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International Trade Union Confederation

FINAL REPORT
13-COUNTRY POLL

Anker Solutions

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INTERNATIONAL TRADE UNION CONFEDERATION GLOBAL POLL 2012

EXECUTIVE SUMMARY

Citizens from across the world – union and non-union members from Indonesia to the United States and from Japan to Greece – are voicing deep uncertainty. Global citizens believe this uncertainty can be reduced considerably through the following three actions:

1. Giving small businesses and workers more influence on economic decision-making, while simultaneously reducing the power of international banks and large companies.
2. Opting for investing in jobs and growth as the best road forward towards paying off debt. This course of action is overwhelmingly preferred to austerity measures that try to cut debt directly by lowering wages and cutting back on government spending.
3. National governments stepping forward to protect the interests of workers and their families with active income measures, such as decent unemployment benefits and pensions and affordable access to education, health and childcare.

These conclusions are based on the *International Trade Union Confederation Global Poll 2012*. This study, commissioned by the International Trade Union Confederation (ITUC), covers the adult populations of Belgium, Bulgaria, Brazil, Canada, France, Germany, Greece, Japan, Indonesia, Mexico, South Africa, the United Kingdom and the United States. In each country, approximately 1,000 respondents were interviewed, yielding a grand total of 13,087 respondents. Quota samples were used to reflect national proportions in terms of age, gender and region.

* * *

Global citizens are hurt by the financial crisis:

- ▶ Two-thirds of the respondents (66 percent) rate their national economy as bad;
- ▶ More than one-third of the respondents (35 percent) say the threat of unemployment has gone up over the past two years;
- ▶ More than half the respondents (58 percent) say they have seen their family incomes fall behind the increase in the cost of living;
- ▶ One out of seven respondents (14 percent) are struggling financially and can no longer pay for basic living expenses like housing, food and electricity; two-thirds of all respondents (64 percent) are no longer able to save any money.

International banks and large companies have too much influence. There is a widespread conviction among global citizens that international banks (67 percent) and large corporations (65 percent) have too much influence on economic decision-making. Conversely, global citizens also feel that small businesses (71 percent), voters (67 percent) and workers (50 percent) do not have enough influence on economic decisions.

Banks and large companies should pay more to fix the crisis. Global citizens also believe that banks (78 percent) and large companies (77 percent) should pay more than they are doing now to fix the global financial crisis. Workers and small businesses should be paying less.

Concern about effectiveness of current labor laws. The global citizenry does not believe current labor laws provide adequate job security (71 percent) and fair wages (70 percent). To a lesser extent, global citizens also express concern (44 percent) about the effectiveness of current labor laws to secure reasonable working hours.

Very strong support for labor laws in general. Global citizens do express very strong, emotionally anchored support for a wide range of labor laws that:

- ▶ ‘Protect workers health and safety.’ (94 percent in favor, of which 69 percent ‘strongly favor’)
- ▶ ‘Establish and protect a decent minimum wage.’ (89 percent in favor, 62 percent strongly)

- ▶ ‘Give workers the right to collectively bargain.’ (86 percent in favor, 49 percent strongly)
- ▶ ‘Give workers the right to join a union’ (83 percent in favor, 43 percent strongly)

Global citizens want action from their governments. Citizens express even more intense support for government action to equip workers with the following items:

- ▶ ‘Affordable access to health care.’ (93 percent in favor, 74 percent strongly)
- ▶ ‘Affordable access to education.’ (94 percent in favor, 72 percent strongly)
- ▶ ‘Decent retirement incomes.’ (91 percent in favor, 70 percent strongly)
- ▶ ‘Affordable access to child care.’ (90 percent in favor, 61 percent strongly)
- ▶ ‘Unemployment benefits.’ (81 percent in favor, 47 percent strongly)

Very strong popular support for a tax on financial transactions. Sixty-three percent of all global respondents favors a financial transactions tax, described as ‘a small levy on large transactions of currencies, bonds and shares, which could raise 480 billion euros globally.’ The idea behind the tax was described as this being ‘a good way for the banking sector to contribute back to society for their part in the financial crisis.’ Twenty-seven percent of the respondents oppose the tax. Ten percent couldn’t decide. The tax enjoys equally strong support in the surveyed G20 countries and is even more popular in the six included EU countries (73 percent support, 10 points above the global mean).

Warning: a massive disconnect between the governing elite and the populace. The *ITUC Global Poll 2012* points to a massive disconnect between the austerity measures proposed by most of the national governments and a desire to invest in jobs and growth on the part of citizens. An austerity approach that proposes that we ‘pay off our debts now, by lowering wages and cutting back on government spending’ is trounced by an alternative policy approach that proposes to ‘invest in jobs creation with decent wages to create demand for the economy, allowing the economy to grow, so we can pay off our debts.’ Two-thirds (66 percent) of the respondents prefer jobs-and-growth, 10 percent austerity and 24 percent express equal support for both messages.

* * *

The findings of this study represent the opinions of more than 1.4 billion people, or 20 percent of the world population. Anker Solutions, based in the Netherlands, was responsible for questionnaire design, analysis and report writing. TNS Opinion carried out the fieldwork between 10 April and 6 May 2012.

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CONTEXT: DEEP UNCERTAINTY

Broad pessimism. On the whole, citizens in our 13-country poll are not happy. A sizable majority of respondents (58 percent) believe their country is headed in the wrong direction. Just 38 percent say their country is on the right track. Four percent doesn't know. The mood is slightly less negative (56 percent wrong direction; 41 percent right direction) in the G20 countries – Germany, France, the United Kingdom, the United States, Indonesia, Mexico, Brazil, South Africa, Canada and Japan. In the combined EU countries, on the other hand, the mood is a tad more negative than the global 13-country average (59 percent wrong direction, 39 percent right direction).

Optimism in Brazil, South Africa and Canada.

Brazil is the most optimistic country in our poll with more than two out of three respondents (69 percent, see figure 2) saying their country is headed in the right direction. Just 31 percent of the respondents believe Brazil is moving in the wrong direction. Canada, perhaps surprisingly, comes in as a strong second: as many as 61 percent of the Canadian respondents believe their country is headed in the right direction, with 39 percent saying Canada is moving in the wrong direction. These numbers form a stark contrast with the grim mood in the neighboring United States, where only 35 percent of the respondents say their country is headed in the right direction (65 percent wrong direction). Finally, South Africa is the third country where optimists outnumber the pessimists: 53 percent of those polled in South Africa believe their country is headed in the right direction; 47 percent say South Africa is moving in the wrong direction.

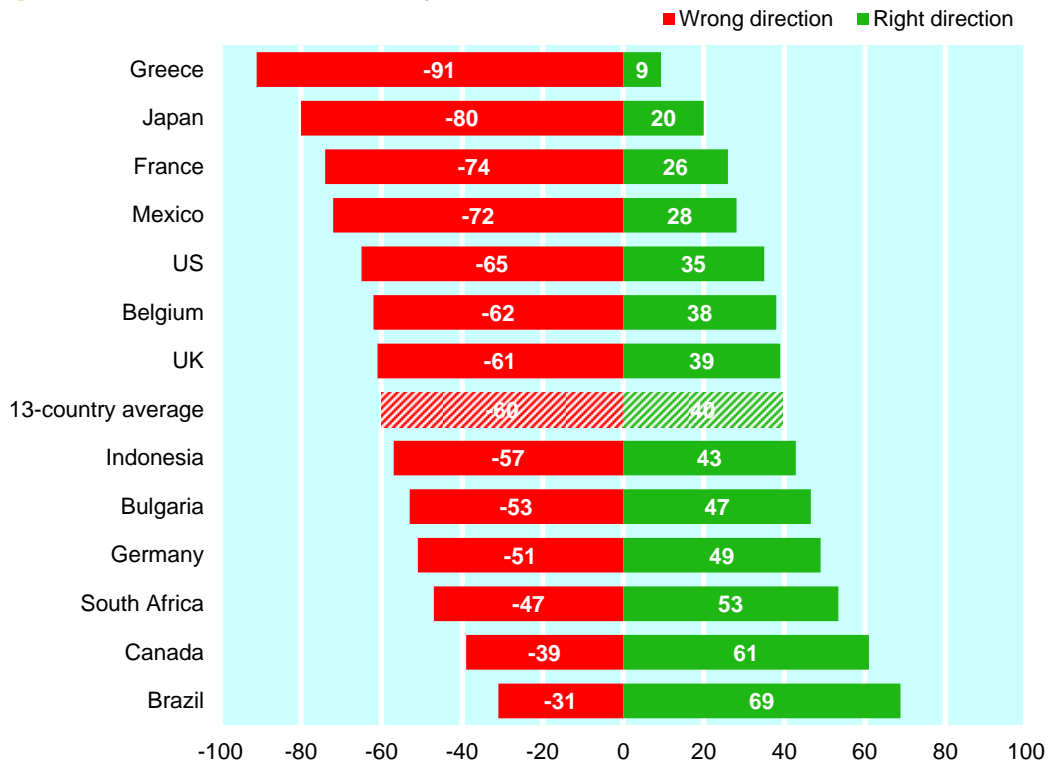
Europe: pessimism reigns. The mood in Europe may be very similar to the 13-country average, but shows remarkable variation among the six included EU-member states:

- **Germany is the least negative.** The Germans are the least pessimistic (49 percent right direction versus 51 percent wrong direction), but are still, albeit narrowly, in negative territory, despite Germany's widely perceived role as the diesel engine of Europe.
- **Pessimism reigns in France, the United Kingdom and Belgium.** Just one quarter of the French respondents (26 percent) say France is moving in the right direction and almost three quarters (74 percent) believe their country is on the wrong track. (Note: fieldwork ended *before* the election of the new French president on May 6.) Negative moods have also taken hold of the United Kingdom (39-61 percent) and Belgium (38-62 percent).
- **Greeks feel absolutely miserable.** A tiny 9 percent of the respondents in Greece believe their country is on the right track; a startling 87 percent of the respondents say Greece is going in the wrong direction. Numbers of this magnitude are normally found in countries that have just experienced a war.

Pessimism has also taken hold of Japan, Mexico and Indonesia. Japan is the second most pessimistic country in our global poll: just 20 percent of the Japanese respondents say their country is going in the right direction; a stunning majority of 80 percent of the Japanese believe it's the other way round. We can only speculate about the deeper causes for this pessimism, but it seems likely that last year's tsunami and its aftermath – especially the nuclear meltdown at three reactors in the Fukushima Daiichi nuclear power plant – must have taken a toll on Japanese self-esteem. Mexicans, in spite of their country taking off economically, are also unhappy (28-72 percent). Elsewhere in Asia, Indonesians are also unenthusiastic about the direction of their country, but not with the intensity of their northern neighbors (43-57 percent).

Figure 1 Direction of the country

Question: Overall, would you say (OUR COUNTRY) is moving in the right direction or the wrong direction? **Note** N=13,087.

Figure 2 Direction of the country

Question Overall, would you say (OUR COUNTRY) is moving in the right direction or the wrong direction? **Note** N=13,087 for 13-country average; N is about 1,000 for each individual country. Don't know responses omitted for ease of presentation. Largest don't know response was 12 percent. Countries ordered from highest score on (adjusted) 'right direction'.

