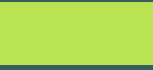
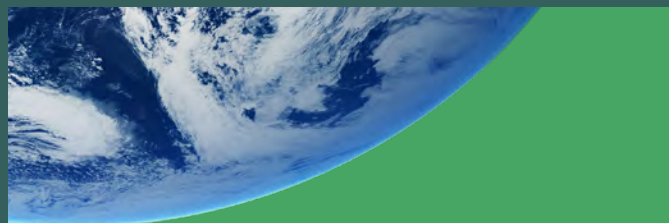
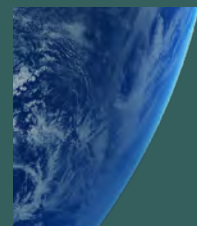
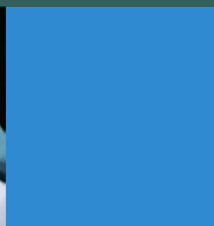
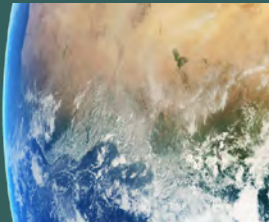
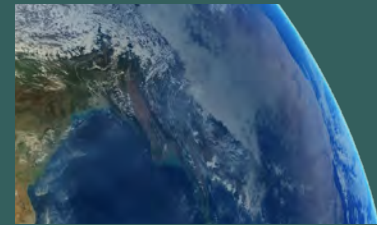




BUILD 
  **THE**
 **SHARED**
FUTURE 

September 2026



**SEEKING SECURITY AND OPPORTUNITY
IN A STORMY WORLD
A 34-COUNTRY SURVEY**

SUMMARY

In an increasingly uncertain world, support for international cooperation is holding – and security has emerged as the clearest shared priority.



1

SUPPORT FOR COOPERATION IS HOLDING EVEN AS PESSIMISM DEEPENS.

Nearly 7 in 10 (69%) surveyed say the world has gotten worse over the past year. Yet, 57% say their country should cooperate to solve global challenges even if it means compromising some national interests, up slightly from 55% in 2025. That global figure has been sustained even as a limited divergence has emerged: support has risen from 55% to 61% in wealthier countries while falling from 55% to 53% in developing countries. Across both, people are looking for proof that cooperation works: around 8 in 10 would support it more if it demonstrated it could solve problems at home or abroad.



deaths by 2030, a majority in every one of the 34 countries wants them reversed or aid increased, including 61% in the United States. Globally, only about 1 in 5 says the cuts were the right decision, and that figure is no higher when looking only at donor countries. Support for reversing cuts draws on both moral responsibility and national interest, with national interest the more persuasive argument in nearly every country.

4

NEITHER THE UNITED STATES NOR CHINA COMMANDS BROAD SUPPORT TO LEAD – BUT PUBLICS STILL WANT COLLECTIVE ACTION.

Only 39% are comfortable with the United States playing a leading role on the world stage and 37% with China. Other major economies score far higher: Canada (60%), Japan (58%), and Australia, the United Kingdom, Germany, Spain, Italy and France all between 51% and 55%. And 61% would support a group of countries taking on global problems together even if it left out both the United States and China, against 12% who would not. Across the developing countries surveyed, the United States is more often seen as a major threat than China.



2

SECURITY IS THE WORLD'S CLEAREST SHARED PRIORITY.

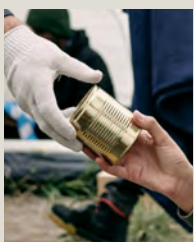
Preventing wars and conflicts ranks first with those surveyed in 21 of 34 countries and in the top two in 33. A fair global economy ranks alongside security in developing countries, but well behind in wealthier ones. Climate change, food and clean water, and democracy and human rights sit at similar levels in both, each a top global issue for about a quarter of people. The rest is emphasis: developing countries place more weight on humanitarian aid and reducing poverty, wealthier countries on migration.



5

TRUST IN INTERNATIONAL INSTITUTIONS IS RISING, NOT COLLAPSING.

All 6 of the international bodies we track gained ground since 2025. The World Health Organization rose to 69% and the United Nations to 62%. The World Bank, the International Monetary Fund and the World Trade Organization all crossed from minority to majority trust.



3

AFTER LEARNING THEIR PROJECTED HUMAN COST, MAJORITIES IN ALL 34 COUNTRIES WANT AID CUTS REVERSED OR AID INCREASED.

Told that recent cuts to international aid could cause more than 9 million

WHO DID WE HEAR FROM?

Focaldata conducted nationally representative polls in 34 countries, capturing responses from 35,399 quantitative respondents. These were carried out from July 21 to August 5 2026, with broad geographic coverage.

The survey reached representative cohorts based on age, gender, region, education, ethnicity, and most recent political vote to achieve nationally representative samples in each country, with ethnicity and past political votes used only where such measures are collected and standard practice. The sample was then weighted to be representative by the same variables.

With samples ranging from 754 to 1,338, the margin error at the 95% confidence level is approximately $\pm 2\text{--}4$ percentage points, with most countries around ± 3.0 percentage points.

Global, wealthier and developing figures are medians of the country percentages unless stated otherwise. Regional figures are averages of the country percentages within each region.

Wealthier and developing economies include the following groupings:

WEALTHIER ECONOMIES: 17

Australia, Canada, France, Germany, Hungary, Italy, Japan, New Zealand, Norway, Poland, Romania, Singapore, South Korea, Spain, Sweden, United Kingdom, United States.

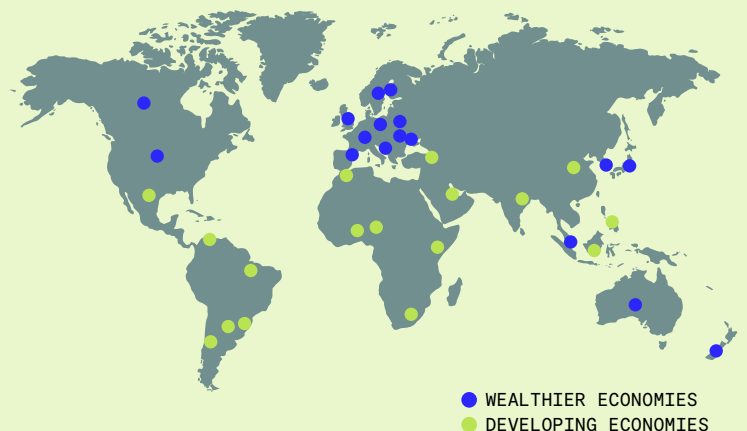
DEVELOPING ECONOMIES: 17

Argentina, Brazil, Chile, China, Colombia, Ghana, India, Indonesia, Kenya, Mexico, Morocco, Nigeria, Philippines, Saudi Arabia, South Africa, Turkey, Uruguay.

Wave 1 of this study polled 36,405 adults across 34 countries between August 8 and September 10 2025 (published findings available [here](#)). G20-focused research polled 19,192 respondents between October 31 and November 7 2025 (published findings available [here](#)).

This survey was conducted and the report authored by Dr. Matt Chennells and Lily Kennish at Focaldata. The Rockefeller Foundation, in association with its public charity, RF Catalytic Capital (RFCC), commissioned Focaldata, an independent entity, to conduct this study, polling individuals in 34 countries showing what people value about international cooperation. This research was carried out entirely by Focaldata. The Rockefeller Foundation and RFCC are not responsible for the accuracy or completeness of the contents of this report.

Focaldata is a public opinion research agency and data collection platform, combining cutting-edge sampling, survey methodology, and machine learning to measure what people think with accuracy and depth. Focaldata is a registered member of the British Polling Council (BPC) and Market Research Society (MRS).



1

SUPPORT FOR COOPERATION IS HOLDING EVEN AS PESSIMISM DEEPENS



SEEKING SECURITY AND OPPORTUNITY IN A STORMY WORLD: A 34-COUNTRY SURVEY



1.1 PEOPLE THINK THE WORLD HAS GOTTEN WORSE

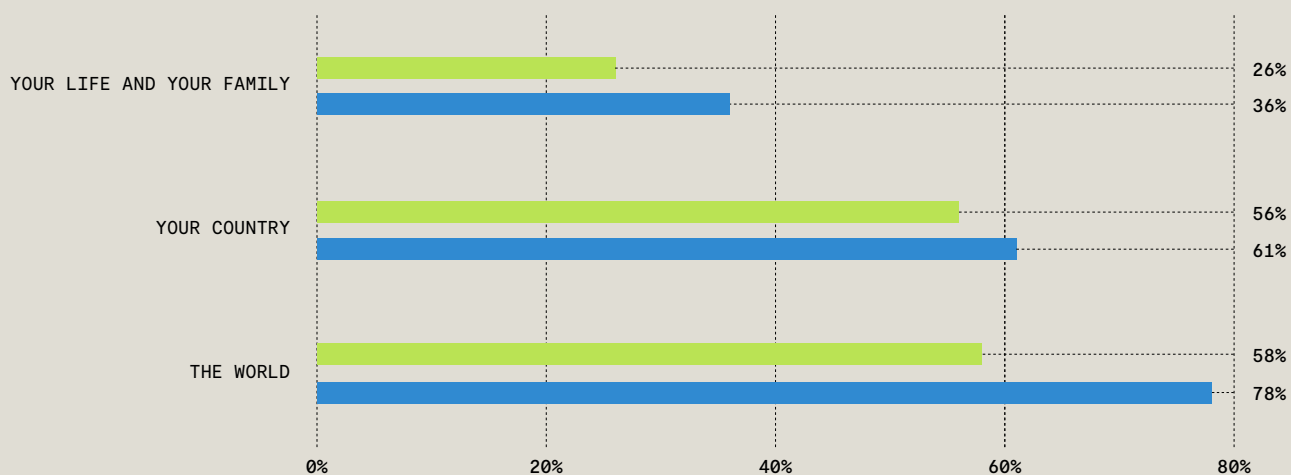
Globally, more than two-thirds of people (69%) say the world has gotten worse over the past year. That is double the share who say it about their own life and family (34%), and higher than the 60% who say their own country has gotten worse. Pessimism is greatest when people look beyond their own lives to the wider world.

Pessimism is particularly pronounced in wealthier countries. There is a 20-point gap between the two groups: 78% in the wealthier economies say the world got worse, compared with 58% in developing economies. When asked about their own lives, the gap narrows to 10 points: 36% versus 26%.



THINGS HAVE GOT WORSE IN THE PAST YEAR, BY WEALTHIER AND DEVELOPING ECONOMIES

% WORSE



“

Thinking back on the last year, do you feel things have gotten better or worse?

