coalition with the Free Democratic Party (FDP), was strongly influenced by the Eurozone debt crisis, where her administration played a crucial role in advocating for fiscal austerity measures in exchange for bailout support.⁸⁹ The crisis also set the stage for the emergence of the AfD in 2013 as a Euro-sceptic party that capitalised on the discontent regarding Germany’s foreign policy.

The European migration crisis in 2015 played a significant role her third term (2013-2018) and the administration’s decision to welcome refugees, encapsulated by the Chancellor’s phrase “Wir schaffen das” (“We can manage this”), sparked extensive debates on migration, integration and national security.⁹⁰ Concurrently, the political rise of the AfD, reflecting broader European right-wing populist trends, challenged the existing approach to migration in favour of more restrictive policies. Merkel’s final four years in government were primarily shaped by the COVID-19 pandemic. The government’s response combined stringent public health measures like lockdowns, widespread testing, and social distancing informed by scientific developments, with economic support packages to mitigate the pandemic’s impact on the economy and businesses.⁹¹ Public reaction was mixed with initial compliance followed by pandemic fatigue and the emergence of protest groups, some of which were fuelled by conspiracy theories and anti-vaccination sentiments.⁹² During this period, the AfD continued to influence political discourse by capitalising on the pandemic-related political discontent, again mirroring broader trends of increasing political polarisation in Europe.

From 2021-2024, a coalition consisting of the SPD with Chancellor Olaf Scholz, the Green Party and the FDP, marked a new phase in German politics. While still dealing with the ongoing effects

⁸⁵https://www.verfassungsschutz.de/DE/verfassungsschutz/der-bericht/vsb-rechtsextremismus/2023-vsb-rechtsextremismus_artikel.html

⁸⁶<https://www.bpb.de/shop/zeitschriften/apuz/250663/agenda-2010-und-arbeitsmarkt-eine-bilanz/>

⁸⁷<https://www.bpb.de/kurz-knapp/hintergrund-aktuell/520059/atomausstieg-deutschland-verabschiedet-sich-endgueltig-von-der-kernkraft/>

⁸⁸<https://commonslibrary.parliament.uk/recession-and-recovery-the-german-experience/>

⁸⁹<https://www.lpb-bw.de/euro-krise>

⁹⁰<https://www.bpb.de/themen/migration-integration/kurzdoessiers/217367/das-jahr-2015-flucht-und-fluechtlinge-im-fokus-ein-rueckblick/>

⁹¹<https://www.bpb.de/shop/zeitschriften/apuz/314355/corona-krise/>

⁹²<https://www.bpb.de/themen/rechtsextremismus/dossier-rechtsextremismus/508468/querdenken-und-verschwoerung-serzaehlungen-in-zeiten-der-pandemie/>

of the COVID-19 pandemic, a key event during this period was the Russian invasion of Ukraine.⁹³ The government responded by increasing defence spending, reassessing energy policies (particularly the strong reliance on Russian gas and the need for 'green' growth), and taking on a key role in shaping the European response to Russia.⁹⁴ Domestically, heavy debates about inflation, rising gas prices, Germany's energy strategy and budgetary gaps were sparked that strongly decreased governmental approval ratings.⁹⁵ Germany also welcomed a substantial number of Ukrainian refugees, which was met with broad public support. However, debates about migration policies, border security, and asylum processes persisted. Relatedly, the period was characterised by further electoral gains for the AfD - at the time the third largest party in parliament - driven by a dissatisfaction with established political parties. The coalition experienced internal conflicts, especially over migration and environmental/energy policies mirrored in public debates and frustration among supporters and the German public.⁹⁶ The ultimate reason for the collapse of the coalition at the end of 2024 were irreconcilable differences regarding additional debt and government spending (particularly between the FDP and the other coalition partners) to fill financial gaps in the government's budget plans.

In the 2025 German Federal Elections – notable for the highest voter turnout since the German reunification – the CDU/CSU emerged as the largest party, albeit with a reduced vote share. Meanwhile, the AfD doubled its vote share, becoming the second largest party in parliament. Die Linke (The Left) also saw substantial gains, in contrast to considerable losses for the SPD and a slight decline for the Green Party. The FDP and the Bündnis Sarah Wagenknecht, a newly formed party defined by its right-leaning stances on cultural issues and immigration, more left-leaning economic policies, as well as an anti-war stance, missed the 5% threshold for parliamentary representation. Key campaign issues that shaped the elections included the ongoing economic recovery from the COVID-19 pandemic, impacts of the Russian invasion and the related energy crisis, national security and defence, alongside immigration and integration as two of the major topics.⁹⁷ Despite gains of the AfD, a political 'firewall' remains with other parties refusing coalition talks with the AfD due to its in part right-wing extremist platform.⁹⁸ Nevertheless, their influence is growing indicating a potential shift to more conservative policies on issues like immigration and government spending among centrist parties which also influence current coalitional negotiations.

⁹³<https://www.bpb.de/kurz-knapp/hintergrund-aktuell/507243/deutschlands-abhaengigkeit-von-russischem-gas/>

⁹⁴<https://www.bpb.de/kurz-knapp/hintergrund-aktuell/559549/vor-drei-jahren-beginn-der-russischen-invasion-in-der-ukraine/>

⁹⁵<https://www.bpb.de/kurz-knapp/hintergrund-aktuell/507243/deutschlands-abhaengigkeit-von-russischem-gas/>

⁹⁶<https://www.bpb.de/shop/zeitschriften/apuz/wahlkampf-2025/558873/dauerstreit-und-dauerwahlkampf/>

⁹⁷<https://www.tagesschau.de/wahl/archiv/2025-02-23-BT-DE/umfrage-wahlentscheidend.shtml>

⁹⁸<https://www.bpb.de/themen/deutschlandarchiv/559041/von-nutzen-und-nachteil-der-brandmauer/>

PUBLIC OPINION RESEARCH

Summary

Since the early 2000s, life satisfaction in Germany has gradually improved, while public concerns have shifted from crime and unemployment to immigration, peace, and social cohesion, especially after 2015. Inflation and immigration are currently seen as the most pressing issues, with immigration standing out more prominently in Germany than across the EU. Although government debt was a major concern in the late 2000s, its importance amongst the public declined after 2010.

Trust in political institutions remains modest, with Germans placing more confidence in the police, the judiciary system, and fellow citizens than in the government, parliament, or political parties. Trust in the EU is somewhat higher than in national institutions. Over the past two decades, trust levels have been relatively stable, with East Germans consistently showing lower trust. A temporary rise during the COVID-19 pandemic has since faded.

Over the past decade, trust in news media has declined but stabilised more recently, with public broadcasters remaining the most trusted sources. Although traditional media still dominate news consumption, interest in news has declined, and social media platforms like YouTube and Facebook have grown in importance despite low trust in online news.

Support for aid has historically been strong, particularly in areas like education, human rights, and food security. However, public and political support for aid has declined recently, driven by shifting domestic priorities, concerns about aid effectiveness, and the perception that international organisations rather than the German government are responsible for aid provision and delivery.

Messages

Top issues driving the debate

In the early 2000s, general life satisfaction in Germany declined, a trend largely linked to labour market challenges and significant unemployment concerns among the German public.⁹⁹ However, life satisfaction rebounded until the early 2010s, a recovery often credited to improved national and individual economic conditions and rising employment rates.^{100 101} Despite ongoing concerns regarding political, economic, and migration issues, life satisfaction has continued to

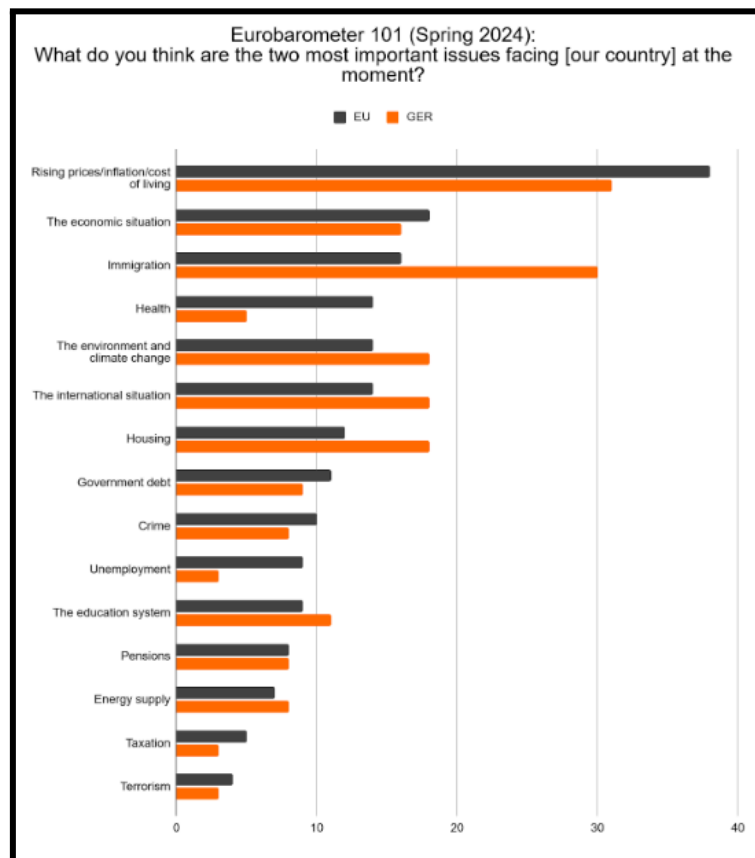
⁹⁹<https://www.iwkoeln.de/fileadmin/publikationen/2014/171266/TR-2-2014-Enste-Ewers.pdf>

¹⁰⁰ Ibid.

¹⁰¹<https://europa.eu/eurobarometer/surveys/browse/all/series/4961>

increase since 2015.¹⁰² Subjective life satisfaction in East Germany, historically lower than in West Germany, has been gradually converging, although disparities remain.¹⁰³

Concerns in both public and private spheres have evolved similarly to trends in life satisfaction, with worries about crime, the labour market and the broader economy decreasing significantly since the mid-2000s.¹⁰⁴ From 2010, there has been a marked increase in national concerns about peace, xenophobia, and migration, influenced by rising immigration and the surge of right-wing populism.¹⁰⁵ Moreover, concerns about social cohesion have increased since 2015 with East Germans showing greater worry than their Western counterparts.¹⁰⁶



In a 2024 Eurobarometer survey, the German public identified inflation and cost of living (32%) and immigration (30%) as the two most pressing issues facing the country, with climate change (18%), international conflicts (18%), housing (18%), and the broader economic situation (16%) trailing behind.¹⁰⁷ While the national concerns of the German public generally align with broader trends across other European countries, immigration stands out as a particularly critical issue in Germany, viewed as more important by the German public (30%) compared to the EU average (24%).¹⁰⁸ This concern is not just seen as a domestic issue, with 35% of Germans highlighting immigration as a crucial challenge for the EU overall, compared to 24% in other EU

¹⁰² <https://www.bpb.de/themen/deutsche-einheit/lange-wege-der-deutschen-einheit/47331/lebenszufriedenheit-und-subjektives-wohlbefinden/#node-content-title-0>

¹⁰³ Ibid.

¹⁰⁴ Ibid.

¹⁰⁵ Ibid.

¹⁰⁶ Ibid.

¹⁰⁷ <https://europa.eu/eurobarometer/surveys/browse/all/series/4961>

¹⁰⁸ Ibid.

countries.¹⁰⁹ This pattern has remained relatively consistent in comparable Eurobarometer surveys since 2015, whereas before that, immigration was not considered one of the main issues either in Europe more broadly or in Germany specifically.¹¹⁰

Other notable trends regarding the most important issues in Germany and Europe include the persistent importance of inflation and the cost of living to the public.¹¹¹ Unemployment has played an increasingly secondary role in Germany – in contrast to broader European trends – since the mid 2010s.¹¹² The German public has also attached more importance to the education system and, recently, also to climate change and the environment.¹¹³

While government debt was a significant issue for the German public in the late 2000s and until the early 2010s, its perceived importance decreased afterwards.¹¹⁴ This reduced concern may be attributed to the introduction of the balanced budget amendment ("Schuldenbremse") to the constitution in 2009, which restricts federal spending in an effort to limit government debt.¹¹⁵ The amendment was modified in spring 2025 to allow increased spending on infrastructure and defence in response to the Russian invasion of Ukraine in 2022, and more isolationist trends in US politics after the recent presidential elections.¹¹⁶

Trust

According to the 2023 OECD Trust Survey,¹¹⁷ which assesses public perception of various institutions, only 36% of Germans express high or moderately high trust in their national government, falling below the OECD average of 39%. In line with trends observed in other countries, Germans exhibit greater trust in their police (64%), judicial system (58%), and fellow citizens (54%) compared to their federal government.¹¹⁸ Approximately half of the German population reports high or moderately high trust in both federal and regional civil services (50%). Among the institutions Germans trust least are the national parliament (35%), the news media (34%), and political parties (26%).

The 2024 Eurobarometer asks respondents to indicate whether they tend to trust or not to trust the European Union, national parliaments, as well as the national government.¹¹⁹ In line with other countries, the German public seems to be somewhat more trusting towards the EU (47%) than towards the German parliament (43%) or the German government (38%).

Longitudinal analyses have indicated that trust in both regulatory and representative institutions in Germany has remained relatively stable over the past two decades and that East Germans still display lower levels of trust in both types of institutions.¹²⁰ Notably, there was a

¹⁰⁹ Ibid.

¹¹⁰ Ibid.

¹¹¹ Ibid.

¹¹² Ibid.

¹¹³ Ibid.

¹¹⁴ Ibid.

¹¹⁵ <https://www.bpb.de/themen/wirtschaft/unter-druck/558524/staatshaushalt-und-schuldenbremse/>

¹¹⁶ Ibid.

¹¹⁷ https://www.oecd.org/en/publications/oecd-survey-on-drivers-of-trust-in-public-institutions-2024-results-country-note_s_a8004759-en/germany_9f727e4a-en.html

¹¹⁸ Ibid.

¹¹⁹ <https://europa.eu/eurobarometer/surveys/browse/all/series/4961>

¹²⁰ <https://www.tandfonline.com/doi/full/10.1080/09644008.2022.2054989#abstract>

temporary increase in trust across all sectors at the onset of the COVID-19 pandemic, but this uplift in trust reverted to pre-pandemic levels subsequently.¹²¹

Government spending & fiscal policies

Compared to other countries, Germany has a relatively comprehensive welfare state with a high-tax, high-benefit system for the funding of public services and social security. In the late 2000s and early 2010s, public debt was a major concern.¹²² A 2013 survey revealed limited support for tax hikes or the incurrence of additional public debt (18%) to increase public expenditure.¹²³ There was strong support for tax cuts (30%) and a reduction in public debt (40%). However, when these reductions led to government expenditure cuts, support fell among a majority of respondents. Preferred areas for increased spending included education, social security, and public safety.

In the mid-2010s, public concern regarding government debt in Germany notably declined,¹²⁴ which has been partly attributed to the balanced budget amendment introduced in 2009, which restricted federal spending and curbed the potential for accumulating further debt.¹²⁵ In a more recent 2022 Eurobarometer survey,¹²⁶ Germans showed strong support for increased government spending on education (77%), long-term care (75%), housing (68%), pensions (67%), and health (64%), with less support for increased spending for culture (32%) and unemployment benefits (41%). Respondents varied in their views on how to fund increased spending, with some favouring higher contributions from wealthier households (28%), while others favoured contributions proportional to household income (18%), an increased budget deficit (16%), or reduced spending for other public programs (14%).

Since the Russian invasion of Ukraine in February 2022, Germany has substantially increased its defence spending with growing public acceptance.¹²⁷ Most recently, there has also been a modification of the amendment of the German constitutions, that limited government spending, now permitting more expenditures for defence as well as infrastructure. These budgetary expansions and the increase of national debt have been supported by a majority of the German public (59%).¹²⁸

Aid & multilateralism

Under the United Nations' Agenda for Sustainable Development, Germany pledged in 1972 to raise its Official Development Assistance (ODA) ratio to 0.70% of its GDP by 2030. This ratio has increased from 0.27% in 2002 to 0.82% in 2023, surpassing the target of 0.7% for the fourth

¹²¹https://www.edelman.de/sites/g/files/aatuss401/files/2022-02/Press%20Release_Edelman%20Trust%20Barometer%202022_German%20data_k_0.pdf

¹²²<https://www.bpb.de/themen/wirtschaft/unter-druck/558524/staatshaushalt-und-schuldenbremse/>

¹²³<https://www.degruyterbrill.com/document/doi/10.1111/geer.12149/html#:~:text=Employing%20data%20from%20a%20representative%20survey%20conducted%20in.and%20public%20spending%20in%20six%20different%20policy%20areas.>

¹²⁴<https://europa.eu/eurobarometer/surveys/browse/all/series/4961>

¹²⁵<https://www.bpb.de/themen/wirtschaft/unter-druck/558524/staatshaushalt-und-schuldenbremse/>

¹²⁶<https://europa.eu/eurobarometer/surveys/detail/2652>

¹²⁷https://www.iwkoeln.de/fileadmin/user_upload/Studien/policy_papers/PDF/2023/IW-Policy-Paper_2023-A-New-Era-for-the-Defense-Industry.pdf

¹²⁸<https://www.tagesschau.de/inland/deutschlandtrend/deutschlandtrend-3468.html>

consecutive year.¹²⁹ However, when considering the funds allocated for refugees within Germany, the rate adjusts to 0.66%.¹³⁰

Public support for the broader principles of aid has consistently been high in Germany since the early 2000s. Eurobarometer surveys over the years show a slight increase in the percentage of Germans who believe it's important to support people in developing countries from 70% in 1998, to 80% in 2003, stabilizing around 90% from 2005 through 2022.¹³¹ While a significant number of respondents still view addressing poverty in developing countries as a main priority for Germany, there has been a notable decline in this sentiment, with the percentage dropping from 71% in 2022¹³² to 58% in 2023.¹³³

A 2022 survey highlighted peace and security (46%), education (40%), agriculture and food security (34%), water and sanitation (32%), human rights (31%), and health (27%) as the most important challenges for developing countries according to the German public.¹³⁴ Additionally, a 2023 survey highlighted that 34% of respondents think that climate change is an area where the EU and partner countries should cooperate most.¹³⁵

Major obstacles to the support for aid include perceived corruption, poor governance, and ongoing conflicts in the recipient countries, as well as a broader perception of aid ineffectiveness.¹³⁶¹³⁷ Furthermore, respondents are more likely to reject countries with a predominantly Muslim population as partner countries.¹³⁸

Recent political discussions in Germany have heightened tensions around aid, also affecting budget negotiations between the CDU/CSU and the SPD as coalition partners in the next government. The CDU/CSU faction has argued for reductions in aid and a focus on domestic issues, a stance that has sparked considerable debate and prompted appeals from politicians and NGOs, urging negotiators to reconsider cuts to aid to avoid compromising Germany's international partnerships and related values and interests.¹³⁹¹⁴⁰ The debates coincide with a drop off in public support for aid across the whole party spectrum: In 2024, 47% of the public said they were in favour of maintaining or increasing aid expenditure - 21 percentage points down from 2022; 43% said they were in favour of reducing aid expenditure, up by 24 percentage points since 2022.¹⁴¹

Several factors may help to explain the recent decline in public support for aid:

¹²⁹https://www.destatis.de/DE/Themen/Staat/Oeffentliche-Finanzen/Entwicklungszusammenarbeit/_inhalt.html#234486

¹³⁰ Ibid.

¹³¹<https://europa.eu/eurobarometer/surveys/browse/all/series/7931>

¹³² Ibid.

¹³³<https://europa.eu/eurobarometer/surveys/detail/2952>

¹³⁴ Ibid.

¹³⁵<https://europa.eu/eurobarometer/surveys/detail/2952>

¹³⁶<https://europa.eu/eurobarometer/surveys/detail/1031>

¹³⁷https://www.deval.org/fileadmin/Redaktion/PDF/05-Publikationen/Berichte/2021_Meinungsmonitor/DEval_Report_2021_Opinion_Monitor_development_policy.pdf#:~:text=development%20cooperation,29

¹³⁸<https://www.deval.org/en/evaluations/our-evaluations/the-deval-opinion-monitor-for-development-policy/the-deval-opinion-monitor-2024>

¹³⁹<https://www.tagesschau.de/inland/innenpolitik/appell-entwicklungshilfe-union-100.html>

¹⁴⁰<https://www.rnd.de/politik/regierungsbildung-live-union-fordert-von-spd-absage-an-jegliche-steuererhoehungen-ATUFTG5YRIHEBGGSHEXTQJZCZU.html>

¹⁴¹

<https://www.deval.org/en/evaluations/our-evaluations/the-deval-opinion-monitor-for-development-policy/the-deval-opinion-monitor-2024>

- **First, external shocks such as the Russian invasion of Ukraine, the subsequent gas crisis, rising inflation, and increased defence spending have shifted public attention toward domestic priorities.** When examining policy attitudes, studies can distinguish between fundamental support – a complete, unconditional support of a policy – and contingent support, which depends on specific policy features and political contexts.¹⁴² Evidence suggests that support for aid in Germany falls into the latter category. A 2024 survey illustrates that only 19% of the German public are stable supporters of aid, while the majority (63%) are classified as moderate supporters of aid, with more unstable or ambivalent attitudes. Aid was also perceived as one of the policy areas where cuts are most acceptable: 21% would accept cutting aid, a much higher share than for domestic areas like digitalization (9%), transport (3%), pensions (3%), internal security (3%), education (2%), or defence (10%).¹⁴³ Arguments that pit aid against domestic needs are particularly powerful in reducing support, suggesting that in times of financial strain, aid may be viewed as more expendable.¹⁴⁴
- **Second, the public favour a multilateral approach to aid as opposed to a bilateral approach.** Survey data show that Germans tend to see international organisations and institutions, rather than their national government, as the primary actors in providing aid. For example, Eurobarometer surveys consistently find that a larger share of respondents believes aid should be a main priority for the EU than for Germany (e.g., 73% vs. 58% in the 2023 Eurobarometer).¹⁴⁵¹⁴⁶ Similarly, in a 2024 poll, the European Union (49%), multilateral organisations (48%), and governments of partner countries (41%) were seen as more responsible for implementing aid than the German Federal Government (35%).¹⁴⁷
- **Third, perceptions of corruption and ineffectiveness in recipient countries remain major obstacles to sustained support for aid.**¹⁴⁸ Negative views of aid effectiveness have been rising: the share of Germans who perceive aid as (absolutely) ineffective increased from 19% in 2022 to 32% in 2024, while the share who view it as (very) effective fell from 27% to 18% over the same period.¹⁴⁹

There has also been some message testing aiming to identify strategies that can effectively boost public support for aid in Germany. Appeals emphasizing the benefits of aid in addressing the root causes of migration – and highlighting that investing abroad is less costly than managing migration domestically – have been particularly persuasive.¹⁵⁰ Similarly, arguments framed around global solidarity and tackling shared global challenges, such as climate change,

¹⁴²<https://eipr.onlinelibrary.wiley.com/doi/10.1111/1475-6765.12210>

¹⁴³<https://www.deval.org/en/evaluations/our-evaluations/the-deval-opinion-monitor-for-development-policy/the-deval-opinion-monitor-2024>

¹⁴⁴<https://developmentengagementlab.org/publication/for-and-against-how-do-the-german-public-respond-to-messages-around-development-cooperation/>

¹⁴⁵<https://europa.eu/eurobarometer/surveys/browse/all/series/7931>

¹⁴⁶<https://europa.eu/eurobarometer/surveys/detail/2952>

¹⁴⁷<https://www.deval.org/en/evaluations/our-evaluations/the-deval-opinion-monitor-for-development-policy/the-deval-opinion-monitor-2024>

¹⁴⁸https://www.deval.org/fileadmin/Redaktion/PDF/05-Publikationen/Berichte/2021_Meinungsmonitor/DEval_Report_2021_Opinion_Monitor_development_policy.pdf#:~:text=development%20cooperation,29

¹⁴⁹<https://www.deval.org/en/evaluations/our-evaluations/the-deval-opinion-monitor-for-development-policy/the-deval-opinion-monitor-2024>

¹⁵⁰ Ibid.

have proven effective in strengthening support for aid.¹⁵¹¹⁵² Further, recent research suggests that focusing on the ‘win-wins’ by emphasising the positive impact of aid spending both internationally and domestically can be effective for building support for aid.¹⁵³

Messengers

Germany's trust in public institutions and media is slightly lower than the OECD average,¹⁵⁴ with the German public placing higher trust in their immediate personal surroundings, the police and the judicial system than in the news media and political institutions. According to the 2023 Edelman Trust Barometer,¹⁵⁵ 71% of Germans trust their coworkers, 63% trust their neighbors, and 58% trust the broader local community. Very high trust levels are also placed in scientists (71%). In contrast, trust levels are lower for journalists (47%), CEOs (39%), and government leaders (37%).

According to the same survey, teachers and NGOs were predominantly seen as unifying forces by the German public, with 59% and 37% respectively viewing them as such, compared to only 19% and 33% who viewed them as divisive.¹⁵⁶ In contrast, journalists, business leaders, and government leaders were more often seen as divisive, with only 35%, 32%, and 32% viewing them as unifying. Additionally, governments and the media were more often perceived as sources of false or misleading information, with 41% and 40% of respondents indicating this, compared to 33% for businesses and 30% for NGOs.

The percentage of people that trust the news ‘most of the time’ has declined from 60% in 2015 to 43% in 2023, despite a temporary increase during the COVID-19 pandemic.¹⁵⁷ From 2023 to 2024, trust levels have stabilised. Among the media outlets, regional or local newspapers and public broadcasting services remain the most trusted brands.

Mediums

In Germany, the news market features a mix of national and regional public broadcasters and influential commercial entities such as Axel Springer and Bertelsmann. Much of the media is operating from a regional or local perspective, and traditional news outlets have recently faced challenges with the digital transformation. When asked about sources of news, the percentage of Germans using print media for news consumption plummeted from 63% to 20% from 2013 to 2024, and those consuming news via TV decreased from 82% to 60%, while reliance on social media as a news source rose from 18% to 34%.¹⁵⁸ Despite these changes, when summing across traditional media sources – television, radio, and print – they remain the most frequently cited news sources in Germany.¹⁵⁹ The national public broadcasters ARD and ZDF rank among the

¹⁵¹ Ibid.

¹⁵² https://www.oecd.org/en/publications/2021/06/oecd-development-co-operation-peer-reviews-germany-2021_8f8fc573.html

¹⁵³ Black Sands Communications, ‘Money Talks’ (2023)

¹⁵⁴ https://www.oecd.org/en/publications/oecd-survey-on-drivers-of-trust-in-public-institutions-2024-results-country-note_s_a8004759-en/germany_9f727e4a-en.html

¹⁵⁵ <https://www.edelman.de/sites/g/files/aatuss401/files/2023-01/2023%20Edelman%20Trust%20Barometer%20Report%20-%20GER.pdf>

¹⁵⁶ Ibid.

¹⁵⁷ https://reutersinstitute.politics.ox.ac.uk/sites/default/files/2024-06/RISJ_DNR_2024_Digital_v10%20lr.pdf

¹⁵⁸ https://reutersinstitute.politics.ox.ac.uk/sites/default/files/2024-06/RISJ_DNR_2024_Digital_v10%20lr.pdf

¹⁵⁹ <https://europa.eu/eurobarometer/surveys/detail/3215>

most popular and trusted news sources, with trust levels at 64% and 62%, respectively.¹⁶⁰ In contrast, the national tabloid BILD, despite its broad reach, is distrusted by 57% of respondents according to a 2024 survey.¹⁶¹

Overall, interest in the news among Germans has markedly decreased over the past decade, dropping from 74% in 2015 to 55% in 2024. Additionally, 44% of Germans report selectively avoiding the news at least occasionally, a sentiment echoed in other European countries like France, the UK, and Spain. Recent findings suggest that this sentiment could be due to a feeling of news fatigue. Specifically, 41% of Germans feel overwhelmed by the volume of news available, which represents a significant 15 percentage point increase since 2019.¹⁶²

Among the various social, video, and messenger platforms, YouTube ranks as the most favored source for news in Germany, used by 21% of the population, followed by Facebook at 16%, WhatsApp at 15%, and Instagram at 11%. TikTok and X (formerly Twitter) are less frequently used as news sources, each by only 5% of the population. Only 13% of Germans pay for online news, and 68% are generally unwilling to do so, one of the highest rates seen in international comparisons. 42% of the German public worry about what is real and what is fake online, and 76% see the presence of misleading or fake news as a significant threat to democracy.¹⁶³ Moreover, Germans express low confidence in their ability to discern between trustworthy and untrustworthy news on digital platforms, with 41% finding it challenging to identify reliable news on TikTok and 38% on X.¹⁶⁴



¹⁶⁰https://reutersinstitute.politics.ox.ac.uk/sites/default/files/2024-06/RIS|_DNR_2024_Digital_v10%20lr.pdf

¹⁶¹ Ibid.

¹⁶² Ibid.

¹⁶³<https://europa.eu/eurobarometer/surveys/detail/3215>

¹⁶⁴https://reutersinstitute.politics.ox.ac.uk/sites/default/files/2024-06/RIS|_DNR_2024_Digital_v10%20lr.pdf



COUNTRY SPECIFIC FINDINGS

FRANCE

- In-principle support for aid (including aid spending) has remained high in France, though the sector does not tend to be a top issue for the public.
- The research suggests relatively high support for multilateralism, particularly through the EU, but the increase in right-wing populism may threaten this approach going forward.
- Public trust in the government and media is relatively low in France, with both institutions being increasingly seen as sources of misinformation.
- There is a significant volume of broader public opinion research in France, but few high quality resources exploring attitudes towards aid and multilateralism more specifically beyond the Development Engagement Lab.

The last 25 years in France have been shaped by modest population growth, an ageing society, a generous but strained welfare state; however the most transformative change has been political with the collapse of the historic center-left/center-right duopoly, replaced by a volatile three-bloc system.