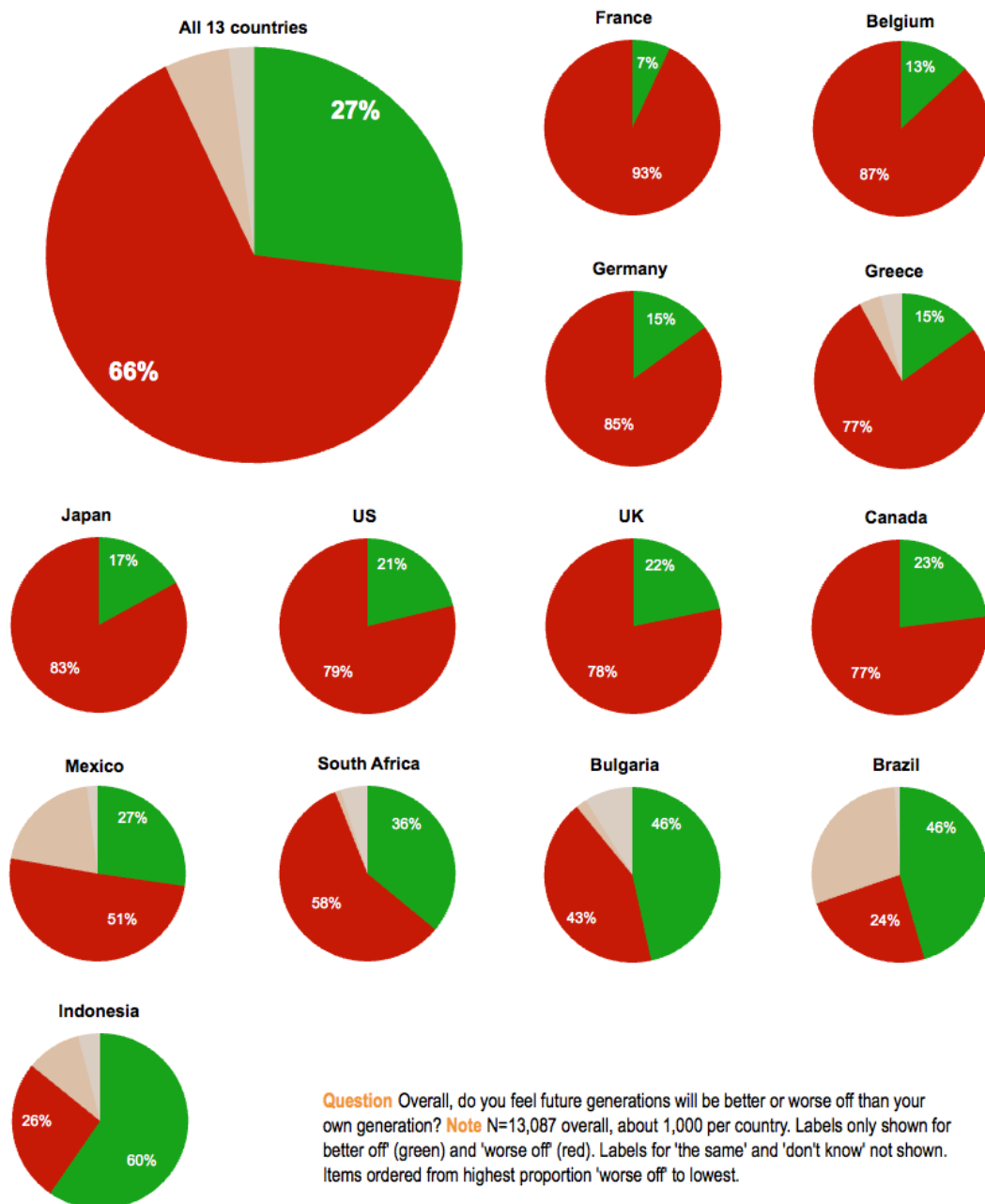
Target findings

- **Women are more pessimistic than men.** Men are less gloomy than women. Among men, 43 percent believe the country is going in the right direction, with 57 percent saying the opposite. Women are more pessimistic (38 percent right direction; 62 percent wrong direction).
- **Positive correlation between education and mood.** The respondents who have the least education are the most pessimistic about the direction of their country (just 30 percent right direction; 70 percent wrong direction), respondents with middle levels of education are somewhat less pessimistic (37-67 percent) and respondents with the highest education levels are the least pessimistic (43-57 percent).
- **Having a job makes people more optimistic; being unemployed makes people more pessimistic.** Forty-one percent of the employed respondents believe their country is headed in the right direction; 54 percent say wrong direction. Conversely, only 29 percent of those who are actively looking for a job say their country is moving in the right direction, with a whopping 71 percent claiming the opposite. Respondents who say the threat of unemployment has gone up are also less optimistic (30-70 percent), while those who believe that threat has gone down tend to be happier (44-56 percent). Students form one of the most optimistic segments (46-54 percent). Finally, the mood among pensioners is virtually identical to the global average (41-59).
- **Personal financial situation matters.** Those who lack the money for basic essentials like housing, food and electricity are disproportionately negative about the direction of their country: a tiny 26 percent say the country is moving in the right direction; 74 percent say the country is on the wrong track. Respondents who do have enough money for essentials but find themselves unable to save are also unhappy with the course of their country (36-64 percent). Those who can save a little money are on balance more or less neutral (48-52 percent). Finally, the group that is affluent enough to save a lot feels very good about where the country is going (58-42 percent). Similar patterns are found for assessments of whether family income has gone up (55 percent right direction; 'just' 45 percent wrong direction) or down (32-68 percent).

FUTURE GENERATIONS NOT BETTER OFF

Future generations not better off. In our 13-country study, deep uncertainty persists with regard to the fate of future generations. An alarming two out of three respondents (66 percent, large pie chart in figure 3) say future generations are ‘worse off than my own generation.’ Just 27 percent of the respondents believe future generations are better off, while 5 percent believe both will be doing the same and 2 percent don't know. These are shocking findings. It means that a fundamental driver for social and economic progress, confidence that our children and grandchildren will be better off, is at least temporarily not in place in most of our surveyed countries. Just three countries in the poll – all with vibrant economic dynamics – show a plurality of optimists: Indonesia (60 percent ‘better off’, versus 26 percent ‘worse off’), Brazil (46-24 percent) and, in Europe, Bulgaria (46-43 percent). In each of the remaining countries, fear trumps hope, with the doomsayers outnumbering the optimists.

Figure 3 Future generations better or worse off?



G20 countries facing virtually identical level of uncertainty as the 13 countries combined. Sixty-five percent of the G20-respondents expect future generations to be worse off, just 1 point below the corresponding number for the joint set of polled countries.

But uncertainty is even deeper in the EU. A startling 77 percent of the respondents living in the six surveyed EU countries believe that future generations are going to be worse off than their own generation. This is 11 points worse than the global 13-country average. With this many people expecting future generations to be worse off, there are only few people left with a brighter view: just 21 percent – only one out of five EU-respondents – expect future generations to be better off.

Target findings

- ***Uncertainty deepens with age.*** Just one out of three young adults (34 percent) between the ages of 18 and 24 years believe future generations will be better off than their own generation. Sixty-one percent of these young adults expect future generations to be worse off. That still turns them into the most optimistic age cohort with respect to future generations. All other age cohorts are more worried: the ‘family builders cohort,’ formed by respondents who are between 25 and 39 years old (29 percent better off; 61 percent worse off); the middle-aged, whose ages hover between 40 and 54 years (26-68 percent); the pre-retirement cohort (24-72 percent) and the pensioners, the respondents who are 65 years or older (22-72 percent).
- ***Uncertainty diminishes with education.*** The higher people’s education levels, the less uncertain they feel about future generations. Still, there is no denying; even those with the highest education still feel deeply uneasy about the fate of future generations (28-66 percent).
- ***The specter of unemployment increases uncertainty.*** Respondents who believe their job security has gone down in the past two years are also more likely to believe future generations will be worse off (22-73 percent) than respondents who believe this threat has gone down (29-61 percent). Similar patterns are found for related indicators.
- ***Positive assessments of where the country is going helps to reduce feelings of uncertainty.*** When people feel better about the general direction of their country, they also feel better about the fate of future generations. Respondents who say their country is moving in the wrong direction are also deeply worried about the prospects for future generations (a whopping 78 percent ‘worse off’ versus just 16 percent ‘better off’). Respondents who believe their country is going in the right direction also give less gloomy assessments of the fate of future generations (43-50 percent). Obviously, these numbers do raise some questions about the flow of causality: ‘direction’ may have an impact on the assessment of how future generations will be doing, but is also likely that negative sentiment about the prospects for future generations will lead respondents to think negatively about where their country is going. For now, the most important conclusion is that, whichever way one looks at it, negative sentiment is dominant.

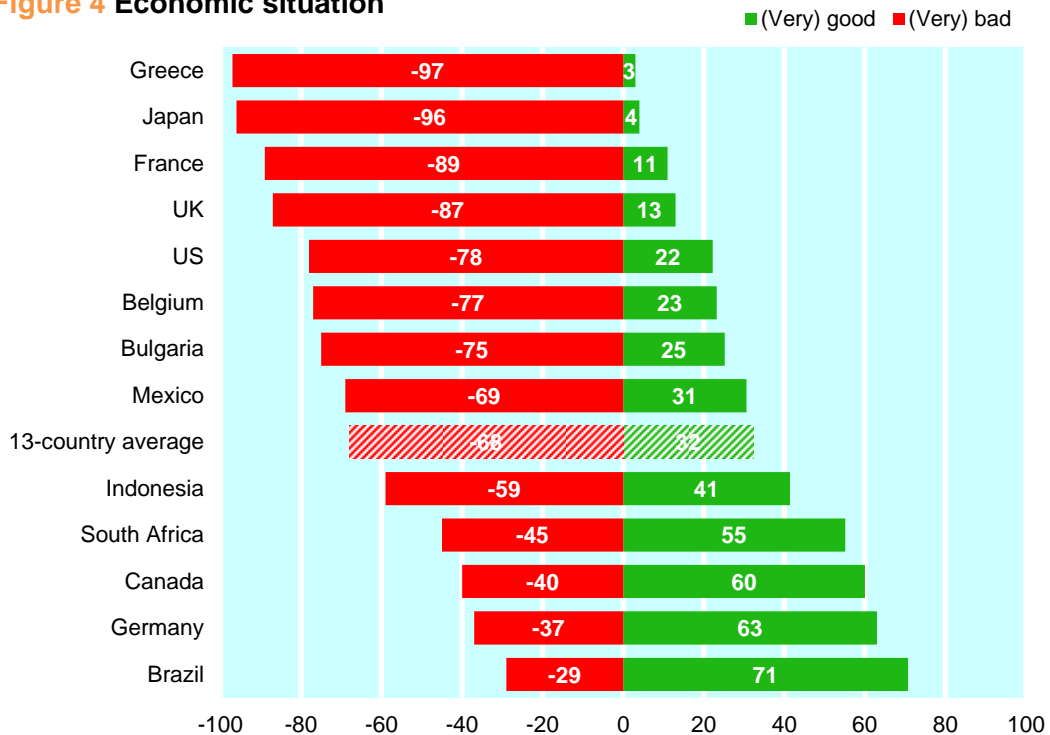
Country findings

- ***Uncertainty is concentrated in Europe.*** The most intense worries about future generations are found in France (93 percent ‘worse off’, small pie charts in figure 3), Belgium (87 percent), Germany (85 percent) and Greece (77 percent, growing to 84 percent when corrected for volunteered responses ‘same’ and ‘don’t know’). The United Kingdom follows at a small distance (78 percent). Bulgaria is the single shining European exception, with ‘just’ 43 percent worse off.
- ***Japan also doing very poorly.*** Uncertainty about the future is also rampant in post-tsunami Japan, where 83 percent of the respondents expect future generations to be worse off.
- ***Uncertainty also runs deep in North America.*** The positive contrast between Canadian citizens feeling much optimistic about their country than their US counterparts evaporates when asked to reflect on the fate of future generations. Americans and Canadians then find themselves reconnected through a shared feeling of deep uncertainty: a disconcerting 79 percent of American respondents and a similarly unnerving 77 percent of Canadian respondents expect future generations to be worse off than their own generation.

ECONOMIC HARD TIMES: NEGATIVE VIEWS OF THE ECONOMY

Most people hold negative views of the economic situation in their country. More than two out of three global respondents (68 percent, shaded bar in middle of figure 4) rate the current economic situation in their country as ‘bad’. Only 32 percent evaluate the current economic situation as good. In the G20 countries, views about the current state of the economy are 5 points less negative than the global average (63 percent ‘bad’ in the G20, not shown in figure 4), while opinions in the EU are 4 points more negative (72 percent ‘bad’, not shown).

Figure 4 Economic situation



Question Thinking about our economic situation, how would you describe the current economic situation in (OUR COUNTRY)?

Note N=13,087 for 13-country average; N is about 1,000 for each individual country. Don't know responses omitted for ease of presentation. Largest don't know response was just 2 percent. Countries ordered from highest to lowest score on (adjusted) score on 'wrong direction.'