→ BETTER
→ WORSE
→ STAYED THE SAME

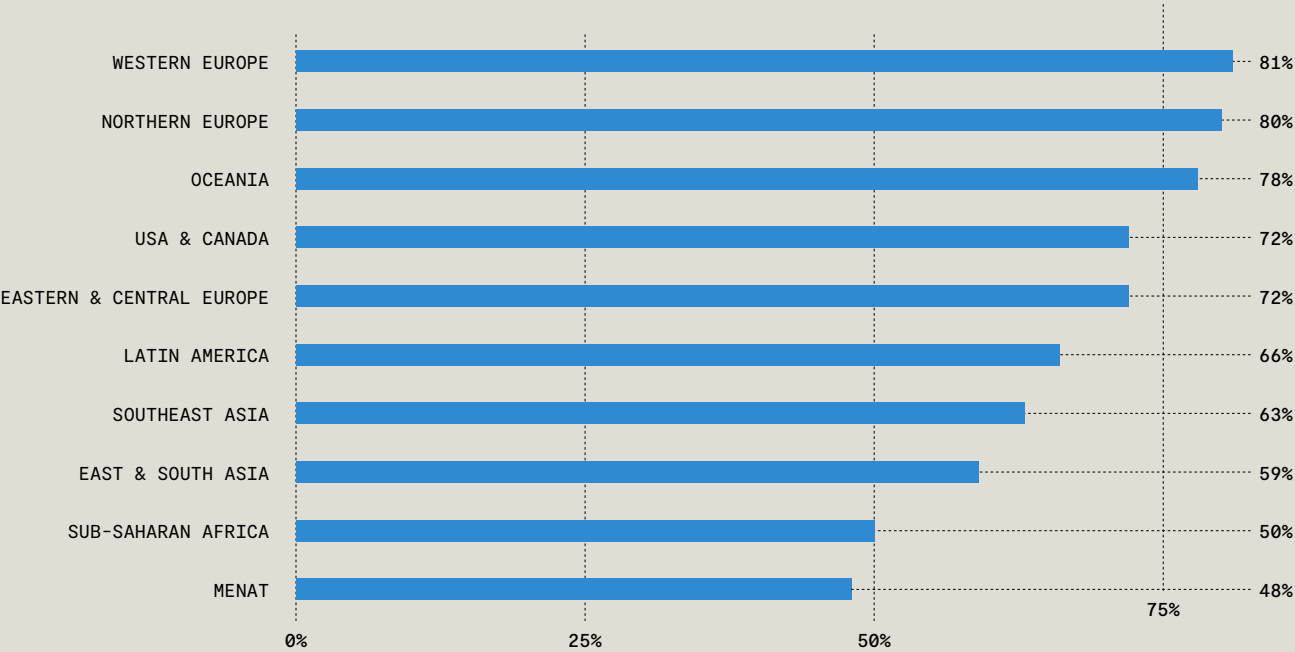
■ WEALTHIER ECONOMIES
■ DEVELOPING ECONOMIES

Regionally, Western Europe is the most pessimistic, with 81% saying the world has gotten worse, followed by Northern Europe (80%) and Oceania (78%). People in the Middle East, North Africa and Turkey (MENAT) (48%) and Sub-Saharan Africa (50%) are least likely to say the same.



THE WORLD HAS GOT WORSE IN THE PAST YEAR, BY REGION

% WORSE



“ Thinking back on the last year, do you feel things have gotten better or worse?

→ BETTER
→ WORSE
→ STAYED THE SAME



1.2 ECONOMIC OPTIMISM IS FALLING ALMOST EVERYWHERE

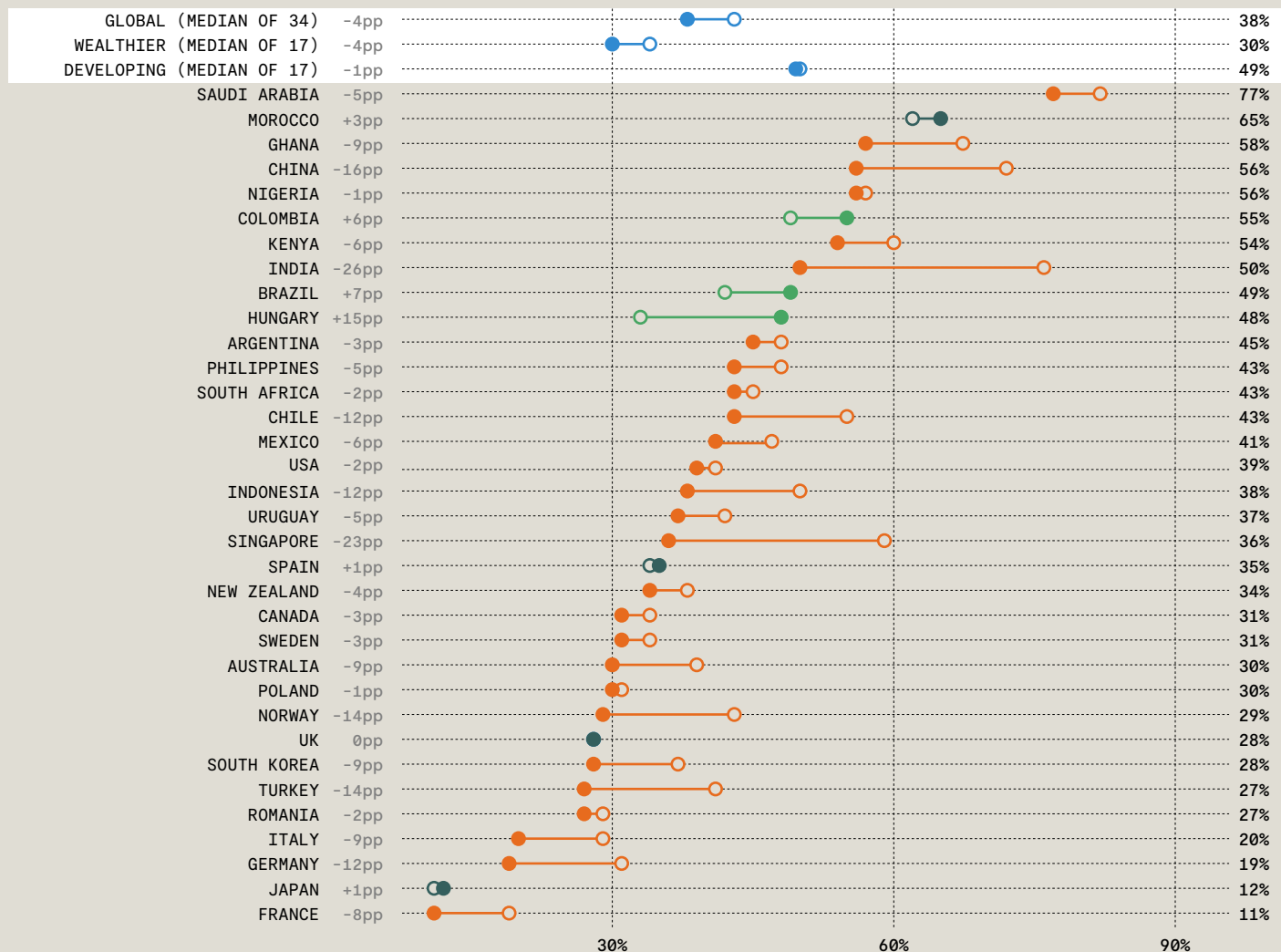
The gloom is not only about the state of the world. Across the 34 countries, the share who are optimistic that their national economy will improve over the next 5 years fell from 42% to 38%. It fell in 27 of the 34 countries and rose in only seven.

Two of the largest economies in the study moved furthest. Optimism fell 26 points in India, from 76% to 50%, and 16 points in China, from 72% to 56%.

This is the backdrop to what follows: people are being asked what they want from international cooperation at a moment when optimism about their own economies is declining across much of the world.

OPTIMISM THAT THE NATIONAL ECONOMY WILL IMPROVE OVER THE NEXT 5 YEARS, BY COUNTRY, WAVE 1 (AUG-SEP 2025) TO WAVE 2 (JUL-AUG 2026)

% VERY OPTIMISTIC + SOMEWHAT OPTIMISTIC



“

How optimistic are you about the national economy improving in the next 5 years?

→ VERY OPTIMISTIC
→ SOMEWHAT OPTIMISTIC
→ NEUTRAL
→ SOMEWHAT PESSIMISTIC
→ VERY PESSIMISTIC

○ WAVE 1 (2025)
● WAVE 2 (2026)
■ SIGNIFICANT RISE
■ MODEST RISE
■ DECLINE
■ MEDIANS

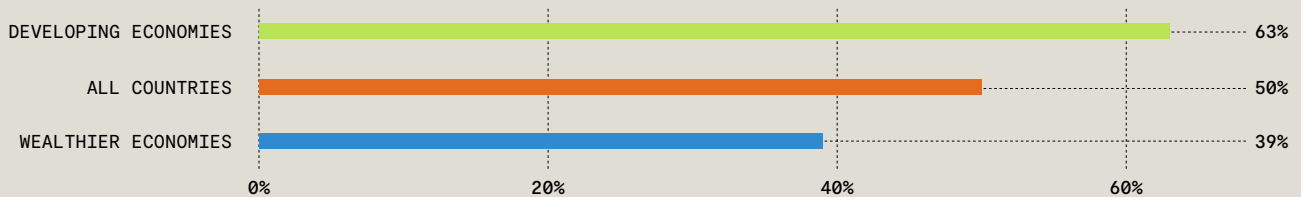
1.3 HALF OF RESPONDENTS SAY GLOBAL COOPERATION IS WORKING EFFECTIVELY

Across the 34 countries, only half (50%) of those surveyed say global cooperation is working effectively today. But perceptions differ sharply by economic group: 63% in developing economies say cooperation is working, compared with just 39% in wealthier economies – a 24-point gap. The regional divide is wider still: from Sub-Saharan Africa (68%) and Southeast Asia (63%) at one end down to Western Europe (31%) and Oceania (32%) at the other. Sub-Saharan Africa is more than twice as likely as Western Europe to say cooperation is working.



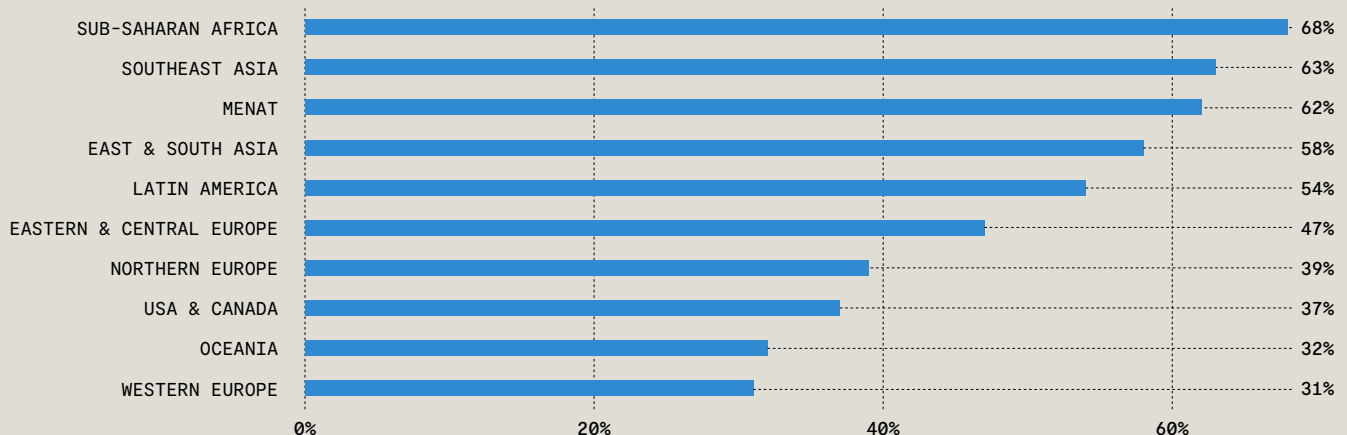
GLOBAL COOPERATION IS WORKING EFFECTIVELY, GLOBALLY AND BY WEALTHIER AND DEVELOPING ECONOMIES

% VERY EFFECTIVELY + SOMEWHAT EFFECTIVELY



GLOBAL COOPERATION IS WORKING EFFECTIVELY, BY REGION

% VERY EFFECTIVELY + SOMEWHAT EFFECTIVELY



“

In your opinion, how effectively or ineffectively do you think global cooperation is working at the moment?