Against this backdrop, our review of the public opinion research in the France found:

- **International aid is a low-priority issue for French voters;** the cost of living now outranks all other issues by a wide margin. By 2023–2024, the share of French people citing the cost of living (prices, wages, taxes) as a top worry hit record levels.
- **But the support among the French public for helping developing countries has consistently remained high,** even during major economic shocks like the financial crisis and the pandemic.
- **Despite support for international aid, the French public harbors skepticism about aid effectiveness.** Many believe that aid money is not being used optimally, reflecting a broader skepticism of the ability of the national government to enact global change.
- **The Development Engagement Lab offers good insights into French attitudes to aid over time,** but beyond this source there is limited high-quality research exploring public opinion towards aid.
- **Public trust in France’s national government has teetered on the verge of crisis.** Only 28% of French respondents express trust in the national government. But the European Union, viewed by some as a more technocratic and less politically tainted actor, often polls slightly better than the French government.
- **The French public generally backs tackling aid issues via multilateral institutions like the European Commission rather than a bilateral approach.** However, rising support for the populist right — who tend to be more skeptical of multilateralism — poses a challenge to this approach going forward.

POLITICAL ECONOMY LANDSCAPE

Summary

From 2000-2025, France has experienced an ageing population, rising levels of immigration, and relatively low income inequality. The country has experienced significant changes to its political landscape, from relatively stable centrist governing coalitions in the early 2000s to a significantly more polarised political environment in recent years.

Demographics/migration

Between 2000-2025, France experienced an ageing yet growing population, stable living standards with persistent inequalities, and a volatile political landscape transitioning into an era of multiparty competition. The population rose from 60 million in 2000 to 68.4 million by 2024, bolstered by sustained immigration and historically high fertility — though the birth rate has fallen sharply in recent years, reaching a low of 1.68 in 2023.¹⁶⁵ By the 2020s, net migration had become the main driver of population growth, contributing nearly 80% of annual growth in 2020–21. By 2021, immigrants made up 10.3% of the population — up from 7.4% in 2000¹⁶⁶.

France remains a wealthy country (7th-largest economy) with a GDP per capita of ~\$44,000 and consistently high human development. Its social model has contained income inequality (Gini ~0.29–0.32) and held poverty near 14%, thanks to strong redistributive policies.¹⁶⁷ However, wealth inequality has worsened as housing costs have surged, and economic pressures have weighed increasingly on the middle class.

Wealth/inequality

France's economy grew modestly over the past 25 years, with GDP per capita rising from ~\$23,000 in 2000 to ~\$44,000 in 2023, despite shocks like the global financial crisis and the COVID-19 pandemic. However, unemployment, especially youth unemployment, remained persistent, hovering around 8–10% for much of this period. A progressive tax system, high minimum wage, and robust transfers kept income inequality low, but wealth became more concentrated and by 2021, the top 10% owned 47% of household wealth.¹⁶⁸

Regional divides remained entrenched — Paris generated a third of national GDP and had per capita output 1.6 times the national average, while former industrial regions in the north and northeast lagged behind. Successive governments tried to close these gaps through decentralization and investment, but the urban-rural divide persisted. Pension reform —

¹⁶⁵ <https://www.insee.fr/en/statistiques/7757334>

¹⁶⁶ <https://www.insee.fr/en/statistiques/7342924?sommaire=7344042>

¹⁶⁷ https://www.lemonde.fr/en/france/article/2023/06/09/france-has-a-persistent-social-divide-according-to-inequality-monitor_6030685_7.html

¹⁶⁸ https://www.lemonde.fr/en/france/article/2023/06/09/france-has-a-persistent-social-divide-according-to-inequality-monitor_6030685_7.html

notably the 2023 law raising retirement age to 64 — became a political flashpoint, triggering widespread strikes and protests.

Trends in politics

Between 2000 and 2025, France moved from a stable center-left/center-right system to a fractured three-bloc contest. Macron's centrist liberalism, Le Pen's far-right nationalism, and Mélenchon's eco-socialist left now dominate a more polarised and pluralistic landscape.

The beginnings of the rise of right-wing nationalism in French politics can be traced back to the 2002 presidential election, when Jean-Marie Le Pen (the far right National Front leader) shocked political commentators by making it to the run-off election against Chirac. Though Chirac won in a landslide (82%), the moment signaled growing discontent amongst the French public with the status quo. In the 2007 election, Nicolas Sarkozy of the center-right UMP party won with 53% of the vote and a reformist agenda. However his presidency became marked by high unemployment, economic stagnation and rising tax burdens (at least in part due to global forces from the 2008 financial crisis), and public dissatisfaction grew dramatically, with 70% of French people taking a negative view of his record at the time.¹⁶⁹

The 2017 elections saw the rise of Macron, who ran as a centrist reformer with pro-EU and pro-market policies. Despite starting with a 62% approval rating in the early days of his presidency,¹⁷⁰ only 29% of the public reported feeling satisfied with Macron's presidency one year in.¹⁷¹ This dissatisfaction, stemming from rising living costs, economic inequality and perceptions of elite detachment, led to the *Gilets Jaunes* protests, which garnered significant attention and exposed growing dissatisfaction with the status quo.

The traditional Socialist Party and center-right Republicans lost ground in recent elections and the far right rose from the political fringe to the mainstream: Marine Le Pen reached the presidential runoff in both 2017 and 2022, taking 41.5% of the vote in the latter. Her rebranded National Rally (RN) also surged in the National Assembly, going from 2 seats in 2017 to 89 in 2022. On the left, Jean-Luc Mélenchon's La France Insoumise (LFI) mobilised voters frustrated with austerity and centrism. He placed third in 2022 with 21.9% and successfully brought together left-wing parties under the NUPES alliance, which won 31% in the legislative first round. Macron lost his parliamentary majority in 2022, leading to a hung parliament with ensuing instability. France entered a new, unsettled phase of multi-bloc competition.

¹⁶⁹ <https://www.theguardian.com/world/2012/feb/10/nicolas-sarkozy-popular-president-toxic>

¹⁷⁰

<https://www.tf1info.fr/elections/sondage-cote-de-popularite-emmanuel-macron-edouard-philippe-aupres-des-francais-d-eux-semaines-apres-son-election-2052720.html>

¹⁷¹ <https://www.newsweek.com/france-macrons-popularity-hits-record-low-1135709>

PUBLIC OPINION RESEARCH

Summary

In the early 2000s, economic issues and unemployment (hovering around 9–10%) dominated public opinion. Crime and security also loomed large, especially after urban unrest in the mid-2000s. The 2008 global financial crisis reignited worries about jobs, purchasing power, and economic resilience.

By the mid-2010s, terrorism and national security became top concerns following multiple terrorist attacks in 2015–2016. Immigration also surged as a worry during the European migrant crisis, rivaling unemployment in public surveys (for example Eurobarometer data at the time indicated sharp rises in those naming immigration as France’s top issue). As the decade closed, climate and environmental concerns rose sharply, with the environment ranking as the second-highest public concern by 2019.

The COVID-19 pandemic further reshaped priorities, placing health at the forefront and by 2022, over 80% viewed it as a top concern. Worry about unemployment declined markedly compared to earlier years – in 2014, 90% of French said unemployment was a major concern, by 2022 only about two-thirds said so.¹⁷² However, the cost of living rose to dominate public concern post-2022, driven by inflation and the Ukraine war. Purchasing power is now consistently cited as the top national worry. A IPSO survey series (“Fractures Françaises”) found that anxiety over purchasing power is by far the French public’s primary preoccupation¹⁷³.

Messages

Top Issues Driving the Debate

In 2004, the country’s main issues according to the French public were unemployment (58%), crime (29%), the economic situation (26%) and inflation (24%). In 2010, the top concerns remained broadly similar, with unemployment (57%), economic situation (31%), and pensions (25%) topping the list. In 2024, many of the same issues remained at the forefront for the French public with the top issues including rising prices, (32%), government debt (22%) and crime (19%).¹⁷⁴

Other surveys have found similar recent results, with the Development Engagement Lab reporting the most important issues in 2025 as economic crises, job security and wages (cited by 58% of the French public), followed by war, conflict and terrorism (46%), then climate change

¹⁷² drees.solidarites-sante.gouv.fr

¹⁷³ ipsos.com

¹⁷⁴ Eurobarometer Spring 2004; Spring 2010; Autumn 2024

and the environment (43%). Only 27% of the public reported ‘access to basic needs in developing countries’ as one of their top three issues when asked.¹⁷⁵

Trust

Public trust in France’s national government falls short of the OECD average, with just 34% reporting high or moderately high trust in the government in 2023.¹⁷⁶ Further, a 2024 survey found that 74% of the French public report having no trust in politics.¹⁷⁷ Political parties, media, and social networks languish near the bottom of the trust rankings, with some research suggesting below 20% of the public trust these sources.¹⁷⁸ However, local authorities and institutions tend to fare better - 60% of the public report trusting mayors and around half trust local governments.¹⁷⁹ Further, public services such as the police, military, hospitals, and schools continue to command relatively strong confidence, often exceeding 60–70%.¹⁸⁰

Government Spending & Fiscal Policies

Polling data suggests that French voters value social protection but are resentful of perceived excessive taxation. In late 2023, 75% of French respondents said the tax burden was excessive, though only a minority would support cutting key services to lighten it.¹⁸¹ In general, most want spending to be more efficient, not lower. In 2024, 74% believed spending could be reduced without harming services.¹⁸² Efforts to rein in public debt, which 82% now view as urgent, are supported in principle but are often resisted in practice when they threaten spending.¹⁸³

Research by Oxfam has found strong support for progressive taxes, with 78% backing higher taxes on wealthy individuals, 76% reporting wanting the wealth tax restored, and 80% supporting clamping down on tax evasion.¹⁸⁴¹⁸⁵ However, broader tax hikes are unpopular, and green taxes that hit rural households remain controversial, as shown by the 2018 fuel tax protests and proposals to expand income tax to lower earners are unpopular (55% opposed in 2024).¹⁸⁶

Aid & Multilateralism

¹⁷⁵ <https://developmentengagementlab.org/wp-content/uploads/2025/03/FR-Dashboard-January-2025.pdf>

¹⁷⁶ https://www.oecd.org/en/publications/2024/06/oecd-survey-on-drivers-of-trust-in-public-institutions-2024-results-country-notes_33192204/france_aab7c213.html

¹⁷⁷ <https://www.sciencespo.fr/cevipof/en/news/4-points-of-view-on-the-cevipof-s-political-trust-barometer>

¹⁷⁸ <https://www.institutmontaigne.org/expressions/sonder-lesprit-du-temps-le-barometre-de-la-confiance-politique>

¹⁷⁹ <https://www.cso.ie/en/releasesandpublications/FP/FP-TRUS/TrustSurvey2021InternationalComparisons/KeyFindings/>

¹⁸⁰ <https://www.institutmontaigne.org/expressions/sonder-lesprit-du-temps-le-barometre-de-la-confiance-politique>

¹⁸¹ <https://www.europe1.fr/economie/les-francais-jugent-quils-paient-trop-dimpots-mais-ne-plaident-pas-pour-les-baisse-r-4227910>

¹⁸² <https://elabe.fr/dette-dependences-publiques/>

¹⁸³ <https://www.europe1.fr/economie/les-francais-jugent-quils-paient-trop-dimpots-mais-ne-plaident-pas-pour-les-baisse-r-4227910>

¹⁸⁴ <https://www.oxfamfrance.org/inegalites-et-justice-fiscale/les-francais-es-favorables-a-une-taxation-plus-importante-des-plus-riches/>

¹⁸⁵ Ibid.

¹⁸⁶ <https://www.europe1.fr/economie/les-francais-jugent-quils-paient-trop-dimpots-mais-ne-plaident-pas-pour-les-baisse-r-4227910>

In-principle support among the French public for helping lower income countries has consistently remained high over the past 25 years, and despite economic downturns and crises, a majority of French respondents have continuously favored sustaining or raising the aid budget. The 2004 Eurobarometer Survey provides an initial benchmark: 88% of French respondents viewed aid to developing countries in Africa, Latin America, and Asia as either very or fairly important. At the time, only 12% felt that the French aid budget was too large, whereas 35% thought it was too small and 26% believed it was about right.¹⁸⁷ In 2025, the Development Engagement Lab found that 59% of the French public support keeping or increasing the aid budget.¹⁸⁸

Even during economic downturns, support for aid remained strong. For instance, amid the 2008 global financial crisis, 69% of French respondents maintained that France should continue providing aid to developing countries despite budgetary constraints.¹⁸⁹ In the same July 2008 poll, when provided context on France's aid, defence, and education spending, 79% supported either maintaining or increasing the aid budget. Later, in October 2008, despite intensified coverage of the financial crisis, 76% of French people believed that Europe should either maintain or increase its aid budget.¹⁹⁰

Support for aid spending also persisted post-Eurozone crisis, with a majority of the public in 2014 favoring maintaining (68%) or increasing (16%) the share of the state budget dedicated to aid spending.¹⁹¹ Similarly, the 2015 special Eurobarometer survey on development, cooperation and aid showed that 86% of French people viewed aid as important and 70% believed aid should be among the EU's main priorities (though only 47% felt the same about their national government, suggesting the French may support a more multilateral rather than bilateral approach to aid). Notably, French respondents were more likely than the EU average to favor increasing aid budgets (76% vs. 68%), although they were less convinced of aid's effectiveness (52% vs. 67%).¹⁹²

Despite relatively high support for aid spending, a significant portion of the French public harbors skepticism about aid effectiveness. Polls by AFD/IFOP have long highlighted this mixed view: for example, about 55% of French in 2011 felt that France's aid to developing countries was effective overall, while 41% considered it not very effective.¹⁹³ In 2006, 42% judged French aid "somewhat effective" vs. 41% "not very effective," revealing a near even split in confidence. This persistent doubt explains why oversight is a top public concern.¹⁹⁴ In one survey, nearly half of French respondents (45%) said the highest priority for France's aid policy should be to ensure that aid funds are well spent and reach their targets.¹⁹⁵ The French public tend to believe that multilateral channels are more effective than their own government, with 40% believing the

¹⁸⁷Special Eurobarometer (2005) Attitudes towards Development Aid
<https://europa.eu/eurobarometer/surveys/detail/410>

¹⁸⁸<https://developmentengagementlab.org/publication/france-dashboard-january-2025/>

¹⁸⁹Les Français et l'aide au développement - Edition 2008 -. IFOP pour l'Agence Française de Développement. Available at: www.afd.fr/jahia/webdav/site/afd/users/administrateur/public/communiqués/AFD-Ifop-confdepresse-231008.pdf

¹⁹⁰Les Français et la place de l'Europe dans le monde. L'institut CSA pour Coordination Sud et Paroles D'Européens. Available at: www.coordinationsud.org/IMG/pdf/Sondage_Les_Francais_et_la_place_de_l_Europe_dans_le_monde-3.pdf

¹⁹¹https://www.lejecos.com/68-des-Francais-favorables-a-l-aide-au-developpement-meme-en-periode-de-crise_a725.html

¹⁹²<https://europa.eu/eurobarometer/surveys/detail/2069>

¹⁹³<https://www.diplomatie.gouv.fr/IMG/pdf/IFOP-AFD.pdf#:~:text=match%20at%20L196%20fran%C3%A7aise%20assez,Sur%20cet>

¹⁹⁴<https://www.diplomatie.gouv.fr/IMG/pdf/IFOP-AFD.pdf>

¹⁹⁵ Ibid.

French government can make a difference to reducing poverty in lower income countries, compared to 57% for the UN and other international organisations.¹⁹⁶

In general, the French public supports addressing aid challenges through multilateral institutions rather than bilaterally. In a 2019 poll by Institut Montaigne and Körber-Stiftung, 92% of French respondents agreed that issues like armed conflicts, terrorism, climate change, cyber threats, and migration should be handled by international institutions (EU, UN) or coalitions of countries, rather than by France acting alone.¹⁹⁷ Moreover, the French are willing to accept compromises of national interests in the name of cooperation.¹⁹⁸ In the same 2019 survey, 78% agreed that it's appropriate to coordinate with other countries even if France may have to sacrifice some of its own interests as a result. In other words, nearly four-in-five French who support international cooperation are prepared for trade-offs, underscoring the value they place on collective action. The sentiment expressed in this polling is mirrored in Eurobarometer surveys - which express greater support for aid spending through the European Commission than through national governments.¹⁹⁹

Polls in the mid-2010s found that the French support basic humanitarian and social sectors as the areas their aid budgets should prioritise. A significant majority—72%—identified "ensuring access to drinking water" as a "very important" action for aid programs, underscoring water and sanitation as the highest priority among the French public.²⁰⁰ The French were also more likely than the EU average to consider peace and security, health, education and water and sanitation as the most pressing challenges for the future of lower income countries.²⁰¹

Several surveys have found that younger and lower-income French citizens are more supportive of aid spending, but there is no meaningful difference in support across gender.²⁰² Further, political orientation remains one of the strongest predictors of attitudes toward aid and multilateralism.²⁰³ French citizens on the centre and left—supporters of parties such as La République En Marche, the Socialists, or the Greens—tend to view aid and international cooperation more positively. For example, 46% of Macron's party supporters said France's UN membership was beneficial, well above the national average.²⁰⁴ In contrast, the nationalist right is far more sceptical. A 2025 survey found that 82% of respondents who voted for Melenchon supported aid, compared to just 42% of those who voted for Le Pen.²⁰⁵

¹⁹⁶ <https://developmentengagementlab.org/wp-content/uploads/2025/03/FR-Dashboard-January-2025.pdf>

¹⁹⁷ <https://www.institutmontaigne.org/en/expressions/france-germany-and-multilateralism>

¹⁹⁸ Ibid.

¹⁹⁹ <https://europa.eu/eurobarometer/surveys/detail/410>

²⁰⁰ https://www.lejecos.com/68-des-Francais-favorables-a-l-aide-au-developpement-meme-en-periode-de-crise_a725.html

²⁰¹ <https://europa.eu/eurobarometer/surveys/detail/2069>

²⁰² https://www.deval.org/fileadmin/Redaktion/PDF/05-Publikationen/Berichte/2018_Meinungsmonitor_Entwicklungspolitik/DEval_Opinion_Monitor_2018_EN.pdf ;

<https://developmentengagementlab.org/wp-content/uploads/2025/03/FR-Dashboard-January-2025.pdf>

²⁰³ <https://developmentengagementlab.org/wp-content/uploads/2025/03/FR-Dashboard-January-2025.pdf>

²⁰⁴ <https://www.institutmontaigne.org/en/expressions/france-germany-and-multilateralism>

²⁰⁵ <https://developmentengagementlab.org/wp-content/uploads/2025/03/FR-Dashboard-January-2025.pdf>

Messengers

According to the Edelman Trust Barometer, the French public tends to distrust both the government and media and have a neutral view of NGOs and businesses.²⁰⁶ More people believe that NGOs are sources of trustworthy information rather than sources of false or misleading information (the opposite is true for the government and media).²⁰⁷

As is true for most countries, the French public see their local communities as the most trusted sources of information. The most trusted individuals are reported as coworkers (69% trust), scientists (68%), and neighbors (58%), whilst the least trusted individuals are CEOs (31% trust), journalists (34%) and government leaders (42%).²⁰⁸

Mediums

France has high media engagement, with 76% of the public reporting that they follow the news closely.²⁰⁹ In the early 2000s, television and radio dominated, with high levels of public confidence in traditional news media. Over time, however, trust in “the media” as a general category declined, particularly during politically sensitive moments like the ‘Gilets Jaunes’ protests and the COVID-19 pandemic. Television, once the most credible medium, saw trust collapse to just 38% in 2019 as Gilets Jaunes protestors accused channels of bias.²¹⁰ According to the Edelman Trust Barometer, only 40% of people trust the media²¹¹ and the public tend to view the media as a source of false or misleading information (45% see it as a source of false or misleading information compared to 35% who see it as a reliable source of trustworthy information).²¹²

In 2021–2022, trust in TV stabilised in the low-to-mid 40s percent range according to various barometers.²¹³ Radio consistently retained its status as the most trusted medium and has been often perceived as balanced and less sensationalist. Regional newspapers have remained relatively well-regarded (63% trust in 2025), but national print has become polarising.²¹⁴ Overall press trust hit a nadir in the Gilets Jaunes period: in early 2019, confidence in the written press fell to 44% (down 8 points).²¹⁵

²⁰⁶

https://www.edelman.com/sites/g/files/aatuss191/files/2024-01/2024%20Edelman%20Trust%20Barometer%20Global%20Report_0.pdf

²⁰⁷

https://www.edelman.fr/sites/g/files/aatuss341/files/2023-05/2023%20Edelman%20Trust%20Barometer_France%20Report.pdf

²⁰⁸ Ibid.

²⁰⁹ <https://www.veriangroup.com/fr/news-and-insights/barom%C3%A8tre-de-la-confiance-des-fran%C3%A7ais-dans-les-media>

²¹⁰ https://www.lexpress.fr/economie/medias/la-confiance-dans-les-medias-au-plus-bas-depuis-32-ans_2058929.html

²¹¹

https://www.edelman.com/sites/g/files/aatuss191/files/2024-01/2024%20Edelman%20Trust%20Barometer%20Global%20Report_0.pdf

²¹²

https://www.edelman.fr/sites/g/files/aatuss341/files/2023-05/2023%20Edelman%20Trust%20Barometer_France%20Report.pdf

²¹³ <https://www.veriangroup.com/fr/news-and-insights/barom%C3%A8tre-de-la-confiance-des-fran%C3%A7ais-dans-les-media>

²¹⁴ <https://phrases.media/la-cote-de-confiance-des-francais-envers-les-medias-remonte/>

²¹⁵ https://www.lexpress.fr/economie/medias/la-confiance-dans-les-medias-au-plus-bas-depuis-32-ans_2058929.html

While a growing number of French, especially under 30, turn to social media for news (53% of 15–30-year-olds cite it as their main source) only a minority actually trust what they find there.²¹⁶ Just 29% of the public trust information on social media, and platforms like TikTok (12% trust), Twitter/X (15%), and Facebook (23%) are viewed as unreliable for news.²¹⁷

²¹⁶ <https://www.vie-publique.fr/en-bref/296376-actualites-comment-les-jeunes-de-15-30-ans-sinforment-ils>

²¹⁷ <https://phrases.media/la-cote-de-confiance-des-francais-envers-les-medias-remonte/>



COUNTRY SPECIFIC FINDINGS

ITALY

- Trust in government and institutions is low in Italy.
- We see some support for multilateralism through the EU, however trust has declined at the EU level seemingly as a result of economic and immigration pressures in the 2010s.
- We find limited high quality public opinion research on aid which meets the standards we lay out as the “gold standard”.
- Despite avoiding aid cuts in recent years, low trust in institutions and the developing political challenge on immigration and nationalism may create an opportunity for cuts in the future.

Italy has faced major challenges in the past 25 years, including an ageing population, slow economic growth, and high unemployment. These have fueled shifting views on immigration and labour participation, especially among women and youth. Meanwhile, Russia's invasion of Ukraine has heightened economic uncertainty and nationalism, with Meloni's government focusing on prioritising socio-economic benefits for Italians. As a result, trust in the EU and support for international goals tend to hinge on alignment with national interests.

The key takeaways from this review include:

1. **Over the past two decades, the economy and unemployment have been key priorities, often influencing attitudes toward immigration:** Despite relative economic prosperity in the early 2000s, Italians worried about EU enlargement and job market competition. Economic and employment concerns persist, peaking during crises like Russia's invasion of Ukraine, when 20% cited inflation as a top issue.²¹⁸
2. **Trust in the national government and politicians has remained relatively low,** particularly amongst the younger generations. The EU enjoys slightly higher levels of trust, although this has fluctuated over time.
3. **Italians are broadly supportive of aid in principle, but have limited awareness of their government or the EU's aid activities.** While over 70% believe the EU should continue aid spending,²¹⁹ 36% of the public were not aware that the EU funds humanitarian aid activities in 2023.²²⁰
4. **Italian governments have increasingly shifted ODA funds to bilateral deals for in-donor refugee costs,** neglecting other development priorities. Since 2012, the share of bilateral aid has risen sharply, reducing capacity for coordination on multilateral projects and prioritising assistance for national concerns, such as managing refugee flows.

²¹⁸ European Commission. (2023, December 21). *Standard Eurobarometer 100 – National Report: Italy*. Representation in Italy. https://italy.representation.ec.europa.eu/notizie-ed-eventi/notizie/eurobarometro-standard-100-rapporto-nazionale-italia-2023-12-21_it

²¹⁹ Focus 2030. (2024, April 24). Survey: Citizen opinions in France, Italy and Germany on the role of the European Union in international development ahead of the elections.

<https://focus2030.org/Survey-citizen-opinions-in-France-Italy-and-Germany-on-the-role-of-the-European>

²²⁰ European Commission. (2024, January). EU Humanitarian Aid – Special Eurobarometer 542: Italy Factsheet. Directorate-General for European Civil Protection and Humanitarian Aid Operations (DG ECHO). <https://europa.eu/eurobarometer/surveys/detail/2976>

POLITICAL ECONOMY LANDSCAPE

Summary

Italy faces significant demographic and economic challenges, including the oldest population in Europe, a declining birth rate, and a shrinking working-age population, which could impact economic productivity and social welfare systems. These trends, combined with sluggish economic growth, high unemployment, and regional inequalities, place additional strain on the country. While Italy has addressed these issues through immigration and labour market reforms, including pension changes and a rising foreign-born population, healthcare investment remains low, and rising life expectancy adds pressure to public health systems.

Italy's political landscape has been shaped by these considerations. The refugee crisis and the COVID-19 pandemic deepened political fragmentation, contributing to the rise of Meloni's far-right coalition in 2022. Her leadership capitalised on public concerns about immigration and economic welfare, emphasising policies that prioritise the economic interests of native-born Italians.

Demographics/migration

Italy has the oldest population in Europe, with a median age of 48.4 years old,²²¹ and a persistently low birth rate of just 1.25²²² – well below the replacement rate of 2.1. These trends are contributing to a steady demographic decline; over the past decade alone, the country has lost 1.4 million people – roughly equivalent to Milan's entire population.²²³ Projections suggest that Italy's working-age population could shrink by nearly 25% over the next 25 years,²²⁴ posing serious implications for economic productivity and social welfare systems.

Since the early 2000s, Italy has addressed growing demographic pressures mainly through increased immigration and labour market reforms aimed at extending workforce participation among older adults. A key policy change occurred in 2011 with pension reform, which shifted the system from a wage-based to a contribution-based model, encouraging later retirement. As a result, employment rates among those aged 55–64 rose by 25% between 2000 and 2016,²²⁵ while the foreign-born population nearly quadrupled from 2002 to 2014.²²⁶

²²¹ Europe-Data.com. (2024, February 20). Portugal sees most pronounced ageing trend in EU in past decade. <https://europe-data.com/2024/02/20/portugal-sees-most-pronounced-ageing-trend-in-eu-in-past-decade/>

²²² Billari, F. C., Tomassini, C., & Balbo, N. (Eds.). (2021). The Italian demographic exceptionalism: Executive summary (Population Report 2021). Associazione Italiana per gli Studi di Popolazione (AISP). <https://population-europe.eu/files/documents/es.pdf>

²²³ <https://www.forbes.com/sites/avivahwittenbergcox/2024/12/17/italian-demographic-decline-hits-labor-force-are-women-the-solution>

²²⁴ IMF, Population Aging In Italy: Economic Challenges and Options for Overcoming the Demographic Drag, 2023.

²²⁵ <https://wol.iza.org/uploads/articles/407/pdfs/the-labor-market-in-italy.pdf>

²²⁶ <https://population-europe.eu/files/documents/es.pdf>

Nevertheless, the long-term viability of these approaches remains uncertain. Italy invests less in healthcare than many EU counterparts, both per capita and relative to GDP; in 2019, health expenditure stood at just 8.7% of GDP.²²⁷ At the same time, rising life expectancy has contributed to a growing burden of age-related conditions. For example, years lived with disability (YLD) linked to Alzheimer's disease surged by 70.6% between 2000 and 2019,²²⁸ contributing to health costs and complicating full-time employment for older adults who may undertake more caring responsibilities.

Wealth/inequality

Alongside demographic challenges, Italy continues to grapple with sluggish economic growth. In 2023, GDP was projected to expand by just 0.6%²²⁹ and, average earnings in Italy have increased by only 8.2% since 2018,²³⁰ significantly below the EU27 average of 19.8%.²³¹ A key factor underlying Italy's economic underperformance is its limited investment in innovation, with research & development expenditure around half the OECD average.²³² This is partly linked to the structure of the labour market, where 41.8% of the workforce is employed in firms with fewer than 10 employees²³³ – who are typically less capable of investing in innovation and expansion.

Regional inequalities further compound these challenges. Structural imbalances in resource distribution continue to hinder growth in the South, where unemployment remains disproportionately high. However, the gap has narrowed slightly. Southern unemployment was three times higher than in the North in 2007²³⁴ but currently hovers at approximately 2.5 times the northern rate.²³⁵ This is partly due to a deceleration in the North's own growth momentum.

Additionally, Italy faces significant labour market inequalities, particularly in gender and age-based employment patterns, influenced by high job precariousness. As of 2024, the gender employment gap was 18%,²³⁶ well above the EU average of 10.2%.²³⁷ Cultural norms and financial disincentives, especially after motherhood, hinder women's participation in the workforce. 29% of women report being dismissed upon returning from maternity leave,²³⁸ while tax credits for dependent spouses discourage dual-income households. Furthermore, women in the workforce still face major challenges in balancing their work and personal lives. Italy invests only 0.1% of

²²⁷de Belvis, A. G., Meregaglia, M., Morsella, A., Adduci, A., Perilli, A., Cascini, F., Solipaca, A., Fattore, G., Ricciardi, W., Maresso, A., & Scarpetti, G. (2022). Italy: Health system review (Health Systems in Transition, Vol. 24 No. 4). European Observatory on Health Systems and Policies. <https://iris.who.int/bitstream/handle/10665/365363/9789289059305-eng.pdf>

²²⁸ [State of health and inequalities among Italian regions from 2000 to 2021: a systematic analysis based on the Global Burden of Disease Study 2021 - ScienceDirect](#)

²²⁹ https://donortracker.org/donor_profiles/italy#politics-priorities

²³⁰ https://eures.europa.eu/living-and-working/labour-market-information-europe/labour-market-information-italy_en

²³¹ Ibid.

²³² IMF, 2023

²³³ https://eures.europa.eu/living-and-working/labour-market-information-europe/labour-market-information-italy_en

²³⁴ [IZA World of Labor - The labor market in Italy, 2000–2016](#)

²³⁵ Ibid.