Country findings

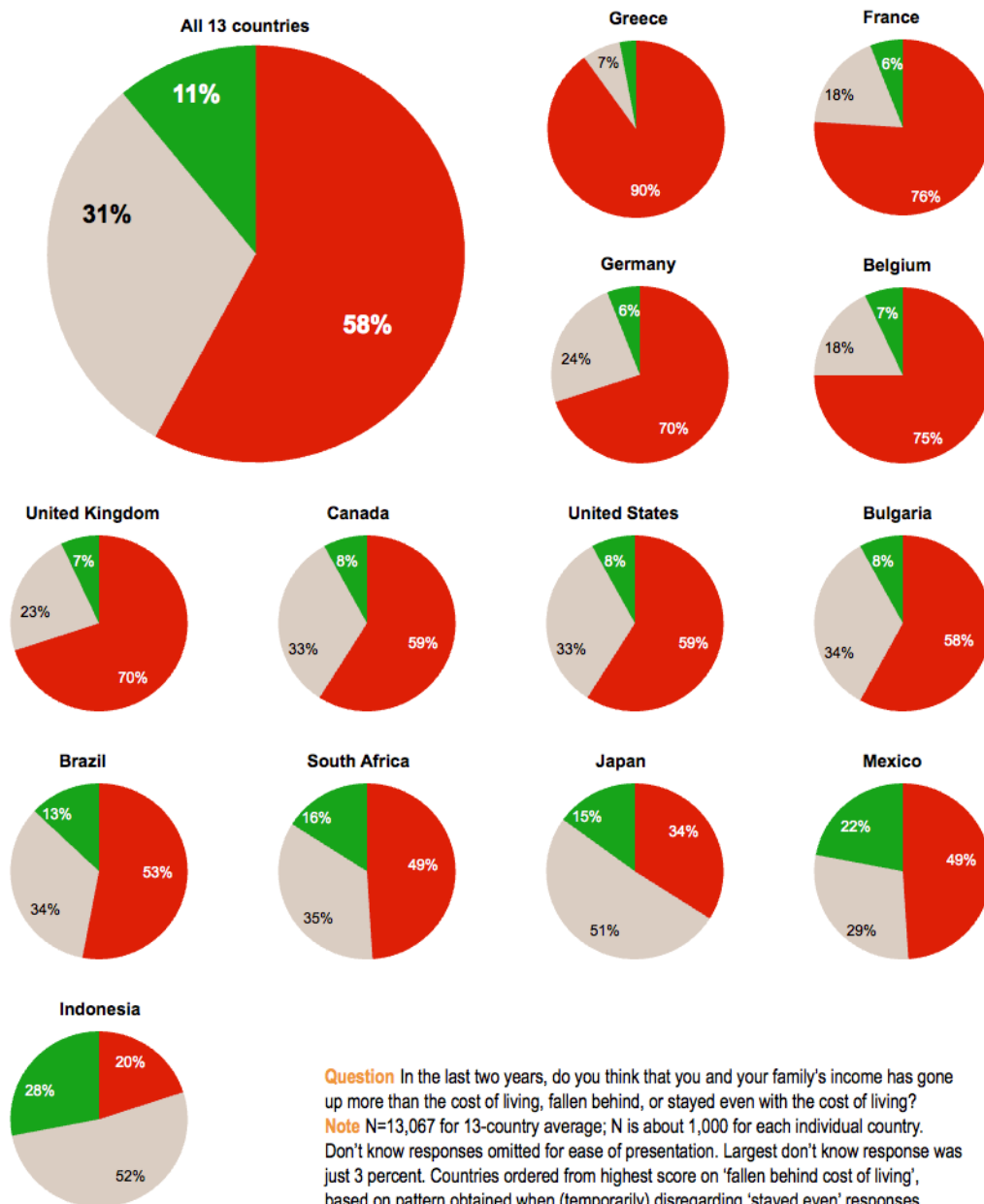
- **Almost unanimous negative views in Greece and Japan.** Greece and Japan have hit rock bottom in terms of their citizens' opinions on the state of the economy. Nearly all respondents rate the economy as bad – 97 percent of the respondents in Greece and 96 percent in Japan.
- **Brazil zooming along.** A bright economic spot is found in Brazil: 71 percent of the Brazilian respondents describe the economic situation in their country as good; just 29 percent rate the economy as bad.
- **Positive views also in Germany.** The German respondents stand out because of their positive views of the German economy: a solid 63 percent of the respondents say the German economic situation is good; just 37 percent say the economic situation is bad. This compares favorably with the five other EU member states in the poll: Greece (3-97 percent), France (11-89 percent), UK (13-87 percent), Belgium (23-77 percent) and Bulgaria (25-75 percent).
- **Canada also doing well.** A clear majority of Canadian respondents (60 percent) rate their national economy as good, while 40 percent say the economic situation is bad. Once again, these numbers are much better than those for the United States (22 percent good; 78 percent bad). The evaluations of the Canadian economy are also much better than further south in Mexico (31 percent good; 69 percent bad).

ECONOMIC HARD TIMES: INCOMES FALLING BEHIND COST OF LIVING

Family incomes are falling behind the cost of living. People across the world are facing serious financial pressure. More than half of the respondents (58 percent, figure 5) say their family income has fallen behind the cost of living in the past two years. One-third of the respondents (31 percent) say their family income has stayed even with the cost of living. A small group of 11 percent of the respondents says their family income has actually moved ahead of the cost of living.

G20 is slightly less negative. In the G20 countries, 53 percent of the respondents say their family incomes have fallen behind the cost of living – 5 points less than the 13-country average. Slightly over one-third (34 percent) say their family income has moved in tandem with the cost of living, while 13 percent say their family income has gone up more than the cost of living – 2 points above the global mean.

Figure 5 Family income and cost of living



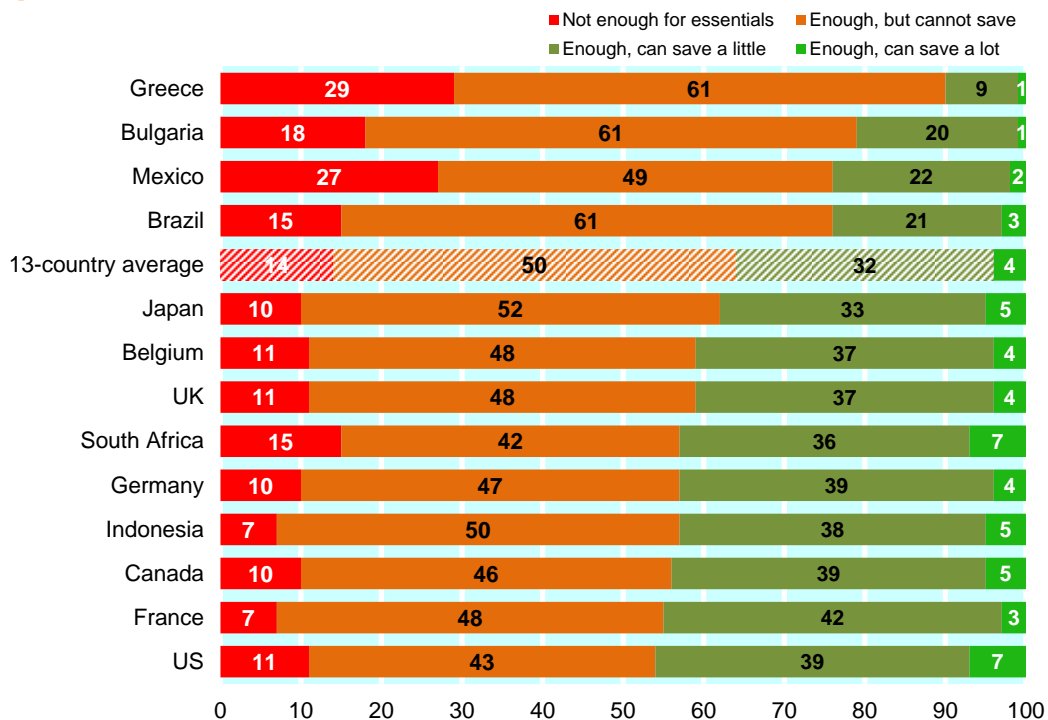
MANY PEOPLE ARE STRUGGLING FINANCIALLY

Many people are struggling financially. Overall, one out of seven respondents (14 percent) lack the money for basic essentials like housing, food and electricity. People's finances are in particularly bad shape in Greece, where an alarming 29 percent of the respondents say they don't have the money for basic living expenses. Poverty is also high in Mexico (27 percent) and Bulgaria (18 percent).

Two out of three people cannot afford to save money. 'Forget about saving money' appears to be the motto emanating from our global poll. There is not a single country where more than half the people can afford to save money. Overall, a vast number of respondents, two out of three (64 percent), say they are not able to put away any money.

One out of three people are able to save some money. One-third of the respondents (32 percent) can afford to pay for essentials while saving 'a little money.' An additional 4 percent say they are able to save 'a lot.' This latter group, the lucky few, is disproportionately found in the United States and South Africa (both 7 percent).

Figure 6 Own financial situation



Question How would you describe your financial situation? **Note** N=13,087 for 13-country average; N is about 1,000 for each individual country. Don't know responses omitted for ease of presentation. Largest don't know response was just 1 percent. Countries ordered from highest to lowest score on combined score for 'not enough for essentials' (shown in red) and 'enough for essentials, but cannot save money' (shown in orange).

Country findings

- **Widespread poverty in Greece, Bulgaria, Mexico and Brazil.** In each of these four countries 75 percent or more of the respondents are not able to save any money. Greece tops the chart with 90 percent unable to save.
- **Remaining countries form a broad second tier.** The responses in the remaining nine countries are remarkably similar, despite the vast differences between these countries. These countries hover around an average of slightly under 60 percent of respondents who are not able to save any money. The United States performs the best among this group.

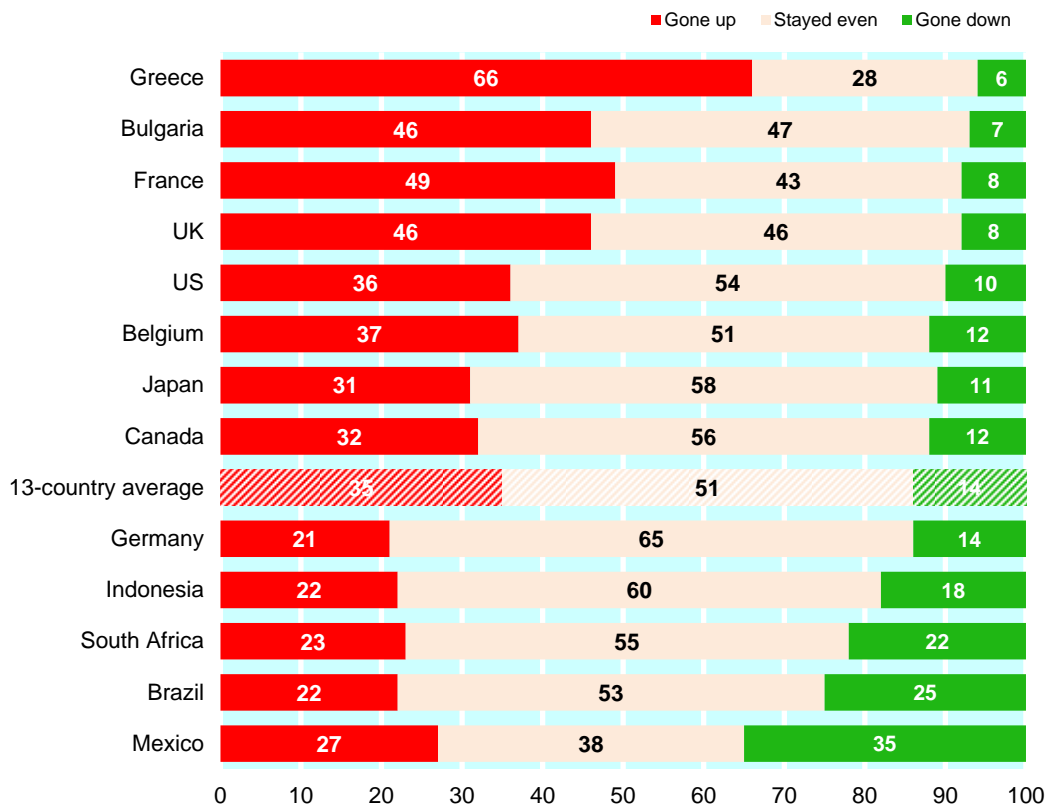
INCREASING THREAT OF UNEMPLOYMENT

Increasing threat of unemployment. Thirty-five percent of the respondents report that, over the last two years, the threat of unemployment for them personally, or their family, has gone up. For about half the respondents (51 percent) there has been no change, while the threat of unemployment has diminished for 14 percent of the respondent households. The threat of unemployment is less pronounced in the G20 ('just' 31 percent up; 53 percent the same; and 16 percent down) and more prominent in the EU (40 percent up; 51 percent the same; and just 10 percent down).