- VERY EFFECTIVELY
- SOMEWHAT EFFECTIVELY
- SOMEWHAT INEFFECTIVELY
- VERY INEFFECTIVELY
- DON'T KNOW

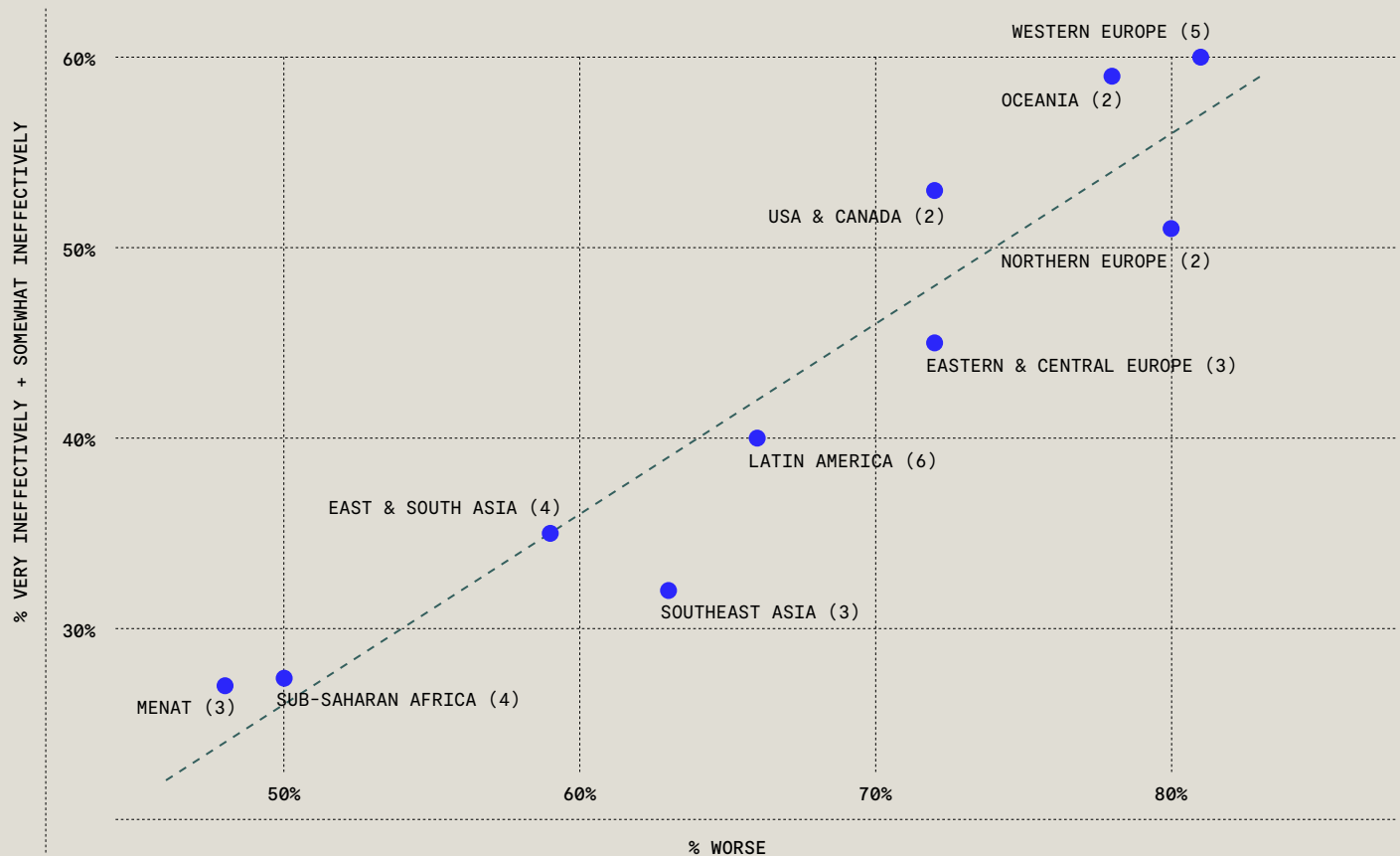
We compare each region on two questions: how many people say cooperation is working, and how many say the world has gotten worse over the past year.

The two views are closely associated across regions. Regions where people are more likely to say the world has gotten worse are also more likely to doubt that

global cooperation is working effectively. Western Europe sits at one end, with the highest share saying the world has gotten worse (81%) and the lowest saying cooperation is working (31%). Sub-Saharan Africa sits at the other, with lower pessimism about the world (50%) and the highest confidence that cooperation is working (68%).

THINKING THE WORLD HAS GOTTEN WORSE AGAINST THE VIEW THAT COOPERATION IS NOT WORKING, BY REGION

NUMBER OF COUNTRIES IN BRACKETS
10 REGIONS R = +0.94
34 COUNTRIES R = +0.88



“

In your opinion, how effectively or ineffectively do you think global cooperation is working at the moment?

- VERY EFFECTIVELY
- SOMEWHAT EFFECTIVELY
- SOMEWHAT INEFFECTIVELY
- VERY INEFFECTIVELY
- DON'T KNOW

1.4 SUPPORT FOR INTERNATIONAL COOPERATION HAS HELD

Despite widespread pessimism, public support for international cooperation has been sustained. We repeated a question from our 2025 poll, asking whether people's own country should cooperate to solve global challenges even if it means compromising on some national interests. Globally, 57% now agree, up slightly from 55%.

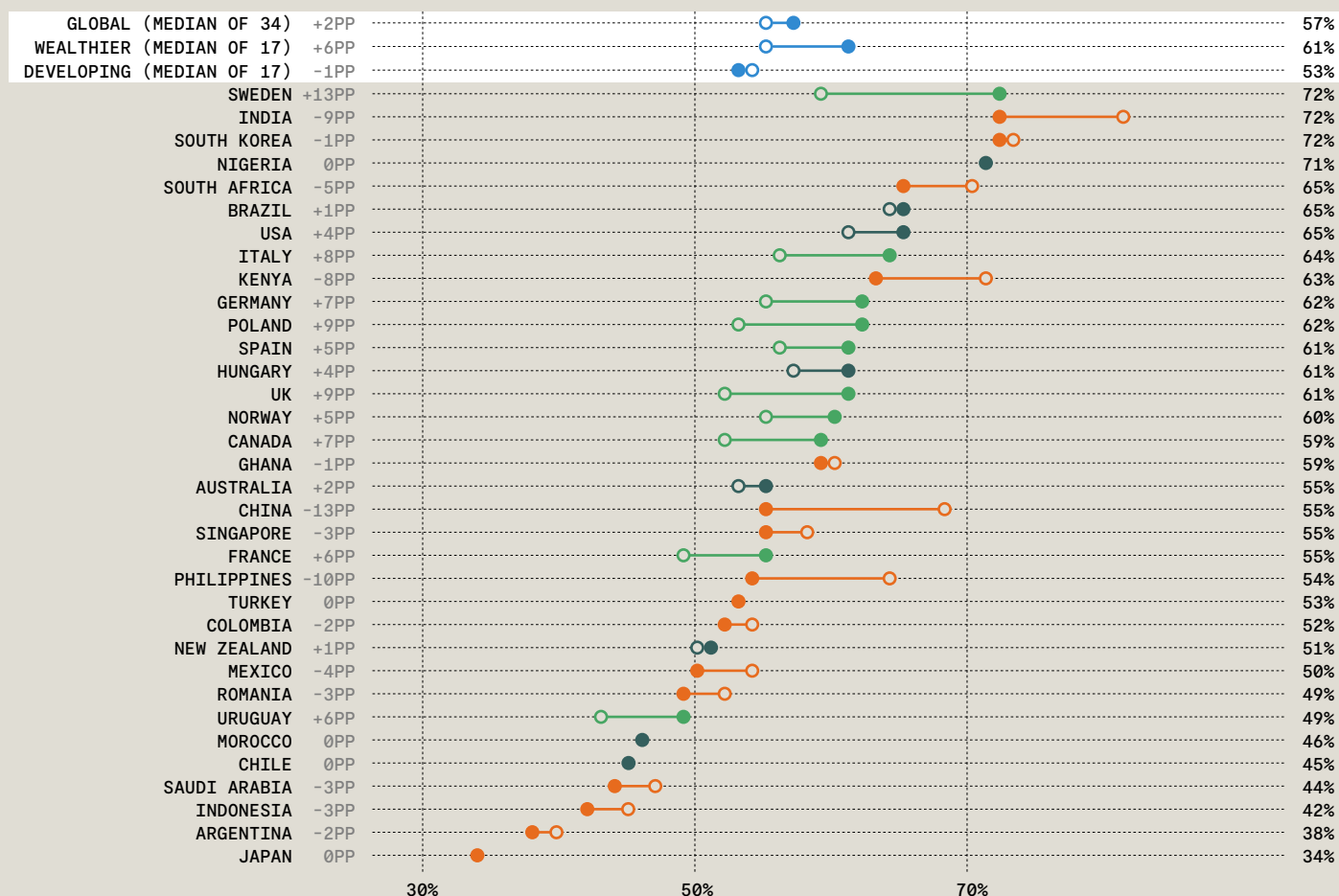
That modest global increase was sustained, even as a limited but measurable divergence between wealthier and

developing economies emerged. In 2025, support stood at 55% among those surveyed in both wealthier and developing economies. Today, it has risen to 61% in wealthier economies and fallen to 53% in developing economies—an eight-point gap between groups that were level a year ago.

Of the 17 wealthier economies, 13 grew more supportive of cooperating even at some cost to national interests; of the 17 developing economies, only 5 did. So the biggest gains are all in wealthier economies: Sweden up 13 points to 72%, the United Kingdom and Poland up 9, Italy up 8, Canada and Germany up 7. The biggest drops are all in developing economies: China down 13 points to 55%, the Philippines down 10 to 54%, India down 9 to 72%, Kenya down 8 to 63%, and South Africa down 5 to 65%.

SUPPORT FOR COOPERATING EVEN IF IT MEANS COMPROMISING ON SOME NATIONAL INTERESTS, BY COUNTRY, WAVE 1 (AUG-SEP 2025) TO WAVE 2 (JUL-AUG 2026)

% STRONGLY AGREE + SOMEWHAT AGREE



“

To what extent do you agree or disagree with the following statement: “My country should cooperate with other countries to solve global challenges, even if it means compromising on some national interests.”