²³⁶ <https://www.forbes.com/sites/avivahwittenbergcox/2024/12/17/italian-demographic-decline-hits-labor-force-are-women-the-solution/>

²³⁷ [Gender statistics - Statistics Explained](#)

²³⁸ <https://www.reuters.com/world/europe/job-or-baby-italian-womens-struggle-have-both-holds-back-growth-2023-10-13/>

its GDP in childcare,²³⁹ leading to widespread underemployment among women, many of whom take part-time jobs.²⁴⁰

Young people face similar challenges, with temporary contracts making up 50% of employment for those aged 15 to 24.²⁴¹ The transition from education to work remains difficult, with 25% of youths classified as NEETs (not in education, employment or training).²⁴² These issues have fuelled perceptions of intergenerational inequality, with 80% of young Italians believing their economic prospects are worsening.²⁴³

Trends in politics

Italy's politics in the 2000s were shaped by the legacy of the 1990s corruption scandals, notably the Mani Pulite investigation and Tangentopoli, which led to the collapse of the post-war political order and the rise of new parties like Forza Italia. Despite electoral reforms aimed at improving accountability, by 2005, half of Italians believed corruption had worsened, even as formal corruption cases declined.²⁴⁴

Berlusconi emerged as a dominant figure after the scandals, serving as Prime Minister for three terms. However, the eurozone financial crisis triggered political instability, fracturing his centre-right coalition. His tenure was followed by technocratic economist Mario Monti. Although Monti's government stabilised Italy's finances, his €30 billion austerity package, 'Save Italy', which included pension freezes and VAT hikes, led to a decline in popularity and his resignation in 2013 after losing parliamentary support.

Political fragmentation in the mid-2010s led to short-lived coalitions, worsened by the refugee crisis. Public attitudes sharply worsened, with 40% of Italians in 2016 viewing migrants as a threat to public order,²⁴⁵ fueling populist rhetoric like Interior Minister Salvini's claims that Tunisia was sending criminals to Italy via boats. This climate of fear strained coalition unity, particularly for the Democratic Party (PD), which faced criticism from the Five Star Movement (M5S) for mishandling the crisis. In response, the PD took a tougher stance, passing the controversial 'Minniti-Orlando Decree' in 2017, which restricted asylum rights and expanded detention.

Italy's economic and migration challenges were worsened by COVID-19 and the Russian invasion of Ukraine. The pandemic led to the downfall of the Second Conte government following a no-confidence vote over its crisis management, particularly regarding the 200 billion euro recovery fund. Initially, attitudes toward Ukrainian refugees were positive, with Foreign Minister Luigi di Maio emphasising Italy's "fraternal relationship"²⁴⁶ with Ukraine. However, Italy's reliance on Russian natural gas, which accounts for 40% of its supply,²⁴⁷ caused gas prices to rise by 64.8% in 2022,²⁴⁸ sparking voter concerns over affordability. Economic concerns also

²³⁹ Ibid.

²⁴⁰ [Labour-market-March_2023.pdf](#)

²⁴¹ https://cepr.org/system/files/publication-files/60250-no_country_for_young_people_youth_labour_market_problems_in_europe.pdf

²⁴² [The NEET problem in Italy – a complex phenomenon to be solved - EST](#)

²⁴³ <https://www.oxfamitalia.org/giovani-disuguaglianza-sondaggio-demopolis/>

²⁴⁴ Vannucci, A. (2009). The controversial legacy of 'Mani Pulite': A critical analysis of Italian corruption and anti-corruption policies. *Bulletin of Italian Politics*, 1(2), 233–264. https://www.gla.ac.uk/media/Media_140182_smx.pdf

²⁴⁵ https://www.ipsos.com/sites/default/files/2016-08/Immigration_and_Refugees-July_2016.pdf

²⁴⁶ [War in Ukraine: Italy Takes a Stand | ITALY Magazine](#)

²⁴⁷ [Italy to become almost independent from Russian gas in H2 2023 - paper | Reuters](#)

²⁴⁸ [Italy's household gas prices rose almost 65% in 2022 | Reuters](#)

influenced views on migration, with over a third believing foreigners were taking jobs from Italians.²⁴⁹ This suggests that there was still a strong focus on prioritising the economic welfare of natives – a sentiment Giorgia Meloni’s far-right ‘Brothers of Italy’ party effectively capitalised on.

In 2022, Meloni’s coalition secured 44% of the vote,²⁵⁰ making her Italy’s first female prime minister. Her party’s rise from 4% in 2018 to 26% in 2022 was driven by 40% of former Lega supporters switching parties and high abstention rates, especially among M5S voters. Meloni’s election platform was socially conservative, focused on supporting national interests and reducing migration, which resonated with Italian voters.²⁵¹

²⁴⁹ Ibid.

²⁵⁰ <https://www.bbc.co.uk/news/world-europe-63029909>

²⁵¹ <https://www.bbc.co.uk/news/world-europe-63029909>

PUBLIC OPINION RESEARCH

Summary

Over the past two decades, Italian public opinion has been shaped by economic uncertainty and shifting priorities, with a growing focus on domestic issues such as unemployment, healthcare, and housing. Despite early optimism about EU membership, particularly during the 2000s, economic struggles, including the eurozone crisis and rising migration pressures, eroded public trust in both the EU and national institutions. Public trust in the EU fluctuated but remained higher than in national institutions, with significant skepticism towards political leaders, particularly after the 2008 financial crisis.

Italy's commitment to development aid has also shifted. While support for aiding vulnerable populations persists, skepticism about the effectiveness of aid has grown. Public concern has increasingly focused on domestic issues, with Italians viewing the world as more insecure and fragmented. Trust in NGOs and media figures has declined, and although television remains the dominant news source, trust in social media has decreased sharply over the past decade. These trends highlight a growing inward focus, as Italians express increasing concern about domestic economic pressures while maintaining a more abstract commitment to international aid and cooperation.

Messages

Top issues driving the debate

In the 2000s, Italian public opinion was marked by economic anxiety and cautious optimism about EU membership. By 2005, only 23% felt their voice counted in Europe,²⁵² reflecting growing political alienation, though support for the EU remained strong due to hopes for economic stability and modernisation. However, this optimism was increasingly undermined by everyday economic struggles. The introduction of the euro was widely seen as a cause of inflation, or "euroflation," with 74% of Italians in 2007 reporting they lacked the means for a "dignified life"²⁵³ and overestimating price increases. This discontent led to broader disillusionment: life satisfaction dropped to the lowest in Western Europe, and skepticism toward EU enlargement grew. By 2009, of those opposing enlargement, 46% wanted immigration to be prioritised over further accessions²⁵⁴, with 35% citing cultural and religious concerns.²⁵⁵ Despite this, early-decade data showed lingering faith in the EU, with 79% of

²⁵²European Commission. (2005, December). Standard Eurobarometer 64: Public opinion in the European Union - Autumn 2005. <https://europa.eu/eurobarometer/surveys/detail/833>

²⁵³ <https://www.italymagazine.com/featured-story/75-italian-families-feel-poor-survey-says>

²⁵⁴European Commission. (2011, December). Standard Eurobarometer 76: Public opinion in the European Union - Autumn 2011. <https://europa.eu/eurobarometer/surveys/detail/744>

²⁵⁵Ibid.

Italians feeling their life had improved in the past five years and 77% expressing pride in EU membership.²⁵⁶

The 2010s saw a sharp decline in Italy's earlier cautious optimism toward the EU, as prolonged economic stagnation deepened political discontent. Public life satisfaction fell to 48%,²⁵⁷ the lowest in Western countries, with older Italians reporting even lower rates, likely due to pension cuts and rising retirement ages. Among younger Italians, initial enthusiasm for EU membership turned to disillusionment as unemployment became a major concern. By mid-decade, 88% believed that even with qualifications, good jobs were out of reach²⁵⁸. Youth unemployment peaked at 40%,²⁵⁹ fueling mass emigration and contributing to Italy's brain drain, with a 41.8% rise in people emigrating in 2013.²⁶⁰ This loss of opportunities led to growing euroscepticism, particularly among younger voters. In 2017, 51% of 18-44 year olds supported leaving the EU in a hypothetical referendum, compared to just 26% of those over 45.²⁶¹

By 2015, with over one million refugees arriving in Europe via the Mediterranean, immigration became Italians' top EU-related concern, surpassing the economy. A staggering 93% called for stronger action against illegal immigration,²⁶² while 69%²⁶³ supported a unified EU migration policy, reflecting frustration with perceived fragmentation and abandonment from Brussels. However, despite a series of terrorist attacks across Europe, only 9% of Italians considered terrorism a national priority,²⁶⁴ well below the EU average of 25%.²⁶⁵ This likely stemmed from the belief that Italy, primarily a transit country, faced fewer immediate security threats. However, concerns about immigration remained high, with 75% of Italians associating foreigners with increased crime, 20 percentage points above the EU average.²⁶⁶

Somewhat unexpectedly, the crises of the 2020s renewed Italian support for the EU, driven more by ongoing economic uncertainty than recovery. As the first European country hit by COVID-19, Italy faced severe health and economic impacts: GDP contracted by 12.4% in 2020,²⁶⁷ while revenue from tourism, which accounted for nearly 13% of the economy,²⁶⁸ fell by over 50%.²⁶⁹ Amid political instability, including the collapse of Conte's government over disputes regarding the EU recovery fund, trust in national institutions plummeted. Only 29% trusted the Italian government to manage the pandemic,²⁷⁰ while 45% expressed confidence in the EU,²⁷¹ signaling a notable shift.

²⁵⁶European Commission. (2005, December). Standard Eurobarometer 64: Public opinion in the European Union - Autumn 2005. <https://europa.eu/eurobarometer/surveys/detail/833>

²⁵⁷ <https://www.pewresearch.org/global/2008/01/17/italys-malaise/>

²⁵⁸ <https://europa.eu/eurobarometer/surveys/detail/829>

²⁵⁹ [What are some of Italy's inflation and unemployment issues? - Cantech Letter](#)

²⁶⁰ [Italy brain drain up 41.8% in 8 years - Audit Court - TopNews - Ansa.it](#)

²⁶¹ [How Italy turned Euroskeptic - POLITICO](#)

²⁶²European Commission. (2015, December). Standard Eurobarometer 84: Public opinion in the European Union - Autumn 2015. <https://europa.eu/eurobarometer/surveys/detail/2098>

²⁶³Ibid.

²⁶⁴Ibid.

²⁶⁵Ibid.

²⁶⁶Ibid.

²⁶⁷<https://www.reuters.com/article/business/italys-gdp-slumps-unprecedented-124-in-second-quarter-but-better-than-analys-idUSKCN24W11S/>

²⁶⁸<https://romebusinessschool.com/blog/the-business-of-tourism-in-italy-analysis-and-outlook-by-sector/>

²⁶⁹<https://www.thelocal.it/20210418/italys-gdp-dropped-by-e120-billion-in-2020-due-to-tourism-restrictions>

²⁷⁰European Commission. (2022, March). Standard Eurobarometer 96: Public opinion in the European Union - Winter 2021-2022. <https://europa.eu/eurobarometer/surveys/detail/2553>

²⁷¹ Ibid.

Russia's invasion of Ukraine had more complicated effects on Italian public opinion, reinforcing support for EU coordination while threatening growing fatigue. As energy prices surged, cost of living re-emerged as the top concern (30%).²⁷² Yet, early reactions reflected renewed alignment with the EU on strategic grounds: 85%²⁷³ supported joint energy purchasing, and nearly half viewed the EU positively,²⁷⁴ with 38% crediting it for maintaining peace and stability.²⁷⁵ However, as the economic toll of the conflict grew, public support wanes – a 2025 poll revealed that 57% of Italians no longer backed either Russia or Ukraine.²⁷⁶

Taken together, two decades of Italian public opinion reflect a pattern where economic insecurity remains the core driver of attitudes towards the EU and national leadership. Crises often trigger either a resurgence of Euroscepticism and nationalist sentiments or, conversely, demand flexibility and competence from supranational institutions.

Trust

Italians trust in their national institutions has been persistently lower than EU averages, a trend rooted in the fallout from the 1990s corruption scandals and ongoing perceptions of political incompetencies. The Parliament (Senate 30%, Chamber 29%) and political parties (17%)²⁷⁷ are least trusted, while the Armed Forces (70%) and the Presidency (60%) rank highest²⁷⁸, likely due to their apolitical or ceremonial roles. Among young Italians, distrust is especially acute, with over a quarter citing lack of trust in national institutions as the greatest threat to democracy²⁷⁹. In contrast, EU institutions have generally enjoyed higher trust levels – 55% in 2005²⁸⁰ – but this too has fluctuated in response to national crises. During the peak of economic and migratory pressures in 2015, EU trust dropped sharply, with 52% expressing scepticism²⁸¹.

Aid & multilateralism

Italy currently contributes just over \$6 billion in Official Development Assistance (ODA), or 0.27% of its Gross National Income (GNI)²⁸² – well below the UN target of 0.7%, ranking 21st among donors.²⁸³ After early progress following the launch of the 2030 Agenda for Sustainable Development, where Italy reached 0.3% of ODA/GNI by 2017,²⁸⁴ contributions declined between 2018 and 2020. This drop was mainly due to a reduction in in-donor refugee costs (IDRCs), which cover the first year of expenses for hosting refugees and asylum seekers.

²⁷²European Commission. (2024, December). Standard Eurobarometer 101: Public opinion in the European Union – Spring 2024. <https://europa.eu/eurobarometer/surveys/detail/3215>

²⁷³European Commission. (2022, December). Special Eurobarometer 531: Key challenges of our times – Autumn 2022. <https://europa.eu/eurobarometer/surveys/detail/2892>

²⁷⁴Ibid.

²⁷⁵European Commission. (2024, December). Standard Eurobarometer 101: Public opinion in the European Union – Spring 2024. <https://europa.eu/eurobarometer/surveys/detail/3215>

²⁷⁶<https://www.ipsos.com/it-it/sondaggi-politici-pagnoncelli-guerra-ucraina-riarmo-europeo-opinioni-italiani>

²⁷⁷https://asvis.it/public/asvis2/files/Rapporto_ASviS/Rapporto_ASViS_2023/RapportoASviS_2023_final.pdf

²⁷⁸Ibid.

²⁷⁹European Commission. (2025, March). Flash Eurobarometer 537: EU challenges and priorities – Young Europeans' views. <https://europa.eu/eurobarometer/surveys/detail/3373>

²⁸⁰European Commission. (2005, December). Standard Eurobarometer 64: Public opinion in the European Union – Autumn 2005. <https://europa.eu/eurobarometer/surveys/detail/833>

²⁸¹European Commission. (2015, December). Standard Eurobarometer 84: Public opinion in the European Union – Autumn 2015. <https://europa.eu/eurobarometer/surveys/detail/2098>

²⁸² [Official development assistance \(ODA\) | OECD](#)

²⁸³ [Donor Profile: Italy](#)

²⁸⁴ [Cooperazione Italia FN](#)

While Italy remains committed to the 0.7% target by 2030, the increasing share of IDRCs within total ODA and a shift toward bilateral assistance raise concerns about its ability to meet broader development goals. These trends have reduced aid for long-term development and multilateral cooperation. Notably, the multilateral share of ODA dropped from 67% in 2019 to 55% in 2023,²⁸⁵ undermining coordinated efforts and limiting aid's impact. To understand these shifting priorities, it's crucial to reflect on Italy's past ODA allocation and public opinion.

In the early 2000s, Italians broadly supported aid, though with limited understanding of its implications. Between 2008 and 2009, awareness of the Millennium Development Goals increased from 18% to 32%, largely due to Italy hosting the 2009 G8 Summit. While support for aid was nearly unanimous, with 90% agreeing it was "very" or "fairly" important,²⁸⁶ opinions on Italy's contributions were divided: 35% felt they were too low, and 35% thought they were appropriate.²⁸⁷ Aid priorities during this period focused on broad humanitarian concerns, such as reducing armed conflict (26%), canceling debt (26%), and promoting democracy.²⁸⁸ When asked about the added value of humanitarian aid for the EU, the most common response was "don't know" (32%),²⁸⁹ revealing a gap between broad support for aid and specific knowledge or engagement with policy outcomes.

In the 2010s, Italy's commitment to ODA reflected a mix of declining spending, shifting attitudes, and changing priorities. After the 2008 financial crisis, ODA sharply dropped from \$4.9 billion in 2008 to \$3.1 billion in 2010,²⁹⁰ reaching just 0.19% of GNI by 2011.²⁹¹ Despite economic pressures, public opinion remained supportive. By 2014, nearly 90% of Italians agreed it was important to help developing countries,²⁹² and 80% believed aid was effective in tackling poverty—well above the EU average of 67%.²⁹³

Public attitudes toward development aid became more ambivalent in the latter half of the decade. Between 2015 and 2017, support for prioritising poverty reduction in the EU dropped by 7 points to 65%,²⁹⁴ and only half of respondents believed it should be addressed nationally,²⁹⁵ highlighting a gap between abstract support and national responsibility.

Despite some early gains in awareness of frameworks like the Sustainable Development Goals (SDGs), progress was superficial. By 2017, only 12% of Italians could correctly identify the SDGs,²⁹⁶ while 58% admitted to having no knowledge of them,²⁹⁷ reflecting a broader challenge in translating global commitments into sustained public engagement.

²⁸⁵ Ibid.

²⁸⁶ European Commission. (2005, December). Standard Eurobarometer 63: Public opinion in the European Union – Autumn 2005. <https://europa.eu/eurobarometer/surveys/detail/792>

²⁸⁷ Ibid.

²⁸⁸ <https://europa.eu/eurobarometer/surveys/detail/410>

²⁸⁹ <https://europa.eu/eurobarometer/surveys/detail/592>

²⁹⁰ [Italian development cooperation: What you need to know | Devex](#)

²⁹¹ [The 0.7 percent club | Devex](#)

²⁹² European Commission. (2015, December). Standard Eurobarometer 83: Public opinion in the European Union – Spring 2015. <https://europa.eu/eurobarometer/surveys/detail/2069>

²⁹³ Ibid.

²⁹⁴ European Commission. (2016, December). Standard Eurobarometer 85: Public opinion in the European Union – Autumn 2016. <https://europa.eu/eurobarometer/surveys/detail/2109>

²⁹⁵ Ibid.

²⁹⁶ [Citizens views on development, cooperation and aid - April 2017 - - Eurobarometer survey](#)

²⁹⁷ Ibid.

Consistent with findings across many donor countries, public understanding of aid volumes remains limited. In 2020, 65% of Italians were unaware of the country's ODA allocation,²⁹⁸ with many overestimating it. Even when given the accurate figure, only 34% supported an increase, while 41% preferred it unchanged.²⁹⁹ Political affiliation influenced these views: 25–28% of Lega and Brothers of Italy voters supported cuts, compared to just 6% of Democratic Party voters.³⁰⁰

Spending patterns also shifted, prioritising domestic concerns, such as managing migration flows, over strategic coordination to address long-standing socio-economic inequalities. From 2012 to 2017, bilateral ODA's share more than doubled—from 22.8% to over 50%, largely due to rising in-donor refugee costs,³⁰¹ which reached \$1.6 billion in 2016. Excluding these costs, investment in core development priorities was limited, with only 16% of bilateral aid going to debt relief and 7% to education.³⁰²

While the 2020s have seen continued support for aiding vulnerable populations—79% back directing aid to women and adolescents³⁰³—skepticism about its effectiveness remains high. Many Italians believe aid is wasted (45%), fosters dependency (56%), or is lost to corruption (79%).³⁰⁴ Additionally, knowledge gaps persist, with over 65% unable to identify how much of the national budget is allocated to ODA, and only 7.8% able to estimate it correctly.³⁰⁵ When informed of Italy's low donor rank, fewer than 40% supported increasing contributions,³⁰⁶ reflecting limited awareness and enthusiasm.

This may be due to a shift in public concern toward domestic issues. The 2025 Ipsos survey found unemployment (38%), healthcare (34%), and crime (31%) dominating the agenda, while concern over poverty and inequality dropped to 26%.³⁰⁷ This shift reflects growing inward focus: 88% of Italians view the world as more insecure, 91% as more fragmented, and 76% as more unequal.³⁰⁸ Although 86% agree that poverty reduction in partner countries should be a key EU priority,³⁰⁹ these views may be seen as abstract commitments rather than support for specific programs or belief in their effectiveness. Since 2019, the share of Italians doubting the impact of sustainability efforts has nearly doubled, rising from 13% to 22%.³¹⁰ In this context, development aid remains symbolically important but politically peripheral.

²⁹⁸ [Building Back Forward. The Future of Italy's Development Cooperation](#)

²⁹⁹ Ibid.

³⁰⁰ Ibid.

³⁰¹ [Cooperazione Italia EN](#)

³⁰² Ibid.

³⁰³ Paviotti, I., Fattibene, D., Angelucci, D., & Piccolino, G. (2023). Building Back Forward: The Future of Italy's Development Cooperation. Istituto Affari Internazionali. <https://www.iai.it/sites/default/files/9788893682961.pdf>

³⁰⁴ Ibid.

³⁰⁵ Angelucci, D., Piccolino, G., Fattibene, D., Paviotti, I., & Cianforlini, M. (2022, December). Gli italiani e gli aiuti pubblici allo sviluppo. Istituto Affari Internazionali (IAI) & Laboratorio Analisi Politiche e Sociali (LAPS), Università di Siena. https://www.iai.it/sites/default/files/laps-iai_2022_aps.pdf

³⁰⁶ Ibid.

³⁰⁷ <https://www.ipsos.com/it-it/sondaggi-politici-oggi>

³⁰⁸ <https://www.ipsos.com/it-it/italiani-politica-internazionale-visione-cupa-speranza-2025>

³⁰⁹ European Commission. (2022, June). Special Eurobarometer 526: EU citizens and international partnerships. <https://europa.eu/eurobarometer/surveys/detail/2673>

³¹⁰ https://asvis.it/public/asvis2/files/Rapporto_ASViS/Rapporto_ASViS_2023/RapportoASViS_2023_final.pdf

Messengers

In Italy, the most trusted sources of information are personal and familiar, such as coworkers (67%) and local community members (52%).³¹¹ In contrast, politicians and government figures are among the least trusted, with 72% believing public officials intentionally mislead the public.³¹² Trust in officials is heavily influenced by the degree of self-assessed grievances: only 18% of those with high grievances believe leaders contribute positively to social cohesion, compared to 42% of those with low grievances.³¹³

Trust in NGOs, once highly regarded, has dropped by 18 percentage points over the past decade,³¹⁴ the largest decline among major institutions. Even among those concerned about social fragmentation, only 52% believe NGOs help repair the social fabric.³¹⁵ Consistent with trends across Europe, Italians' trust in media figures has also decreased. Only 33% trust journalists,³¹⁶ while 75% agree that media organisations are more interested in grabbing attention than informing the public.³¹⁷

Mediums

Television remains the dominant source of news for Italians, with 77% relying on TV³¹⁸, far surpassing social media (36%) and online press platforms (46%)³¹⁹. This trend holds strong even among youth: 71% of Italian 15-24 year olds still identify TV as their primary news source, unlike their peers in other EU countries³²⁰. While social media is gaining ground, it hasn't overtaken traditional formats as in many other EU nations.

Trust in the media reflects these habits. Public TV and radio have the highest trust levels (45%), followed by the written press (40%).³²¹ Social media and digital-first sources—such as influencers, blogs, and podcasts—lag behind, with only 12-14% expressing trust.³²² This may be due to greater trust in traditional media's fact-checking compared to social media's lack of regulation. Furthermore, growing concerns over election interference and fake news likely contributed to an 11-point decline in trust in social media over the past decade, while trust in traditional media has remained steady, with a modest 2-point increase.³²³

³¹¹Edelman. (2023, April). 2023 Edelman Trust Barometer: Italy Report. https://www.edelman.it/sites/g/files/aatuss391/files/2023-04/2023%20Edelman%20Trust%20Barometer_Italy.pdf

³¹²Ibid.

³¹³Edelman Trust Institute. (2025, January). 2025 Edelman Trust Barometer: Trust and the Crisis of Grievance. https://www.edelman.com/sites/g/files/aatuss191/files/2025-01/2025%20Edelman%20Trust%20Barometer_Final.pdf

³¹⁴Edelman, 2023.

³¹⁵Edelman, 2025.

³¹⁶Edelman, 2023.

³¹⁷Edelman, 2025.

³¹⁸European Parliament. (2023, November). Flash Eurobarometer 537: News & Media Survey 2023. <https://europa.eu/eurobarometer/surveys/detail/3153>

³¹⁹Ibid.

³²⁰Ibid.

³²¹European Commission. (2022, July). Flash Eurobarometer 511: Media & News Survey 2022. <https://europa.eu/eurobarometer/surveys/detail/2832>

³²²Ibid.

³²³Edelman, 2023.



COUNTRY SPECIFIC FINDINGS

NORWAY

- Norway has enjoyed consistent levels of high government trust and life satisfaction over the past 25 years.
- Norway is a leading donor country with consistent strong public support for their high levels of aid spending.
- However, support for aid spending could be threatened by concerns over efficacy and in the context of domestic priorities.
- There remain gaps in the public opinion data sources on aid for Norway. Crucially, much of the research which shows high levels of support for aid only tests absolute rather than relative support.

Over the past 25 years, Norway has seen steady population growth, mainly driven by immigration. As in other European countries, there has been a decline in fertility rates and the population is ageing. Norway ranks highly on several economic indices and shows low levels of poverty and inequality in international comparisons due to an extensive welfare state. Politically, the country has alternated between center-left and center-right governments, with debates shifting from welfare and economics to immigration, climate and energy. Major events like the 2011 terrorist attacks, the COVID-19 pandemic and the Russian invasion of Ukraine have influenced public priorities, and political fragmentation has increased recently.

Our review of the public opinion research in Norway found:

- **Life satisfaction in Norway remains consistently high**, while public concerns have shifted over time. In the 2000s, taxation and education were seen as the most important issues; in the early 2010s, the focus shifted to immigration, and more recently to climate change, the environment, inflation, and defence.
- **Norway has a strong welfare state that enjoys broad public approval.** Levels of support are particularly high for government spending on health, education, and pensions.
- **Trust in local communities and local and national institutions is comparatively high.** The police and the judicial system are among the most trusted institutions. However, trust gaps persist across different education levels, income groups and geographical regions.
- **Public broadcasters and traditional national and local outlets are the most used and trusted news sources.** While print and TV news consumption has declined, traditional news brands remain influential on digital platforms as shown by high rates of online news subscriptions.
- **Norway is a leading donor country for aid spending, which is generally supported by the public.** However, perceptions of aid efficiency are mixed, and support may be weakened when weighed against domestic priorities.

POLITICAL ECONOMY LANDSCAPE

Summary

Norway has experienced significant demographic, economic, and political changes over the past 25 years. Overall, Norway's population has grown, largely driven by immigration, while fertility rates have declined in recent years and the population is ageing. Norway's economy has grown steadily and remains one of the strongest globally, with relatively low levels of poverty and income inequality. Politically, Norway has shifted between center-left and center-right governments, with key debates evolving from welfare and economics, to immigration, climate change, and inflation more recently. Events such as the 2011 far-right terrorist attacks and the 2022 Russian invasion of Ukraine further shaped the political discourse and political priorities. While trust in national institutions remains high, Norway's political landscape has become increasingly fragmented in recent years.

Demographics/migration

Norway's population grew steadily from 4.5 million in 2000 to 4.9 million in 2010, reaching 5.6 million by 2025.³²⁴ Immigration has been the main driver of Norway's population growth, with the number of foreign citizens moving to Norway substantially exceeding the number leaving in most years.³²⁵ Meanwhile, fertility rates declined from 1.85 children per woman in 2000 to around 1.4 by 2024, remaining consistently below the replacement level of 2.1.³²⁶ The population in Norway is also ageing: The proportion of the population aged 45 and over rose from 38% in 2000 to 45% in 2025.³²⁷

Non-Norwegian citizens constitute approximately 17% of the population in Norway, with the largest groups being from Poland, Ukraine, Lithuania, and Syria.³²⁸ Net immigration to Norway rose steadily from 11,000 in 2003 to over 47,000 in 2012, before gradually declining to 20,000 by 2021. This was followed by a sharp increase in 2022 (58,000) and 2023 (53,000), largely due to the Russian invasion of Ukraine, which was again followed by a decline in net migration. Recently, Norway has ranked among the European countries with the most positive views on immigration, with around 55% of respondents in the 2023 European Social Survey stating that immigrants make Norway a better place to live and a similar proportion indicating that immigration is good for the country's economy.³²⁹ Both rates have substantially increased since the 2004 European Social Survey.³³⁰

³²⁴<https://www.ssb.no/en/statbank/table/06913>

³²⁵<https://www.ssb.no/en/statbank/table/09203>

³²⁶<https://www.ssb.no/en/statbank/table/04232>

³²⁷<https://www.ssb.no/en/statbank/table/07459/tableViewLayout1/>

³²⁸<https://www.ssb.no/en/statbank/table/13880>

³²⁹<https://www.rfberlin.com/wp-content/uploads/2025/01/Attitudes-towards-migration-in-Europe-evidence-from-the-European-Social-Survey-RFBerlin-2025.pdf>

³³⁰ Ibid.

Wealth/inequality

Norway's GDP per capita increased steadily from 2000 to the early 2010s, declined after 2014 and recovered again after 2020, consistently remaining among the highest in the world.³³¹ According to international standards, Norway has a low poverty rate³³² and a low income inequality.³³³

Despite this overall prosperity and strong international standing, wealth and income inequalities have gradually increased in recent years. Poverty rates, particularly among immigrant populations and children, have risen, and wealth has become more concentrated among the richest 0.1%, while the bottom 50% have seen little change.³³⁴

As in many other European countries, home ownership is one of the most important components of household wealth in Norway.³³⁵ Housing ownership rates in Norway have been stable and high compared to other Western European countries, with about three out of four households owning their home.³³⁶ However, ownership rates are lower among economically disadvantaged groups, and this gap has widened since the early 2000s.³³⁷ Poor housing conditions, such as overcrowding, are also more common among low-income households, single parents, and young people.³³⁸

Overall, Norway maintains a very high ranking on the Human Development Index, reflecting strong achievements in essential areas of human development such as health, education, and living standards, also when adjusting for inequality.³³⁹ Norway also scores very well on the Gender Development Index, which measures gender equality across the same dimensions.³⁴⁰

Trends in politics

The early 21st century has been a period of gradual political transformation in Norway. Although the country maintained its reputation for political stability and high levels of public trust in institutions, significant shifts in party support, public opinion, and key issues took place. These changes often reflect broader European and global trends – such as the rise of populism, debates over immigration, and environmental concerns – while also revealing uniquely Norwegian patterns shaped by the country's welfare model, energy economy, and political culture.