Country findings

- **Biggest threat in Greece.** Two-thirds of the Greek respondents (66 percent) say the threat of unemployment has gone up, while only 6 percent believes the threat has gone down, thus creating the biggest spread among the thirteen countries included in the poll.
- **Bulgaria, France and the UK form second tier.** This set of countries resembles Greece in the absence of substantial numbers of people for whom the threat of unemployment is actually going down (high single digit scores at best). What makes them different from Greece is the smaller number of people who say the threat of unemployment has already gone up (46 to 49 percent range, versus 66 percent in Greece).
- **Mexico single country where more people say the threat of unemployment has gone down.** An impressive thirty-five percent of the respondents in Mexico say the threat of unemployment has gone down, while a smaller group of 27 percent says the threat has gone up (38 percent believe the threat has remained the same). This turns Mexico into the leader of an elite group of countries – with Brazil, Indonesia, South Africa and perhaps Germany – where the threat of unemployment appears to be under control, at least for now.

Figure 7 Threat of not having a job



Question: Over the last two years, has the threat of not having a job or not having enough work for you and your family gone up, gone down or stayed the same? **Note** N=13,087 for 13-country average; N is about 1,000 for each individual country. Don't know responses merged with 'stayed even with cost of living' for ease of presentation. Largest don't know response was 5 percent. Countries ordered from highest score on 'gone up', based on pattern obtained when (temporarily) disregarding 'stayed even' responses.

ECONOMIC DECISION-MAKING BY THE GOVERNMENT: MOST INFLUENCE FOR BANKS AND LARGE CORPORATIONS, VOTERS AMONG LEAST POWERFUL

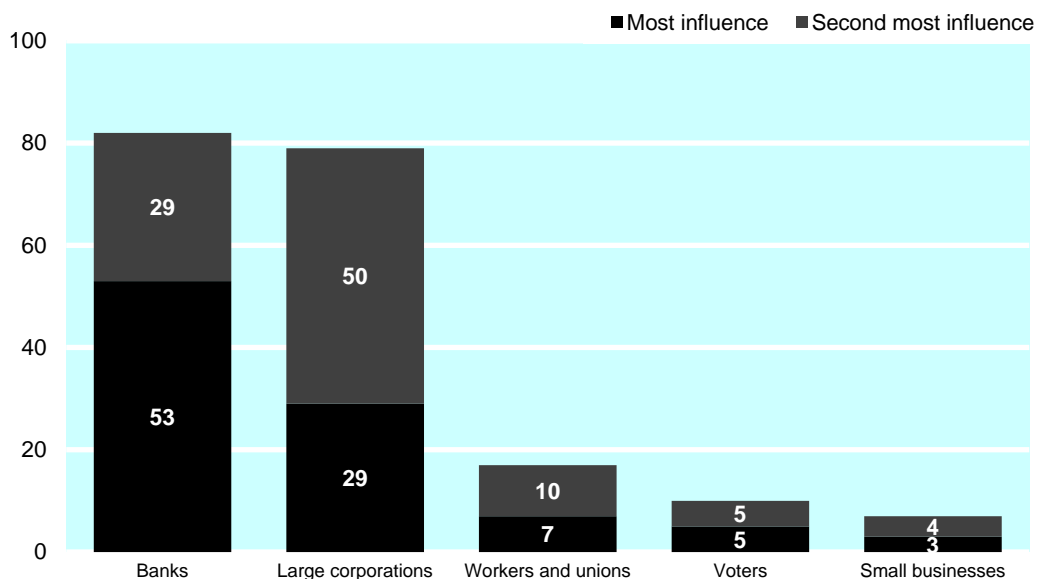
Economic decision-making: ‘international banks and financial institutions’ most powerful.

More than half the respondents (53 percent) single out the international banks as the most powerful actors when it comes to economic decision-making by the national government in their country. Twenty-nine percent of the respondents identify the banks as the second most powerful actor. All in all, an amazing 82 percent of the respondents rank the international banks as among the two most powerful actors with regard to economic decision-making. Virtually all respondents agree that these international financial institutions hold a tremendous amount of sway over their national economies.

Large corporations are the second most powerful actor. Large corporations are, in the eyes of global citizens, the second most powerful actor when it comes to economic decisions taken by national governments. Twenty-nine percent for the respondents rank ‘large corporations’ as the most powerful actor; an additional 50 percent put them in second place, yielding a total of 79 percent who view large corporations as one of the two most powerful actors with regard to national economic decision-making.

Workers and their unions, voters and small business are the least powerful. Very few respondents regard these actors as very powerful when it comes to economic decision-making. Just 17 percent rank ‘workers and their unions’ as among the two most powerful economic actors. ‘Voters’ are mentioned by only 10 percent and ‘small businesses’ come in last, mentioned by only 7 percent of the respondents.

Figure 8 Influence on national economic decisions (ranking)



Question: According to you, which of the following actors has the most influence on economic decisions taken by the government? And which one would have the second highest amount of influence? **Note** N=13,087.

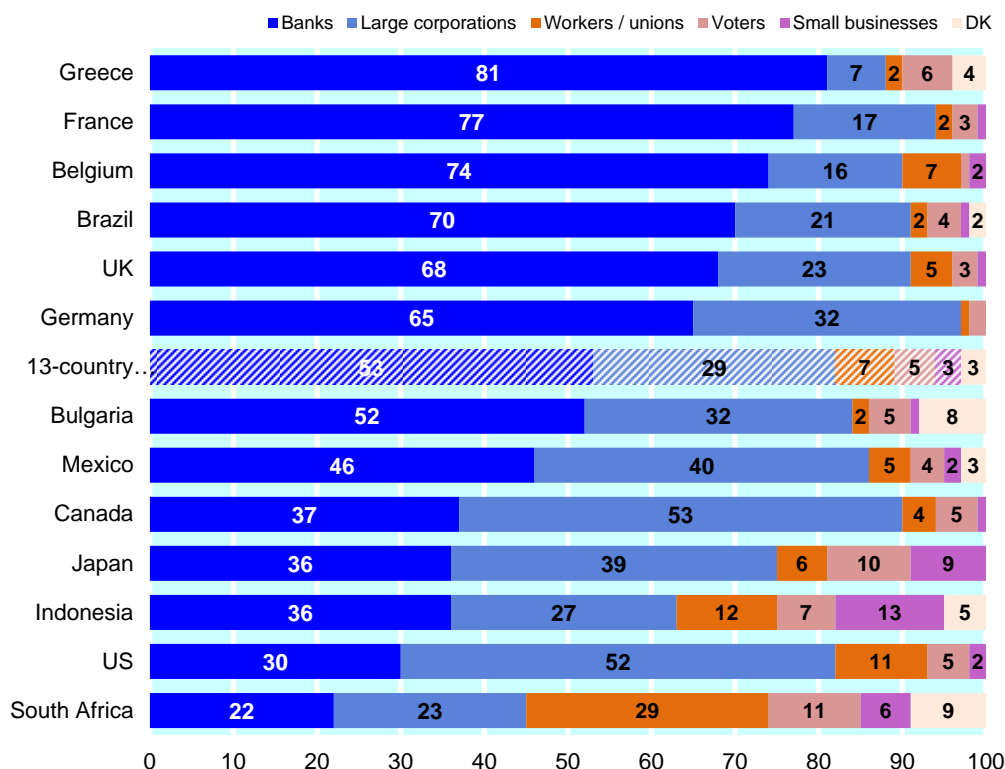
G20: more focus on large corporations, less emphasis on banks. The G20-respondents put somewhat less emphasis on the power of international banks (‘just’ 49 percent most powerful, 4 points less than the global mean) and are somewhat more inclined to see ‘large corporations’ as the most powerful economic actors (33 percent, 4 points more than the global mean).

EU: strong emphasis on banks. Sixty-eight percent of the EU-respondents, 13 points more than the global average, single out the international banks as the most powerful economic actors in the decisions taken by their national governments. Large corporations are mentioned by 24 percent, 5 points below the 13-country average.

Target findings

- **Banks most important: negative correlation with education.** Lower educated respondents are more likely to single out banks (60 percent) as the most important economic actor than middle and higher educated respondents (54 and 53 percent, respectively). Students are the least likely to see the banks as most powerful (48 percent).
- **Government workers are disproportionately inclined to single out banks.** Sixty percent of the respondents who work for the government mention banks as the most powerful economic actor.
- **Economic hardship also correlates with singling out the banks.** Respondents who have seen their family income go down or have seen the threat of unemployment gone up are disproportionately inclined to see the banks as the most powerful economic actor (both 59 percent).

Figure 9 Single most powerful economic actor



Note N=13,087 for 13-country average; N is about 1,000 for each individual country.

Country findings

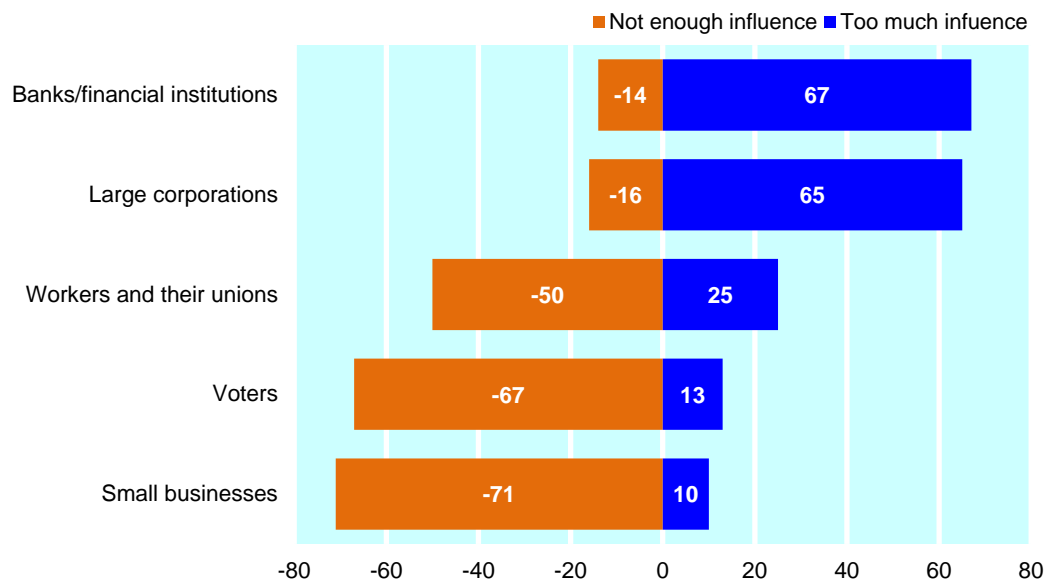
- **Sociodemographic contrasts pale in comparison with country contrasts.** While, perhaps with the exception of Indonesia and South Africa, there seems to be some relative global consensus about the economic power structure, there are still amazingly strong differences in terms of how much emphasis people from different countries put on banks vis-à-vis ‘large corporations.’
- **Europe obsessed by banks.** Greece (81 percent), France (77 percent) and Belgium (74 percent) top the charts, followed by the UK (68 percent) and Germany (65 percent), followed in turn at some distance by Bulgaria (52 percent).
- **US and Canada do not share this obsession.** In both the US and Canada, a majority sees large corporations as the most powerful actor (52 and 53 percent, respectively). The banks are second, mention by 30 and 37 percent, respectively.
- **BRICS all over the place.** Brazil has joined Europe in its focus on banks (70 percent). Both Indonesia and South Africa see a wider pallet of most important economic actors. Mexico, while not an official member of the BRICS club, is torn (46 percent).
- **Workers and their unions seen as powerful in Brazil.** Brazil is the only country where a substantial portion of the respondents see ‘workers and their unions’ as the most important economic actor (29 percent).