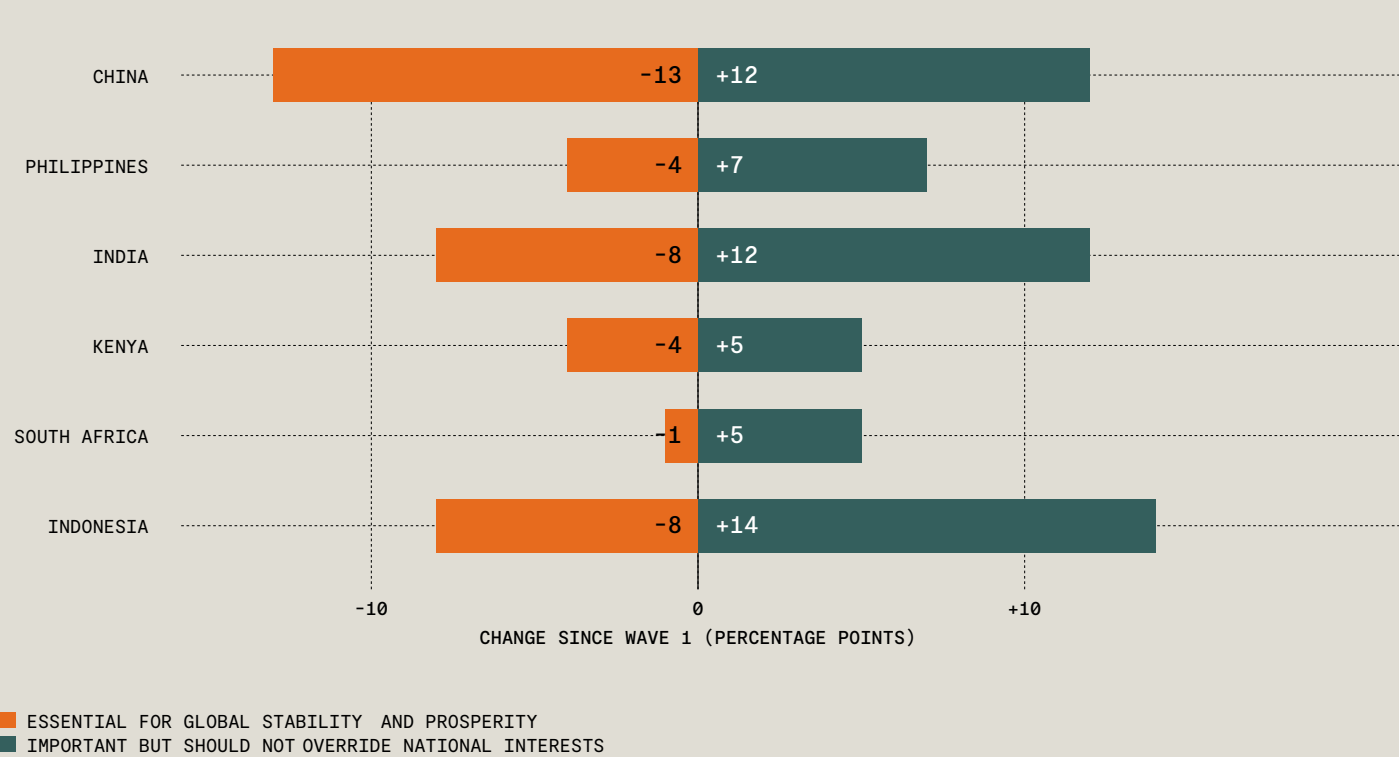
→ STRONGLY AGREE
→ SOMEWHAT AGREE
→ NEITHER AGREE NOR DISAGREE
→ SOMEWHAT DISAGREE
→ STRONGLY DISAGREE

○ WAVE 1 (2025)
● WAVE 2 (2026)
■ SIGNIFICANT RISE
■ MODEST RISE
■ DECLINE
■ MEDIANS

In six of the countries where headline support declined, the change appears to reflect a more qualified view of cooperation rather than outright rejection. In a separate question, in China, the Philippines, India, Kenya, South Africa and Indonesia, fewer people described cooperation as “essential for global stability and prosperity,” while more said it was “important, but should not override national interests”.

CHANGE IN POSITIVE VIEWS ON INTERNATIONAL COOPERATION WHERE HEADLINE SUPPORT FELL, WAVE 1 (AUG-SEP 2025) TO WAVE 2 (JUL-AUG 2026).

% SELECTED, WAVE 2 - WAVE 1



“

Which of the following best describes your general attitude toward international cooperation?

- ESSENTIAL FOR GLOBAL STABILITY AND PROSPERITY
- IMPORTANT BUT SHOULD NOT OVERRIDE NATIONAL INTERESTS
- USEFUL IN SOME CASES, BUT OFTEN INEFFECTIVE
- GENERALLY A WASTE OF TIME AND RESOURCES
- DON'T KNOW



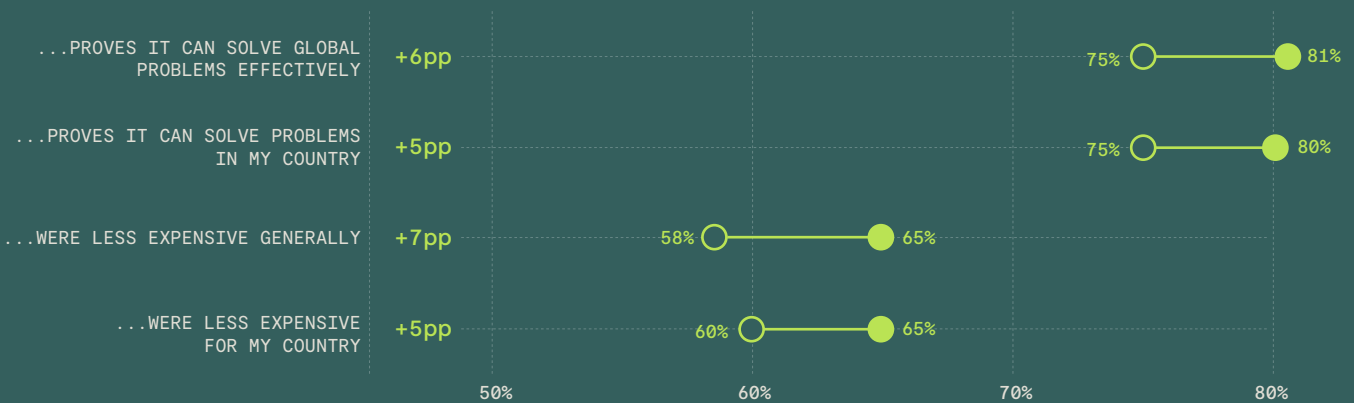
BREAKOUT BOX: SUPPORT WOULD RISE FURTHER IF COOPERATION PROVED IT WORKS

We asked people what would make them more supportive of cooperation. Effectiveness matters more than cost. Around 8 in 10 (81%) would support cooperation more if it proved it could solve

global problems, up six points since 2025; 80% say the same if it proved it could solve problems in their own country, up five points. Cost matters too, but less: 65% would become more supportive if cooperation were less expensive overall, and the same share if it cost their own country less.

GLOBALLY, WHAT WOULD INCREASE SUPPORT FOR COOPERATION, WAVE 1 (AUG-SEP 2025) TO WAVE 2 (JUL-AUG 2026)

% STRONGLY AGREE + SOMEWHAT AGREE



“

To what extent do you agree or disagree with the following statements?

“I’d support international cooperation if it...”

- STRONGLY AGREE
- SOMEWHAT AGREE
- NEITHER AGREE NOR DISAGREE
- SOMEWHAT DISAGREE
- STRONGLY DISAGREE

○ WAVE 1 (2025)
● WAVE 2 (2026)



2

SECURITY IS THE WORLD'S SHARED PRIORITY, BUT OTHER PRIORITIES DIFFER



SEEKING SECURITY AND OPPORTUNITY IN A STORMY WORLD: A 34-COUNTRY SURVEY



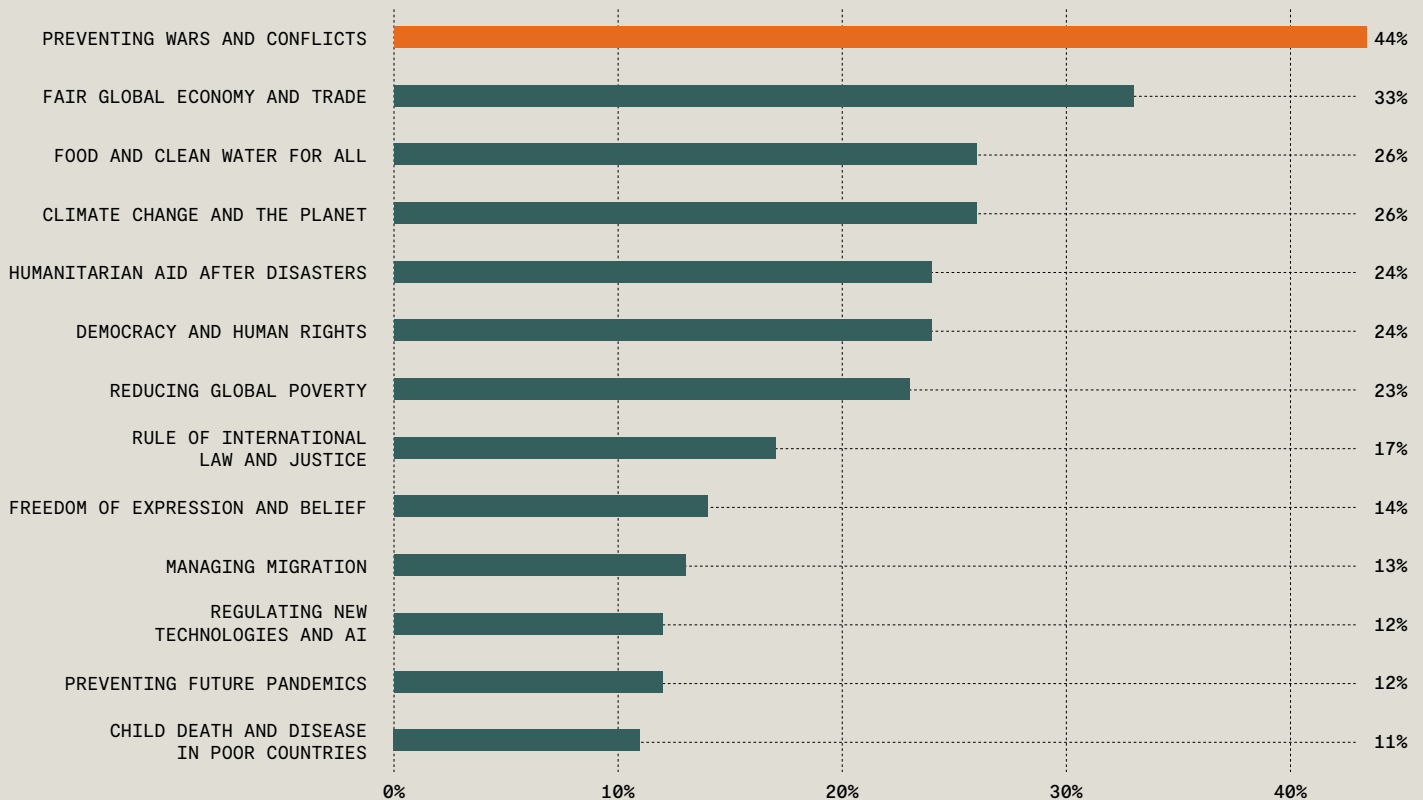
2.1 PREVENTING WARS IS THE WORLD'S TOP PRIORITY

Security is the clearest shared priority for international cooperation. Preventing wars and conflicts was selected by 44% of those surveyed as one of the three most important issues facing the world, 11 points ahead of the next-ranked issue. It ranks first in 21 of the 34 countries surveyed, in the top two in 33, and no lower than third anywhere. In six countries, more than half the public names preventing wars and conflicts as a top-three priority, led by Japan at 62%. Even in the lowest-ranked countries, it remains a significant concern. It is lowest in India, where 29% still name it a top-three priority.