The early 2000s were characterised by relative political stability. The Labour Party (Arbeiderpartiet), traditionally dominant in Norwegian politics, faced growing competition from center-right parties. The Conservative Party (Høyre) performed strongly in the 2001

³³¹<https://data.worldbank.org/indicator/NY.GDP.PCAP.CD?locations=NO>

³³²https://data.worldbank.org/indicator/SI.POV.NAHC?locations=NO&most_recent_value_desc=false

³³³<https://ourworldindata.org/grapher/economic-inequality-gini-index>

³³⁴[https://www.thelancet.com/journals/lanepi/article/PIIS2666-7762\(25\)00017-1/fulltext](https://www.thelancet.com/journals/lanepi/article/PIIS2666-7762(25)00017-1/fulltext)

³³⁵<https://www.ssb.no/en/inntekt-og-forbruk/artikler-og-publikasjoner/wealth-distribution-in-norway>

³³⁶<https://www.ssb.no/en/bygg-bolig-og-eiendom/bolig-og-boforhold/artikler/housing-conditions-in-norway-1980-2022>

³³⁷ Ibid.

³³⁸ Ibid.

³³⁹<https://hdr.undp.org/data-center/documentation-and-downloads>

³⁴⁰ Ibid.

parliamentary elections, and a center-right coalition government formed under Prime Minister Kjell Magne Bondevik (Christian Democratic Party). Key debates centered on welfare reform and privatization, but major structural changes after the elections were limited.³⁴¹

In 2005 and 2009, the Red-Green coalition – comprising Labour, the Socialist Left Party (SV), and the Centre Party (Sp) – won the elections. Jens Stoltenberg (Ap) served as Prime Minister for the next eight years. The coalition emphasised maintaining Norway's welfare state and increasing investment in education.³⁴²³⁴³ Norway's oil wealth continued to be a main source of economic prosperity, but debates intensified about how best to manage the oil fund and reduce emissions.³⁴⁴ The 2011 terrorist attacks by far-right extremist Anders Behring Breivik shocked the nation and sparked debates about extremism, tolerance, and national unity.³⁴⁵ In the aftermath, Norway saw a surge in political engagement, particularly among youth. Local elections reflected both solidarity with mainstream parties (i.e., Conservative and Labour Party) and a backlash against the Progress Party – a right-wing party known for its critical stance on immigration and the welfare state – which Breivik had been a member of.³⁴⁶

Despite this, the 2013 elections saw a shift to the right, with Erna Solberg (Conservative Party) forming a center-right government initially in coalition with the Progress Party. Over time, cooperation with the smaller Liberal (Venstre) and Christian Democratic parties broadened the coalition. Key issues included immigration, modernisation of the public sector, and tax reforms.³⁴⁷ The 2015 refugee crisis placed immigration at the center of public debate, leading to a tightening of asylum policies.³⁴⁸ Environmental concerns grew, particularly among younger voters, but tension remained between Norway's commitment to climate leadership and its role as a major oil exporter.³⁴⁹

In 2021, the Labour Party, under Jonas Gahr Støre, returned to power in coalition with the Centre Party. The government faced challenges managing post-pandemic recovery, rising energy prices, and increasing polarisation on environmental issues. While traditional parties remained dominant, regional tensions rose, especially concerning rural-urban divides and policies.³⁵⁰ Further, the Russian invasion of Ukraine in 2022 shaped the political agenda, reinforcing debates on national security, energy independence, and Norway's role within NATO. By 2023, Norwegian politics reflected a more fragmented landscape.³⁵¹ Environmental debates intensified, with conflicts between energy needs, green transition ambitions, and oil interests dominating political discourse. Calls for faster climate action clashed with concerns about job security in oil-producing regions.³⁵² Immigration and integration remain important but became less polarising compared to the mid-2010s.

³⁴¹<https://www.eurofound.europa.eu/en/resources/article/2002/2001-annual-review-norway>

³⁴²<https://www.eurofound.europa.eu/en/resources/article/2006/eiro-2005-annual-review-12>

³⁴³<https://www.robert-schuman.eu/en/monitor/932>

³⁴⁴<https://www.theguardian.com/environment/article/2024/jul/26/climate-hero-villain-fossil-fuel-frenzy-challenges-norway-green-image>

³⁴⁵<https://www.bbc.co.uk/news/world-europe-16636885>

³⁴⁶<https://www.bbc.co.uk/news/world-europe-14895052>

³⁴⁷<https://www.robert-schuman.eu/en/monitor/1429>

³⁴⁸<https://comparativemigrationstudies.springeropen.com/articles/10.1186/s40878-019-0169-8>

³⁴⁹<https://www.theguardian.com/environment/article/2024/jul/26/climate-hero-villain-fossil-fuel-frenzy-challenges-norway-green-image>

³⁵⁰<https://onlinelibrary.wiley.com/doi/10.1111/1467-9477.12292>

³⁵¹<https://whogoverns.eu/the-left-wins-but-is-more-fragmented-than-ever-the-2021-norwegian-general-elections/>

³⁵²<https://www.theguardian.com/environment/article/2024/jul/26/climate-hero-villain-fossil-fuel-frenzy-challenges-norway-green-image>

PUBLIC OPINION RESEARCH

Summary

Norway stands out for its high levels of life satisfaction and institutional trust, supported by a strong welfare state and the availability of reliable public services. Voter priorities have shifted over the past two decades from taxation, education and, more recently, immigration, to concerns about climate change, social equality, inflation and defence. Substantial public spending is widely supported, particularly for health, education and pensions. Trust in news outlets has increased recently and is particularly high for public broadcasters and traditional national outlets, while social media and partisan platforms are met with more scepticism. Norway continues to be a leading contributor to international development, maintaining close to 1% of its GNI for aid. While public support has remained strong, views on aid effectiveness are more ambivalent, and support tends to be less robust when weighed against domestic priorities. Yet, existing research rarely explores these trade-offs or distinguishes between different types of aid and the factors that sustain long-term public backing.

Messages

Top issues driving the debate

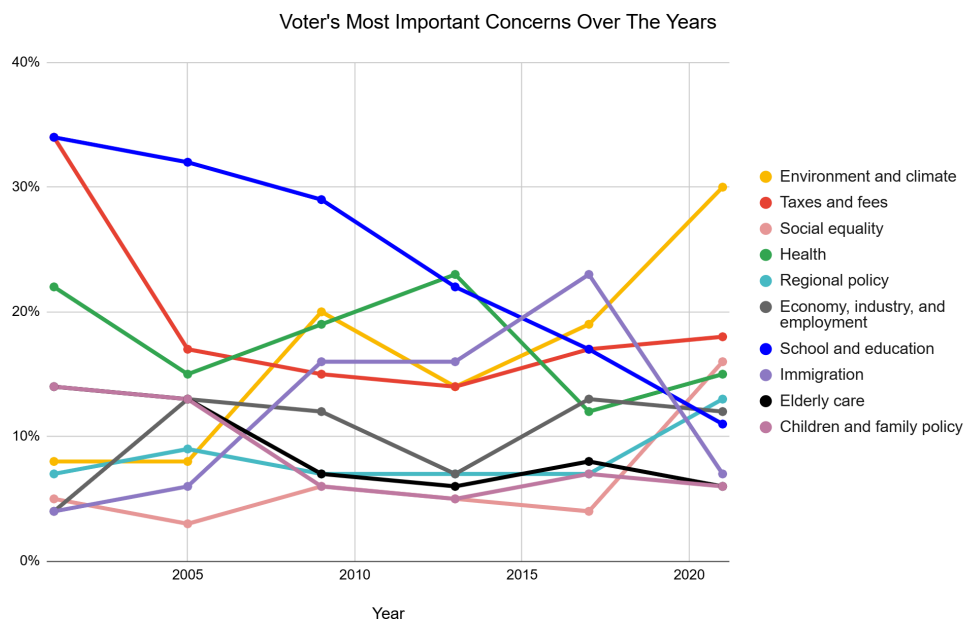
Norway ranks among the countries with the highest levels of life satisfaction, which is often attributed to its reliable public institutions, low levels of corruption, and high social trust. Voter priorities have shifted over the past two decades—from taxation, education and immigration to growing concerns about climate change, social equality, and, more recently, inflation and living costs.

Norway consistently ranks among countries with the highest levels of life satisfaction. Since the early 2010s, it has regularly appeared in the top positions of the World Happiness Report, even claiming first place in 2017.³⁵³ The most prominent explanations for Norway's high levels of life satisfaction include factors related to the quality of institutions, low levels of corruption, and reliable, extensive welfare benefits.³⁵⁴ In addition, Norwegian citizens report a strong sense of autonomy and freedom, along with high levels of social trust.³⁵⁵

³⁵³<https://worldhappiness.report/ed/2020/the-nordic-exceptionalism-what-explains-why-the-nordic-countries-are-constantly-among-the-happiest-in-the-world>

³⁵⁴ Ibid.

³⁵⁵ Ibid.



Norwegian voters' perceptions of the most important political topic have shifted notably over the past two decades. In the early 2000s, economic issues dominated, with taxes and education each cited as the most important topic by 34% of voters in 2001.³⁵⁶ Over time, the salience of education as a primary concern gradually declined.³⁵⁷

From the late 2000s into the 2010s, immigration rose sharply as a voter priority, becoming the most important issue for 23% of voters in 2017.³⁵⁸ However, concerns about immigration decreased substantially by the 2021 election, with only 7% naming it as the most important issue.³⁵⁹ In contrast, the environment and climate steadily gained importance. Starting at 8% in 2001, climate change became the most important political topic for 30% of voters by 2021. It was the main concern across all demographic groups, with the exception of men over 50.³⁶⁰ Although the gender gap in climate concern has narrowed over time, women and younger voters continue to show slightly greater engagement with the issue.³⁶¹ Social equality has also become more important recently, with an increase from 5% of voters citing it as the most important issue in 2001 to 16% in 2021.³⁶²

Meanwhile, topics like health care, taxes and regional policy, although less dominant overall, remained relatively stable throughout the period and even saw modest increases in importance in the latest election.³⁶³ Further, in the 2024 citizen survey, a large share of participants expressed concerns about inflation and the cost of living.³⁶⁴

³⁵⁶ <https://tendens.no/velgerne-ropte-ja-til-klima-og-miljo-men-nei-til-mdg-et-paradoks/#:-:text=%E2%80%93%20Klimasa%20var%20viktig%20allerede.med%20tidligere%20%C3%A5r%2C%20sier%20Bergh>

³⁵⁷ Ibid.

³⁵⁸ <https://www.ssb.no/valg/artikler-og-publikasjoner/droyt-1-av-4-tenkte-pa-innvandring-da-de-stemte/#:-:text=velgerne%20bevissthet>

³⁵⁹ <https://tendens.no/velgerne-ropte-ja-til-klima-og-miljo-men-nei-til-mdg-et-paradoks/>

³⁶⁰ Ibid.

³⁶¹ Ibid.

³⁶² Ibid.

³⁶³ Ibid.

³⁶⁴ <https://dfo.no/undersokelser/innbyggerundersokelsen-2024/innbyggerundersokelsen-pa-5-minutter>

Trust

The 2023 OECD Trust Survey shows that Norwegians report higher-than-average trust in government and institutions, with the largest increase in trust among all OECD countries since 2021. Trust is highest in the police, courts, and fellow citizens, while political parties and media remain least trusted. However, trust gaps persist across education, income, and geographical regions.

According to the 2023 OECD Trust survey,³⁶⁵ which assesses public perception of various institutions, 48% of Norwegians reported high or moderately high trust in their national government. This is substantially higher than the reported OECD average of 39%. Norway also recorded the largest increase in trust among all OECD countries between 2021 and 2023, with a rise of 16%.

In line with trends observed in other countries, Norwegians exhibit greater trust in their police (77%), the judicial system (77%), and fellow citizens (76%) compared to the national government.³⁶⁶ Approximately half of the Norwegian population report high or moderately high trust in the national parliament (54%) and their local government (51%). The least trusted institutions are the news media (49%) and political parties (36%) with still somewhat higher trust levels compared to the OECD average.³⁶⁷

Norway's high level of institutional trust is attributed to a combination of economic, social, and political factors, such as the well-funded welfare system delivering high-quality public services, substantial fiscal capacity and related public investments, high levels of social cohesion as well as widespread satisfaction with the political system.³⁶⁸ For example, more than three-quarters of Norwegians report being satisfied with the quality of services delivered by both central and local governments.³⁶⁹ Additionally, 35% feel that the political system gives people like them a voice in government decisions – five percentage points higher than the OECD average.³⁷⁰

Government spending & fiscal policies

Norway is characterised by a strong welfare state and high levels of public spending. Public support is particularly high for spending on health, education, and pensions, while support for increased spending on unemployment benefits and culture is lower. Most Norwegians believe the government should ensure key welfare functions. Recent polls also show growing support for higher defence spending.

Compared to other countries, Norway has a comprehensive welfare model based on high taxes and generous public spending to support infrastructure, social security, and public services.³⁷¹

³⁶⁵https://www.oecd.org/en/publications/oecd-survey-on-drivers-of-trust-in-public-institutions-2024-results-country-note_s_a8004759-en/norway_d9a67b9b-en.html

³⁶⁶ Ibid.

³⁶⁷ Ibid.

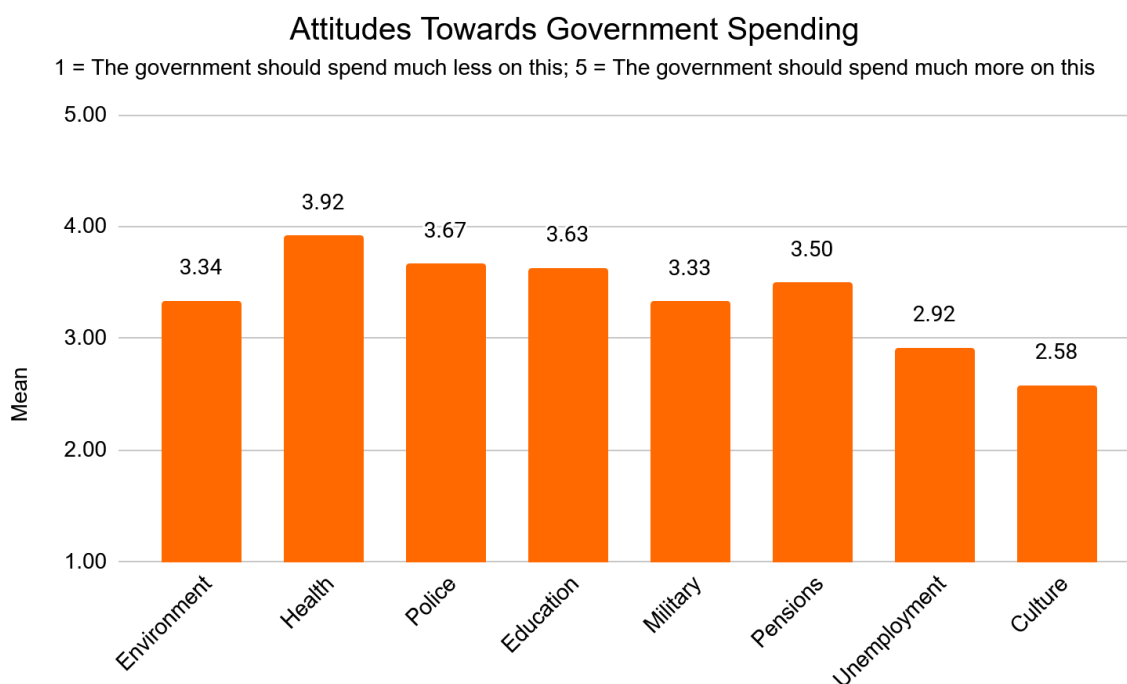
³⁶⁸https://www.oecd.org/content/dam/oecd/en/publications/reports/2022/03/drivers-of-trust-in-public-institutions-in-norway_1b4b4ae9/81b01318-en.pdf

³⁶⁹ Ibid.

³⁷⁰https://www.oecd.org/en/publications/oecd-survey-on-drivers-of-trust-in-public-institutions-2024-results-country-note_s_a8004759-en/norway_d9a67b9b-en.html

³⁷¹https://www.sgi-network.org/docs/2022/country/SGI2022_Norway.pdf

The state plays a dominant economic role, owning roughly one-third of equity traded at the Oslo Stock Exchange and almost fully funding education, research, and cultural institutions.³⁷²



In a 2016 poll conducted as part of the International Social Survey Program (ISPP), Norwegians were asked to rate their attitudes towards government spending on a range of policy areas on a scale from 1 (the government should spend much less on this) to 5 (the government should spend much more on this).³⁷³ Overall, support for increased public spending was highest for health (3.92), followed by police spending (3.67), education (3.63), and pensions (3.50). In contrast, support for increased spending on unemployment benefits (2.92) and culture (2.58) was relatively low, with both falling below the neutral midpoint. There was a notable increase in support for military spending in Norway from 1996 to 2016.³⁷⁴

The same survey illustrated that a large majority of Norwegians believe the government should play a central role in key welfare areas: 87% indicated that healthcare should definitely be a government responsibility and 80% say the same for ensuring a living standard for the old.³⁷⁵ 45% indicate that the government should definitely be responsible for reducing income inequality, 39% for controlling prices, 35% for job provision, 32% for supporting the unemployed, and 20% believe the government should definitely be responsible for promoting national industry.

Furthermore, a 2024 poll shows that nearly half of Norwegians (48%) believe the current defence budget is too low, compared to 26% who think it is adequate or too high, reflecting a broader European trend of rising public support for increased defence spending following Russia's invasion of Ukraine in 2022. Perceptions vary by political affiliation, with concerns about insufficient defence funding being most pronounced among right-leaning voters (e.g., 72% of Progress Party and 58% of Conservative Party supporters), and less so among those on the left (e.g., 45% of Labour Party and 22% of Socialist Left Party voters).

³⁷² Ibid.

³⁷³ <https://www.tandfonline.com/doi/full/10.1080/00207659.2019.1605027>

³⁷⁴ Ibid.

³⁷⁵ Ibid.

Aid & multilateralism

Norway remains a leading donor for aid, consistently allocating close to 1% of its GNI to aid. Although public support is high, perceptions of the effectiveness of developmental aid are more mixed, and support appears sensitive to trade-offs with domestic issues.

Norway remains one of the most generous contributors to international development relative to its economic capacity, with sustained political support for allocating approximately 1% of its GNI to official development assistance (ODA). Over the past five years, its ODA has consistently exceeded the 0.7% target set by the United Nations' Agenda for Sustainable Development.³⁷⁶ In 2023, Norway's bilateral ODA focused heavily on emergency responses, which received the largest share of funding, alongside high levels of spending for refugees in Norway, environmental protection, governance, energy, and health.³⁷⁷

In 2022, the Norwegian government faced criticism for proposing a reduction in development aid despite rising petroleum revenues linked to the war in Ukraine.³⁷⁸ The proposal was ultimately withdrawn after pressure and negotiations with the Socialist Left Party, whose support is important for the current minority government, leading to a renewed commitment to uphold the 1% ODA/GNI target.³⁷⁹

According to Norway's federal statistical bureau, public support for aid to Asia, Africa, and Latin America has remained consistently high over the past 25 years, fluctuating between 82% and 90%, while opposition has remained low, at around 10%.³⁸⁰ This pattern is relatively consistent across different gender and age groups.³⁸¹ Across different voter groups, voters for the right-wing Progress Party (FrP) are most critical of aid spending, while voters of left-wing parties like the Socialist Left Party show the strongest support.³⁸²

³⁷⁶https://donortracker.org/donor_profiles/norway#oda-spending

³⁷⁷ Ibid.

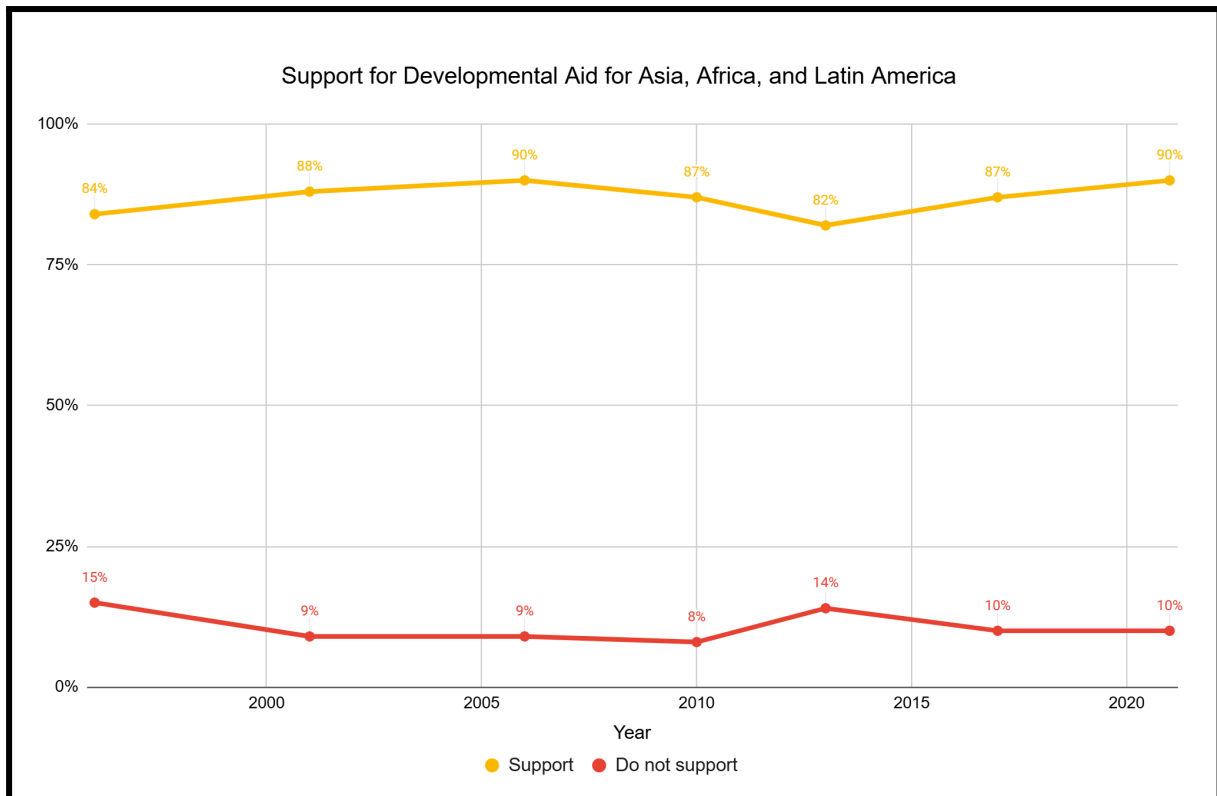
³⁷⁸ Ibid.

³⁷⁹ Ibid.

³⁸⁰<https://www.ssb.no/en/statbank/table/10220/tableViewLayout1/>

³⁸¹ Ibid.

³⁸²<https://www.panoramanyheter.no/utviklingsbransjen-utviklingspolitikk/meningsmaling-det-er-qreit-a-gi-1-krone-av-hv-er-hundrelapp-vi-tjener/110466#:~:text=er%20din%20kommentar%20til%20det>



In addition to this broad consensus, Norwegian aid has been characterised by limited public or parliamentary debate, particularly regarding changes in aid instruments and thematic priorities.³⁸³ For instance, although many Norwegians express a general interest in development aid, most are unable to name specific countries that receive Norwegian assistance.³⁸⁴ While traditional values like poverty reduction remain central, there has been a shift from bilateral partnerships to more focus on multilateralism.³⁸⁵

Despite consistently high public support for development aid, confidence in its effectiveness remains mixed. In a 2017 survey, more than a third of respondents believed that the Norwegian Agency for Development Cooperation wastes much of the aid budget, and only half felt that aid produces fairly or very good results.³⁸⁶ Further, public opinion diverges when it comes to the scale of aid. A recent poll found that while 61% of respondents supported maintaining or increasing the 1% GNI/ODA target, 29% favoured a reduction.³⁸⁷ Moreover, nearly six in ten agreed that aid should be scaled back in proportion to declining national income during the COVID-19 pandemic.³⁸⁸ This suggests that, when faced with concrete trade-offs, domestic priorities may influence support for aid, although there is limited empirical research directly examining such trade-offs.

³⁸³<https://www.tandfonline.com/doi/full/10.1080/08039410.2022.2096480>

³⁸⁴<https://www.panoramanyheter.no/norge-og-europa-utviklingsbransjen-utviklingspolitikk/flere-sier-ja-til-norsk-bistand-usikker-pa-om-det-hjelper/152423#:~:text=Nesten%20halve%20utvalget%20tror%20bistanden,mer%20enn%20tredoble%20siden%202006>

³⁸⁵<https://www.tandfonline.com/doi/full/10.1080/08039410.2022.2096480>

³⁸⁶<https://www.panoramanyheter.no/norge-og-europa-utviklingsbransjen-utviklingspolitikk/flere-sier-ja-til-norsk-bistand-usikker-pa-om-det-hjelper/152423#:~:text=Nesten%20halve%20utvalget%20tror%20bistanden,mer%20enn%20tredoble%20siden%202006>

³⁸⁷<https://www.panoramanyheter.no/utviklingsbransjen-utviklingspolitikk/meningsmaling-det-er-greit-a-gi-1-krone-av-hv-er-hundrelapp-vi-tjener/110466#:~:text=,er%20din%20kommentar%20til%20det>

³⁸⁸<https://www.panoramanyheter.no/utviklingsbransjen-utviklingspolitikk/meningsmaling-det-er-greit-a-gi-1-krone-av-hv-er-hundrelapp-vi-tjener/110466#:~:text=,er%20din%20kommentar%20til%20det>

Messengers

Norway consistently shows higher-than-average levels of institutional trust, with trust in news media also growing recently. Public broadcasters and well-established national outlets are among the most trusted, while international and partisan sources are viewed more critically. The government is generally perceived as transparent and compliant with the law, though concerns about corruption at the local level remain.

Norway's trust in public institutions and the media is somewhat higher than the OECD average, with the Norwegian public placing higher trust in their immediate personal surroundings, the police, and the judicial system.³⁸⁹

The proportion of the population that trusts 'most news most of the time' has recently increased from 46% in 2016 to 55% in 2024. Norwegians place the highest trust in public broadcast services and established domestic outlets, with NRK (80%), TV2 News (76%), and regional/local newspapers (75%) being trusted by the highest portion of respondents in a recent poll.³⁹⁰ Large print brands like Aftenposten (71%) and Dagens Næringsliv (70%) also score highly, alongside local radio news (66%).³⁹¹ In contrast, tabloids and more ideologically distinct outlets such as Dagbladet (53%) and Klassekampen (50%) receive more mixed evaluations.³⁹² The lowest trust levels are observed for international brands like ABC News (44%) – which may be seen as less familiar or relevant than Norwegian outlets – and the right-wing online newspaper Document.no (35%).³⁹³

Norway has long been a frontrunner in promoting transparency in governance, with 72% of citizens believing that government decisions are made transparently.³⁹⁴ However, despite this positive perception, information is partially seen as being communicated in complex bureaucratic language, which can limit meaningful access for certain social groups.³⁹⁵ Public confidence in institutional integrity is also high: 74% of Norwegians agree that the public sector generally adheres to laws and regulations.³⁹⁶ Nevertheless, concerns persist at the local level, where 36% of the population believes that practices such as bribery or informal favors are fairly or very common.³⁹⁷

During the COVID-19 pandemic, the Norwegian government responded quickly and effectively, attempting to maintain essential public services and introducing comprehensive support measures, while keeping communication with citizens transparent and consistent.³⁹⁸ By October 2021, public confidence remained high, with 68% expressing trust in the government's control efforts and 69% in the accuracy of its information.³⁹⁹

³⁸⁹https://www.oecd.org/en/publications/oecd-survey-on-drivers-of-trust-in-public-institutions-2024-results-country-note_s_a8004759-en/norway_d9a67b9b-en.html

³⁹⁰https://reutersinstitute.politics.ox.ac.uk/sites/default/files/2024-06/RISJ_DNR_2024_Digital_v10%20lr.pdf

³⁹¹ Ibid.

³⁹² Ibid.

³⁹³ Ibid.

³⁹⁴https://www.oecd.org/content/dam/oecd/en/publications/reports/2022/03/drivers-of-trust-in-public-institutions-in-norway_1b4b4ae9/81b01318-en.pdf

³⁹⁵ Ibid.

³⁹⁶ Ibid.

³⁹⁷ Ibid.

³⁹⁸https://www.oecd.org/content/dam/oecd/en/publications/reports/2022/03/drivers-of-trust-in-public-institutions-in-norway_1b4b4ae9/81b01318-en.pdf

³⁹⁹ Ibid.

Mediums

Norway's media landscape is shaped by large public service broadcasters among some large commercial outlets. While use of print and TV has declined, traditional news brands remain influential on digital platforms. The use of social media as a news source has declined in recent years.

In Norway, the news media landscape is dominated by strong public service broadcasters like NRK, alongside major commercial players such as Schibsted, which owns leading newspapers like Aftenposten and Verdens Gang.⁴⁰⁰ Norway's media landscape is also marked by high levels of press freedom, topping global rankings by Reporters Without Borders.⁴⁰¹ While national outlets maintain broad reach, local and regional newspapers remain important, with the sector as a whole adapting to digitalisation and shifting revenue models, e.g., by offering hybrid subscription models.⁴⁰² Still, the sector is overall facing financial pressures due to generational shifts in readership. For instance, the average age of Amedia subscribers – a large Norwegian media company – is 50.⁴⁰³

When asked about sources of news, the percentage of Norwegians using print media for news consumption decreased in recent years from 41% in 2016 to 19% in 2024, and those consuming news via TV decreased from 72% to 57%.⁴⁰⁴ Despite stable reliance on online news – used by around 85% of the population – social media has declined as a news source, with usage dropping from 54% in 2016 to 41% in 2024.⁴⁰⁵ Overall, while Norwegians are increasingly moving away from traditional print and broadcast formats, this shift does not necessarily reflect a move away from traditional news brands themselves with established outlets such as NRK, VG, and Aftenposten having a strong online presence.⁴⁰⁶

Among the various social, video, and messenger platforms, Facebook ranked as the most favoured source for news in Norway, used by 25% of the population for that purpose.⁴⁰⁷ Smaller shares of the population also receive their news via YouTube (13%), Snapchat (11%), Instagram (10%), or TikTok (7%). Reflecting concerns about the reliability of such platforms, 45% of Norwegians worry about what is real and what is fake online.⁴⁰⁸

Norway has one of the highest portions of residents that pay for online news at 40%.⁴⁰⁹ In addition to Norway's generally high socio-economic indicators, this high subscription rate can be attributed to several structural and cultural factors, such as a strong newspaper tradition, a successful shift to digital subscriptions, the absence of free-sheet newspapers, and the emergence of bundled subscription models giving access to multiple outlets from major media companies.⁴¹⁰

⁴⁰⁰https://reutersinstitute.politics.ox.ac.uk/sites/default/files/2024-06/RISJ_DNR_2024_Digital_v10%20lr.pdf

⁴⁰¹<https://rsf.org/en/index>

⁴⁰²https://reutersinstitute.politics.ox.ac.uk/sites/default/files/2024-06/RISJ_DNR_2024_Digital_v10%20lr.pdf

⁴⁰³ Ibid.