ECONOMIC DECISION-MAKING BY THE GOVERNMENT: SMALL BUSINESSES AND WORKERS SHOULD HAVE MORE POWER

International banks and large corporations are too powerful. Being seen as the most powerful economic actor does not necessarily imply being viewed as having too much power. Yet, this is clearly the case when it comes to economic decision-making by the national governments. An astonishing 67 percent of the global respondents say that ‘international banks and financial institutions’ have too much influence. An almost identical proportion (65 percent) says that ‘large corporations,’ too, exercise too much power.

Workers and their unions, voters and small business should have more power. Three actors are viewed as having too little influence on economic decision-making by the national governments. First, small businesses – traditionally the engine of job creation – are viewed as the actors most in need of more power: a brutal 71 percent of the global respondents say small businesses don’t have enough influence on economic decisions. Voters are a close second (67 percent not enough influence) and ‘workers and their unions’ come in third (50 percent not enough influence).

Figure 10 Influence on economic decisions



Question: For each of the following groups, could you please tell how much influence you think they have on economic decisions taken by the government? **Note** N=13,087.

Attitudes in G20 are very similar to global average. Attitudes among the G20-respondents are very similar to those found for the thirteen countries combined. Sixty-six percent of the G20 respondents regard international banks and financial institutions as too powerful (just 1 point less than the global mean). Sixty-four percent say large corporations are too powerful (again, 1 point below the global mean). Twenty-eight percent say workers and their unions are too powerful (3 points above the global mean). Thirteen percent say voters are too powerful (same as 13-country average) and 11 percent say small businesses are too powerful (1 point higher than global mean).

EU countries are more critical of the power of the banks. With the precious findings in mind, it comes as no surprise that the EU respondents are more critical about the power of the banks than the global average (76 percent, 9 points above the global mean). Europeans are also more likely to say that large corporations have too much power (69 percent, 4 points above the global mean). Workers and their unions (18 percent, 7 points below the global mean), voters (4 percent, 9 points below the global mean) and small businesses (4 percent, 6 points below the global mean), already perceived as not having enough power on the global scene, are viewed in Europe as even less powerful. European citizens feel disempowered. Something is brewing.

Target findings

- **Critical attitudes towards banks and large corporations tend to increase with age.** Fifty-nine percent of young adults between the ages of 18 and 24 say that large corporations are too powerful. That number is equal to 62 percent for the ‘family building’ cohort of respondents who are between 25 and 39 years old; then grows to 68 percent among the middle-aged and on to 69 percent among the pre-retirement cohort. Retirees are slightly milder in their judgments: 65 percent of this cohort believes that large corporations are too powerful.
- **Civil servants are very critical.** Seventy percent of the respondents who are employed by the government say large corporations are too powerful. Those who work for a private employer are somewhat less critical (64 percent).
- **Economic hardship does contribute to more critical attitudes toward large corporations.** For example, respondents who have experienced an increase in the chance of losing their jobs (69 percent) and people who cannot pay for essentials (63 percent) are more likely to say that large corporations are too powerful. While these are interesting findings, the message to take from these data is that resentment is very widespread and certainly not limited to a group of grumpy people who have experienced a difficult time in their professional careers.

Country findings

- **Banks and large corporations too powerful everywhere, except South Africa.** South Africa is the only country where, on balance, international banks and financial institutions are *not* deemed too powerful. This is reflected in a negative 11-point net influence score (see table 1, top right hand column)
- **Banks and large corporations are the bogeyman in Europe and Brazil.** The net influence scores for large corporations in the European countries and Brazil are very high (second row, left side of table 1), indicating they are viewed as way too powerful in these countries.
- **Power is not a zero sum game.** The assessments of the actors’ influence, and whether they should have more or less of it, on economic decisions are only partially correlated. The country patterns for the banks and large corporations are pretty similar. But the country orderings for workers, voters and small businesses tend to be much more idiosyncratic. For example, workers and unions are especially short on power in Bulgaria (negative 75-point net influence score), France (negative 51-point margin), Greece (negative 50-point margin), Germany (negative 50-point margin), and Japan (negative 37-point margin). Likewise, Brazilian respondents kind of break away from their European counterparts by refusing to think of voters and small businesses as almost completely disempowered.
- **Workers, voters and small businesses most disempowered in Bulgaria.** The net influence scores in this country are very, very low: workers (negative 75-point margin), voters (negative 67-point margin) and small businesses (negative 78-point margin).

Table 1 Influence on economic decisions by the government

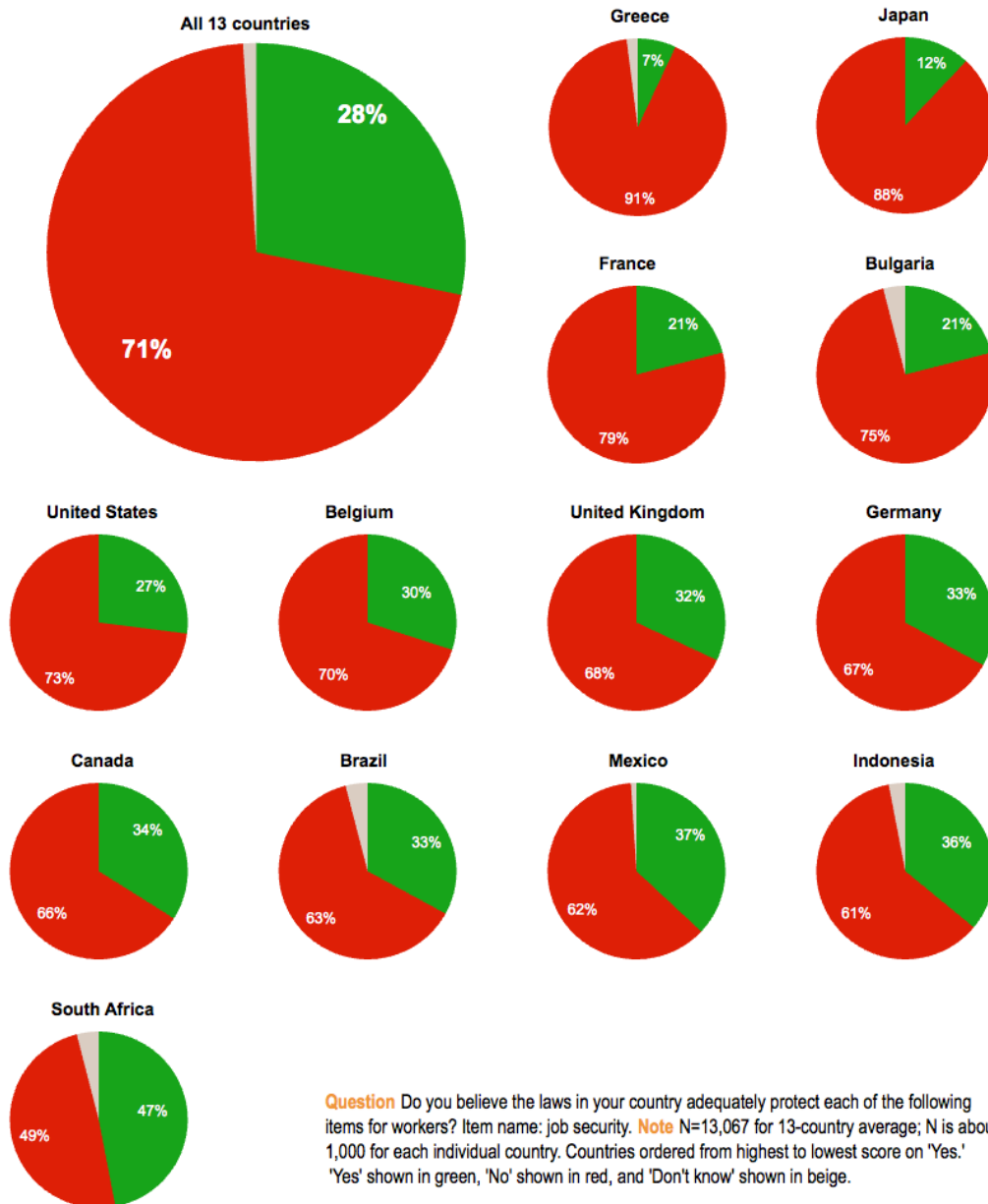
	EL	DE	FR	BR	UK	BE	US	CA	Total	MX	ID	BG	JN	SA
Banks/financial institutions	+82	+79	+77	+76	+72	+71	+66	+59	+53	+42	+41	+32	+10	-11
Large corporations	+72	+75	+60	+65	+61	+41	+66	+67	+49	+30	+44	+43	+18	-11
Workers and their unions	-50	-50	-51	-40	-14	-21	-6	-8	-25	-15	+14	-75	-37	+19
Voters	-39	-82	-74	-40	-82	-76	-77	-78	-54	-23	+2	-67	-56	-24
Small businesses	-66	-83	-80	-44	-82	-70	-75	-72	-61	-33	-5	-78	-46	-58

Note N=13,087 for 13-country average; N is about 1,000 for each individual country. Cell entries are margin scores, calculated as percentage ‘too much influence’ minus percentage ‘not enough influence’. Net positive numbers indicate a surplus of influence; net negative numbers indicate a deficit of influence. Countries ordered from highest to lowest scores for ‘international banks and financial institutions’. See Appendix 2 for list of country abbreviations.

CURRENT LABOR LAWS PROVIDE INADEQUATE LEGAL PROTECTION

Labor laws do not provide workers with adequate job security. More than seven out of ten respondents (71 percent) say that the laws in their country do not provide with adequate job security. Just 28 percent believe the opposite; 1 percent doesn't know. These patterns are very similar in both the G20 and EU countries.

Figure 11 Legal protection for job security



Target findings

- **Women more critical.** Seventy-three percent of female respondents say the laws in their country are inadequate with regard to protecting job security, 6 points more than the corresponding number for men.
- **Milder responses with higher education.** The lowest educated respondents are most critical with regard to current legislation providing adequate job security (74 percent 'no'; 27 percent 'yes').

Middle educated respondents are slightly less critical (72-27 percent) and higher educated are again somewhat less critical (69-30 percent). Students are the least critical (34-65 percent).

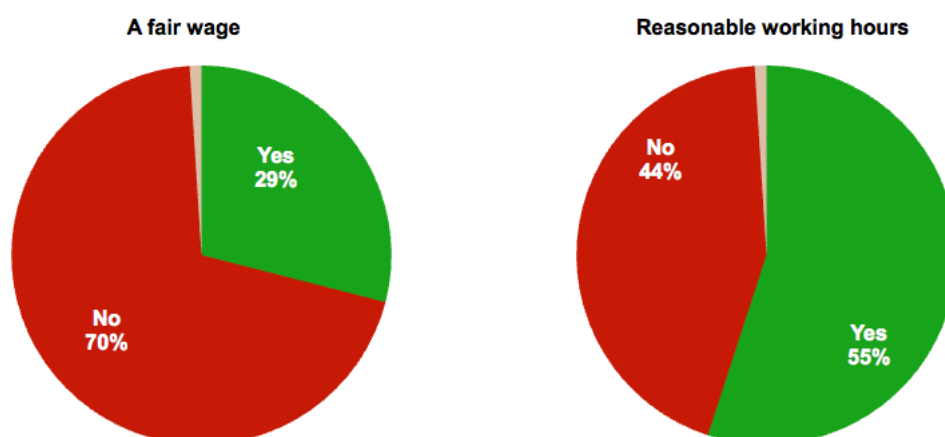
- **People without a job are the most critical about job security.** This should hardly come as a surprise as these respondents are living proof that job security laws cannot protect everyone. Still, it is very relevant to know that more than four out of five unemployed respondents (81 percent) say current laws in their country provide inadequate job security. Among people with a job, the corresponding number is close to the global average (69 percent).
- **Strong correlation with income.** Respondents who cannot pay for essentials are the most critical about the laws providing adequate job security (80-18 percent), followed by those who can pay for essentials but who are unable to save money (74-24 percent), and subsequently followed by respondents who can save a little (37-62 percent). Respondents who can save a lot are the only ones who mostly believe that current laws in their country provide workers with adequate job security (47-52 percent).