Globally, the most important issues for countries to work together on

% IN TOP 3 IMPORTANCE



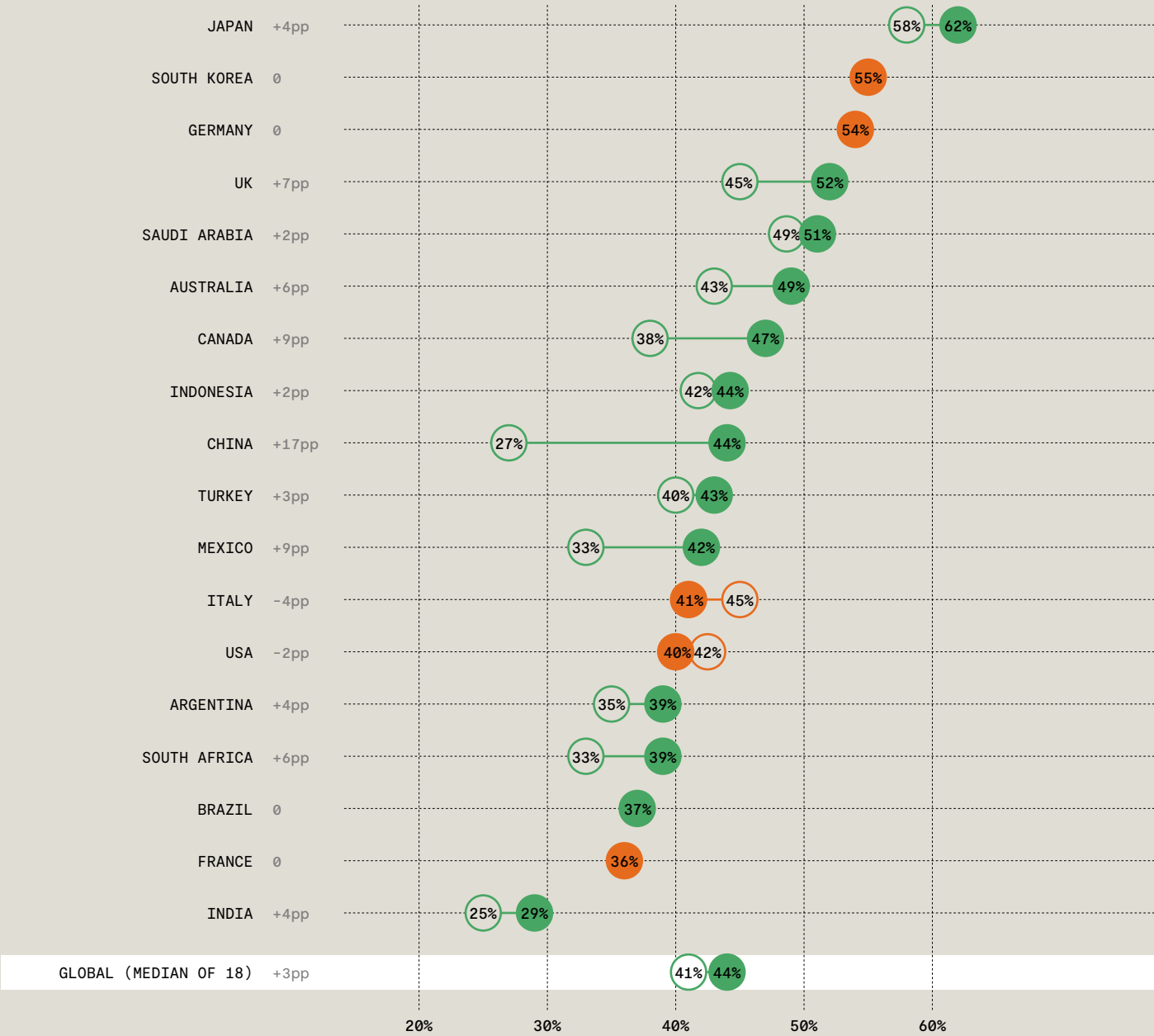
“

From the list above, please choose the three issues you think are most important for countries to work together on.

Among 18 countries also surveyed in November 2025, preventing wars and conflicts rose as a priority in 13, with the median increasing three points from 41% to 44%. The largest increase was in China, up 17 points from 27% to 44%; every developing economy in the comparison also recorded an increase.

PREVENTING WARS AND CONFLICTS IN THE TOP THREE IMPORTANT ISSUES, G20 (OCT-NOV 2025) TO WAVE 2 (JUL-AUG 2026), 18 COUNTRIES

% PREVENTING WARS AND CONFLICTS IN TOP 3 IMPORTANCE



“ Preventing wars and conflicts as one of the three most important issues facing the world today.

○ G20 POLL (OCT-NOV 2025) ● WAVE 2 (2026)
● ROSE ● FELL

2.2 BEYOND SECURITY, SOME PRIORITIES DIFFER

Security is the top concern in both groups, but it is not equally dominant. In wealthier economies preventing wars and conflicts is selected by 50%, 22 points above the next issue. In developing economies it is selected by 41%, and a fair global economy and good jobs sits level with it, at 42%.

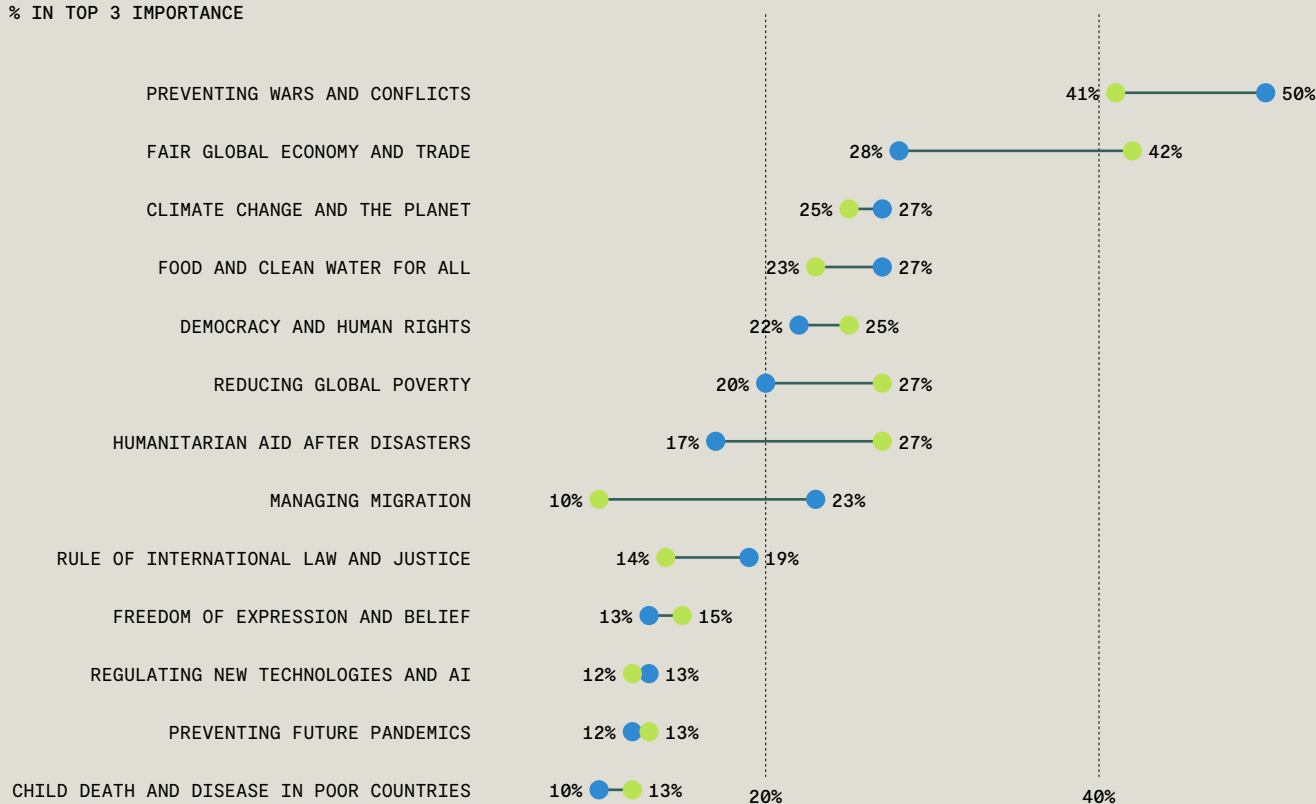
Three issues register at broadly similar levels in both wealthier and developing economies: climate change (27% and 25%, respectively), food and clean water (27% and 23%), and democracy and human rights (22% and 25%).

The two groups diverge from this point. Those surveyed in developing economies prioritize cooperation on humanitarian aid after disasters (27% as compared to 17%) and on efforts to reduce poverty (27% as compared to 20%). Those surveyed in wealthier economies place more weight on managing migration.

Migration is the issue on which the two groups are furthest apart. Almost a quarter of people in wealthier economies name it one of their three most important issues, where it ranks fifth of the 13. In developing economies, only 10% of those surveyed name migration as one of their three most important issues, and it is their lowest priority of 13.

THE MOST IMPORTANT ISSUES FOR COUNTRIES TO WORK TOGETHER ON, BY WEALTHIER AND DEVELOPING ECONOMIES

% IN TOP 3 IMPORTANCE



“

From the list above, please choose the three issues you think are most important for countries to work together on.

● WEALTHIER ECONOMIES
● DEVELOPING ECONOMIES

2.3 PEOPLE AGREE ON WHO SHOULD ACT ON MANY GLOBAL CHALLENGES

We also asked who people think is most responsible for solving each issue. Wealthier and developing economies select the same leading actor on eight of the 13 issues tested.

- **Groups of countries working together** lead on preventing wars, climate change, international law and regulating new technologies.
- **International organizations** lead on preventing pandemics and reducing child deaths and disease in poorer countries.
- **National governments** lead on managing migration and protecting freedom of expression.

On the issue people rank first—preventing wars and conflicts—collective action is also the clear preference. Groups of countries working together are the leading choice in both wealthier economies (45%) and developing economies (38%), while only about 1 in 5 names their own national government. Of the 13 issues tested, preventing wars receives the highest level of support for countries acting together. Where the two groups differ, the divide is generally over which form of collective action should lead. Across all 13 issues, those surveyed in developing economies are more likely than wealthier ones to name international organizations, while those surveyed in wealthier economies are more likely to choose groups of countries working together.

That distinction is clearest on humanitarian and development issues. In developing economies, international organizations are the leading choice for humanitarian aid, reducing poverty, food and clean water, and democracy and human rights. In wealthier economies, responsibility is more often split between international organizations and groups of countries.