⁴⁰⁴ Ibid.

⁴⁰⁵ Ibid.

⁴⁰⁶ Ibid.

⁴⁰⁷ Ibid.

⁴⁰⁸ Ibid.

⁴⁰⁹ Ibid.

⁴¹⁰https://reutersinstitute.politics.ox.ac.uk/sites/default/files/2024-06/RISJ_DNR_2024_Digital_v10%20lr.pdf



COUNTRY SPECIFIC FINDINGS

IRELAND

- Economic challenges have remained prevalent in Ireland since the 2008 financial crisis, particularly around housing and unemployment.
- Trust and support for the EU has been consistently strong in Ireland and surpasses trust in the national government.
- The research suggests public support for aid in Ireland is one of the highest across the EU, however this does not necessarily translate to support for increasing spending.
- The annual Ipsos survey for Dóchas provides high quality data on Irish attitudes towards aid since 2021 and the public opinion data on aid in Ireland is the strongest amongst markets included in this review. However, the research landscape would benefit from further exploration into why support for aid breaks down across different demographics.

The 21st century has brought a series of interconnected pressures to Ireland, including a rapidly ageing population, a volatile housing market, and the lingering impacts of the 2008 financial crisis. These factors have shaped evolving public attitudes toward migration, economic redistribution, and the credibility of institutions. At the same time, Ireland's traditionally high levels of support for multilateralism and development aid remain strong, though increasingly influenced by concerns over cost and effectiveness. In recent years, the legacy of austerity combined with housing shortages and demographic pressures, continue to define the contours of Irish political and social debate.

Reflecting on recent public opinion trends in Ireland, the following points stand out:

1. **Ireland's ageing population and workforce pressures have reshaped the political economy**, but migration remains a politically sensitive solution: Although Ireland's population has grown by 8.1% since 2016⁴¹¹, this increase has been largely driven by migration, as the 65+ population surged by 35% over the past decade⁴¹². While increased migration is needed to offset the shrinking ratio of workers to retirees and support Ireland's ageing population, public concerns over housing shortages and strained public services have made calls for a more open migration strategy politically challenging.
2. **Ireland's economy rebounded after the 2008 financial crisis, but structural vulnerabilities persist** – particularly in housing and inequality. Ireland's post-crisis recovery, driven by foreign investment and rising female labour participation, helped it exit its IMF austerity package by 2013. However, the housing system remains under severe strain. In 2023, 56% of Irish respondents named housing as their top concern – over five times the EU average⁴¹³ – while younger generations are increasingly pessimistic about their long-term prospects.
3. **Public trust in national political institutions remains fragile, but the EU is still widely supported** – especially post-Brexit. Trust in Irish political leaders collapsed during the 2008 crisis and has remained low, particularly among Sinn Féin voters, 23% of whom report no trust in political parties.⁴¹⁴ By contrast, the EU has retained stronger support, possibly bolstered by Brexit's fallout, with two-thirds rejecting the idea that Ireland would be better off outside the EU in 2017.⁴¹⁵
4. **Support for aid remains high, but increasingly conditional on affordability and strategic value**. While 98% of the public in 2022 agreed it was important to partner with countries outside the EU to reduce poverty⁴¹⁶, only 26% supported increased aid spending.⁴¹⁷ Fiscal caution has become a clear limitation factor; as willingness to increase aid drops significantly when it requires higher taxes or reduced public spending. Still, a majority believe development aid serves national interests, especially when tied to trade, access to resources, or climate cooperation.

⁴¹¹ [Migration and Diversity Census of Population 2022 - Summary Results - Central Statistics Office](#)

⁴¹² [Ireland's population ageing faster than anywhere else in Europe as births fall - The Irish Times](#)

⁴¹³ [European Commission publishes latest Eurobarometer Report for Ireland - European Commission](#)

⁴¹⁴ [https://publicpolicy.ie/downloads/papers/2020/Trust in Politics Politicians and Institutions .pdf](https://publicpolicy.ie/downloads/papers/2020/Trust%20in%20Politics%20Politicians%20and%20Institutions.pdf)

⁴¹⁵ [Standard Eurobarometer 88 - Autumn 2017 - December 2017 - - Eurobarometer survey](#)

⁴¹⁶ <https://europa.eu/eurobarometer/surveys/detail/2673>

⁴¹⁷ <https://europa.eu/eurobarometer/surveys/detail/2252>

POLITICAL ECONOMY LANDSCAPE

Summary

From 2000 to 2025, Ireland's demographic and migration trends have significantly impacted its economic and political landscape. The country has experienced a population growth of 8.1% since 2016,⁴¹⁸ however, much of this increase has been driven by net migration as birth rates have declined. Ireland's ageing population, particularly those aged 65 and over, has created economic challenges, placing strain on healthcare and pension provision.

Meanwhile, economic recovery post-2008 has led to skyrocketing housing prices and rents, causing significant wealth disparities and public dissatisfaction, especially among younger generations struggling with homeownership. These demographic shifts and economic pressures have made housing, immigration, and the cost-of-living central issues in politics. This, combined with the lasting effects of the 2008 financial crisis, is contributing to political realignment, with recent elections showing growing influence from opposition and smaller parties as the two major parties' dominance weakens.

Demographics/migration

Ireland faces the pressures of an ageing population, with a population growth of 8.1% since 2016⁴¹⁹, largely driven by net migration due to declining birth rates. The fastest-growing demographic is those aged 65 and over, which has increased by 35% in the past decade.⁴²⁰

This shift poses economic challenges, with projections showing the ratio of tax-contributing workers to retirees will fall from five-to-one to three-to-one in 20 years,⁴²¹ straining healthcare and pensions. To address some of these pressures, the 2025 budget allocated an additional €2.7 billion to health services,⁴²² aiming for a 27% increase in the healthcare workforce compared to 2019 levels.⁴²³

A more flexible migration strategy could help address some of these challenges but may face political resistance. From 1996 to 2009, Ireland's liberal stance on migration, especially after granting unrestricted labour access to new EU accession states in 2004, led to a rise in EU nationals in semi-skilled or unskilled jobs, from 3.5% in 2003 to 6.3% in 2005.⁴²⁴ Public sentiment

⁴¹⁸<https://www.cso.ie/en/releasesandpublications/ep/p-cpsr/censusofpopulation2022-summaryresults/migrationanddiversity/>

⁴¹⁹ Ibid.

⁴²⁰<https://www.irishtimes.com/ireland/social-affairs/2022/12/02/ireland-ageing-faster-than-anywhere-else-in-europe-as-births-fall/>

⁴²¹<https://www.irishtimes.com/ireland/social-affairs/2022/12/02/ireland-ageing-faster-than-anywhere-else-in-europe-as-births-fall/>

⁴²² [Budget 2025 and what it means for healthcare in Ireland | Eolas Magazine](#)

⁴²³ Ibid.

⁴²⁴ <https://www.migrationpolicy.org/article/ireland-rapid-immigration-recession/>

was initially positive, with 93% of Irish respondents in 2003 believing EU expansion would benefit businesses.⁴²⁵

However, emigration surged by 240% by 2012⁴²⁶ and unemployment hit historic highs, which led public opinion on migration to shift. By 2012, 81% of 18–24-year-olds supported reducing migration, while 40% anticipated emigrating within five years⁴²⁷, suggesting economic insecurity and concerns over the domestic labour market were becoming widespread.

Today, Ireland is seeing a renewed wave of migration, driven by the Ukrainian refugee crisis and post-recession recovery, resulting in an 18% increase in non-Irish residents since 2016⁴²⁸. With housing and healthcare still major concerns, the combination of an ageing population, reliance on foreign labour, and the legacy of austerity will likely complicate efforts to address long-term demographic and workforce challenges.

Wealth/inequality

From the mid-1990s to the early 2000s, Ireland experienced rapid economic growth, earning the nickname “Celtic Tiger.” The country shifted from high per capita debt and a GDP at just 63% of the UK’s⁴²⁹ to annual growth rates of 5.14% (1990-1995) and 9.66% (1996-2000).⁴³⁰ However, Ireland’s heavy reliance on property-related lending left it acutely vulnerable to the 2008 global financial crisis. Between 2002 and 2006, the share of bank assets tied to property rose from under 40% to over 60%⁴³¹, amplifying the economy’s exposure when the property bubble burst. In response, the Irish government secured a €85 billion bailout from the EU and IMF in 2010⁴³², contingent on stringent austerity measures, including significant tax increases and nearly €30 billion in public spending cuts.⁴³³ Consequently, unemployment soared to 16% in 2011 from 5% in 2007.⁴³⁴

Despite the severe impact of the 2008 financial crisis, Ireland’s recovery exceeded expectations, earning the IMF’s ‘poster child’ title for austerity after exiting its programme in 2013. Key to this rebound was Ireland’s ability to attract foreign direct investment, particularly in sectors like pharmaceuticals, food production, and ICT services. Increased migration and higher female workforce participation also fueled growth, with women’s employment rising from 59% in 2009 to 74% by 2024.⁴³⁵

However, the crisis left lasting effects, especially in the housing sector where supply couldn’t meet demand. Two-thirds of construction jobs were lost in the recession⁴³⁶ and house prices plummeted, resulting in fewer than 10,000 units built annually between 2011 and 2014,

⁴²⁵ <https://europa.eu/eurobarometer/surveys/detail/299>

⁴²⁶ Gilmartin, M. (2013). Changing Ireland, 2000–2012: Immigration, emigration and inequality. *Irish Geography*, 46(1-2), 19–34. <https://doi.org/10.2013/igj.v46i1-2.530>

⁴²⁷ <https://www.irishcentral.com/news/majority-of-irish-want-fewer-immigrants-in-ireland-72525702-237671671>

⁴²⁸ <https://www.cso.ie/en/releasesandpublications/ep/p-cpsr/censusofpopulation2022-summaryresults/migrationanddiversity/>

⁴²⁹ <https://www.celticcountries.com/economy/32-ireland-economic-miracle-celtic-tiger>

⁴³⁰ Ibid.

⁴³¹ Chari, R. (2011, April 28). *Crisis and change in Ireland (ARI 79/2011)*. Real Instituto Elcano. <https://media.realinstitutoelcano.org/wp-content/uploads/2021/11/ari79-2011-chari-crisis-change-ireland.pdf>

⁴³² [Irish Republic 'to get 85bn-euro EU and IMF bail-out' - BBC News](https://www.bbc.com/news/world-europe-25347135)

⁴³³ <https://www.bbc.com/news/world-europe-25347135>

⁴³⁴ Ibid.

⁴³⁵ [Employment rate up, female participation at record high](https://www.socialeurope.eu/irelands-recovery-from-bust-to-buoyancy-to-brexit)

⁴³⁶ <https://www.socialeurope.eu/irelands-recovery-from-bust-to-buoyancy-to-brexit>

compared to 75,000 before the crash.⁴³⁷ As demand surged in the 2020s, property prices rose by 134% from 2013.⁴³⁸

Trends in politics

In the 2000s, politics were largely dominated by two political forces: Fianna Fáil and Fine Gael. The political system during this period was often described as a "two-and-a-half-party" system, with Fianna Fáil and Fine Gael competing for dominance, while smaller parties, including Labour and the Greens, frequently acted as coalition partners. Fianna Fáil, under Taoiseach Bertie Ahern, was the dominant force, positioned as a centrist party with a strong rural and working-class base. Fine Gael, more pro-business and socially conservative, was associated with urban areas.

However, after the financial crisis of 2008, the political landscape shifted. The economic collapse and subsequent recession left an imprint on the public's confidence in their government; in 2010, 62% of the Irish public believed government policies had no impact on improving the conditions of the most vulnerable.⁴³⁹ Fianna Fáil's role in the banking bailout and austerity measures, along with Ahern's resignation over undeclared financial transactions, further damaged public confidence. His successor, Brian Cowen, struggled with the fallout, leading to Fianna Fáil's loss of 51 of its 71 seats in the 2011 election⁴⁴⁰.

The 2010s marked a period of economic recovery and significant social transformation in Ireland. By 2017, unemployment had dropped from over 15% in 2011 to under 7%.⁴⁴¹ Ireland also became the first country to legalise same-sex marriage in 2015 and repealed the Eighth Amendment in 2018, legalising abortion. While Fianna Fáil and Fine Gael adjusted to new social realities, Sinn Féin capitalised on the liberalisation of attitudes. Under Gerry Adams until 2018 and Mary Lou McDonald afterward, Sinn Féin embraced pro-choice views and focused on social justice issues like healthcare and housing. Its popularity surged, with housing resonating strongly with voters. By 2020, Sinn Féin's vote share reached 24.5%, nearly doubling its 2016 support and marking its first time topping the popular vote⁴⁴².

However, Sinn Féin's limited candidates and the two major parties' refusal to form a coalition kept it in opposition. Instead, Fianna Fáil and Fine Gael formed a power-sharing agreement in June 2020, with the Green Party as a smaller partner. However, they remain vulnerable to public discontent, especially over housing, with protests like "Raise the Roof" demanding stronger action. Meanwhile, the cost-of-living crisis, worsened by global inflation and the war in Ukraine, has become the second most pressing issue at 19%.⁴⁴³ Thus, despite economic recovery, many citizens have not felt the benefits, fuelling dissatisfaction and providing opportunities for political realignments.

⁴³⁷ [Economic Letter: Housing supply after the crisis](#)

⁴³⁸ [Rents continue to rise across Ireland with almost 30% of tenancies over €2,000 a month – The Irish Times](#)

⁴³⁹ <https://europa.eu/eurobarometer/surveys/detail/883>

⁴⁴⁰ [2011 General Election](#)

⁴⁴¹ [Working Together: Ireland and IMF](#)

⁴⁴² <https://www.esri.ie/system/files/publications/RS170.pdf>

⁴⁴³ <https://dublinpeople.com/news/house-home/articles/2025/02/19/housing-the-issue-that-wont-leave-the-government-alone/>

PUBLIC OPINION RESEARCH

Summary

From 2000 to 2025, the Irish public's priorities have shifted from healthcare in the early 2000s to economic concerns, particularly unemployment, following the 2008 financial crisis. In the 2020s, housing became the top issue, with 56% of respondents citing it as their primary concern,⁴⁴⁴ followed by immigration and inflation. Trust in the government has remained volatile, with increasing disillusionment, while trust in the EU has remained relatively high, especially post-Brexit with Ireland feeling its interests are best served through EU membership.

While public support for aid has remained strong throughout the past two decades, outpacing most EU countries, fiscal pressures have limited increases in funding. Furthermore, limited information on public attitudes suggest that when economic considerations are taken into account, public support for increasing aid spending drops. These issues alongside limited awareness regarding the EU's development goals raise questions as to whether Ireland's longstanding pro-aid attitudes could withstand an environment where they are forced to compete with other policy trade-offs.

Messages

Top issues driving the debate

In the early 2000s, healthcare emerged as the dominant concern among the Irish public. A 2005 Eurobarometer survey revealed that 49% of Irish respondents identified health as the country's top priority.⁴⁴⁵ This focus reflected dissatisfaction with Ireland's two-tier healthcare system, which struggled to provide timely, affordable, and equitable care. Nearly 90% believed private hospitals offered faster treatment,⁴⁴⁶ and 36% of those with poor health rated the system as "bad" or "very bad".⁴⁴⁷

By the 2010s, the economic recession had replaced healthcare as the primary concern. Between 2008 and 2009, the percentage of respondents citing the economy as the top issue surged from 10% to 50%, while concern for health dropped by around 30 percentage points.⁴⁴⁸ This shift reflected the severity of Ireland's exposure to the global financial crisis, with the bailout and broader ramifications resulting in Ireland's government debt quadrupling to 135% of Gross National Product.⁴⁴⁹ The collapse of the construction sector was particularly severe as it

⁴⁴⁴https://ireland.representation.ec.europa.eu/news-and-events/news/european-commission-publishes-latest-eurobarometer-report-ireland-2023-12-19_en#:~:text=For%20Irish%20people%2C%20the%20most%20important%20issue%20facing,respondents%20said%20housing%20was%20a%20key%20national%20concern.

⁴⁴⁵<https://www.independent.ie/irish-news/law-breaking-now-top-issue-with-voters/25976156.html>

⁴⁴⁶ <https://www.esri.ie/system/files/media/file-uploads/2015-07/BKMNINT163.pdf>

⁴⁴⁷ Ibid.

⁴⁴⁸ <https://europa.eu/eurobarometer/surveys/detail/831>

⁴⁴⁹ [How did Ireland recover so strongly from the global financial crisis? - Economics Observatory](#)

employed nearly a third of young men and therefore contributed to youth unemployment reaching 30.4% by 2012.⁴⁵⁰ By 2013, unemployment became the most pressing issue at 65%, followed by the general economy (45%) and government debt (16%).⁴⁵¹ As recovery efforts improved economic forecasts in the mid-2010s, public sentiment began to stabilise, and national priorities diversified. By 2015, unemployment, though still high at 32%, was overtaken by housing concerns (34%), followed by health and public security (29%).⁴⁵²

In the 2020s, Irish public opinion broadened to include a range of concerns. Housing became the top issue, as housebuilding targets were continuously missed; with just 30,330 new homes built in 2024, compared to the anticipated 40,000.⁴⁵³ These housing pressures meant the rental market also became increasingly unaffordable, contributing to 56% of Irish respondents citing housing as their top concern, well above the EU average of 10%.⁴⁵⁴ These challenges have led to feelings of hopelessness, with only 36% of young people believing the next generation will be better off.

Alongside housing, immigration concerns have grown steadily. While the majority of the Irish public (75%) agree that immigrants contribute positively to their country⁴⁵⁵ – well above the EU average – concern over immigration continues to rise. In 2024, 22% of Irish respondents identified immigration as a key issue, compared to 20% across the EU.⁴⁵⁶ At the same time, 84% of the Irish public support helping refugees, higher than the EU average of 73%.⁴⁵⁷ Anti-immigration sentiment is also stronger among those aged 35-44 with a generally negative outlook on the future, suggesting that anxiety over housing, services, or employment is driving concern over migration.

A longitudinal Ipsos survey exploring attitudes in Ireland towards aid has found that a critical segment of the population termed the “Disengaged” (including those with more negative or reserved attitudes towards ODA) has grown to 17%, up from 10% in 2021.⁴⁵⁸

Trust

Over the past two decades, public trust in Irish national institutions has diverged from trust in the EU, with the latter consistently faring better. In 2005, 57% of Irish respondents trusted both the European Parliament,⁴⁵⁹ a figure that remained strong at 56% in 2024.⁴⁶⁰ In contrast, trust in the national government, parliament, and political parties has been more volatile, particularly after the 2008 financial crisis. By 2012, trust in politicians hit an all-time low, and by 2022, 48% distrusted the government,⁴⁶¹ with 53% feeling ignored by it.⁴⁶²

⁴⁵⁰ [2013-12-05 spotlight-responding-to-youth-unemployment-in-europe_en.pdf](#)

⁴⁵¹ [Standard Eurobarometer 80 - Autumn 2013 - December 2013 - - Eurobarometer survey](#)

⁴⁵² [Standard Eurobarometer 84 - Autumn 2015 - December 2015 - - Eurobarometer survey](#)

⁴⁵³ [Potential Rent Control Scrap - What this Could mean for the Irish Housing Market in 2025. - mylittlehome.ie](#)

⁴⁵⁴ https://ireland.representation.ec.europa.eu/news-and-events/news/european-commission-publishes-latest-eurobarometer-report-ireland-2023-12-19_en#:~:text=For%20Irish%20people%2C%20the%20most%20important%20issue%20faci ng,respondents%20said%20housing%20was%20a%20key%20national%20concern.

⁴⁵⁵ [Standard Eurobarometer 102 Public opinion in the European Union](#)

⁴⁵⁶ Ibid.

⁴⁵⁷ Ibid.

⁴⁵⁸ <https://www.dochas.ie/resources/worldview/quantitative-findings/survey-5/>

⁴⁵⁹ [Standard Eurobarometer 63 - Spring 2005 - July 2005 - - Eurobarometer survey](#)

⁴⁶⁰ [Standard Eurobarometer 102 Public opinion in the European Union](#)

⁴⁶¹ [Nearly half of Irish public does not trust the Government to be honest or tell the truth, according to new UCD study - University College Dublin](#)

⁴⁶² Ibid.

This distrust is especially strong among Sinn Féin voters, 23% of whom report no trust in political parties,⁴⁶³ likely due to political exclusion, as Fianna Fáil and Fine Gael have repeatedly ruled out coalitions with Sinn Féin. Meanwhile, perceptions of the EU have improved, especially post-Brexit. In 2017, 66% of Irish respondents rejected the idea of Ireland being better off outside the EU,⁴⁶⁴ and 59% viewed the Union positively,⁴⁶⁵ a significant shift from 2015, when 52% expressed distrust.⁴⁶⁶

Aid & multilateralism

In 1993, the government published its first official policy on development cooperation, which laid the foundation for a period of ambitious engagement in the early 2000s. Ireland committed to the UN target of allocating 0.7% of GNP to ODA by 2007, reflecting its economic confidence and rising international profile. Aid volumes peaked at €920.7 million in 2008⁴⁶⁷, with 95% of the public supporting aid,⁴⁶⁸ though public awareness of specific aid policies remained low, as 72% were unfamiliar with the Millennium Development Goals by 2007.⁴⁶⁹

The 2010s marked a period of shifting attitudes influenced by the economic recession and by 2013, ODA fell sharply to €623 million.⁴⁷⁰ Despite economic constraints, Irish public support for aid remained among the highest in the EU. In 2010, 95% of respondents said it was important to support people in developing countries,⁴⁷¹ and 65% reported giving money or support to development causes⁴⁷² – the highest figure in Europe. However, awareness for aid related policies and programmes remained uneven, with 77% unaware of the MDGs in 2013⁴⁷³ and 64% unfamiliar with the SDGs in 2017.⁴⁷⁴ Still, many Irish people saw aid as aligned with national interests, with 70% in 2013 believing poverty reduction benefited the EU.⁴⁷⁵

Notably, the 2010s revealed a gap between Ireland's strong moral support for aid and the limits of that support when personal cost was involved. In 2015, only 8% were willing to pay between 6-10% more for fair trade groceries, while 47% would refuse to pay more altogether.⁴⁷⁶ Notably, in the same poll, 71% agreed that tackling poverty in developing countries should be one of the EU's main priorities,⁴⁷⁷ suggesting that while Irish people broadly endorse aid in theory, willingness to absorb personal cost depended on economic circumstances.

⁴⁶³https://publicpolicy.ie/downloads/papers/2020/Trust_in_Politics_Politicians_and_Institutions_.pdf

⁴⁶⁴ [Standard Eurobarometer 88 - Autumn 2017 - December 2017 - - Eurobarometer survey](#)

⁴⁶⁵ Ibid.

⁴⁶⁶ [Standard Eurobarometer 84 - Autumn 2015 - December 2015 - - Eurobarometer survey](#)

⁴⁶⁷ Pain, C. (2013). Who supports increasing development aid in Ireland? An analysis of attitudes towards and predictors of support for development aid (Master's thesis, Trinity College Dublin). Trinity College Dublin.

⁴⁶⁸ Ibid.

⁴⁶⁹ <https://europa.eu/eurobarometer/surveys/detail/592>

⁴⁷⁰ Pain, C. (2013).

⁴⁷¹ <https://europa.eu/eurobarometer/surveys/detail/865>

⁴⁷² Ibid.

⁴⁷³ <https://europa.eu/eurobarometer/surveys/detail/1082>

⁴⁷⁴ <https://europa.eu/eurobarometer/surveys/detail/2109>

⁴⁷⁵ <https://europa.eu/eurobarometer/surveys/detail/1082>

⁴⁷⁶ [The European Year for Development – Citizens views on development, cooperation and aid - January 2015 - - Eurobarometer survey](#)

⁴⁷⁷ Ibid.

In the 2020s, with Ireland’s economy recovering, Ireland has again substantially increased its ODA spending. In 2023, Ireland’s total ODA stood at €2.6 billion, amounting to 0.67% of GNI⁴⁷⁸ – the highest nominal level to date. However, this figure includes in-country refugee costs for Ukrainians in their first year in Ireland. When these costs are excluded, the underlying ODA drops to €1.4 billion, or 0.38% of GNI.⁴⁷⁹ This reflects a modest increase from 0.30% in 2021 to 0.39% in 2022, before dipping slightly again in 2023.⁴⁸⁰

However, public attitudes during this period have remained overwhelmingly positive, reflecting a long-standing consensus on the importance of global development. In 2022, 98% of Irish respondents said it was important to partner with non-EU countries to reduce poverty,⁴⁸¹ the second-highest rate in the EU, with support cutting across political lines, including 72% of EU critics backing climate-related aid efforts.⁴⁸²

Nonetheless, there are limits to the public appetite for increased spending. In 2019, only 26% of Irish respondents wanted aid spending to rise⁴⁸³ – slightly below the EU28 average of 30%⁴⁸⁴ – while a majority (53%) preferred to maintain current levels.⁴⁸⁵ That said, development cooperation is still seen as strategically relevant: 84% believe tackling poverty in developing countries serves the EU’s interests, including through trade and access to raw materials.

Messengers

Recent trends suggest that scientists (78%) and teachers (76%) remain the most trusted voices in Irish society,⁴⁸⁶ indicating that expertise and perceived neutrality carry considerable weight. Neighbours (68%) and CEOs (56%) are trusted more than government leaders (46%) or journalists (42%),⁴⁸⁷ suggesting that proximity and familiarity influence perceived credibility more than institutional position.

Political leaders, by contrast, face persistent declines in trust levels. In 2025, just 46% of respondents trusted government leaders to do what is right,⁴⁸⁸ while 60% believed journalists actively misled audiences⁴⁸⁹ – a significant rise from 52% in 2021.⁴⁹⁰ This loss of faith appears to reflect not only a decline in credibility, but a shift in how authority is judged. Only 42% of those with high political grievance believe formal positions alone confer legitimate influence;⁴⁹¹ instead, legitimacy is increasingly tied to perceived empathy and responsiveness. Across grievance levels, over two-thirds of respondents said leaders earn authority when they understand “what people like me need and want.”⁴⁹²

⁴⁷⁸ Department of Foreign Affairs. (2024, October 2). Irish Aid report shows highest investment to date in ODA programme. Government of Ireland. <https://www.gov.ie/en/department-of-foreign-affairs/press-releases/irish-aid-report-shows-highest-investment-to-date-in-oda-programme/>

⁴⁷⁹ Ibid.

⁴⁸⁰ Ibid.

⁴⁸¹ <https://europa.eu/eurobarometer/surveys/detail/2673>

⁴⁸² Ibid.

⁴⁸³ <https://europa.eu/eurobarometer/surveys/detail/2252>

⁴⁸⁴ Ibid.

⁴⁸⁵ Ibid.

⁴⁸⁶ [2025 Edelman Trust Barometer Ireland Report.pdf](#)

⁴⁸⁷ Ibid.

⁴⁸⁸ Ibid.

⁴⁸⁹ Ibid.

⁴⁹⁰ Ibid.

⁴⁹¹ Ibid.

⁴⁹² Ibid.

Mediums

Over the past decade, the ways Irish people access information have shifted sharply from traditional to digital platforms and trust in these mediums has become increasingly fragmented. In 2015, television (65%) and radio (52%) were the primary sources for political news.⁴⁹³ By 2022, digital had overtaken traditional media in general: 72% accessed news weekly via smartphone,⁴⁹⁴ and outlets like RTÉ, TheJournal.ie, and Independent.ie were among the most used digital sources. Younger people led this shift – TV viewership declined by 14.2% among adults aged 25–44 and 17.8% among those 15–34.⁴⁹⁵

By 2025, only 55% of Irish people reported trusting traditional media, 50% trusted search engines, and just 22% trusted social media.⁴⁹⁶ Social networks as a political news source has dropped slightly in recent years.⁴⁹⁷ However, nearly 40% of those aged 18 to 24 chose social media as their primary news source, whereas TV remains popular among the over 65s (51% report it as their primary news source)⁴⁹⁸ – suggesting generational disparities over media consumption could be becoming more pronounced.

Notably, in Ipsos research the clearest trend on news sources for the “Disengaged” group, where negative attitudes towards ODA tended to concentrate, was that they were less engaged with the news overall. They were significantly less likely to engage with TV, Newspaper, or Radio news. Social media, however, was roughly level with the population average. These results imply that the core group who are out of step with aid advocacy are broadly harder to reach through traditional outlets.⁴⁹⁹



⁴⁹³ <https://europa.eu/eurobarometer/surveys/detail/2068>

⁴⁹⁴ <https://www.adworld.ie/wp-content/uploads/2022/08/Irish-Media-Consumption-Report-H1-2022-Final-2.pdf>

⁴⁹⁵ Ibid.

⁴⁹⁶ https://www.edelman.ie/sites/g/files/aatuss306/files/2025-03/2025%20Edelman%20Trust%20Barometer_Ireland%20Report.pdf

⁴⁹⁷ [Standard Eurobarometer 100 - Autumn 2023 - December 2023 - - Eurobarometer survey](#)

⁴⁹⁸ [Social media is on the rise in Ireland as main news source](#)

⁴⁹⁹ <https://www.dochas.ie/resources/worldview/quantitative-findings/survey-5/>



COUNTRY SPECIFIC FINDINGS

JAPAN

- Japan's rapidly ageing society poses significant domestic economic challenges.
- Trust in the government is moderate at best, with recent research indicating a majority of the public have little trust in the government. Trust is significantly lower among younger people.
- There is a gap in the available data showing attitudes towards aid and multilateralism, and on effective messages and messengers for building support.
- Where there is public opinion research on aid, it broadly shows widespread in principle support but does not interrogate aid spending in the context of domestic trade-offs.