Country findings

- **Greece most critical.** Respondents from Greece are almost unanimous (93 percent) in their opinion: Greek laws do not provide workers with sufficient job protection. After everything that has happened in Greece, these findings should come as a surprise.
- **Strong negative sentiment in the Anglo-Saxon countries.** Solid majorities in each of the three included Anglo-Saxon countries say that current laws do not offer workers sufficient job security. Respondents from the United States are the most critical (73 percent), followed by respondents from the UK (68 percent). But even in Canada, 66 percent of the respondents do not believe current laws bring adequate levels of job security.
- **Most positive assessments of job security protection in BRICS countries and Mexico.** Remarkably, respondents in Brazil, Mexico, Indonesia and South Africa provide the most positive assessments of how the laws in their country help to protect workers' job security.

Additional worries about legal protection for fair wages. An overwhelming majority of the respondents (70 percent, figure 12, pie chart on the left) does not believe that current laws give workers adequate protection for a fair wage. Just 29 percent of the respondents say that current laws do actually provide adequate protection. One percent doesn't know. The patterns in the G20 and EU countries are similar.

Figure 12 Adequate legal protection?



Question Do you believe the laws in your country adequately protect each of the following items for workers? **Note** N=13,087. Labels only shown for 'Yes' (green) and 'No' (red). Labels for 'don't know' deliberately not shown.

Assessments of protection for reasonable working hours are more positive. A solid and encouraging majority of the respondents (55 percent, right hand pie chart) say that current laws do provide workers with adequate protection for reasonable working hours. Still, 44 percent believes that this is not the case. The most critical voices can be found in Greece (86 percent, bottom row table 2 below) and Brazil (58 percent). Satisfaction is relatively high in France, where ‘only’ 37 percent believes that legal protection is falling short.

Legal protection for fair wages: G20 slightly less concerned, EU slightly more concerned. Sixty-six percent of the G20-respondents (4 points below the global mean) say that legal protection for fair wages is inadequate. The EU-respondents, on the other hand, are slightly more concerned about insufficient legal protection for fair wages (73 percent, 3 points above the global mean).

Legal protection for reasonable work hours: both G20 and EU slightly less concerned. Forty-one percent of the respondents from the G20 countries say that legal protection for reasonable working hours is inadequate (3 points below the global mean), while ‘only’ 36 percent of the EU respondents say so (8 points below the global mean). These numbers suggest relative satisfaction with these laws in Europe.

Country findings

- **Greece tops the charts – again.** The Greeks feel as if they have lost all legal protection on the job market. An amazing 92 percent of the Greek respondents say there is inadequate legal protection for a fair wage. In addition, 86 percent say that there is no adequate legal protection for reasonable working hours.
- **Bulgaria and France: worried about fair wages, less worried about reasonable working hours.** Overwhelming majorities in Bulgaria (86 percent) and France (84 percent) believe that legal protection for a fair wage is inadequate. Respondents in both countries are less worried about inadequate legal protection of reasonable work hours (49 and 37 percent, respectively).
- **Reasonable working hours is a big issue in Greece, Japan, Brazil and Mexico.** Solid majorities in these countries say that legal protection is inadequate: Greece leads (86 percent – already discussed above); Japan is the runner-up (73 percent) and is followed by Brazil (58 percent) and Mexico (56 percent).

Table 2 Adequate legal protection?

	EL	BG	FR	JN	DE	MX	BR	Total	BE	ID	CA	UK	US	SA
A fair wage	92	86	84	81	79	77	72	70	65	63	54	53	53	48
Reasonable working hours	86	49	37	73	39	56	58	44	25	39	26	33	31	23

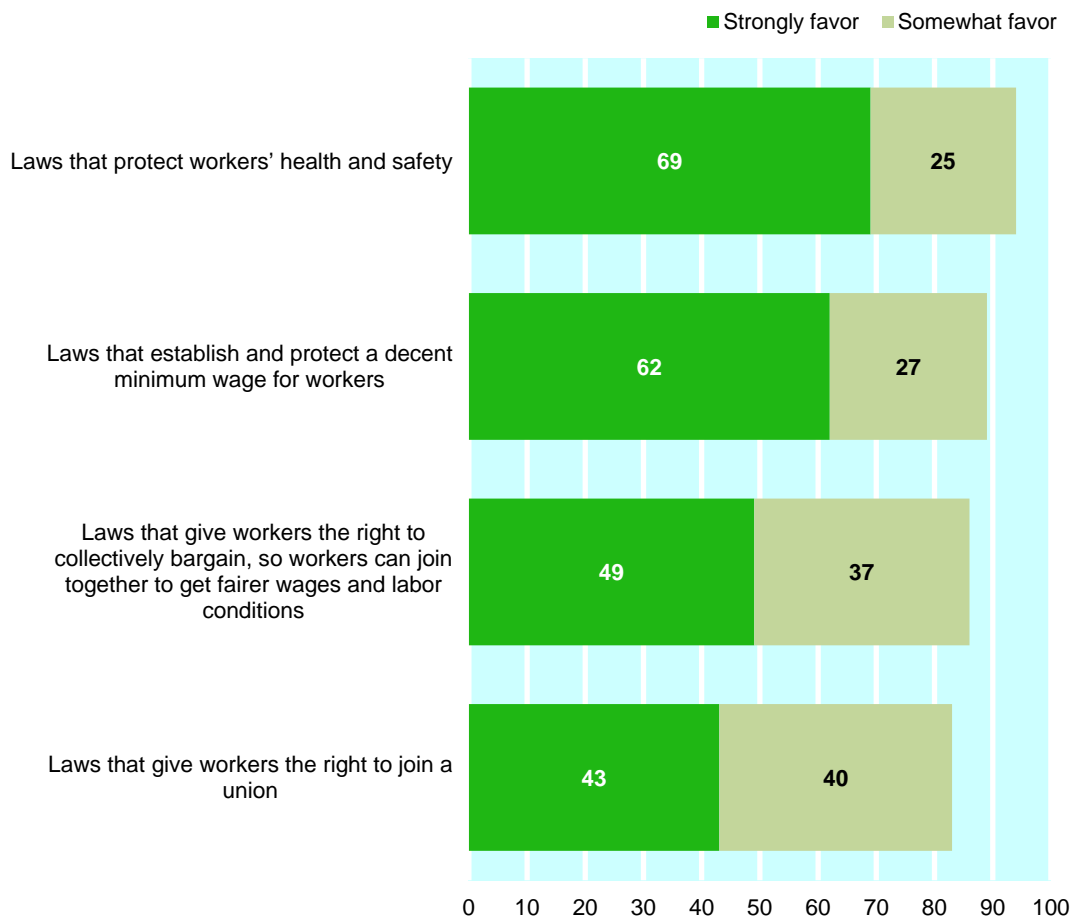
Question Do you believe the laws in your country adequately protect each of the following items for workers? **Note** N=13,087 for 13-country average; N is about 1,000 for each individual country. Cell entries are number of respondents who answer ‘No’. Countries ordered from highest to lowest scores for ‘a fair wage’. See Appendix 2 for list of country abbreviations.

STRONG GLOBAL CALL FOR LABOR LAWS

Strong global call for labor laws. Global citizens express strong majority support for a wide range of labor laws, covering health and safety (94 percent ‘favor,’ of which 69 percent ‘strongly favor’, indicating deep emotional support), a minimum wage (89 percent favor, of which 62 percent strongly), collective bargaining (86 percent favor; 49 percent strongly) and the basic right to join a union (83 percent favor; 43 percent strongly). There is no serious opposition against these laws.

Similar urge in G20 and EU countries. Both the G20 and EU countries show a similar urge for labor laws that help to protect workers. The responses in both sets of countries are very similar to those given globally. The only (minor) difference is that emotional intensity in the EU falls 4 to 8 points behind the global mean, indicating slightly less emotional commitment to each of the four labor laws.

Figure 13 Favor or oppose laws that protect workers?



Question Could you please tell me if you strongly favor, somewhat favor, somewhat oppose or strongly oppose each of the following laws?

Note N=13,087. Items ordered from highest favor score to lowest score.

Target findings

- **Lower educated respondents stand out.** This group is emotionally very strongly committed to labor laws. This is reflected by, in comparison with the global average, consistently higher scores for ‘very favor’ for each of the four labor laws:
 - ▶ Laws that protect workers’ health and safety (78 percent ‘strongly favor’ – 9 points above the global mean);
 - ▶ Minimum wage laws (68 percent ‘strongly favor’ – 6 points above the global mean);

- ▶ Laws that give workers the right to collective bargaining (60 percent ‘strongly favor’ – a substantial 11 points above the global mean). This right, as abstract as it may sound to some, carries very real meaning for this group of respondents.
- ▶ Right to join a union (47 percent ‘strongly favor’ – 4 points above the global mean).

Overwhelming support for labor laws in each of the 13 countries. Global citizens are fully behind the notion of labor laws. Most of the time, the four included labor laws draw more than 90 percent support in the individual countries.

Table 3 Overall support for laws that protect workers

	BR	DE	ID	FR	UK	MX	JN	EL	Total	CA	BE	US	BG	SA
Laws that protect workers' health and safety	98	98	97	96	95	95	92	95	94	96	93	96	82	85
Laws that establish and protect a decent minimum wage for workers	96	93	94	94	95	90	89	88	89	93	88	90	74	76
Laws that give workers the right to collectively bargain, so workers can join together to get fairer wages and labor conditions	93	90	92	91	86	91	89	91	86	84	83	76	86	72
Laws that give workers the right to join a union	86	91	89	88	89	84	87	81	84	77	82	77	79	76

Note N=13,087 for 13-country average; N is about 1,000 for each individual country. Cell entries are number of respondents who answer ‘strongly favor + somewhat favor.’ Countries ordered from highest to lowest mean scores on all four laws. See Appendix 2 for list of country abbreviations.

With support for individual labor laws reaching the ceiling, there is perhaps more to be learned from looking at the emotional intensity of support, as measured by the proportion of respondents who say they ‘strongly favor’ the labor laws presented to them:

Table 4 Emotionally intense support for laws that protect workers

	EL	ID	BR	MX	DE	Total	SA	CA	UK	BG	US	FR	BE	JN
Laws that protect workers' health and safety	91	85	90	73	69	69	67	71	62	56	69	59	57	48
Laws that establish and protect a decent minimum wage for workers	80	78	85	67	65	62	50	65	65	46	59	54	50	44
Laws that give workers the right to collectively bargain, so workers can join together to get fairer wages and labor conditions	82	74	65	59	49	49	42	35	34	58	35	37	34	31
Laws that give workers the right to join a union	65	67	51	52	50	43	46	32	39	40	30	34	33	25

Note N=13,087 for 13-country average; N is about 1,000 for each individual country. Cell entries are number of respondents who answer ‘strongly favor.’ Countries ordered from highest to lowest mean scores on all four laws. See Appendix 2 for list of country abbreviations.