A fair global economy is the exception. It is the one issue where national governments do as well as collective action. In developing economies, 30% name their own government and 28% name groups of countries working together. In wealthier economies the two are close as well, at 29% and 34%. International organizations trail in both, on 23% and 15%. On the economy, people see a role

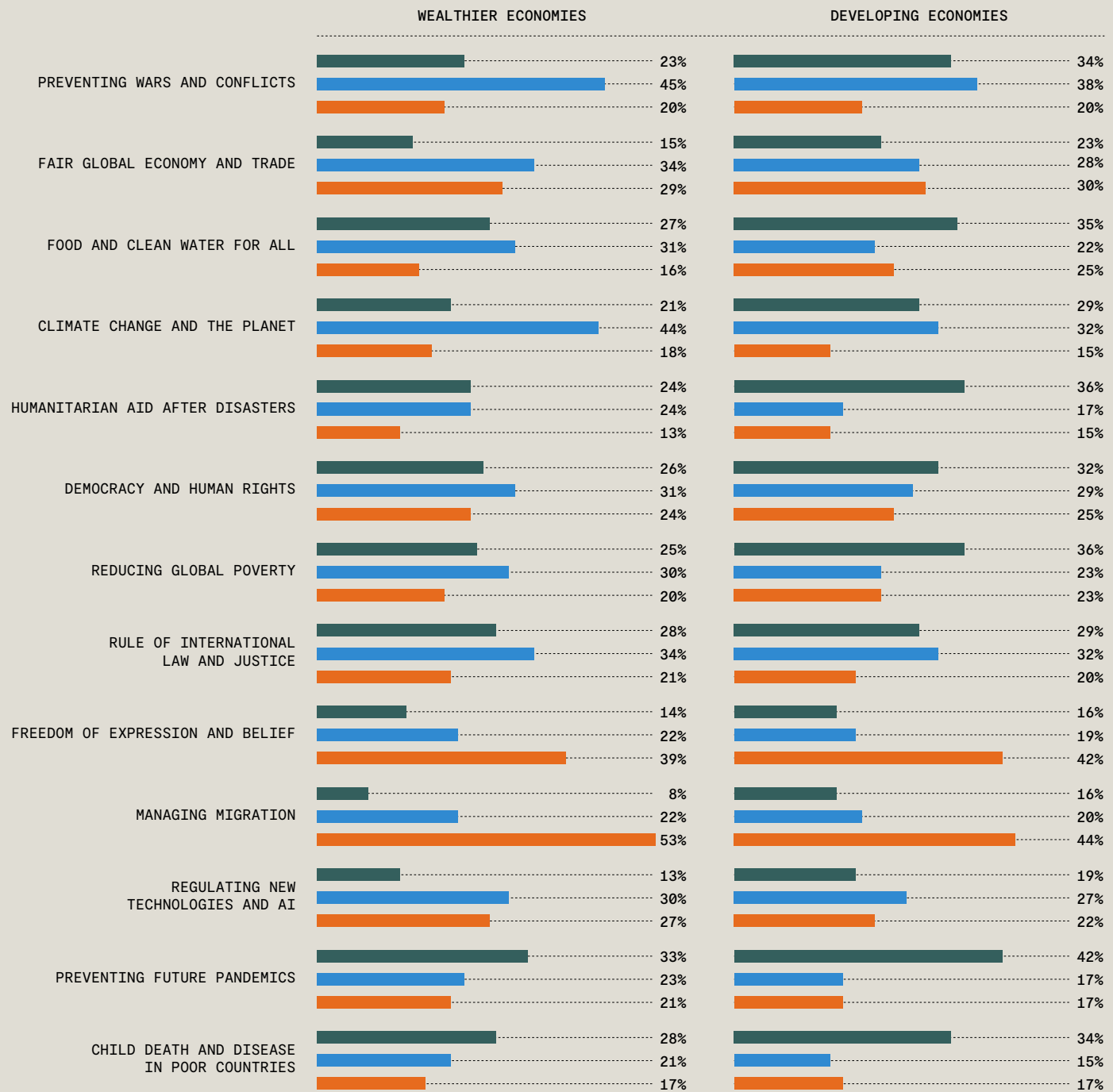
for governments at home as much as for countries acting together abroad.

Climate change shows the same pattern. Both groups name groups of countries working together as the leading choice, but they back it by very different margins: 44% in wealthier economies against 32% in developing ones, the widest gap of any of the 13 issues. In developing economies, international organizations are a close second on 29%.



WHO IS MOST RESPONSIBLE FOR SOLVING EACH GLOBAL ISSUE, BY WEALTHIER AND DEVELOPING ECONOMIES

% MOST RESPONSIBLE



“

Who do you think is most responsible for solving each of the following global issues?

- YOUR NATIONAL GOVERNMENT
- COUNTRIES WORKING TOGETHER IN GROUPS OR ALLIANCES
- INTERNATIONAL ORGANIZATIONS
- INTERNATIONAL NGOS
- BUSINESSES AND INNOVATORS
- CHARITIES
- LOCAL COMMUNITIES AND NGOS
- PHILANTHROPISTS
- DON'T KNOW

■ INTERNATIONAL ORGANIZATIONS
■ COUNTRIES WORKING TOGETHER IN GROUPS
■ YOUR NATIONAL GOVERNMENT

3

MAJORITIES IN EVERY COUNTRY WANT AID CUTS REVERSED OR AID INCREASED



SEEKING SECURITY AND OPPORTUNITY IN A STORMY WORLD: A 34-COUNTRY SURVEY



3.1 MAJORITIES AROUND THE WORLD WANT THE CUTS REVERSED

Research published in the Lancet¹ estimates that recent cuts to international aid could lead to more than 9 million deaths in the world's poorest countries by 2030, mostly from preventable disease and malnutrition.

We presented respondents with this estimate and then asked whether the cuts should be reversed or aid increased, or whether governments were right to prioritize needs at home. Question wording was adapted for donor, recipient and middle-income countries so that respondents were asked about the relevant policy choice in their own context. In each case, respondents chose among a moral rationale for reversing or increasing aid, a national-interest rationale, support for the cuts, or “don’t know.”²

After receiving that information, a majority in every one of the 34 countries surveyed says aid cuts should be reversed or aid increased, whether for moral or national-interest reasons. Support ranges from 54% in the United Kingdom to 82% in Brazil, but above 50% everywhere, including the United States (61%) and every European country surveyed.

Support for maintaining the cuts remains a minority position everywhere. Globally, about 1 in 5 calls the cuts the right decision, and in donor markets the share is no higher, at a median of 22% against 21% in recipient countries. It falls as low as 14% in Japan and 15% in Spain. Even in the United Kingdom, where the largest share says the cuts were right, only a third (33%) chose that option.



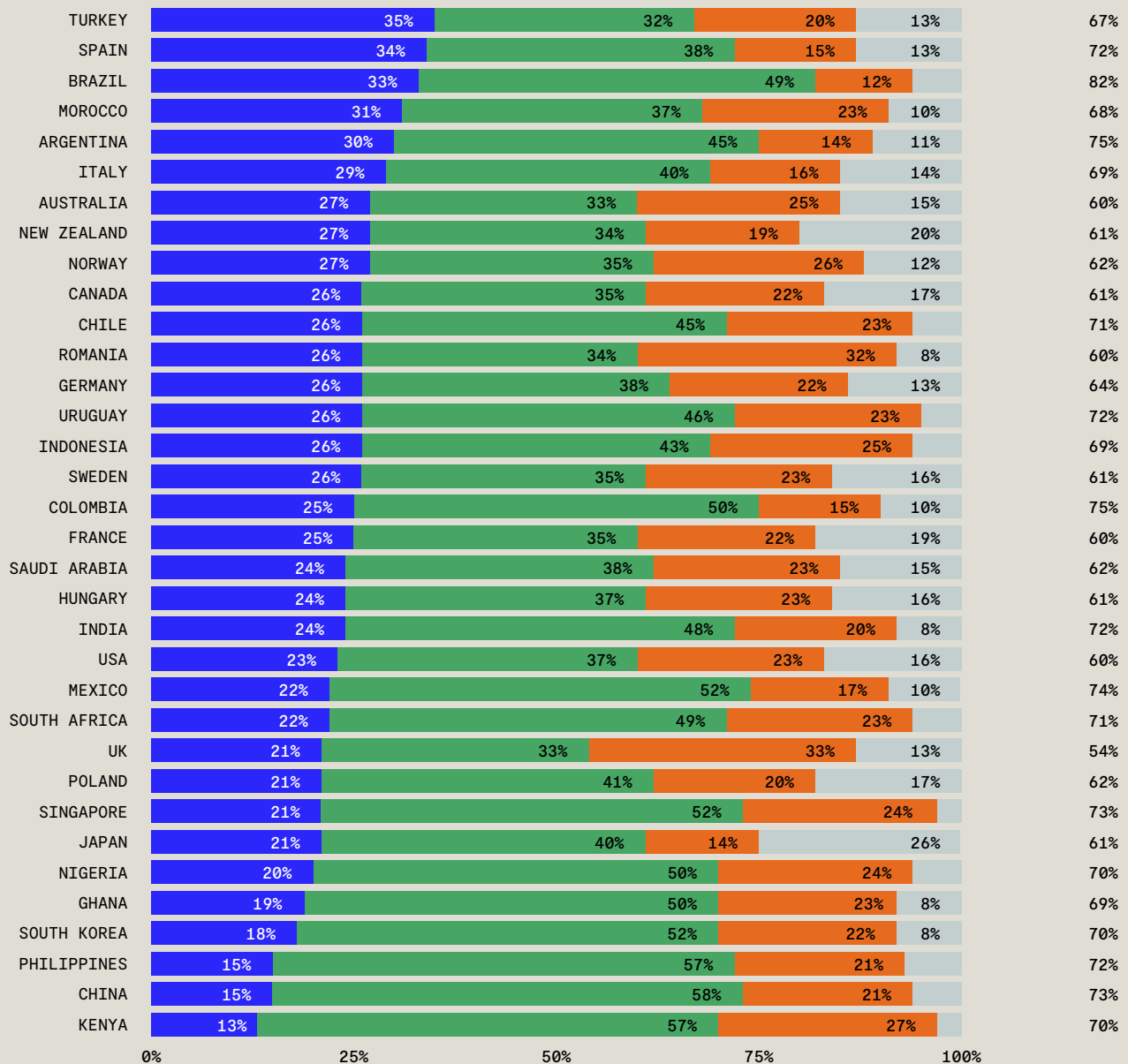
¹ [https://www.thelancet.com/journals/langlo/article/PIIS2214-109X\(26\)00008-2/fulltext](https://www.thelancet.com/journals/langlo/article/PIIS2214-109X(26)00008-2/fulltext)

² Question wording by country type. Donor countries were asked about their own country reversing the cuts; recipient countries about donor countries reversing them; middle-income countries about countries that can afford to, increasing aid. In each case the moral option cited a responsibility to help prevent these deaths, the national-interest option cited global stability, security and economic growth, and the third option said governments should prioritize their own citizens. Donor countries: Australia, Canada, France, Germany, Hungary, Italy, Japan, New Zealand, Norway, Poland, South Korea, Spain, Sweden, UK, USA. Recipient: Argentina, Brazil, China, Colombia, Ghana, India, Indonesia, Kenya, Mexico, Morocco, Nigeria, Philippines, South Africa, Turkey. Middle-income: Chile, Romania, Saudi Arabia, Singapore, Uruguay.

WHETHER AID CUTS SHOULD BE REVERSED OR AID INCREASED, BY COUNTRY

% SELECTED

% CUTS SHOULD
BE REVERSED OR
AID INCREASED



SEEKING SECURITY AND OPPORTUNITY IN A STORMY WORLD: A 34-COUNTRY SURVEY

“

Research estimates that recent cuts to international aid could lead to the deaths of over 9 million people in the world's poorest countries by 2030, mostly from preventable diseases and malnutrition. Which of the following statements comes closest to your view?