Japan's economic growth has stagnated over the past 30 years. Labour inequalities between men and women (resulting in fewer women in the workforce) and an ageing population have compounded to make it even more difficult to reignite the economy. Politics has focused both on boosting economic growth and bolstering national security. China's rapid militarisation has triggered Japan's ruling party to reconsider its pacifist stance and has invested considerably in collective self-defence.

Against this backdrop, our review found:

1. **Strong support amongst the Japanese public for aid and multilateralism.** Despite economic pressures and regional instability, a large majority of the Japanese public supports maintaining or increasing international aid spending, viewing development cooperation as essential for tackling global challenges like natural disasters and disease. Only a small minority (3%) think aid should be stopped entirely.
2. **Public perceptions around increased cost of living may put pressure on government spending decisions in the near future.** Over half (55.9%) of the public feel financially worse off than the previous year, and nearly all perceive rising prices, which has driven increased demand for government policies targeting relief for low- and middle-income households. Responding to these domestic economic challenges may present a threat to other spending areas, including aid, in the future.
3. **Public trust in government is lukewarm, though they still expect it to govern with authority.** Over half of the public say they trust the national government to do what is best for the country (57% in 2017) which is lower than the Netherlands (71%) and Germany (69%) but higher than the UK (49%).⁵⁰⁰ Trust in politicians and political parties is particularly low amongst younger people.
4. **The public prioritise national security over all else, and anticipate increased instability in Asia in upcoming years.**⁵⁰¹ 82% have noted that the security environment of East Asia has gotten more severe in recent years. When asked about how the Japanese government should approach diplomacy in different parts of the world, the public overwhelmingly chose that the government should protect Japanese national security and take a strong stance against intrusions. The public was split on whether economic partnerships and trade (52%) or security and defence (50%) should take priority in US-Japan relations.

⁵⁰⁰ <https://www.pewresearch.org/global/2017/10/17/mixed-feelings-on-japans-democracy/>

⁵⁰¹ <https://www.mofa.go.jp/files/100807389.pdf>

POLITICAL ECONOMY LANDSCAPE

Summary

Japan's population is ageing rapidly, exacerbating the country's economic stagnation. In the past 25 years, the government has introduced economic reforms aimed at involving more women in the job market, improving childcare opportunities, widening access to work visas to encourage immigration, and increasing the retirement age (reaching 65 in 2025), though the economy still hasn't fully recovered since the 1990s.⁵⁰² This is due in part to the 2008 financial crisis, the tsunami and subsequent nuclear disaster in 2011, and the COVID-19 pandemic, alongside persisting inequalities that have made it difficult to increase immigration and stable employment for women.

The political environment has been largely stable since 2000. However, a recent scandal by the dominant ruling party, the Liberal Democratic Party (LDP), has led to the first minority government in 30 years.

Demographics/migration

Japan is considered a "super-aged" society, where more than 20% of a country's population is 65 or older - in Japan, the elderly make up roughly 30% of the total population. Despite Japan's commitment to reverse the birth rate decline, 2025 recorded the lowest birth rate in Japan in 125 years.⁵⁰³ The OECD projects the population will fall by 45% and employment by 52% in 2100 at the current rates of fertility (1.20 births per woman⁵⁰⁴), employment, and immigration.⁵⁰⁵

Japan experienced positive net migration in 2023 (175,003) despite a long-standing history of restrictive immigration laws and perceptions of Japan as a 'homogenous' country. Around 2.7% of the population is foreign nationals, largely from China, Vietnam, the Philippines, South Korea, and Brazil. Immigration to Japan and cultural integration has been relatively limited compared to many other countries reviewed in this report, and immigration is not considered a top priority among the Japanese public. A majority of the public agree that it is difficult for foreigners to assimilate into Japanese society and aren't easily able to identify the benefits of immigrants to the national economy.⁵⁰⁶

⁵⁰² <https://library.oapen.org/bitstream/handle/20.500.12657/90947/1/978-981-97-2867-1.pdf#page=218>

⁵⁰³ <https://www.independent.co.uk/asia/japan/japan-birth-rate-lowest-population-b2705648.html>

⁵⁰⁴ https://www.oecd.org/en/publications/2024/06/oecd-employment-outlook-2024-country-notes_6910072b/japan_85e15368.html

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https://www.oecd.org/en/publications/addressing-demographic-headwinds-in-japan-a-long-term-perspective_96648955-en.html

⁵⁰⁶ <https://library.oapen.org/bitstream/handle/20.500.12657/90947/1/978-981-97-2867-1.pdf#page=218>

Wealth/inequality

Japan is the world's fourth largest economy, following the US, China, and Germany. Despite this relative prominence, Japan has been experiencing economic stagnation since the 1990s resulting from the collapse of an asset price bubble, when commercial and residential land prices decreased significantly. The resulting deflation has often been referred to as the 'Lost Decades', as companies reduced wages, and limited research investments led to a decline in competitiveness of the economy as a whole. The economy has taken an upward trajectory since the pandemic, after a rise in import prices and tightening of the labour market, though it still has yet to fully recover.⁵⁰⁷

In the past 25 years, Japan's GDP per capita has decreased, from \$39,691 in 2000 to \$33,766 in 2023.⁵⁰⁸ The most recent Gini coefficient was recorded in 2013, at 0.329 which is in line with similar-sized economies like South Korea, Germany, and India, and slightly lower than the UK, US, and China. Income inequality has been steadily increasing since the 1980s, coinciding with economic stagnation and a rapidly ageing population.⁵⁰⁹ Although women have increasingly been entering the workforce, they are mostly taking low-skilled, non-regular, and/or part-time occupations which exacerbates economic inequality and widens the gender wage gap, which is the second highest in all OECD countries at 24.9%.

Trends in politics

Japanese politics has been dominated by the centre-right Liberal Democratic Party (LDP); over the past 25 years, it has been in power for all but four of them (2009-2012), which saw a brief stint by the centre-left Democratic Party of Japan (DPJ) which later splintered into the Democratic Party (DP), the Japan Innovation Party, and the Constitutional Democratic Party of Japan (CDP). The failure of the DPJ is largely attributed to its inability to prevent and respond to the tsunami and nuclear disaster at Fukushima in 2011. The 2012 election saw them lose 173 seats in the House of Representatives and ushered in a long tenure of a stable Prime Minister, Shinzo Abe.

During his time in office, Abe prioritised national security and defence, mainly arguing for collective self-defence, more military spending, and a closer relationship with the US. This marked a shift away from the pacifist values that dominated Japan's politics in the latter half of the 20th century.⁵¹⁰ When Abe resigned in 2020, he left a legacy of a strong, top-down administration but one that had mishandled the pandemic, leading to two prime ministers in rapid succession: Yoshihide Suga (2020-2021) and Fumio Kishida (2021-2024). Kishida was characterised by his largely moderate politics. Notably, he continued the LDP's trend of asserting Japan's military strength, increasing Japan's defence spending limit from 1% of the country's GDP to 2%.⁵¹¹ He left office after a series of scandals that revealed corruption in the LDP, which impacted the most recent snap elections called by Kishida's successor Shigeru Ishiba in October 2024: the ruling coalition (LDP) and New Komeito lost their majority. Currently, no party or coalition holds a 200-seat majority in the National Diet, Japan's parliament, requiring the minority LDP - Komeito coalition to work with opposition parties on an ad hoc basis. Despite

⁵⁰⁷ https://www.boj.or.jp/en/about/press/koen_2025/data/ko250114a1.pdf

⁵⁰⁸ <https://data.worldbank.org/indicator/NY.GDP.MKTP.KD.ZG?end=2023&locations=JP&start=2000>

⁵⁰⁹

<https://www.imf.org/en/Publications/selected-issues-papers/Issues/2024/07/01/Sustainable-Path-to-Inclusive-Growth-in-Japan-How-to-Tackle-Income-Inequality-551201>.

⁵¹⁰ https://japan.kantei.go.jp/constitution_and_government_of_japan/constitution_e.html

⁵¹¹ <https://journals.sagepub.com/doi/epdf/10.1177/20419058241305471>

this, Japan's public remains largely conservative, with 48% identifying as conservative compared to 29% who identify as liberal and 23% who identify as centrist.⁵¹² The election also saw the third-lowest voter turnout in Japan's post-war history (54%).⁵¹³

Although LDP lost its majority, it remains the leading party in the Diet with 192 seats, followed by the centre-left CDP at 148 seats. The third- and fourth-largest parties are considered populist parties: Ishin which lost 3 seats to bring it to a total of 41, and the Democratic Party for the People (DPFP) which won 17 seats to bring its total up to 27. The DPFP has been described as a reformist-centrist and reformist-conservative party but is critical of Japan's security-focused policies and has advocated for more humanitarian aid spending.⁵¹⁴ It has also been adamant that it will not join a coalition and instead will vote on a policy-by-policy basis, giving it significant bargaining power in the Diet.⁵¹⁵ DPFP's main priority is to 'increase take-home pay'⁵¹⁶ and has strongly advocated for raising the income tax threshold, though some estimates expect this would reduce annual tax revenue by 7 to 8 trillion yen (roughly 37 billion to 43 billion pounds).⁵¹⁷ Ishiba has expressed interest in pursuing this which will likely have repercussions for Japan's spending in other areas.

Due to Japan's economic stagnation over the past 20 years and its poor recovery from the 2011 disasters and COVID-19, Ishiba's government is expected to prioritise its economic policies, alongside increasing its defensive stance in the region.⁵¹⁸ Security has become a top issue for the government, resulting from China's increased military activities near Japan and Taiwan, and North Korea's deepened ties with Russia.⁵¹⁹ Prime Minister Ishiba has advocated for constitutional reform of Article 9 - often referred to as the 'pacifist clause' - which renounces war as a sovereign right and prohibits Japan's possession of war potential, arguing that Japan maintains a right to self-defence.⁵²⁰ It is expected that security will remain a priority of Japan's foreign policy.

⁵¹² <https://www.asahi.com/articles/ASRCW61S4RCSUTIL023.html>

⁵¹³ <https://www.swp-berlin.org/en/publication/minority-government-in-japan>

⁵¹⁴ <https://www.crjapan.org/voices/democratic-party-people-dpfp>

⁵¹⁵ <https://www.asahi.com/ajw/articles/15485987>

⁵¹⁶ Ibid.

⁵¹⁷ <https://www.swp-berlin.org/en/publication/minority-government-in-japan>

⁵¹⁸ <https://www.csis.org/analysis/new-normal-navigating-japans-shifting-political-currents>

⁵¹⁹ <https://www.swp-berlin.org/en/publication/minority-government-in-japan>

⁵²⁰ <https://japannews.yomiuri.co.jp/editorial/yomiuri-editorial/20240928-213913/>

PUBLIC OPINION RESEARCH

Summary

The Japanese public increasingly feels worse off financially, with over half reporting declining household conditions and nearly all perceiving rising prices. Beyond economic conditions, national security is also a top concern, with the public favoring a strong defence posture amid regional instability. Trust in political institutions is low—especially among youth—though trust remains high in the Imperial family and defence forces. Despite economic concerns and regional instability, the Japanese public remains broadly supportive of aid and multilateralism. Most people believe Japan should maintain or increase its aid spending, viewing global collaboration as essential for addressing shared challenges like disasters and disease.

Messages

Top issues driving the debate

Perceived household conditions - how the public feels about their household circumstances compared to a year ago - has undergone a shift in the past three years (since March 2022) with more people feeling worse off than they used to. In the most recent polling conducted by the Bank of Japan, 55.9% of the Japanese public feels like they are worse off compared to last year, while only 3.9% feel like they are better off. Similarly, nearly three-quarters of the public feel like price levels have gone up significantly; 96% of the public feel like prices have gone up generally.

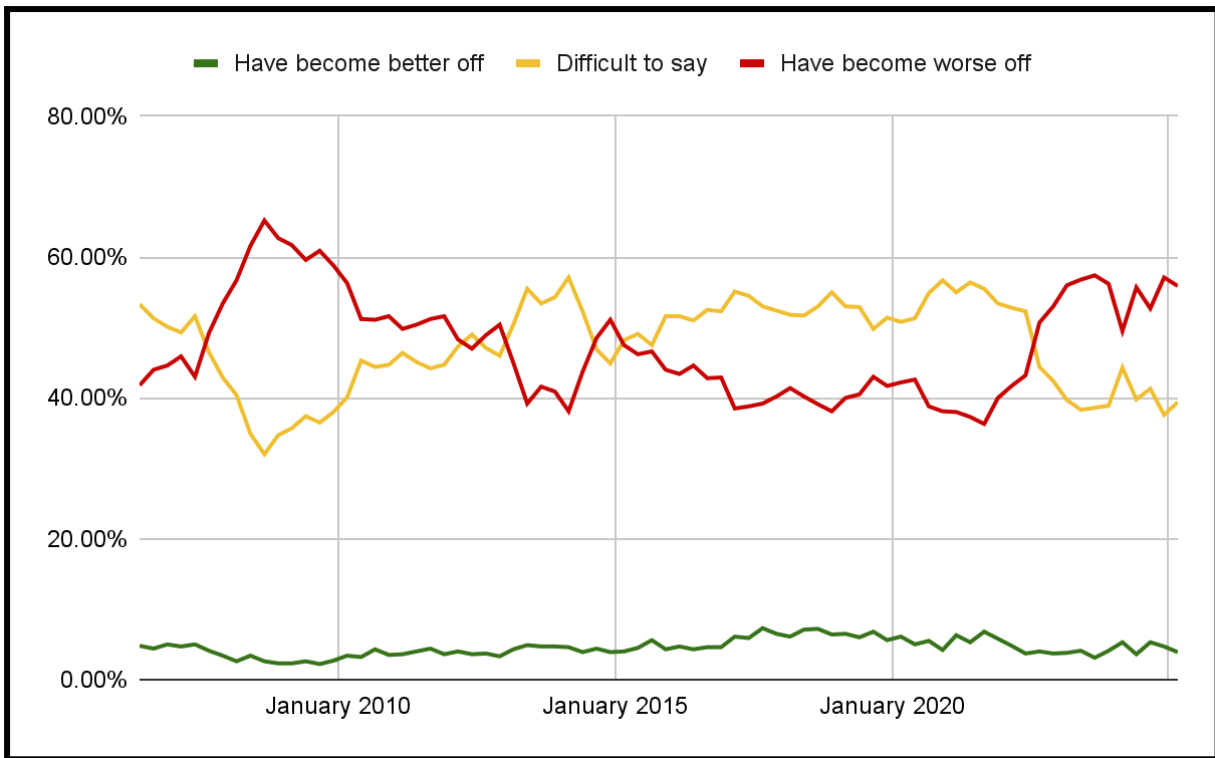


Figure X: Impression of Present Household Circumstances compared with one year ago (June 2006 - March 2025), Bank of Japan⁵²¹

Public perception of prices increasing and household circumstances worsening largely aligns with the current government’s shifting priorities to adjust its tax policies to bring relief to low- and middle-income households.

Despite high levels of domestic concerns with the state of the economy and the cost of living, the Japanese public is also concerned about instability in the wider Asia-Pacific region - particularly how this instability will affect Japan’s national security. When it comes to non-economic issues, the public prioritise national security highly, and anticipate increased instability in Asia in upcoming years.⁵²² When asked about how the Japanese government should approach diplomacy in different parts of the world, the public overwhelmingly chose that the government should protect Japanese national security and take a strong stance against intrusions. The public was split on whether economic partnerships and trade (52%) or security and defence (50%) should take priority in US-Japan relations.

Trust

Public trust in the government is lukewarm; in 2019, roughly two-thirds of the public said they had little trust in Japanese political parties (67.6%) and the Diet (60.4%). There is also a mistrust of the media and government, with roughly a third of the public saying they trusted these institutions compared to half who said they did not trust them.⁵²³ Trust in political institutions was significantly lower among younger people. Most people feel like elections don’t result in much change, and though they don’t feel courts or institutions are corrupt or unfair, they

⁵²¹ https://www.boj.or.jp/en/research/o_survey/ishiki2504.htm

⁵²² <https://www.mofa.go.jp/files/100807389.pdf>

⁵²³ https://www.genron-npo.net/en/opinion_polls/archives/5496.html

perceive high levels of crime and feel disenfranchised with their elected officials.⁵²⁴ Public trust was highest in the Imperial family (87.1%), the Japanese Self-Defence Forces (77% trust), the police (71.6% trust), and the courts (70.6%).⁵²⁵

Government spending & fiscal policies

There was little research available on Japanese public opinion on government spending. Evidence, however, has linked austerity to higher rates of suicide in the country, connecting the real impact of public spending cuts and higher taxes with worsening mental health.⁵²⁶ The majority of the public feel that trade is good for the country and for the economy but doesn't feel that it creates jobs, increases wages, or decreases prices.⁵²⁷

Aid & multilateralism

When it comes to multilateralism and engagement with the international community, the Japanese public feel that it's important for countries to protect territorial sovereignty (25.5% agree), cooperate with the international community (20.8%), and maintain values of human dignity (18.6%).⁵²⁸ The Japanese public sees value in strengthening bilateral ties with all major world powers (Russia, China, and the US), but only feel a strong affinity towards the US.⁵²⁹ This is partly explained by continuous close ties with the US over past decades, including a particular tightening of US-Japan relations under Shinzo Abe's prime ministership between 2012-2020.

Despite high levels of concern with the current geopolitical instability of the region, the Japanese public remains largely supportive of aid and peacekeeping efforts. A quarter (25%) feel that Japan should more actively promote development cooperation while half (53%) think that the current level is appropriate; only 15% think it should be decreased and 3% think it should be stopped in its entirety.⁵³⁰ Two-thirds of those who believe that Japan should continue aid spending said countries need to work together to solve global issues like disasters and disease (68%). Men were slightly less likely to support foreign aid spending.

Messengers

Reports on Japanese public trust in the media vary significantly depending on the source. Research conducted by the SmartNews Media Research Institute in 2023 reported that 68% of the public trust mass media like newspapers and television with little variation between conservative and liberal groups.⁵³¹ Research conducted by Japanese think tank Genron NPO in 2019 reported that only 32.3% of the public trusted the media compared to other political, legal, and commercial institutions.⁵³² Although these surveys were conducted 4 years apart, it seems

⁵²⁴ <https://www.pewresearch.org/global/2018/11/12/views-of-japanese-democracy/>

⁵²⁵ Ibid.

⁵²⁶ <https://link.springer.com/article/10.1186/s12889-020-8264-1>

⁵²⁷

<https://www.pewresearch.org/global/2018/11/12/sentiment-about-the-state-of-the-economy-trade-and-prospects-for-the-future/>

⁵²⁸

https://www.genron-npo.net/en/opinion_polls/docs/Japan-China%20Joint%20Public%20Opinion%20Survey%202024.pdf

⁵²⁹ <https://survey.gov-online.go.jp/h30/h30-gaiko/summary.pdf>

⁵³⁰ https://survey.gov-online.go.jp/diplomacy_defense/202502/r06/r06-gaiko/#head2

⁵³¹ <https://japannews.yomiuri.co.jp/politics/politics-government/20231125-151738/>

⁵³² https://www.genron-npo.net/en/opinion_polls/archives/5496.html

unlikely that this drastic change in media trust would be explained by such a short period of time, and more likely reflects differences in the question design and methodology.

Mediums

Historically, Japan has had one of the highest rates of per capita daily print newspaper readership in the world.⁵³³ Readership rates, however, have decreased in recent years, declining by 7.31% in March 2024 from the previous year, but major news sources have struggled to keep up with increasing demand for digital news.⁵³⁴ Newspapers remained the most highly trusted news source (40.3%), followed by 'television' (35.7%) while digital media were considerably lower. Despite lower levels of trust, portal sites were the most frequently used.



⁵³³ <https://geography.oii.ox.ac.uk/the-worlds-newspapers/>

⁵³⁴ <https://reutersinstitute.politics.ox.ac.uk/digital-news-report/2024/japan>

NON TRADITIONAL DONORS

We explore the available data in three markets which will likely play a significant role in the future of international development cooperation. These are:

- Brazil
- Qatar
- China

These markets pose slightly different challenges to the traditional donor markets. Typically, the problem of data availability is not one of data being misaligned or non-exhaustive, but missing entirely. Qatar, for example, has no data sources which cover the subject matter. Brazil and China have some inconsistent data sources, but these tend to be of significantly lower quality seen in traditional donor countries.

While this naturally presents an opportunity for additive research, as any detailed study conducted in these three markets would be an immediately impactful contribution, there is a question as to whether public opinion can be an effective advocacy tool for influencing governments that are not open or democratic.

These markets could present an opportunity for new primary research, preempting challenges to spending here in the future. However, there is a clear risk of moving too early in providing insights where challenges are yet to fully surface.

Some key takeaways from this research include:

1. **There is a moderate amount of political economy data for these countries**, which can be used to infer certain drivers of policy decisions.
2. **There was a considerable challenge with data availability across these countries.** Even in Brazil, where the government has played a prominent role in international spaces in recent years (e.g. G20 and COP presidencies), this review found very limited public research available on aid or multilateralism.
3. **Where there is data, there are serious questions of reliability and quality, particularly in both Qatar and China.** In Qatar, the high expatriate population calls into question the relevance of public opinion data to decision makers. Therefore, despite finding high levels of trust in state authority, it is unclear whether this has any impact on policy decisions. In China, the problems revolve more around consistency and reliability - there have been stop-start longitudinal investigations into Chinese public attitudes, and a Western-bias to the research design (e.g. focus on free speech, democracy and censorship) which may influence results.



COUNTRY SPECIFIC FINDINGS

BRAZIL

- The economy is a top concern in Brazil and Brazilian trust levels tend to be increasing from a nadir in the 2010s.
- There is notable support for multilateralism, though support fluctuates depending on which countries are involved.
- International aid is seen as an important aspect of Brazilian geopolitical soft power, though support wanes when traded off with domestic issues.
- There are considerable gaps in high quality public opinion data on aid.

The past 25 years in Brazil have been characterised by economic growth, demographic shifts, widening inequality and various political corruption scandals. In response to these macro trends, government policies have largely aimed to improve social inequalities and stabilise the economy.

Against this backdrop, our review found:

1. **Brazilians feel positively towards multilateralism but it depends on the country.** In general, the public tend to be wary about holding relations with authoritarian regimes, for example 90% of the Brazilian public were critical of the Maduro government in Venezuela. The public was more split about Brazil's involvement in BRICS, seeing it both as a useful but complicated alliance that amplifies its global influence while requiring them to work with authoritarian leaders.⁵³⁵
2. **Social inequality in Brazil is extremely high, and discourse around aid spending internationally is often met with concerns that the government should prioritise social issues at home.** This has been particularly visible during times of economic hardships. For example, the 2014 presidential debates featured arguments targeting the incumbent government for spending money on aid that should have been spent on relieving hardships resulting from the recession.⁵³⁶
3. **The public agrees that Brazil should help less developed countries, though when framed as a trade-off for domestic issues support drops considerably.**⁵³⁷ A study between 2006-2008 found that the Brazilian public was most supportive of 'helping people around the world who live in precarious situations', more so than Canada, France, Sweden, Spain, Portugal and the United States. However, more recent studies have found less positive results, with 70% of the public wanting to reduce or eliminate international aid spending in its entirety.⁵³⁸

⁵³⁵ <https://www.cebri.org/media/documentos/arquivos/BrazilianPublicOpinionandtheWo.pdf>

⁵³⁶ <https://www.scielo.br/j/bpsr/a/WvtD7MgcVkB33LgHJZmYdh/>

⁵³⁷ <https://www.proquest.com/openview/91a7574eb4c5bc4fba1a231a1a36c028/1>

⁵³⁸ <https://www.scielo.br/j/bpsr/a/WvtD7MgcVkB33LgHJZmYdh/>

POLITICAL ECONOMY LANDSCAPE

Summary

Brazil's demographic trends align with many of the high-income countries explored in this review with its declining fertility rates and a highly urbanised population. The past 25 years have recorded some economic stability compared to the 20th century, but a recession in 2014 and corruption scandals within the government led to political instability. Social inequalities have remained consistently amidst varying economic conditions. Despite significant improvements in providing public services like education, universal healthcare, employment benefits, and welfare, access to these services has remained persistently unequal.

Inequality and the economy are the main underlying factors behind voting behaviour in Brazil, with the public swinging between parties based on performance in economic crises and closing the wealth gap between the country's poorest and richest.

Demographics/migration

Over the past 25 years, the overall population in Brazil has increased significantly, from 174 million in 2000 to over 211 million in 2024.⁵³⁹ As it has grown, Brazil's population has also been ageing. Similar to many high-income countries, Brazil's birth rate is falling, currently at 1.6 compared to 2.1 in the early 2000s.⁵⁴⁰ The median age is six years higher than where it was in 2010 (now at age 35) and the elderly now make up 11% of the total population, a 57% increase from 2010.⁵⁴¹ Meanwhile, the number of children between 0-14 have fallen significantly, from nearly a quarter of the population in 2010 to 19.8% in 2022.⁵⁴² The ageing population has heightened demand for treatment for chronic illnesses, placing pressure on Brazil's healthcare system.

Wealth/inequality

In the 20th century, Brazil's GDP growth was second in the world, behind Japan.⁵⁴³ As of 2025, Brazil's per capita GDP is over \$10,000 USD, up from around \$3,750 in 2000⁵⁴⁴ Despite this growth, Brazil has a historic reputation as one of the most socioeconomically unequal countries

⁵³⁹ <https://data.worldbank.org/indicator/SP.POP.TOTL?locations=BR>

⁵⁴⁰ <https://gmdpacademy.org/news/shifting-demographics-brazils-aging-population-poses-challenges-and-calls-for-systemic-adjustments/>

⁵⁴¹ Ibid.

⁵⁴²

<https://agenciadenoticias.ibge.gov.br/en/agencia-news/2184-news-agency/news/38187-2022-census-number-of-elderly-persons-in-the-brazilian-population-grew-57-4-in-12-years>

⁵⁴³ <https://www.wider.unu.edu/publication/inequality-brazil>

⁵⁴⁴ <https://www.imf.org/external/datamapper/profile/BRA>

in the world. The most recent Gini coefficient was recorded in 2023 at 0.516 and is one of the highest among all Latin American countries - second only to Colombia.⁵⁴⁵

This unequal wealth distribution is highly visible: the six wealthiest men in Brazil have the same wealth as the poorest 50% of the population (roughly 100 million people).⁵⁴⁶ This is partly due to a historical absence of labour rights - by 2008 only around half of the working population had access to unemployment benefits, insurance, parental leave, pensions, and paid leave - and limited access to education opportunities.⁵⁴⁷ Rapid urbanisation has further heightened inequalities within Brazil. Over the past few decades, many rural migrants to Rio de Janeiro and other cities moved into favelas, informal housing slums where 8.1% of the population currently lives.⁵⁴⁸

These inequalities underscore Brazil's past 25 years, with much of Brazil's economic policy between 2001-2014 shaped by attempts to balance wealth and provide job opportunities to the public.⁵⁴⁹ Economic reforms in the 1990s under President Cardoso's Plano Real fixed hyperinflation and introduced a new currency that laid the foundation for President Lula de Silva to implement social reforms in his first two terms. Lula established a conditional cash-transfer program and promoted school attendance by sending parents monthly payments conditional on them ensuring children attended school and received health check ups.⁵⁵⁰ Under Lula, extreme poverty decreased from 10.1% in 2003 to 5.2% in 2009.⁵⁵¹

The mid-2010s was marked by an economic recession and political corruption scandals - with an impeachment of president Rousseff due to mismanagement of public funds⁵⁵² and accusations of bribery against her successor, Temer.⁵⁵³ Bolsonaro's right-wing government followed, which campaigned on reducing the size of the government and its role in the economy through privatisation of state-owned enterprises, market deregulation, and competition.⁵⁵⁴ The Bolsonaro government oversaw the Covid-19 pandemic response, including delivering emergency stipends to lower income households.⁵⁵⁵ However, even after some recovery from the pandemic, satisfaction with public services remained low, particularly among the health sector.