Country findings

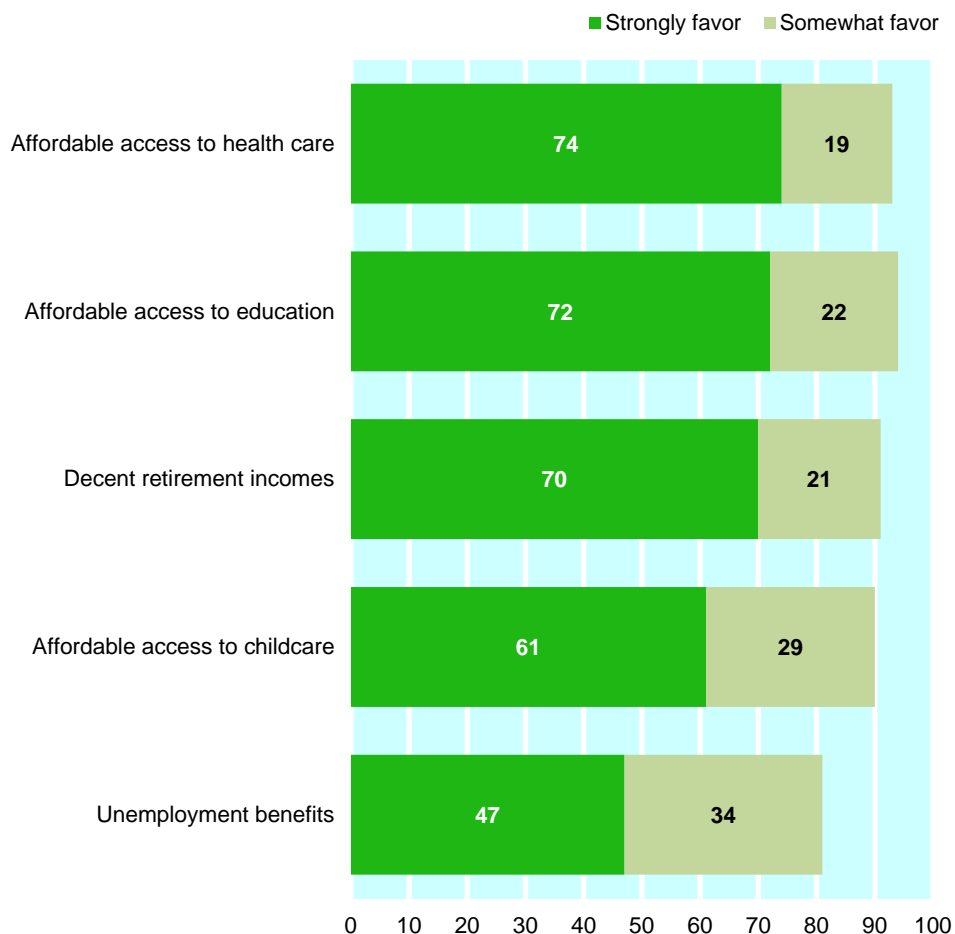
- **Greece, Indonesia, Brazil and Mexico offer deep emotional welcome for labor laws.** Labor laws in these countries evoke very strong positive emotions.
- **Muted response in Japan.** Response in Japan is the weakest, at least emotionally, when it comes to each of the four presented labor laws.

VERY STRONG SUPPORT FOR GOVERNMENT ACTION

Government action evokes even stronger feelings than labor laws. Global citizens overwhelmingly want their government to be working on affordable access to health care, education and childcare (at least 91 percent ‘favor,’ of which at least 70 percent ‘strongly’). Another government goal, decent retirement incomes, evokes similarly positive responses. Finally, global respondents also offer a warm welcome to the idea of the government working on unemployment benefits (81 percent ‘favor’). These reactions are even stronger than the already powerful emotional reactions to the labor laws discussed in the previous section. Government action really matters, is what the respondents are saying.

G20 equally positive, EU slightly muted response. Overall support for the five government goals is very strong in both the G20 and the EU. While the G20 registers a similar kind of emotional response as the joint thirteen countries, emotional intensity in the EU stays behind by a few points. The biggest negative contrasts in the EU are found for unemployment benefits (11 points behind) and childcare (9 points behind). Yet support for these items is still very strong everywhere, including the EU.

Figure 14 Favor or oppose specific government actions?



Question And would you strongly favor, somewhat favor, somewhat oppose or strongly oppose the government working on providing workers with each of the following items? **Note** N=13,087. Government goals ordered from highest to lowest ‘strongly favor’ score.

Target findings

- **Lower educated respondents stand out – again.** Intense support (measure by ‘very strongly’) is 7 to 10 points higher for each of the government goals. Government action carries very special meaning for this group.

Table 5 Emotionally intense support for specific government actions

	<i>EL</i>	<i>BR</i>	<i>MX</i>	<i>ID</i>	<i>DE</i>	<i>SA</i>	<i>Total</i>	<i>CA</i>	<i>BG</i>	<i>UK</i>	<i>FR</i>	<i>BE</i>	<i>US</i>	<i>JN</i>
Affordable health care	92	93	78	89	78	72	74	80	59	70	71	69	61	52
Affordable education	91	93	84	90	70	76	72	66	61	67	66	66	59	40
Decent retirement incomes	94	91	77	81	77	65	70	70	56	69	69	65	57	40
Affordable childcare	91	88	78	74	62	68	61	49	63	44	45	42	43	43
Unemployment benefits	90	58	69	23	48	54	47	58	47	31	29	23	46	37

Note N=13,087. Countries ordered from highest to lowest average score on the five government goals.

Country findings

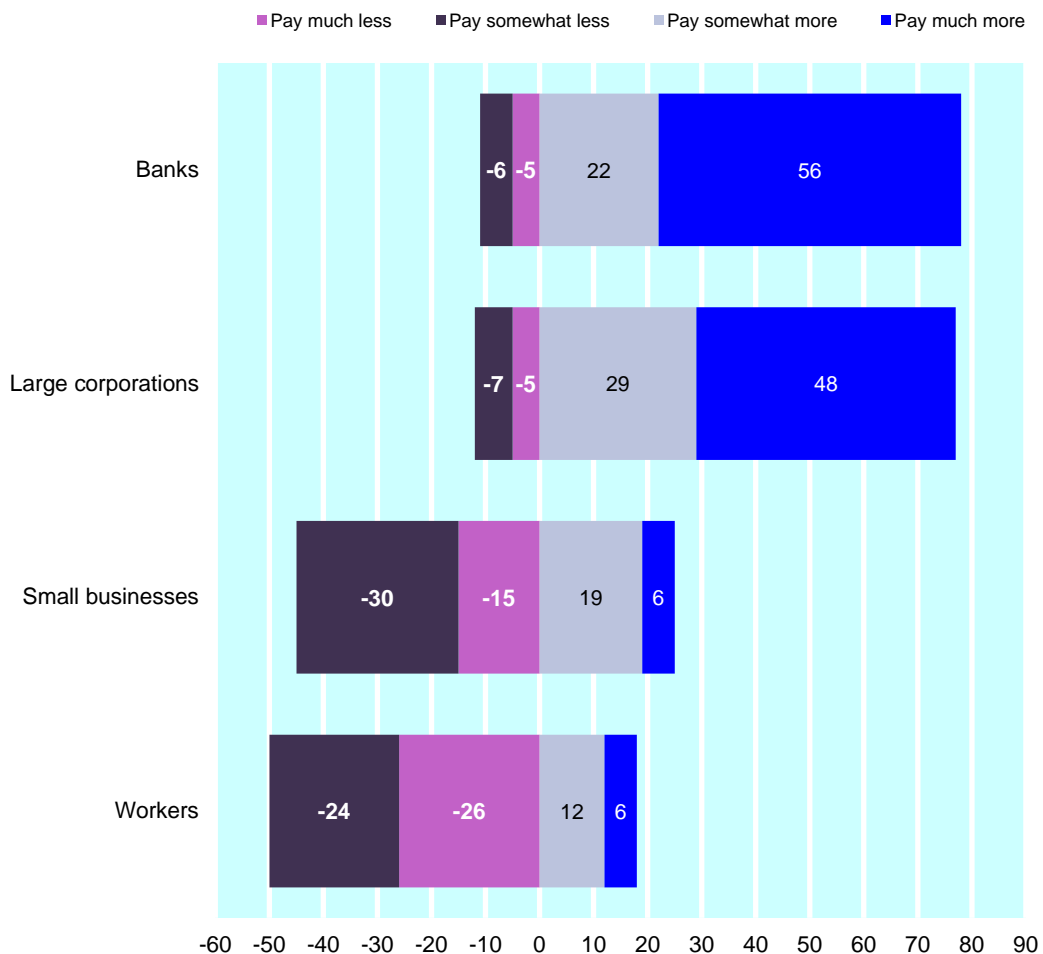
- **Greece, Brazil, Mexico and Indonesia offer deep emotional welcome for government goals.** The presented government goals evoke hugely strong positive emotion in these countries. The only exception is the idea of the government working on unemployment benefits in Indonesia, which is apparently seen as a bridge too far and which draws only 23 percent support.
- **Country ranking very similar to responses to labor laws.** The country ranking, based on the average score across all presented items, is very similar to that found for the labor laws in the previous section. There are only small differences in the ranking. This strongly suggests that the labor laws from the previous section and the government goals in the current section are in essence manifestations of the same underlying continuum.

BANKS AND LARGE COMPANIES SHOULD PAY MORE

Make the polluter pay. More than half of the respondents (56 percent) want international banks and financial institutions to pay ‘much more’ to fix the global financial crisis. These numbers indicate very strong emotion. The banks obviously are the bad guys. In total, more than 3 out of 4 global respondents (78 percent) want the banks to pay more than they do at the moment. But the banks are not alone. Large corporations also bear responsibility for the financial crisis; almost half of the global respondents expect them to pay ‘much more,’ growing to 77 percent when ‘somewhat more’ is added. These are astonishing numbers help to understand the depth of public anger with regard to international banks and large corporations. So far banks and large corporations have done very little to channel that anger in a positive way.

Small businesses and workers are fine. They have done little wrong and there is no need for them to contribute financially towards fixing the global crisis. Exactly half the respondents (50 percent) believe that workers should be paying less to get the crisis fixed. Or small businesses, this number stands at 45 percent. Few people believe that workers and small businesses should be paying more than they are already doing (just 18 percent for workers and 25 percent for small businesses). Emotional intensity is very low at just 6 percent for both.

Figure 15 Who should pay for the global financial crisis?



Question As you may know, there is a global financial crisis and many governments are in trouble. For each of the following actors, do you believe they should be paying much more to fix this, pay somewhat more, pay somewhat less, pay much less, or do you believe they are currently paying the right amount? **Note** N=13,087. Numbers don't add up to 100 because categories 'paying the right amount' and 'don't know' have been left out. Actors ordered from highest total 'pay' score to lowest score.

G20 is very much in line with global opinion. The margin scores for the G20 countries are very similar to the global scores.

EU opinion is more pronounced. The EU countries are more adamant about having the international banks and (other) large corporations pay to fix the crisis. The margin score for the banks in Europe equals 74 percent, 7 points above the global mean. The score for large corporations is also 74 percent, 11 points above the global average. Conversely, Europeans are also more adamant that workers and small business pay less towards fixing the crisis. The margin score for small business is -28 points, 8 points below the global mean. For workers the contrast amounts to 9 points, with a negative 41-point margin score.

Table 6 The net balance: who should pay and who shouldn't

	DE	BR	EL	FR	MX	BE	BG	ID	Total	CA	UK	US	JN	SA
International banks	+91	+87	+84	+79	+74	+71	+70	+67	+67	+65	+62	+52	+42	+28
Large corporations	+90	+83	+81	+80	+70	+66	+76	+66	+65	+65	+57	+49	+37	+31
Small businesses	-40	-19	-40	-29	+8	-16	-16	-16	-20	-10	-35	-27	-16	-9
Workers	-48	-48	-53	-46	-11	-48	-38	-13	-32	-25	-27	-27	-22	-9

Note N=13,087 for 13-country average; N is about 1,000 for each individual country. Cell entries are margin scores, calculated as percentage 'pay more' minus 'pay less.' Net positive numbers indicate that, on average, respondents believe these actors should pay more; net negative numbers means that respondents, on average, believe these actors should pay less towards fixing the crisis. Countries ordered from highest to lowest scores for 'international banks and financial institutions'. See Appendix 2 for list of country abbreviations.

Country findings

- **Strongest resentment against banks and large corporations in Germany.** The German respondents are the most adamant about banks and large corporations paying more to fix the economic crisis (tremendously high margin scores of 91 and 90 percent, respectively). The Germans also have very strong feelings about small businesses and workers being spared by paying less (negative 40-point and 48-point margin scores, respectively).
- **Anglo-Saxon countries are more moderate.** The margin scores for Canada, the UK and the US are more moderate than those for most of the other countries. Yet even in these Anglo-Saxon countries, there is still very strong demand for the banks and international corporations to pay more.
- **South Africa most moderate country.** The margin scores for South Africa are the closest to zero, which suggests relative satisfaction with the current state of affairs.