- REVERSE OR INCREASE: MORAL RESPONSIBILITY
- REVERSE OR INCREASE: LONG-TERM INTEREST
- CUTS WERE RIGHT: OWN CITIZENS FIRST
- DON'T KNOW

3.2 BOTH MORAL AND NATIONAL-INTEREST ARGUMENTS FOR REVERSING THE CUTS ARE COMPELLING

As described in Section 3.1, we assessed possible rationales supporting a reversal of the aid cuts – offering those surveyed a choice between one moral reason and one national-interest reason.

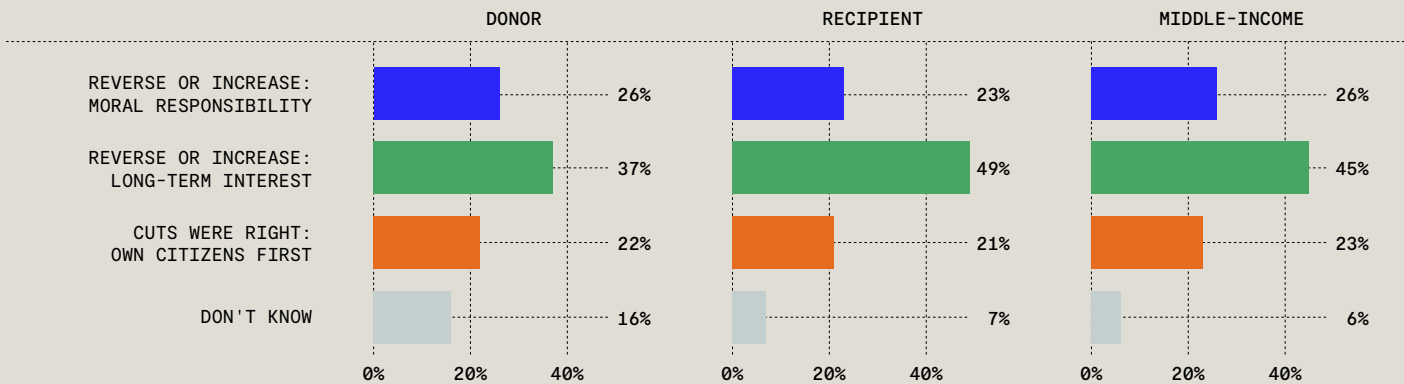
Neither reason wins a majority on its own. Among donor publics, 26% of those surveyed chose the

moral case and 37% the long-term interest case, together almost two-thirds (63%). Among recipient publics, the split is 23% and 49%; among middle-income publics, 26% and 45%.

The majorities supporting more aid therefore span two different rationales: some respondents emphasize moral responsibility, while more emphasize the long-term benefits to their own country and the wider international system. The interest argument is the larger of the two almost everywhere, and the gap is widest among the publics who would receive the aid rather than fund it. Turkey is the only country where the moral case leads (35% to 32%).

REASONS FOR REVERSING THE AID CUTS, BY DONOR, RECIPIENT AND MIDDLE-INCOME COUNTRIES

% SELECTED BY WORDING EACH MARKET RECEIVED; COMPARE RANK WITHIN A PANEL, NOT LEVELS ACROSS THEM



“ Research estimates that recent cuts to international aid could lead to the deaths of over 9 million people in the world’s poorest countries by 2030, mostly from preventable diseases and malnutrition. Which of the following statements comes closest to your view?

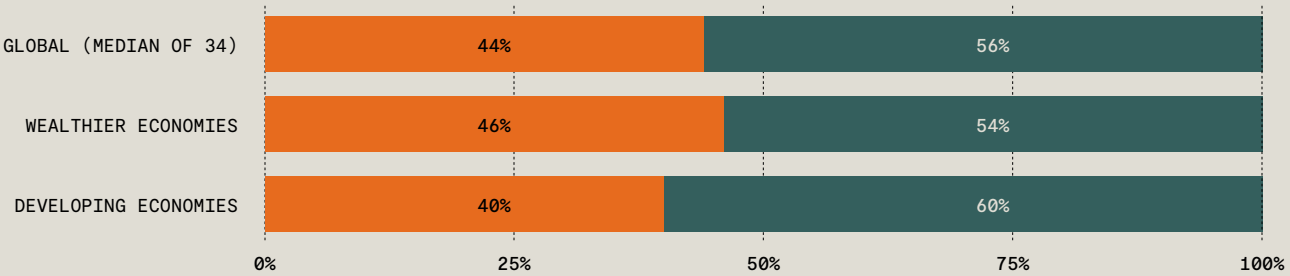


The stronger response to national-interest arguments should not be read as support for a purely transactional foreign policy. We asked respondents whether they think their country's foreign policy should always reflect national values, even if it means missing out on beneficial deals with other countries, or if their foreign policy should focus on getting the best deal for their citizens, even if it means compromising on their national values.

Globally, just over half (56%) say their country's policy should reflect its national values even if that means missing out on beneficial deals, against 44% who want the best deal for citizens. This is relatively consistent in both wealthier economies (54% saying national values against 46% saying best deal) and developing economies (60% national values against 40% best deal). Taken together, the findings suggest that people respond to practical arguments about what international engagement delivers for their own country, but do not see national interest and national values as mutually exclusive.

WHETHER FOREIGN POLICY SHOULD FOLLOW NATIONAL VALUES OR GET THE BEST DEAL FOR CITIZENS, GLOBALLY AND BY WEALTHIER AND DEVELOPING ECONOMIES

% SELECTED



“ Which of the following statements comes closest to your view? Please choose one even if you don't agree fully with either.

- SHOULD GET THE BEST DEAL FOR OUR CITIZENS, EVEN IF WE COMPROMISE ON VALUES
- SHOULD REFLECT OUR NATIONAL VALUES, EVEN IF WE MISS OUT ON BENEFICIAL DEALS



4

NEITHER THE UNITED STATES NOR CHINA COMMANDS BROAD SUPPORT TO LEAD

SEEKING SECURITY AND OPPORTUNITY IN A STORMY WORLD: A 34-COUNTRY SURVEY



4.1 THREAT PERCEPTIONS VARY SHARPLY ACROSS COUNTRIES

There is no single global power that people everywhere see as the greatest threat.³ Excluding respondents' assessments of their own country, a median of 42% identify Russia as a major threat, compared with 34% for the United States and 30% for China. Based on survey responses broken down by country, Russia is the most widely named of the three in 14 countries, the United States in 15 and China in five; that is, the country where the largest share of people call it a major threat.

Concern about Russia is highest in Europe: 78% in Poland, 73% in Norway and Sweden, 67% in the United Kingdom, and 64% in France and Germany identify it as a major threat. Perceptions are markedly different elsewhere, including India (22%), Nigeria (21%) and Saudi Arabia (10%).

Of the three, the United States ranks as the greatest threat in 15 of the 32 countries where all three could be rated. That pattern differs sharply by economic group: in 13 of 16 developing economies the United States is the most widely named, compared with two of 16 wealthier economies – Canada and Singapore. Perceptions of the United States as a major threat are highest in Indonesia (73%), Brazil (59%), Mexico (58%) and Turkey (57%).

Every country surveyed in Latin America and in the Middle East, North Africa and Turkey rates the United States as a greater threat than either Russia or China. In Canada, 52% identify the United States as a major threat, compared with 50% for Russia and 35% for China. Concern about China is concentrated in its own neighborhood: 70% in the Philippines, 67% in Japan, 62% in South Korea, 48% in India, and 47% in Australia.

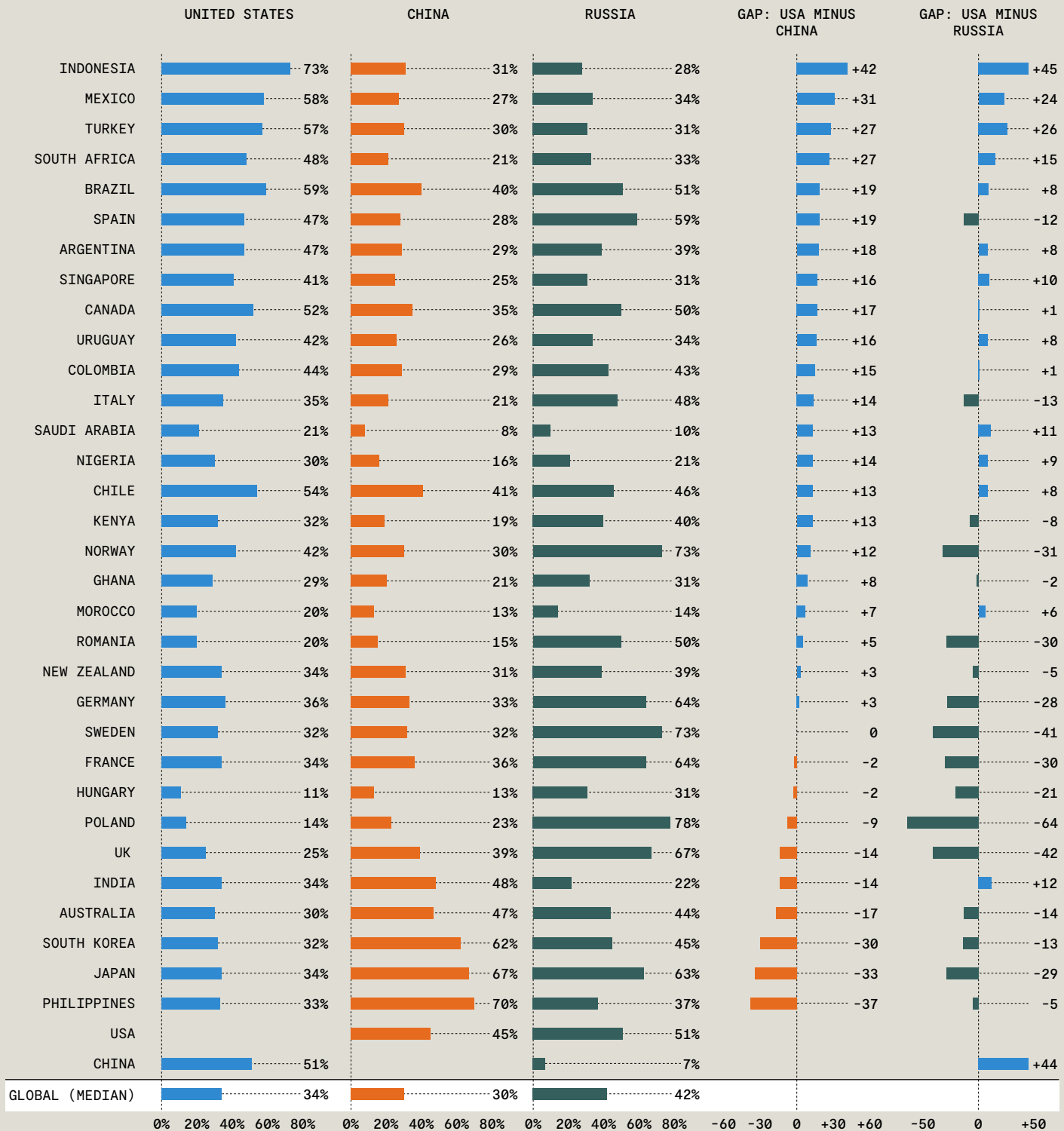
Comparing the two ratings, more people call the United States a major threat than China in 22 of the 32 countries that rate both, by a median margin of 12 points. Wealthier economies split evenly, eight to eight, while 14 of 16 developing economies rate the United States as the greater threat.