⁵⁴⁵ <https://data.worldbank.org/indicator/SI.POV.GINI?locations=BR>

⁵⁴⁶ <https://www.oxfam.org/en/brazil-extreme-inequality-numbers>

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<https://oxfamilibrary.openrepository.com/bitstream/handle/10546/112516/fp2p-bp-notes-inequality-poverty-brazil-current-140608-en.pdf>

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<https://agenciadenoticias.ibge.gov.br/en/agencia-news/2184-news-agency/news/41813-2022-census-16-4-million-persons-in-brazil-lived-in-favelas-and-urban-communities>

⁵⁴⁹ <https://www.wider.unu.edu/publication/inequality-brazil>

⁵⁵⁰ <https://documents1.worldbank.org/curated/en/972261468231296002/pdf/398530SP1709.pdf>

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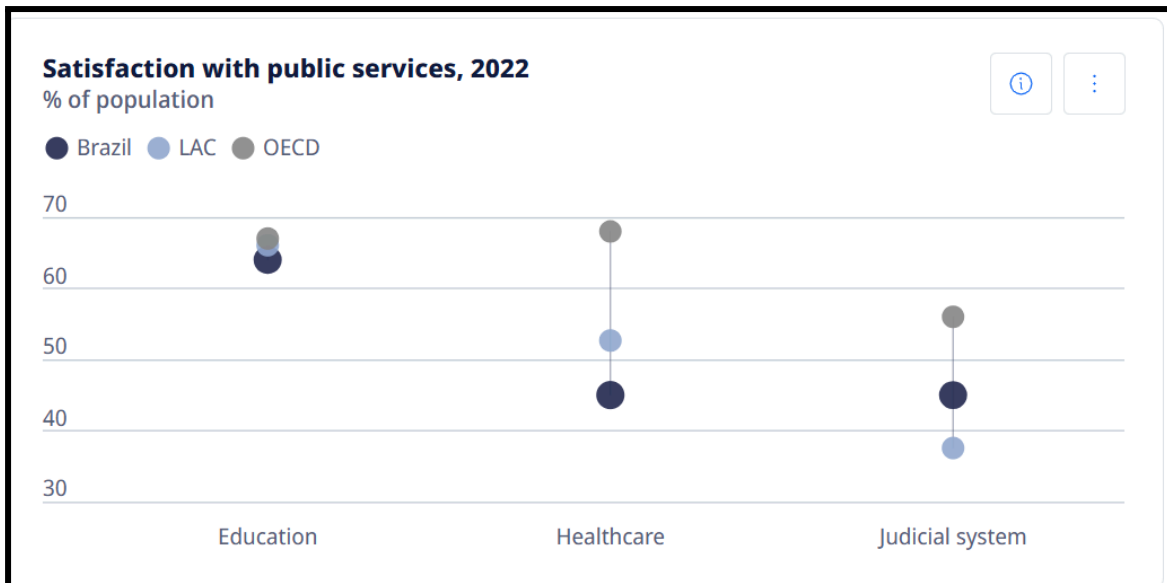
<https://www.chronicpovertyreport.org/blog/2014/6/27/chronic-poverty-and-inequality-reduction-in-brazil-where-next>

⁵⁵² <https://www.bbc.co.uk/news/world-latin-america-37237513>

⁵⁵³ <https://www.bbc.co.uk/news/world-latin-america-47658080>

⁵⁵⁴ <https://bti-project.org/en/reports/country-report/BRA>

⁵⁵⁵ <https://pmc.ncbi.nlm.nih.gov/articles/PMC9968470/>



Lula's second presidency began in 2023 and has been characterised by high GDP growth and low unemployment as well as rising inflation.⁵⁵⁶ Inequality remains high despite some economic bounceback after COVID-19 and the cost of food and drinks increased by nearly 8% between 2023 and 2024, triggering high levels of public dissatisfaction with the government.⁵⁵⁷

Trends in politics

Brazil is a federal, multi-party democracy, with powers separated nationally and by state. The last 25 years of Brazil's politics have represented a shift from the left to the right and towards the left again, changes that have largely been driven by economics, inequality and political corruption scandals. Lula's centre-left/left Workers' Party (PT) introduced social reforms that reduced inequalities and boosted the economy, leading to the election of Dilma Rousseff, also from the PT, in 2011. Rousseff was impeached after a series of corruption scandals revealed that she and other senior officials had been mishandling state budgets.⁵⁵⁸

Temer of the centre/centre-right Brazilian Democratic Movement (PMDB/MDB) took over after the impeachment and attempted to reduce the fiscal deficit by pursuing austerity measures. Public approval of the government was extremely low and the economy remained weak, ushering in the rise of Bolsonaro's far-right Social Liberal Party (PSL/PL) which championed less economic regulation, tough-on-crime, global isolationist, pro-gun, and pro-military policies.⁵⁵⁹ Bolsonaro's government suffered during COVID-19, and most of its economic policies were unsuccessful in sufficiently alleviating burdens from Brazilian families.

The most recent elections resulted in a swing back towards the left, with the reelection of Lula da Silva as president in 2023. However, a conservative majority in Congress led to high levels of polarisation and instability. Lula's most recent policies include plans to increase the minimum wage, increase taxes on the wealthiest, create a debt-forgiveness program, expand social

⁵⁵⁶ <https://www.globalpolicywatch.com/2025/01/brazil-under-lula-the-second-year/>

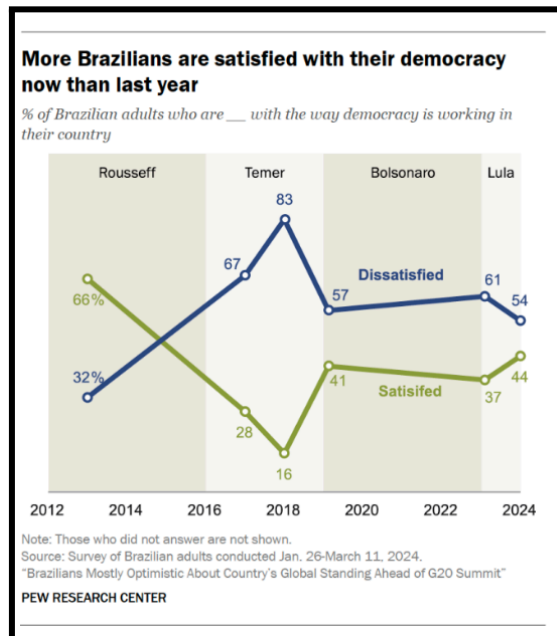
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<https://www.pbs.org/newshour/world/once-called-the-worlds-most-popular-politician-lulas-approval-in-brazil-plummeting>

⁵⁵⁸ <https://www.bbc.co.uk/news/world-latin-america-35810578>

⁵⁵⁹ <https://www.bbc.co.uk/news/world-latin-america-45979682>

housing, restore and conserve the Amazon, and restore Brazil's role as a global leader particularly in the fight against climate change.⁵⁶⁰ Despite these shifts in policy, approval ratings of the past presidents have remained consistently low. In early 2025, approval of Lula's government reached the lowest in all his terms, 24% - 11 points lower than recorded in December 2024.⁵⁶¹ Satisfaction with democracy acts as a proxy for government satisfaction, with a majority of the public displaying dissatisfaction since 2015.



⁵⁶⁰ <https://www.cfr.org/in-brief/lula-back-what-does-mean-brazil>

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<https://datafolha.folha.uol.com.br/avaliacao-de-governo/2025/02/aprovacao-ao-governo-lula-cai-de-35-para-24-indice-mais-baixo-de-seus-mandatos.shtml>

PUBLIC OPINION RESEARCH

Summary

The top issues driving Brazil's public discourse are the economy (poverty and inequality), crime, and public services. Corruption scandals and high levels of crime have impacted trust in government and institutions, while changes in Brazil's journalism environment have led to lower levels of trust in the media. Slow economic growth over the past five years has caused an increased focus on domestic issues, though public spending has been capped so as not to exacerbate a deficit. Despite this, the public largely supports more public spending on public services and expects Brazil to maintain its involvement as a global mediator, engaging in multilateral discussions and contributing to tackling global challenges like climate change.

Messages

Top issues driving the debate

According to one poll, the public's top issue in 2024 is the economy.⁵⁶² At 24%, this was followed by violence (17%) and social issues (16%). Despite being a top concern, Brazil's economy has experienced relative stability since the pandemic.⁵⁶³ Violence and crime were particularly prevalent issues during the period before Bolsonaro's election (2018) and remain significant concerns; a poll from Ipsos shows crime and violence as a top concern (33%) followed by inflation (23%), unemployment (28%) and poverty and social inequality (28%).⁵⁶⁴ A majority of the public are afraid of violent crime and report feeling high levels of insecurity.⁵⁶⁵ Perceptions of corruption and high levels of crime have led to distrust in institutions and scepticism as to whether institutions are effective.⁵⁶⁶

Trust

Levels of trust in the government and public institutions are recovering from the mid-2010s, where the majority of the public did not trust the government to act in their interests - driven by high levels of crime and corruption. Brazilians have an increasingly positive view on the role of the police, banks, and the courts, however perceptions of the media have turned increasingly negative since 2010, from 81% to 58% in 2024.⁵⁶⁷

⁵⁶² <https://www.statista.com/statistics/1329322/public-opinion-main-problems-brazil/>

⁵⁶³ <https://data.worldbank.org/indicator/NY.GDP.MKTP.KD.ZG?locations=BR>

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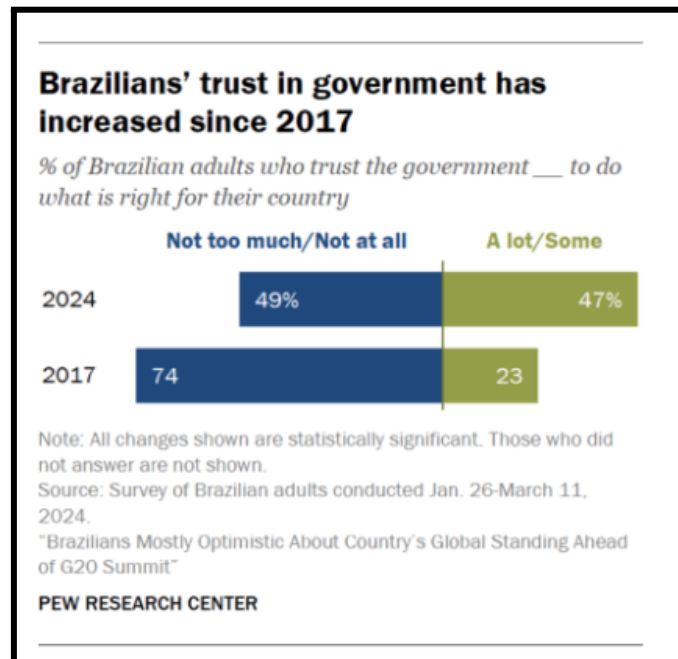
https://www.ipsos.com/sites/default/files/ct/news/documents/2025-11/What%20Worries%20the%20World%20October%202025_0.pdf

⁵⁶⁵ <https://journals.sagepub.com/doi/full/10.1177/26338076221122939>

⁵⁶⁶ Ibid.

⁵⁶⁷ <https://www.pewresearch.org/global/2024/09/23/brazilians-views-of-institutions-and-government-systems/>

According to the OECD, only around a quarter of the public report high or moderately high trust in the federal government.⁵⁶⁸ According to a recent Pew Research Center poll, the public is split on whether they feel the government will act in their interests, with 49% saying they do not trust the government to do what is right while 47% say they do.⁵⁶⁹ A majority of Brazilians are dissatisfied with the way that democracy works in Brazil (54%) though satisfaction has improved from 2023 to 2024.⁵⁷⁰ However, it is worth noting that trust in government has increased between 2017 and 2024, offering some positive signals for the future.



Government spending & fiscal policies

Research on Brazilian attitudes towards government spending is limited, though we can infer some desire for a government that prioritises public spending and services from the results of the most recent election. Lula's first presidency was characterised by his expansion of social welfare programmes and he generally holds the view that spending on public services is an investment, not expenditure.⁵⁷¹

Recently, however, there has been pushback on public spending, with the Finance Minister announcing \$12bn in spending cuts in 2024 to mitigate investor fears that the government will not be able to deliver on its fiscal commitments.⁵⁷² The government is currently attempting to balance economic growth with resolving social inequalities.

Aid & multilateralism

⁵⁶⁸ https://www.oecd.org/en/publications/drivers-of-trust-in-public-institutions-in-brazil_fb0e1896-en.html

⁵⁶⁹ <https://www.pewresearch.org/global/2024/09/23/brazilians-views-of-their-country/>

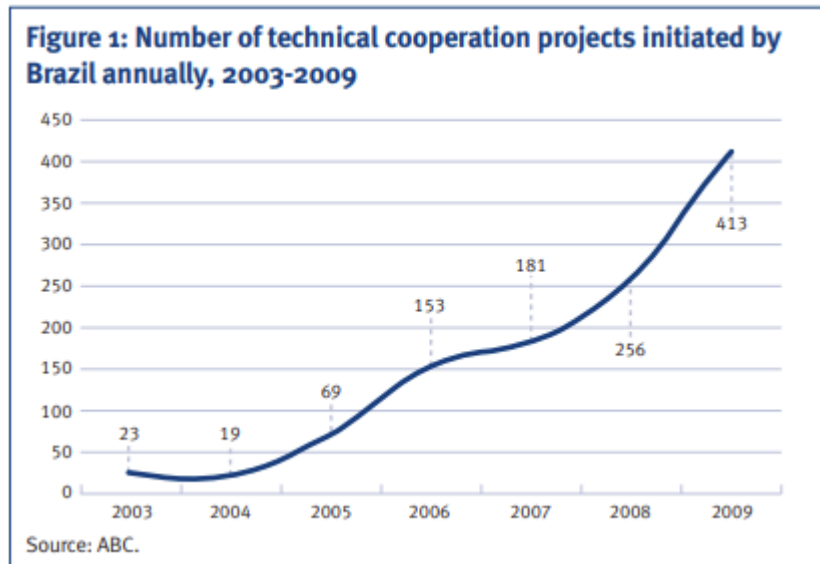
⁵⁷⁰ Ibid.

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<https://www.reuters.com/world/americas/brazils-lula-urges-congress-cut-spending-help-beat-financial-markets-2024-11-11/>

⁵⁷² <https://www.barrons.com/news/brazil-reins-in-public-spending-by-12-bn-for-2025-26-0e7fce49>

Brazil both receives ODA and contributes aid to other countries, notably through South-South cooperation.⁵⁷³ Brazil has been an aid donor (though their spending is not classified as ODA) since the 1960s. This spending increased significantly in the early 2000s under Lula's first term.⁵⁷⁴ In 2022, Brazil received \$577 million in ODA while contributing as much as \$1 billion in international development support, according to one estimate.⁵⁷⁵



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Generally, Brazilians feel positively towards multilateralism but are considerably more wary about holding relations with authoritarian regimes. 90% of the Brazilian public were critical of the Maduro government in Venezuela, though the public was more split about Brazil's involvement in BRICS, seeing it both as a useful but complicated alliance that amplifies its global influence while requiring them to work with authoritarian leaders.⁵⁷⁷

Due to high levels of social inequality, discourse around aid spending is often met with concerns that the government should prioritise social issues at home. This was particularly visible during the economic crises of 2014-2016; the 2014 presidential debates featured arguments targeting the incumbent government for spending money on foreign aid that should have been spent on relieving hardships resulting from the recession.⁵⁷⁸ The public generally agrees that Brazil should help less developed countries, though when framed as a trade-off for domestic issues, support wanes considerably.⁵⁷⁹

Messengers

In 2024, nearly half of the public reported often or sometimes avoiding the news (47%), up from 41% in 2023.⁵⁸⁰ Social media platforms are considered some of the least trustworthy sources with 24% of TikTok and X users in Brazil saying it is difficult to delineate between trustworthy

⁵⁷³ <https://www.scielo.br/j/bpsr/a/WvtD7MgcVkB33LgHJZmYdh/>

⁵⁷⁴ https://docs.aiddata.org/ad4/files/wps43_brics_and_foreign_aid.pdf

⁵⁷⁵ <https://borgenproject.org/foreign-aid-on-brazil/>

⁵⁷⁶ <https://media.odi.org/documents/6295.pdf>

⁵⁷⁷ <https://www.cebri.org/media/documentos/arquivos/BrazilianPublicOpinionandtheWo.pdf>

⁵⁷⁸ <https://www.scielo.br/j/bpsr/a/WvtD7MgcVkB33LgHJZmYdh/>

⁵⁷⁹ <https://www.proquest.com/openview/91a7574eb4c5bc4fba1a231a1a36c028/1?cbl=2026658&pq-origsite=gscholar;https://www.scielo.br/j/bpsr/a/WvtD7MgcVkB33LgHJZmYdh/>

⁵⁸⁰ <https://reutersinstitute.politics.ox.ac.uk/digital-news-report/2024/brazil>

and untrustworthy news content.⁵⁸¹ Research suggests that the 2010s saw a significant shift in journalism in Brazil and the firing of 2,327 journalists between 2012 and 2018 has contributed to a decline in the quality and independence in news coverage.⁵⁸² While Brazilians have relative low trust in media compared to other countries explored in the Edelman Trust Barometer,⁵⁸³ it is worth noting that Brazil's trust in news is high compared to other Latin American countries.⁵⁸⁴

Mediums

The ways in which Brazilians source their news has changed significantly in the past ten years. Print news has given way to digital mediums, with broadcast TV remaining consistently high in terms of viewership⁵⁸⁵ and this period has been marked by the rise of online news sources.⁵⁸⁶



⁵⁸¹ <https://reutersinstitute.politics.ox.ac.uk/digital-news-report/2024/brazil>

⁵⁸²

<https://reutersinstitute.politics.ox.ac.uk/news/press-didnt-notice-bolsonaros-strength-heres-what-went-wrong-and-how-fix-it>

⁵⁸³

https://www.edelman.com/sites/g/files/aatuss191/files/2024-02/2024%20Edelman%20Trust%20Barometer%20Global%20Report_FINAL.pdf

⁵⁸⁴ <https://reutersinstitute.politics.ox.ac.uk/digital-news-report/2024/brazil>

⁵⁸⁵ <https://reutersinstitute.politics.ox.ac.uk/digital-news-report/2024/brazil>

⁵⁸⁶ <https://www.niemanlab.org/2022/12/trust-in-news-will-continue-to-fall-just-look-at-brazil/>



COUNTRY SPECIFIC FINDINGS

QATAR

- Qatar is a high-income country with a small citizen population and very large expatriate population.
- This review found very limited public opinion data available for Qatar. What does exist suggests high levels of trust in the system, and preference for the status quo.
- This review did not uncover any publicly available research exploring public attitudes towards aid and/or multilateralism specifically.
- Out of all the countries included in this review, Qatar had the clearest research gaps, and would provide an opportunity for primary research that creates the baseline understanding rather than filling in gaps.

Qatar's political economy from 2000 to 2025 has been shaped by significant economic growth and major demographic shifts. Using the benefits of vast natural gas reserves, the country's economy grew rapidly, with GDP per capita more than doubling from 27,535 in 2000 to \$76,276 by 2024.⁵⁸⁷ Over the same period, the population grew nearly fivefold to 3.1 million,⁵⁸⁸ driven almost entirely by migrant labor. By the mid-2020s, around 88% of Qatar's residents were non-citizens, making it one of the most expatriate-heavy societies globally.⁵⁸⁹

Qatar is governed as a constitutional hereditary monarchy under the Al Thani family.⁵⁹⁰ It is an Islamic state whose laws and customs comply with Islamic law. Qatar has increasingly engaged in multilateral fora in recent years, including through participation at the United Nations, the Gulf Cooperation Council, the League of Arab States, the Group of 77, the Non-Aligned Movement and the Organisation of Islamic Cooperation.⁵⁹¹ The country has also affirmed its commitment to the Sustainable Development Goals and spent approximately \$4.8 billion on international development efforts and humanitarian relief between 2020-2024.⁵⁹²

This review found extremely limited public opinion research in Qatar, including no research exploring perceptions to aid specifically. The main public opinion surveys identified in this review include:

- Qatar University's Social and Economic Research Institute (SERSI) publications.⁵⁹³ Notably the Omnibus Survey of Life in Qatar (Annual from 2010⁵⁹⁴, most recent survey found in 2019⁵⁹⁵)
- Northwestern University's Annual Media Use in Middle East Survey (Annual from 2013⁵⁹⁶, most recent survey found in 2022)⁵⁹⁷
- Washington Institute 2021 Public Opinion Survey (One-Off)⁵⁹⁸
- Arab Center for Research and Policy Studies' Annual Arab Opinion Index (Annual starting in 2011,⁵⁹⁹ most recent survey found in 2024⁶⁰⁰)
- World Values Survey Wave 6 (2010-2014)⁶⁰¹

⁵⁸⁷ <https://data.worldbank.org/indicator/NY.GDP.PCAP.CD?locations=QA>

⁵⁸⁸ <https://worldpopulationreview.com/countries/qatar>

⁵⁸⁹ <https://www.qatarmoments.com/qatar%E2%80%99s-expatriate-landscape-2024-population-breakdown-709759.html>

⁵⁹⁰ <https://imo.gov.qa/state-of-qatar/government-of-qatar>

⁵⁹¹ <https://imo.gov.qa/priorities/foreign-policy>

⁵⁹²

<https://mofa.gov.qa/en/qatar/latest-articles/latest-news/details/2025/10/16/qatar-reiterates-commitment-to-enhance-multilateral-cooperation-to-implement-sustainable-development-goals>

⁵⁹³ <https://www.qu.edu.qa/en-us/Research/sesri/Pages/publication.aspx>

⁵⁹⁴

https://www.qu.edu.qa/SiteImages/static_file/qu/research/SESRI/documents/SESRI%20in%20media/Media%20project/Omnibus_2010-Report.pdf

⁵⁹⁵ [https://www.qu.edu.qa/siteimages/static_file/qu/sesri/omnibus%20binder\[22\].pdf](https://www.qu.edu.qa/siteimages/static_file/qu/sesri/omnibus%20binder[22].pdf)

⁵⁹⁶ <https://www.qatar.northwestern.edu/docs/publications/research/2013-Media-Use-Middle-East.pdf>

⁵⁹⁷ <https://www.mideastmedia.org/survey/2022/>

⁵⁹⁸ <https://www.washingtoninstitute.org/policy-analysis/qatar-poll-shows-public-content-not-pro-iran-third-accept-some-israel-ties>

⁵⁹⁹ <https://arabindex.dohainstitute.org/EN/Documents/Arab-Opinion-Index%20-2011.pdf>

⁶⁰⁰ <https://www.dohainstitute.org/en/News/Pages/arab-center-announces-results-of-arab-opinion-index.aspx>

⁶⁰¹ <https://www.worldvaluessurvey.org/WVSDocumentationWV6.jsp>

POLITICAL ECONOMY LANDSCAPE

Summary

Qatar's political economy between 2000 and 2025 has been defined by explosive economic growth and significant demographic change towards an expatriate-heavy society. Politically, Qatar remained a constitutional hereditary monarchy ruled by the Al Thani family. Constitutional reforms in 2003 introduced the potential for legislative electives for the two-thirds of the country's legislative authority, the Shura Council. The first public legislative election took place in 2021, however a public referendum in 2024 (approved by 90% of eligible votes) replaced elections for the Sura Council with appointed roles.⁶⁰²

Demographics & Migration

Between 2000 and 2025, Qatar experienced one of the fastest demographic transformations in the world. Fueled by massive inflows of foreign labor, the population grew 5x over the past 25 years – expatriates now make up around 88% of the population.⁶⁰³

The population boom was driven by infrastructure and energy-sector expansion, especially following the liquefied natural gas (LNG) boom of the 2000s. Due to the growth of employment in construction and energy sectors, the population has shifted heavily male-dominated, expatriate, and working age - indeed, around 70% of residents are aged 25–54.⁶⁰⁴

Wealth/inequality

Over the past 25 years, wealth in Qatar has grown significantly. GDP per capita surged from \$27,535 in 2000 to \$76,276 by 2024⁶⁰⁵ and by this metric, Qatar is one of the richest countries in the world.⁶⁰⁶ This wealth stemmed primarily from the country's vast energy resources, with hydrocarbon exports accounting for over 80% of government revenue.⁶⁰⁷ This wealth allowed the state to invest heavily in infrastructure, public services, and welfare for its citizens over the past two decades, including: free healthcare and education, housing grants, and zero personal income tax or VAT.

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<https://www.reuters.com/world/middle-east/qatar-passes-referendum-replaces-shura-council-elections-with-appointments-state-2024-11-05/>

⁶⁰³ <https://www.globalmediainsight.com/blog/qatar-population-statistics/>

⁶⁰⁴ Ibid.

⁶⁰⁵ <https://data.worldbank.org/indicator/NY.GDP.PCAP.CD?locations=QA>

⁶⁰⁶ <https://www.macrotrends.net/global-metrics/countries/qat/qatar/gdp-per-capita>

⁶⁰⁷ <https://www.eia.gov/international/overview/country/qat>

The overall gini coefficient in Qatar suggests moderate inequality (last measured by the World Bank as 0.351 in 2017).⁶⁰⁸ However, there is a significant difference in the living standards and rights afforded to citizens vs. non-citizens. Non-citizens are generally afforded no political rights, limited pathways to citizenship, few civil liberties, and limited access to economic opportunities compared to citizens.⁶⁰⁹

Trends in politics

Domestic Politics

Between 2000 and 2025, Qatar remained a constitutional hereditary monarchy. The Al Thani family has ruled since independence from Britain, and most political power sits with the Emir and his inner circle. A new constitution was introduced in 2003, approved by 96.6% of the Qatari population,⁶¹⁰ which promised a partly elected legislature and codified some civil liberties.⁶¹¹ A voluntary leadership handover took place in 2013, when Qatar's emir, Sheik Hamad bin Khalifa al-Thani abdicated in favor of his son Tamim, signaling generational renewal without major political liberalisation.⁶¹²

The most notable political liberalisation occurred in 2021, when Qatar held its first legislative elections for two-thirds of the Shura Council seats (the state's legislative authority). However, voting rights were restricted to citizens with ancestral ties predating 1930, excluding many naturalised families and triggering protests.⁶¹³ In 2024, a constitutional referendum abolished the elections, returning appointment powers to the Emir.⁶¹⁴ Over 90% of voters approved the change,⁶¹⁵ signaling that the leadership retains broad citizen support.

Generous welfare, public-sector employment, and a strong sense of national identity have all contributed to high levels of citizen loyalty to the leadership.⁶¹⁶ While there have been some advancements in women's rights over the past two decades, women continue to need male guardian permission for many decisions, including marriage, higher education, and work in many government jobs.⁶¹⁷ Despite the advancements made in the 2003 constitution, civic and political participation have remained tightly constrained in practice.

Foreign Policy

Over the past 25 years, Qatar has pursued an ambitious foreign policy, maximising its influence beyond its small size. It positioned itself as a diplomatic broker, mediating talks during conflicts in Iran, Afghanistan, Lebanon, Libya, Chad, Venezuela, Palestine and more.⁶¹⁸

⁶⁰⁸ <https://data.worldbank.org/indicator/SI.POV.GINI?locations=OA>

⁶⁰⁹ <https://freedomhouse.org/country/qatar/freedom-world/2024>

⁶¹⁰ <https://imo.gov.qa/state-of-qatar/government-of-qatar>

⁶¹¹ <https://www.almeezan.qa/LawView.aspx?opt&LawID=2284&language=en>

⁶¹² <https://www.npr.org/sections/parallels/2013/06/25/195464213/in-qatar-a-rare-royal-abdication>

⁶¹³ <https://www.hrw.org/news/2021/09/09/qatar-election-law-exposes-discriminatory-citizenship>

⁶¹⁴

<https://www.reuters.com/world/middle-east/qatar-passes-referendum-replaces-shura-council-elections-with-appointments-state-2024-11-05/>

⁶¹⁵ <https://imo.gov.qa/state-of-qatar/government-of-qatar>

⁶¹⁶ <https://bti-project.org/en/reports/country-report/OAT>

⁶¹⁷ <https://www.hrw.org/world-report/2023/country-chapters/qatar>

⁶¹⁸ https://mecouncil.org/blog_posts/how-acting-as-mediator-expands-qatars-geopolitical-reach/

Qatar has periodically experienced tensions with its Gulf neighbors due to its foreign policy approach. In 2017, Saudi Arabia, the UAE, Bahrain and Egypt cut all diplomatic and trade ties with Qatar and imposed a three-year air, land and sea blockade on the country. The blockade was introduced primarily due to concerns around supporting terrorist organisations, the government's relationship with Iran, and content being produced by Qatari-affiliated media outlets. The neighboring states made a series of demands, including downgrading diplomatic ties with Iran and closing state owned media agencies such as Al-Jazeera.⁶¹⁹ The blockade lasted until 2021, when the Al-Ula Agreement restored relations without Qatar conceding on its core positions.

Recently, Qatar hosted the 2022 FIFA World Cup – the first held in the Middle East. The event raised Qatar's international visibility, however, it also drew scrutiny over labour conditions and human rights.⁶²⁰ These concerns prompted the government to accelerate reforms such as introducing a minimum wage and partially dismantling the kafala system (where business owners can hold workers' passports), though the implementation of these reforms remains uneven.⁶²¹

⁶¹⁹ <https://www.aljazeera.com/news/2020/6/5/qatar-blockade-five-things-to-know-about-the-gulf-crisis>

⁶²⁰ <https://www.bbc.co.uk/newsround/63557689>

⁶²¹ <https://www.ecdhr.org/migrant-rights-in-qatar-inaction-after-the-world-cup/>

PUBLIC OPINION RESEARCH

Summary

Research on Qatar's public opinion landscape remains limited to a few key sources. Consistent themes include: strong support for the regime by Qatari citizens,⁶²² satisfaction with economic conditions⁶²³ and relatively high levels of trust in many national institutions, including the armed forces, police,⁶²⁴ and some state-affiliated media outlets – particularly Al-Jazeera⁶²⁵ – though this trust in national institutions has been declining in recent years.

According to one longitudinal study, maintaining order has been the top national priority among Qatari citizens and expatriates since 2011, followed by fighting rising prices at a distant second.⁶²⁶ Both Qatari citizens and expatriates have also expressed high levels of satisfaction with public services over the years.⁶²⁷ This review did not uncover any research on public attitudes towards aid specifically.

The public opinion research that does exist in Qatar faces the methodological challenge of high degrees of self-censorship across the country.⁶²⁸ It is therefore a challenge to understand the extent to which the research findings reflect the true attitudes of the public.