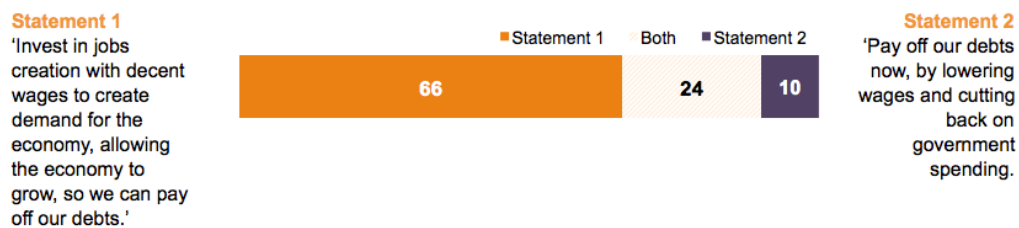
FUTURE DIRECTION: INVEST IN JOBS-AND-GROWTH

‘Prioritizing jobs and growth’ trounces ‘Paying off debts first’. Two-thirds of the respondents (66 percent) in the 13 countries prefer a statement that calls for investment in jobs and growth to a second statement outlining the austerity argument that debts need to be paid off ‘now’ by cutting wages and government spending. The second statement is preferred by only 10 percent of the respondents. Twenty-four percent cannot make a choice.

The contrast is even starker in the EU countries. Support for a ‘jobs-and-growth’ policy is even more pronounced in the six EU-countries, enjoying 70 percent support (4 points above global average). A dismal 6 percent (4 points below the global mean) of the global respondents supports the austerity statement. Twenty-four percent couldn’t make a choice (identical to global mean).

Strong support for jobs and growth in the G20. In the G20, support for jobs-and-growth is slightly less pronounced than the 13-country average but still very strong at 62 percent (4 points below global mean). Just 12 percent of the G20-respondents support the austerity statement (2 points above the global score) and 26 percent is unable to make a choice (2 points above the global average).

Figure 18 Political priorities: jobs-and-growth versus austerity



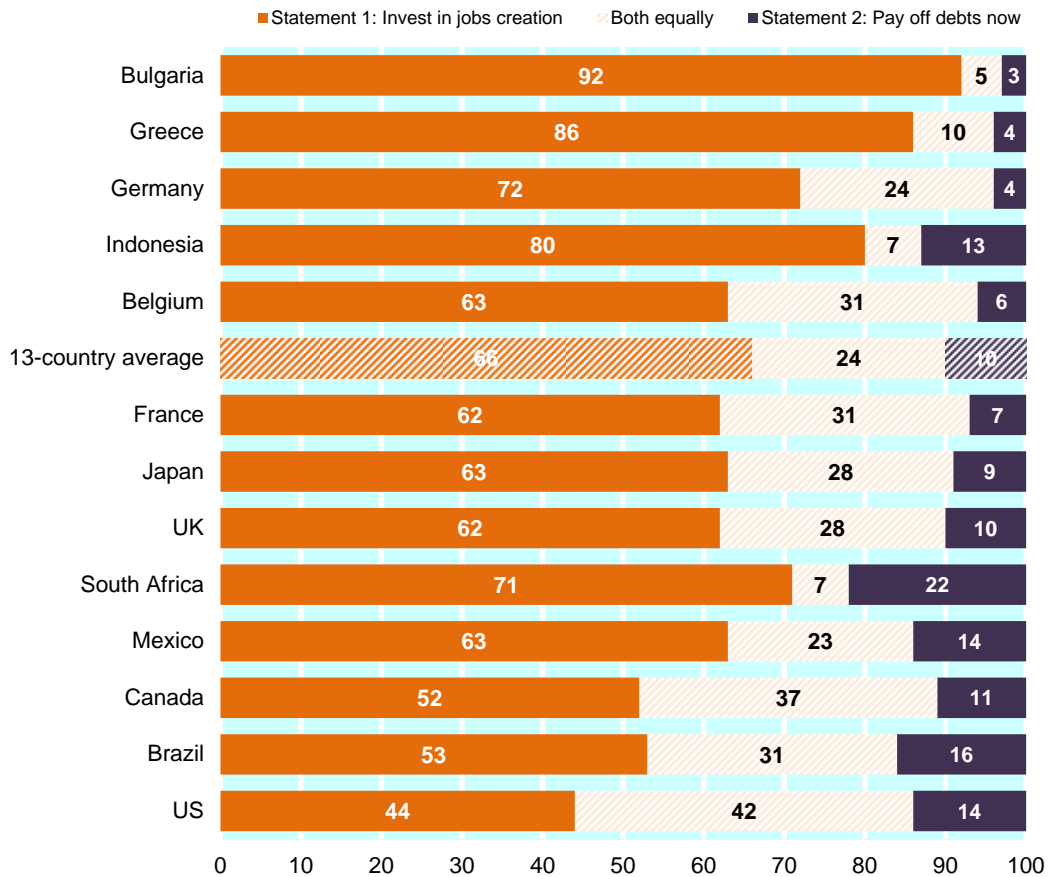
Question If you were asked to pick one of the two following actions the government could do in dealing with the effects of the financial crisis, which one would you choose? **Note** N=13,087. Don't know and 'neither' responses merged with 'both' for ease of presentation.

Target findings

- **Across the board support for jobs-and-growth.** Different demographic groups do differ in interpretable ways in their message preferences (for example, women like the jobs-and-growth slightly better than men, as the latter traditionally assign more value to paying off debts). But the differences are very small and often not distinguishable from chance. The reality is that numbers shown in the figure above are found across the board.

Country findings

- **Across the board support for jobs-and-growth.** In each of the thirteen countries (figure 19) a plurality of respondents prefers a jobs-and-growth approach to an approach that emphasizes paying down debts first.
- **Bulgaria leads the chart.** Bulgaria demonstrates overwhelming support for a policy approach that focuses on jobs-and-growth first (92 percent). The ‘pay off debt first’ approach draws support from a tiny 3 percent of the population.
- **US are at the bottom.** The US-respondents have serious reservations about what should come first: invest in jobs-and-growth or pay off the debts first.

Figure 17 Political priorities: jobs-and-growth vs austerity

Question If you were asked to pick one of the two following actions the government could do in dealing with the effects of the financial crisis, which one would you choose? Statement 1: 'Invest in jobs creation with decent wages to create demand for the economy, allowing the economy to grow, so we can pay off our debts.' Statement 2: 'Pay off our debts now, by lowering wages and cutting back on government spending.' **Note** N=13,087 for 13-country average; N is about 1,000 for each individual country. Don't know and 'neither' responses merged with 'both' for ease of presentation. Countries ordered from highest to lowest spread between statement 1 and statement 2.

APPENDIX 1

CORE BACKGROUND STATISTICS

	Total	G20	EU	DE	FR	UK	US	ID	MX	BR	SA	CA	JN	BG	EL	BE
Male	48	48	48	49	48	49	49	48	48	46	49	49	48	47	49	48
Female	52	52	52	51	52	51	51	52	52	54	52	51	52	53	51	52
18-24 years old	14	15	12	10	11	16	12	17	20	18	24	11	12	10	14	12
25-39 years old	28	29	24	23	25	23	27	33	36	37	32	25	23	26	27	25
40-54 years old	26	26	27	29	26	26	28	27	25	27	22	28	22	25	25	28
55-64 years old	14	13	15	14	16	14	15	12	9	9	10	16	17	17	14	15
65+	18	17	22	24	22	20	17	10	10	9	9	19	26	22	21	20
Low education	6	6	4	3	3	10	1	9	10	15	3	3	4	2	16	4
Middle education	38	40	36	38	33	47	26	40	58	51	39	33	40	27	33	35
High education	45	44	50	49	55	32	57	41	30	34	43	52	44	64	43	50
Student	7	7	8	10	6	11	12	5	1	0	12	10	6	6	7	9
No Full-Time Education	2	2	2	1	3	1	5	2	1	0	1	3	6	0	1	3
Employed	53	54	52	52	50	50	48	52	63	73	54	46	50	63	41	47
Unemployed, looking for work	8	8	6	5	7	6	13	3	7	5	13	10	6	5	17	8
Retired	20	18	27	28	32	26	22	12	3	6	11	28	16	23	23	28
Student	8	8	8	9	6	8	5	7	10	5	14	7	5	6	9	8
Homemaker	10	11	6	6	5	9	12	20	14	6	5	9	23	2	9	8
Other	1	2	0	0	0	0	0	6	2	5	2	0	0	1	0	0
Private Company	61	63	61	60	58	59	67	69	53	71	54	62	73	70	42	53
Government	18	17	23	24	29	20	13	10	17	15	18	18	6	14	18	32
Non-profit organization	5	6	6	5	6	8	11	0	9	1	4	7	7	4	0	7
Self-employed	15	15	10	11	7	13	8	21	21	12	24	13	14	10	39	7
Union member	14	13	17	15	14	10	6	8	12	22	17	17	8	10	5	39
Not union member	86	87	82	86	87	90	94	91	88	77	81	83	92	89	94	61
Union household	23	22	27	22	20	20	12	18	20	30	32	29	17	19	7	54
Non-union household	77	78	73	78	80	80	88	82	79	70	67	71	84	80	93	46
Live comfortably	11	13	7	7	5	11	18	18	15	9	24	16	3	3	2	9
Get by well	37	38	38	43	41	33	30	57	38	33	31	37	39	31	16	44
Get by with difficulty	39	38	42	40	45	46	40	21	34	41	31	40	43	40	50	39
Get by with great difficulty	13	11	12	10	8	11	12	3	12	16	12	8	14	24	32	9
Not enough for essentials	14	12	11	10	7	11	11	7	26	15	15	10	10	18	29	11
Enough, but cannot save	50	48	50	47	48	47	43	50	48	60	41	47	52	61	61	48
Enough, can save a little	32	35	35	39	42	37	39	38	22	21	36	39	33	20	9	37
Enough, can save a lot	4	4	3	4	3	4	7	5	2	3	7	5	5	1	1	4

APPENDIX 2



TNS opinion

International Trade Union Confederation Global Poll 2012

TECHNICAL SPECIFICATIONS

Between the 10th of April and 6th of May 2012, TNS Opinion carried out the survey "International Trade Union Confederation Global Poll 2012". International Trade Union Confederation Global Poll 2012 covers the 18+ population of Belgium, Bulgaria, Brazil, Canada, France, Germany, Greece, Indonesia, Japan, Mexico, South Africa, UK and USA.

The sample in each country has been selected by quotas to reflect national proportions in terms of age, gender and region.

In each country 1000 interviews were targeted for a total of about 13.000 interviews to conduct.

ABBR.	COUNTRIES	INSTITUTES	N° INTERVIEWS	FIELDWORK	DATES
BE	Belgium	Lightspeed Research	1.001	13/04/2012	18/04/2012
BG	Bulgaria	RSM Research	1.000	17/04/2012	06/05/2012
BR	Brazil	RSM Research	1.000	15/04/2012	06/05/2012
CA	Canada	Lightspeed Research	1.000	12/04/2012	18/04/2012
FR	France	Lightspeed Research	1.000	13/04/2012	19/04/2012
DE	Germany	Lightspeed Research	1.000	12/04/2012	17/04/2012
EL	Greece	RSM Research	1.000	18/04/2012	03/05/2012
JN	Japan	Lightspeed Research	1.000	12/04/2012	19/04/2012
ID	Indonesia	RSM Research	1.086	18/04/2012	02/05/2012
MX	Mexico	RSM Research	1.000	15/04/2012	06/05/2012
SA	South Africa	RSM Research	1.000	16/04/2012	03/05/2012
UK	United Kingdom	Lightspeed Research	1.000	10/04/2012	16/04/2012
US	United States of America	Lightspeed Research	1.000	12/04/2012	18/04/2012
Total			13.087	10/04/2012	06/05/2012

For each country a comparison between the sample and the universe was carried out. The Universe description was derived from Eurostat population data or from national statistics offices. For all countries surveyed, a national weighting procedure, using marginal and intercellular weighting, was carried out based on this Universe description.

In all countries, gender, age and region were introduced in the iteration procedure. For international weighting (i.e. Total, EU and G20 averages), TNS Opinion & Social applies the official population figures as provided by EUROSTAT or national statistic offices.

Readers are reminded that survey results are estimations, the accuracy of which, everything being equal, rests upon the sample size and upon the observed percentage. With samples of about 1,000 interviews, the real percentages vary within the following confidence limits:

Observed percentages	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
Confidence limits	± 1.9 points	± 2.5 points	± 2.7 points	± 3.0 points	± 3.1 points

COLOFON

ITUC Global Poll 2012

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