Government spending & fiscal policies

In the Arab Opinion Index, 99% of Qataris reported that the economic conditions in their country were good or very good - higher than all other middle eastern countries including in the analysis.⁶²⁹ The majority of citizens express confidence that the country is on the right path, and few perceive corruption as a significant problem.⁶³⁰ Further, in the Arab Opinion Index, Qatar has the highest level of agreement with the statement 'the state represents all citizens equally without discrimination' (72% agree) compared to other Arab states.⁶³¹ It is a challenge, however, to understand the extent to which these responses reflect true public attitudes given high levels of self censorship across the state.⁶³²

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<https://www.washingtoninstitute.org/policy-analysis/qatar-poll-shows-public-content-not-pro-iran-third-accept-some-israel-ties>

⁶²³<https://arabcenterdc.org/resource/arab-opinion-index-2022-executive-summary/>

⁶²⁴https://www.qu.edu.qa/siteimages/static_file/qu/sesri/omnibus%20binder1221.pdf

⁶²⁵https://www.qu.edu.qa/siteimages/static_file/qu/conference/jmem2017/vol/9/en/trusted%20news%20sources.pdf

⁶²⁶https://www.qu.edu.qa/siteimages/static_file/qu/sesri/omnibus%20binder1221.pdf

⁶²⁷https://www.qu.edu.qa/siteimages/static_file/qu/sesri/omnibus%20binder1221.pdf

⁶²⁸<https://freedomhouse.org/country/qatar/freedom-world/2023>

⁶²⁹<https://arabcenterdc.org/resource/arab-opinion-index-2022-executive-summary/>

⁶³⁰

<https://www.washingtoninstitute.org/policy-analysis/qatar-poll-shows-public-content-not-pro-iran-third-accept-some-israel-ties>

⁶³¹<https://www.dohainstitute.org/en/Lists/ACRPS-PDFDocumentLibrary/arab-index-2025-in-brief-en.pdf>

⁶³²<https://freedomhouse.org/country/qatar/freedom-world/2023>

Due to vast energy resources, one of the core pillars of Qatar's economy is the extension of generous state welfare benefits without personal income tax or VAT (though this is likely to be implemented soon). Although not extensively studied, these benefits appear to be important to the public - with one study finding that Qatari citizens strongly favored introducing modest new revenue measures, such as VAT, over reducing core entitlements.⁶³³

Compared to other countries in the region - including Saudi Arabia, the UAE, Bahrain, Egypt, Jordan, and Lebanon - fewer Qataris perceive corruption as a serious issue, and a large majority reject public protests as a legitimate form of political expression.⁶³⁴ On economic and other domestic concerns, only about one-quarter or fewer believe the government is doing too little.⁶³⁵

Trust

Qatar's public demonstrates relatively high trust in many state institutions, with one survey finding 81% of Qataris expressing 'a great deal of confidence' in the armed forces and 54% expressing 'a great deal of confidence in the police'. However, it is worth noting that confidence in several national institutions seems to have declined in recent years, with confidence in the courts falling from 74% in 2011 to 44% in 2017, confidence in the Shura Council falling from 69% in 2011 to 36% in 2017, and confidence in Government institutions falling from 56% to 27% over the same time period.⁶³⁶

Trust in domestic media outlets has remained relatively high compared to regional standards, though there was a notable drop during the 2017 Gulf blockade - from 74% trust in 2017 to 62% in 2019.⁶³⁷ For both Qatari citizens and expatriates, TV is seen as the most trusted source for local, regional and international news, with Al-Jazeera perceived as the most objective media network.⁶³⁸

Aid & multilateralism

This review did not uncover any research specifically exploring public attitudes toward aid, international development, or multilateralism. The closest available insights come from broader surveys on foreign policy and the importance of relationships with other countries. A 2021 study revealed that only 16% of Qataris value good relations with Iran. In contrast, 50% of respondents viewed strong ties with the United States, Russia and China as important for Qatar's national interests - these views have not significantly changed over time.⁶³⁹ Additionally, just over one-third of Qataris expressed approval of Arab economic relations with Israel - figures comparable to those in the UAE, Bahrain, and Saudi Arabia.⁶⁴⁰

⁶³³https://www.qu.edu.qa/SiteImages/static_file/qu/research/SESRI/documents/Publications/17/Public%20awareness%20EN.pdf

⁶³⁴<https://www.washingtoninstitute.org/policy-analysis/qatar-poll-shows-public-content-not-pro-iran-third-accept-some-israel-ties>

⁶³⁵ Ibid.

⁶³⁶ [https://www.qu.edu.qa/siteimages/static_file/qu/sesri/omnibus%20binder\[22\].pdf](https://www.qu.edu.qa/siteimages/static_file/qu/sesri/omnibus%20binder[22].pdf)

⁶³⁷ <https://theharrispoll.com/briefs/nu-q-middle-east-media-survey-reveals-reduced-trust-in-national-media/>

⁶³⁸https://www.qu.edu.qa/siteimages/static_file/qu/conference/jmem2017/vol/9/en/trusted%20news%20sources.pdf

⁶³⁹<https://www.washingtoninstitute.org/policy-analysis/qatar-poll-shows-public-content-not-pro-iran-third-accept-some-israel-ties>

⁶⁴⁰ Ibid.

Messengers & Mediums

Qatar's media environment has remained highly centralised over the past 25 years, with state-funded networks dominating the media landscape. The Omnibus Survey of Life examined patterns of media trust in its first iteration (2010) and found television as the most trusted news source by far for both Qatari citizens and expatriates for local, regional and international news, with Al Jazeera viewed as objective by approximately 99% of Qatari citizens and 96% of expatriates.⁶⁴¹ This review did not uncover repeated assessments of media patterns in later surveys to compare results longitudinally.

Trust in national media has declined over time. Longitudinal surveys conducted by Northwestern University in Qatar documented a decline in trust from 74% in 2017 to 62% in 2019 - the steepest drop among Gulf countries during that period.⁶⁴² Despite this erosion, domestic media continued to command greater trust than foreign outlets, suggesting state-linked institutions remain central to the national information environment.

Social media usage has grown over the past two decades and by 2017 the majority of Qatar residents reported daily access to at least one social media platform.⁶⁴³ Qatar now ranks amongst the top three states in the Arab Opinion Index for following social media influencer accounts, with 52% of respondents reporting they sometimes or always follow influencer accounts.⁶⁴⁴ However, they don't report using social media as a trusted source on news or politics - 65% of Qataris said that they never use social media to interact with political issues.⁶⁴⁵ This lack of engagement in political issues may be explained by the fact that almost half of respondents in Qatar believe their social media activity is being monitored.⁶⁴⁶



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https://www.qu.edu.qa/SiteImages/static_file/qu/research/SESRI/documents/SESRI%20in%20media/Media%20project/Omnibus_2010-Report.pdf

⁶⁴² <https://theharrispoll.com/briefs/nu-q-middle-east-media-survey-reveals-reduced-trust-in-national-media/>

⁶⁴³ [https://www.qu.edu.qa/siteimages/static_file/qu/sesri/omnibus%20binder\[22\].pdf](https://www.qu.edu.qa/siteimages/static_file/qu/sesri/omnibus%20binder[22].pdf)

⁶⁴⁴ <https://www.dohainstitute.org/en/Lists/ACRPS-PDFDocumentLibrary/arab-index-2025-in-brief-en.pdf>

⁶⁴⁵ <https://arabcenterdc.org/resource/arab-opinion-index-2022-executive-summary/>

⁶⁴⁶ <https://www.dohainstitute.org/en/Lists/ACRPS-PDFDocumentLibrary/arab-index-2025-in-brief-en.pdf>



COUNTRY SPECIFIC FINDINGS

CHINA

- China has dramatically changed since 2000, moving from a country dominated by extreme poverty to its near eradication.
- The core challenges now facing China are long term demographic trends on ageing, economic challenges in inequality and unemployment, and the emerging trade challenges, particularly with the US.
- There is a wide range of research in China, but due to differences in methodologies and data sources, it is challenging to form a consistent or comprehensive picture of attitudes. Researchers often doubt their own findings on the basis of self-censorship.
- There are some limited pieces of research dedicated towards understanding attitudes to aid. None provide rigorous investigation into effective messaging, mediums or messengers, and many suffer from sampling issues and representativeness.

China represents an interesting case study in global development, both economically and politically. As with Brazil, China occupies a rare position as both recipient and donor of international aid, however this does not appear to vastly influence the attitudes in the country.

Since 2000, China has seen one of the fastest and largest reductions in extreme poverty globally, transitioning from a largely agrarian, low-income population to one of the world's leading economies. Yet this transformation has also created new challenges. China now faces rapid population ageing, deepening inequality, and shifting political structures marked by increasing centralisation of political power. Alongside this, China's global engagement — particularly through the Belt and Road Initiative — signals a distinctive approach to international development and investment, positioned as mutual economic opportunity rather than traditional aid.

Understanding Chinese public opinion in this context is uniquely difficult. The lack of voting data and the constraints on free expression complicate attempts to gauge sentiment with confidence. While some broad trends can be identified – such as strong headline trust in government and low overall salience for aid – self-censorship, methodological limitations, and uneven data coverage limit certainty. Nonetheless, the research that does exist suggests that attitudes in China towards aid, development, and global engagement are not radically dissimilar to the traditional donor countries explored in this review, particularly when domestic needs are perceived to be met.

Data sources which are available for China include:

- **Piecemeal academic research** which involves bespoke surveys - these have shifted towards a largely online methodology, which leads to likely survey biases given internet penetration in particularly rural areas.
- **World Values Survey (WVS)** which is often used as a source for academic research, but lacks a specific focus on international aid or foreign affairs
- **Tsinghua University, Center for International Security and Strategy: Chinese outlook on international security** which explicitly explores attitudes towards China's foreign policy, in moderate detail, and was conducted in 2023 and 2024.

POLITICAL ECONOMY LANDSCAPE

Summary

China's political and economic change since 2000 has been dramatic. It has moved from having a majority of its population live in extreme poverty to a very small minority and this shift is responsible for the majority of the global poverty reduction since 1990. China is currently faced with significant demographic and economic hurdles. The population is rapidly ageing, while wealth and opportunities inequalities have widened considerably since 2000. Through all this, China has also seen political power concentrating, with the removal of term limits on the CCP General Secretary representing a major shift away from the collective leadership model of the 1980s.

Demographics/migration

Estimates of China's population indicate that it peaked at 1.41 billion in 2019, and has remained stable there, having grown from 1.26 billion in 2000.⁶⁴⁷ Fertility rates have dipped to 1 in 2023, considerably below replacement, indicating a risk of ageing population over the next few decades.⁶⁴⁸ The end result of these trends is that China has one of the fastest ageing populations, and is experiencing a population peak. Combined with this, China's population has been seeing rapid urbanisation. In 2021, 902 million people lived in urban areas, or 64% of the population. This was up 14% from 2010.⁶⁴⁹

Chinese immigration figures now show that China experienced a negative net migration of -310,000, suggesting existing demographic challenges may persist into the future.⁶⁵⁰

Wealth/inequality

A key part of China's trajectory since the 1990s has been the vast reduction in the number of those living in extreme poverty. Data from the World Bank has shown that China's economic growth since 1990 has lifted 748.5 million people out of extreme poverty, bringing the extreme poverty rate down from 66.3% to just 0.3%.⁶⁵¹ However, if a higher poverty line is applied (\$5.50 per day), then China's poverty rate is worse than some countries with comparable incomes: 17% in poverty in China compared to 8.5% in Turkey and 15% in Iran.⁶⁵²

The rapid growth in China's economy has been accompanied by a similar growth in inequality. Measured by the Gini Coefficient, China went from being considered a moderately unequal

⁶⁴⁷ <https://data.worldbank.org/indicator/SP.POP.TOTL?end=2023&locations=CN&start=1960>

⁶⁴⁸ <https://data.worldbank.org/indicator/SP.DYN.TFRT.IN?locations=CN>

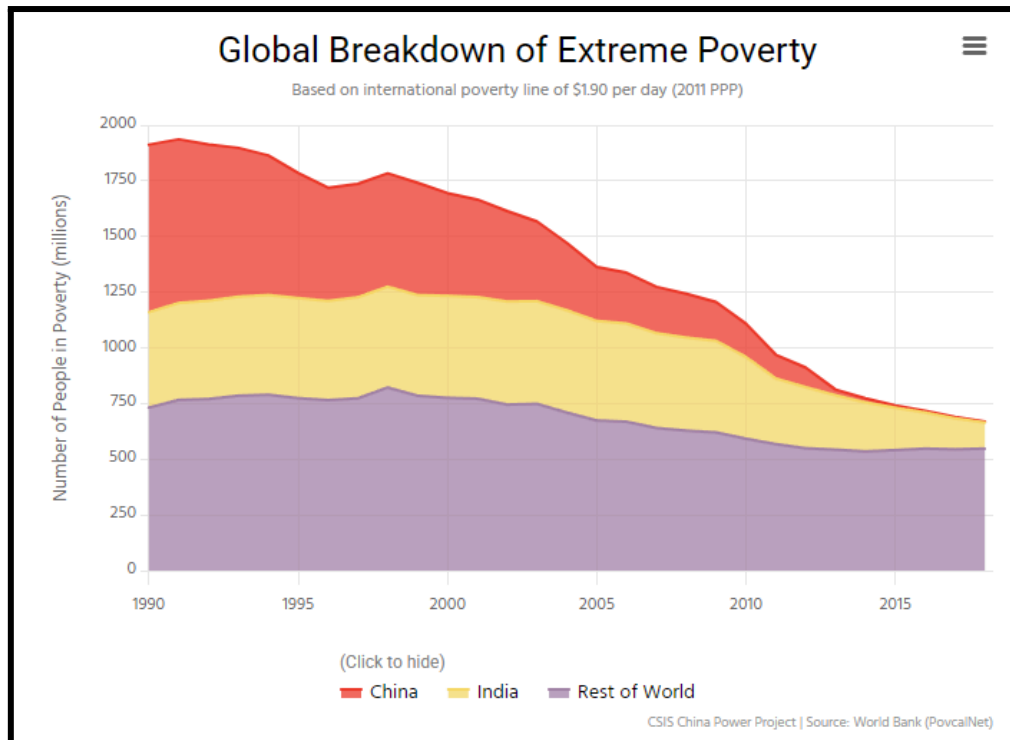
⁶⁴⁹ https://www.stats.gov.cn/english/PressRelease/202105/t20210510_1817185.html

⁶⁵⁰ <https://www.macrotrends.net/global-metrics/countries/chn/china/net-migration>

⁶⁵¹ <https://chinapower.csis.org/poverty/>

⁶⁵² Ibid.

country in 1990, to being one of the most unequal countries in the world in 2018.⁶⁵³ While rising incomes were experienced across the population, the largest gains were accrued at the upper end of the income spectrum. Similarly, there is evidence of widening opportunity gaps, with inequality in tertiary education between urban and rural areas, regions, and wealth groups being larger than those in other emerging markets or advanced economies.⁶⁵⁴



Youth unemployment has been a challenge in China, with 16-24 year old joblessness hitting a peak of 21.3% in June of 2023.⁶⁵⁵ It has since dipped to 16.5% in March 2025. This is accompanied by a frustration among young people with workplace demands, in particular the 996 working hour system. This resulted in a counter-cultural movement among young Chinese citizens, termed “Tang Ping” (躺平), which is a rejection of the “rat race” in favour of “lying flat” and was one of the most popular memes of 2021 in China.⁶⁵⁶

As of the start of 2025, the economic situation in China is likely to change rapidly as a result of the trade disputes with the United States.

Trends in politics

One of the challenges with assessing political trends in China is the lack of voting data. This necessitates an analysis at the top level, looking mainly at the movements of key politicians and policy.

⁶⁵³ <https://www.imf.org/en/Publications/WP/Issues/2018/06/05/Inequality-in-China-Trends-Drivers-and-Policy-Remedies-45878>

⁶⁵⁴ Ibid.

⁶⁵⁵ <https://www.reuters.com/world/china/chinas-youth-jobless-rate-dips-march-165-2025-04-17/>

⁶⁵⁶ http://www.news.cn/politics/2021-12/07/c_1128137881.htm

The critical story of China's political trajectory since 2000 has been the arrival and ascendancy of Xi Jinping. Removing term limits for the CCP General Secretary in 2018 means that Xi Jinping was able to secure a third term in 2022, and increasingly the political outlook of the governing CCP reflects "Xi Jinping Thought". This represents a crucial reversal to the collective leadership model promoted by Deng Xiaoping in the 1980s, and centralises power in the CCP General Secretary. Through a series of anti-corruption campaigns, those in key authority positions are now largely Xi Jinping loyalists.⁶⁵⁷

Importantly for the context of this research, China's approach to international development and investment in recent years has been shaped by the 2013 Belt and Road Initiative (BRI). This incorporates a range of agreements and construction projects, which are mainly financed by Chinese policy banks and carried out by state-owned enterprises. Typically the focus is on infrastructure development and is often aimed at facilitating trade between the two countries. These are framed as mutually beneficial investments with recipient countries, rather than one-sided aid delivery.

⁶⁵⁷ <https://www.reuters.com/breakingviews/xi-jinpings-graft-crackdown-is-fight-without-end-2025-02-19>

PUBLIC OPINION RESEARCH

Summary

Gathering public opinion data in China faces a number of challenges; critically on reaching a representative sample, and on receiving authentic answers from those who respond. From the inconsistent data that is available, the indication is that Chinese public attitudes are often very different from those in Western countries. Many investigations of Chinese public opinion focus on attitudes towards democracy, freedom of speech, and trust in the government. Often this research can break down into simplistic interpretations of the Chinese population as for and against the CCP. Research which explores political and policy attitudes in greater depth, finds a high degree of nuance and complexity to these attitudes. Critical to the stability of the CCP is that the Chinese public sees positive results from their government, and even more anonymous explorations of trust in government find consistently higher rates than is typically seen in liberal democracies.

From the existing research, there is scope for China to be a significant part of the future landscape of aid, with the public viewing economic strength as critical to China's geopolitical power on the global stage, and broadly seeking more proactive foreign policy. The challenge in China, as like in other markets, is that the public broadly prioritises domestic issues when forced to choose.

Survey Quality & Understanding Chinese Political Opinion

Public opinion data, in the absence of voting history, can offer some unique insight into the political groups and attitudinal groups within China.

However, there are some key challenges to survey research conducted in China. Broadly, there is a challenge with reaching a representative sample, and a challenge with self-censorship among that sample when it is reached. Modern surveys of China tend to use online samples, which lean towards urban areas, younger respondents, wealthier respondents.⁶⁵⁸ Additionally, there is some evidence (as well as a broad expectation among commentators) that respondents over-report satisfaction with actions of the Chinese government. These self-censorship biases can be hard to prove, though one study utilised a list experiment which confers greater anonymity on the respondent and found that CCP approval dipped to between 50 and 70%, though this survey was also distributed online which has its own methodological limitations.⁶⁵⁹

Ultimately, our review of the literature indicates great data scarcity in China as a result of these challenges. In China, some of these challenges may prove intractable for primary research.

⁶⁵⁸ <https://www.prcleader.org/post/what-we-know-about-public-opinion-in-china-and-why-it-matters-for-policymakers>

⁶⁵⁹ <https://www.cambridge.org/core/journals/china-quarterly/article/do-chinese-citizens-conceal-opposition-to-the-ccp-in-surveys-evidence-from-two-experiments/12A2440F948D016E8D845C492F7D0CFE>

Non-online research methodologies can be prohibitively expensive, and more exposed to self-censorship due to the reduction in anonymity. Online sampling approaches miss certain demographic groups. For example, research on foreign policy attitudes from Tsinghua University, which was conducted online, had only 7% of participants over the age of 60, only 15% non-graduates, and notably reduced the sample from 5,646 participants to just 2,662 through quality controls.⁶⁶⁰

Messages

Top issues driving the debate

Much research has focussed on attitudes towards freedom of expression in China, particularly given internet censorship. A study from Pan & Xu et al., indicates that respondents to a survey in China would prefer allowing free speech even if it led to social instability.⁶⁶¹

A related issue often raised is that of Chinese attitudes towards democracy. Through the Chinese Social Governance Surveys in 2015 and 2019, Yang et al., (2024) made use of open response data to explore Chinese attitudes to democracy. Crucially, they find that understanding of democracy within China is not widespread, estimating that around 50% were unfamiliar with the concept. Crucially, for those that were familiar, it was not typically related to competitive voting, instead being related to consultation, freedom of speech and “Min ben” (民本) which is a Confucian political philosophy asserting that the primary purpose of government is to benefit its people. In other words, the core consideration around the need for democracy in China is around the government’s ability to deliver, rather than the ability of the people to elect it.

Corruption in government is an issue which has been discussed by Xi Jinping, particularly in the context of removing officials accused of that corruption. There is some evidence that, for the population at large, this corruption is a significant concern. For example, national surveys indicate that despite growing income inequalities in China, citizen anger is lower than in other societies, and is instead largely directed towards power abuses and official corruption.⁶⁶²

The implications of these findings are that the Chinese government would face challenges mostly as a result of failure to deliver for citizens, rather than through latent demands for freedom of speech or information.

Trust

Trust in the government and in government institutions is one of the more challenging areas for researchers in China. Research typically finds high levels of trust, and some researchers make the connection between this high trust and the resilience of the CCP within China.⁶⁶³ This is debated, however, with some researchers claiming that there is a consistent overstatement of support, confidence and trust in the Chinese government as a result of self-censorship. There is some evidence for this, with experimental designs that aim to increase anonymity resulting in

⁶⁶⁰ https://ciss.tsinghua.edu.cn/upload_files/atta/1727662169826_AD.pdf

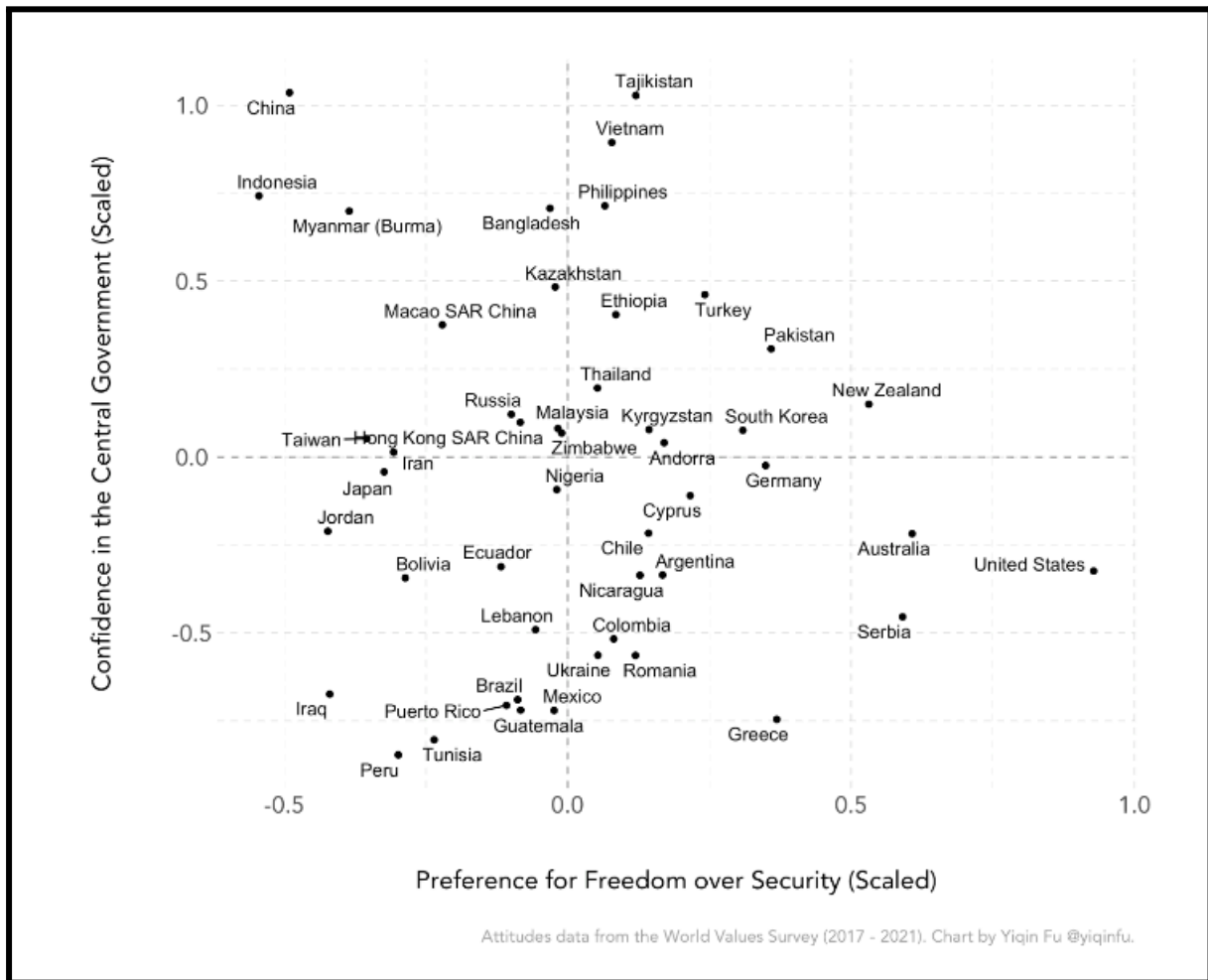
⁶⁶¹ <https://www.csis.org/analysis/public-opinion-china-liberal-silent-majority>

⁶⁶² <https://www.journals.uchicago.edu/doi/10.1086/683124>

⁶⁶³ <https://rajawali.hks.harvard.edu/resources/understanding-ccp-resilience-surveying-chinese-public-opinion-through-time/>

more muted results.⁶⁶⁴ However, even here the impact on opposition does not bring support below the majority level, consistently higher than many Western democracies tend to report.

The World Values Survey (WVS), as one of the few sources of data which has consistently operated within China, also reports high levels of government confidence in China. In a further question, the WVS asked if citizens would prioritise freedom over security, and finds that China and the US practically represent opposite ends of the scale.⁶⁶⁵ Collectively, the results indicate that while trust may be overstated, there are different ideological priors in China which need to be taken into account.



Government spending & fiscal policies

In 2022, Wang & Cooper set out to understand whether opposition towards aid in China stemmed from general dissatisfaction or perceived budgetary trade-offs. The results were interpreted quite indirectly. Critically, though, they find a correlation between attitudes to various government spending increases. This is interpreted as evidence against a trade-off based opposition.⁶⁶⁶ Other research, using more trade-off based language, indicates that in a

⁶⁶⁴<https://www.cambridge.org/core/journals/china-quarterly/article/do-chinese-citizens-conceal-opposition-to-the-ccp-in-surveys-evidence-from-two-experiments/12A2440F948D016E8D845C492F7D0CFE>

⁶⁶⁵ <https://yiqinfu.github.io/posts/liberty-safety/>

⁶⁶⁶ <https://www.tandfonline.com/doi/full/10.1080/10670564.2022.2090101>

forced choice scenario most would say domestic affairs take precedence. In a 2024 survey, 60% indicated that domestic affairs should take precedence over international aid.⁶⁶⁷

Research has consistently shown that the Chinese public is concerned about the climate, and has found relatively high support for action (including personal expenditure). For example, a 2012 survey showed 87% of respondents in China were willing to pay more for energy-efficient and environmentally-friendly products.⁶⁶⁸ Indirectly, this research indicates that the Chinese public can be more open to expenditure to tackle global issues, though it is worth noting that climate may well be a special case. Research from Pew indicates, for example, that a majority would prefer a reduction in air pollution even if it meant slower economic growth.⁶⁶⁹

Aid & multilateralism

Wang & Cooper used social media sources to estimate the salience of aid as an issue within China, and found that it was low salience, seeing little online discussion.⁶⁷⁰ As in other countries, research into aid therefore tends to measure absolute rather than relative support.

Research by Pew finds that China's population lean towards isolationism, with 56% of those surveyed wanting Beijing to focus on China's problems. However, there is some nuance, and a majority (62%) would support, rather than oppose, increasing international aid to developing nations.⁶⁷¹ More recent survey results indicate that a majority (56%) believe that international aid is excessive.⁶⁷²

However, an important finding from this 2024 research is that many in China see the economy as the primary force for achieving foreign policy goals (42%), more than those that see the military as the primary force (31%). Combined with the finding that, in both 2023 and 2024, the majority of respondents indicated that China should be more proactive rather than more restrained, the data indicates that engaging actively through economic means would align the Chinese government with the population.⁶⁷³

This research also indicates that multilateralism may be a less promising angle for China, as 42% indicate that China should rely on its own strength to resolve disagreements rather than multilateral institutions. Interestingly, this proportion was higher among the oldest respondents.⁶⁷⁴

Data on the demographic indicators of attitudes towards aid are relatively sparse, and sometimes inconsistent. While depending on relatively sparse data, a study from 2014 provides some indication that those living in more economically disadvantaged provinces and provinces with higher poverty rates express less support for giving international aid.⁶⁷⁵ On an individual level, however, higher income tends to be associated with less support for international aid.

⁶⁶⁷ https://ciss.tsinghua.edu.cn/upload_files/atta/1727662169826_AD.pdf

⁶⁶⁸ <https://wires.onlinelibrary.wiley.com/doi/full/10.1002/wcc.639>

⁶⁶⁹ <https://www.pewresearch.org/global/2016/10/05/chinese-public-sees-more-powerful-role-in-world-names-u-s-as-top-threat/>

⁶⁷⁰ <https://www.tandfonline.com/doi/full/10.1080/10670564.2022.2090101>

⁶⁷¹ <https://www.pewresearch.org/global/2016/10/05/2-china-and-the-world>

⁶⁷² https://ciss.tsinghua.edu.cn/upload_files/atta/1727662169826_AD.pdf

⁶⁷³ Ibid.

⁶⁷⁴ Ibid.

⁶⁷⁵ https://mpra.ub.uni-muenchen.de/59052/3/MPPA_paper_59052.pdf

Overall, while the data is patchy, the indication is that those groups which tend to express higher levels of discontent with the government are those who have greater opposition to aid. This aligns with findings across other countries included in this review that trust in government is an important factor in support for international support. In China, this can lead to some counter-intuitive findings, where the demographic groups who in other countries tend to support aid (notably, higher education, and higher income groups) are those who end up more opposed. These groups are typically the groups which support democratic institutions, though it is important to note that the split is not as straightforward as “pro” and “anti” regime.⁶⁷⁶

Messengers & Mediums

In the context of high trust in the government, and the well-reported challenges for messengers who are contrary to the government position, identifying trusted messengers in China may be as straightforward as identifying those aligned with the government. One study uses the disparity between government-aligned and non-government aligned media on aid as indicative of the explicit messages that the government wants to convey, identifying these messages to be “friendship”, “belt and road” and “helping the poor.”⁶⁷⁷

While there are still high levels of trust for traditional media sources, 2024 research indicated that Weibo and WeChat have become the primary channels for the public in China to access news.⁶⁷⁸ Some research indicates that this shift to consuming news via social media channels may contribute to a decline in trust in traditional media.⁶⁷⁹



⁶⁷⁶ <https://www.journals.uchicago.edu/doi/abs/10.1086/694255>

⁶⁷⁷ <https://www.tandfonline.com/doi/full/10.1080/10670564.2022.2090101>

⁶⁷⁸ <https://journals.sagepub.com/doi/10.1177/02666669241269779>

⁶⁷⁹ <https://journals.sagepub.com/doi/10.1177/20594364241293153?icid=int.sj-abstract.citing-articles.8>

CONCLUSION & NEXT STEPS

This review summarises political economy data and public opinion research across 10 key markets to gather insights into what has been driving policy decisions over the past 25 years, particularly with regards to aid and multilateralism. Broadly, we find the current research landscape to be insufficient for supporting effective advocacy aimed at shifting public opinion on aid. Much of the research that exists across these markets tends to measure absolute rather than relative support and there is insufficient publicly available research into effective advocacy messages, messengers or mediums for different segments of the public.

The next step of this research project is stakeholder interviews to understand the following:

- Whether there are resources not cited in this review which are helpful or formative for their understanding of attitudes towards aid.
- Whether private research passes some of the key tests we lay out in this review to adjudicate whether research is high quality.
- Whether forthcoming research will tick these boxes.
- Whether there are gaps in the existing data which are particularly frustrating, or which need focus to counteract.

The results of this literature review and the stakeholder interviews will inform the primary research undertaken in a chosen subset of markets.



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