³ Respondents rated the United States, China and Russia separately, each as a major threat, a minor threat or not a threat. They were not asked to rank the three against one another, and were not asked about their own country.



THE UNITED STATES, CHINA AND RUSSIA AS MAJOR THREATS, BY COUNTRY

% A MAJOR THREAT, GAP IN PERCENTAGE POINTS



SEEKING SECURITY AND OPPORTUNITY IN A STORMY WORLD: A 34-COUNTRY SURVEY

“

Thinking about the actions of the following countries and groups of countries, how much of a threat, if any, do they pose to your country?

- A MAJOR THREAT
- A MINOR THREAT
- NOT A THREAT
- DON'T KNOW

UNITED STATES
CHINA
RUSSIA

4.2 MANY COUNTRIES AND INSTITUTIONS DRAW MORE SUPPORT TO LEAD THAN THE UNITED STATES OR CHINA

We also asked how comfortable people would be seeing each of 20 countries and organizations take a leading role in world affairs. Several other major economies and institutions draw substantially more support to lead than either superpower.

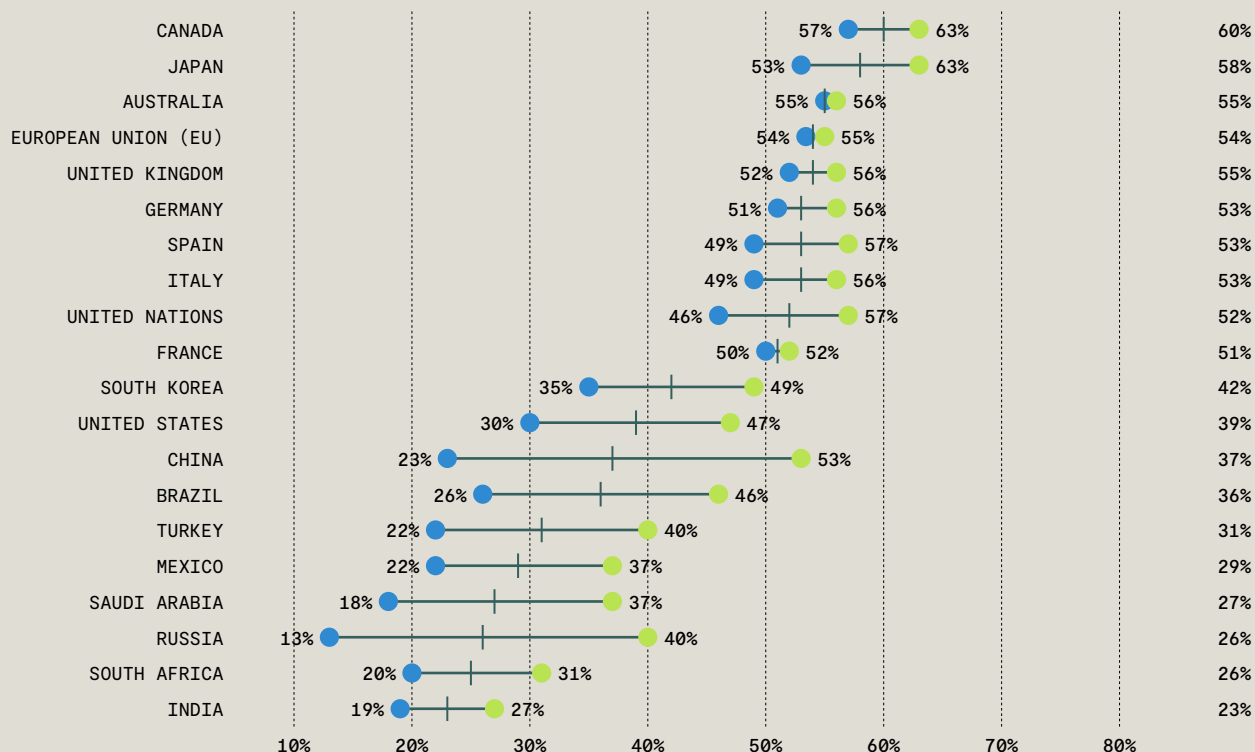
Canada receives the highest level of comfort from those surveyed globally at 60%, followed by Japan (58%) and Australia (55%). The European Union and United Kingdom sit closely behind at 55% and 54%, respectively, while the United Nations stands at 52%. By comparison, just 39% are comfortable with the

United States taking a leading role and 37% with China. Opinion on both the United States and China is closely divided: 39% are comfortable with U.S. leadership and 40% uncomfortable, while China stands at 37% comfortable and 36% uncomfortable. Russia is viewed more negatively, with 26% comfortable and 50% uncomfortable.

Comfort with Chinese and Russian leadership is where the two groups differ most. On China, 53% in developing economies are comfortable against 23% in wealthier ones, a 30-point gap. On Russia the gap is 27 points, 40% against 13%. On the United States it is 17 points, 47% against 30%. In each case people in developing economies are more comfortable. Some countries are viewed almost identically by both groups: Australia (55% in wealthier economies, 56% in developing), France (50% and 52%) and the United Kingdom (52% and 56%).

COMFORT WITH EACH COUNTRY AND ORGANIZATION PLAYING A LEADING ROLE IN WORLD AFFAIRS, BY WEALTHIER AND DEVELOPING ECONOMIES

% VERY COMFORTABLE + SOMEWHAT COMFORTABLE. AVERAGES OF COUNTRY PERCENTAGES. GREY TICK IS ALL RATES TOGETHER. NO PUBLIC RATES ITS OWN COUNTRY.



“

How comfortable or uncomfortable are you with each of the following countries, groups of countries and organizations playing a leading role in world affairs?

- VERY COMFORTABLE
- SOMEWHAT COMFORTABLE
- NEITHER COMFORTABLE NOR UNCOMFORTABLE
- SOMEWHAT UNCOMFORTABLE
- VERY UNCOMFORTABLE
- DON'T KNOW

● WEALTHIER ECONOMIES
● DEVELOPING ECONOMIES

4.3 COUNTRIES NEED NOT WAIT FOR THE UNITED STATES OR CHINA TO COOPERATE

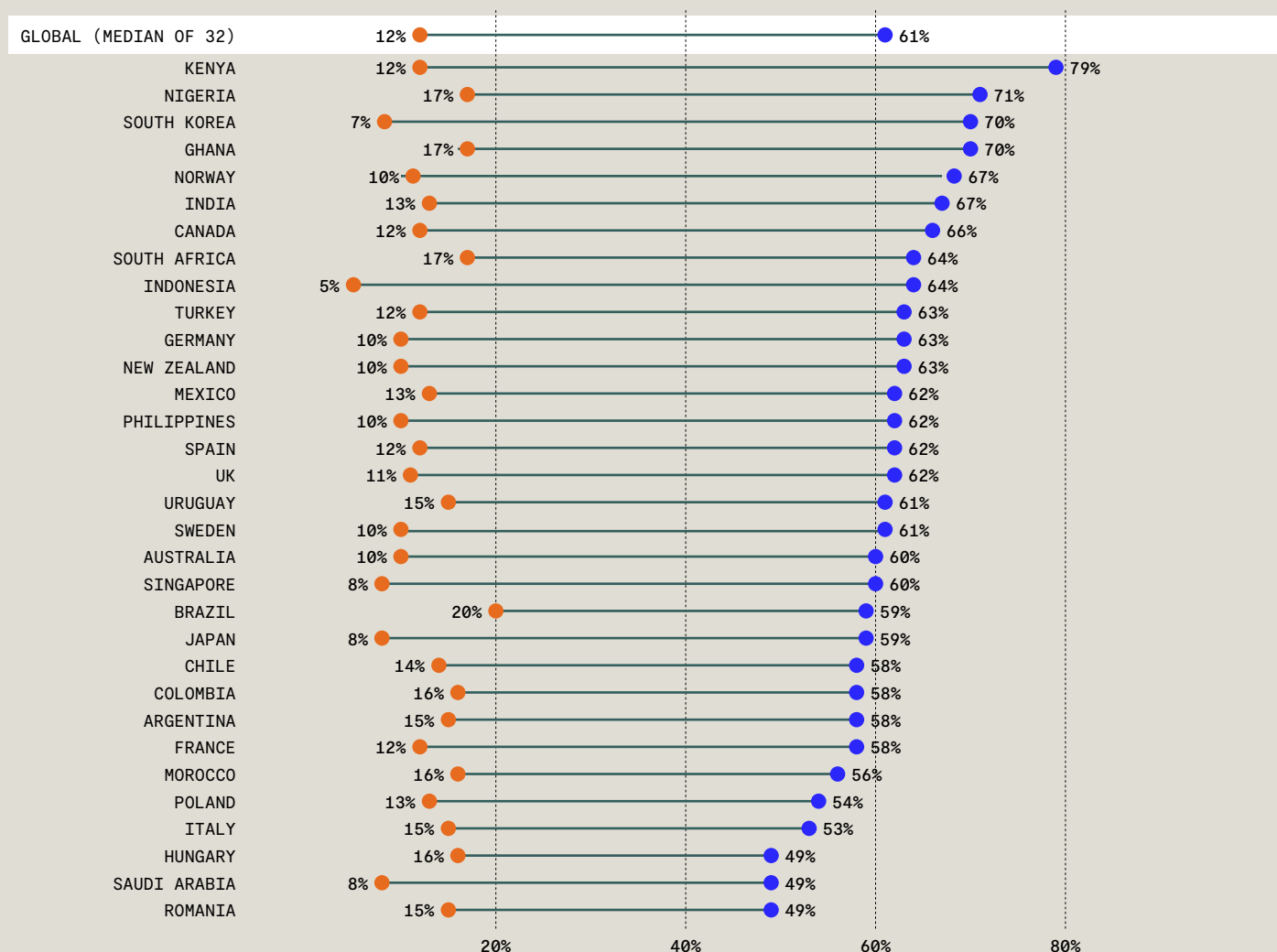
We asked whether people would support a group of countries working together to address global problems even if it excluded both the United States and China. Across the 32 countries where the

question was asked, 61% support the idea and just 12% oppose it — a margin of five to one.

Support is remarkably broad across countries, ranging from 79% in Kenya to 49% in Romania. Twenty-nine of the 32 countries register majority support; the remaining three — Hungary, Saudi Arabia and Romania — are all at 49%. The result also crosses the wealthier/developing divide, with support at 60% and 62%, respectively.

SUPPORT FOR A COALITION ACTING WITHOUT THE UNITED STATES AND CHINA, GLOBALLY AND BY COUNTRY

% STRONGLY AGREE + SOMEWHAT AGREE, % STRONGLY DISAGREE + SOMEWHAT DISAGREE.
FOR THE 32 COUNTRIES OTHER THAN THE UNITED STATES AND CHINA.



“

To what extent do you agree or disagree with the following statement: “I would support a coalition of countries coming together to address global challenges even if it does not include the US and China”

- STRONGLY AGREE
- SOMEWHAT AGREE
- NEITHER AGREE NOR DISAGREE
- SOMEWHAT DISAGREE
- STRONGLY DISAGREE

● AGREE
● DISAGREE

4.4 TRUST IN INSTITUTIONS IS RISING

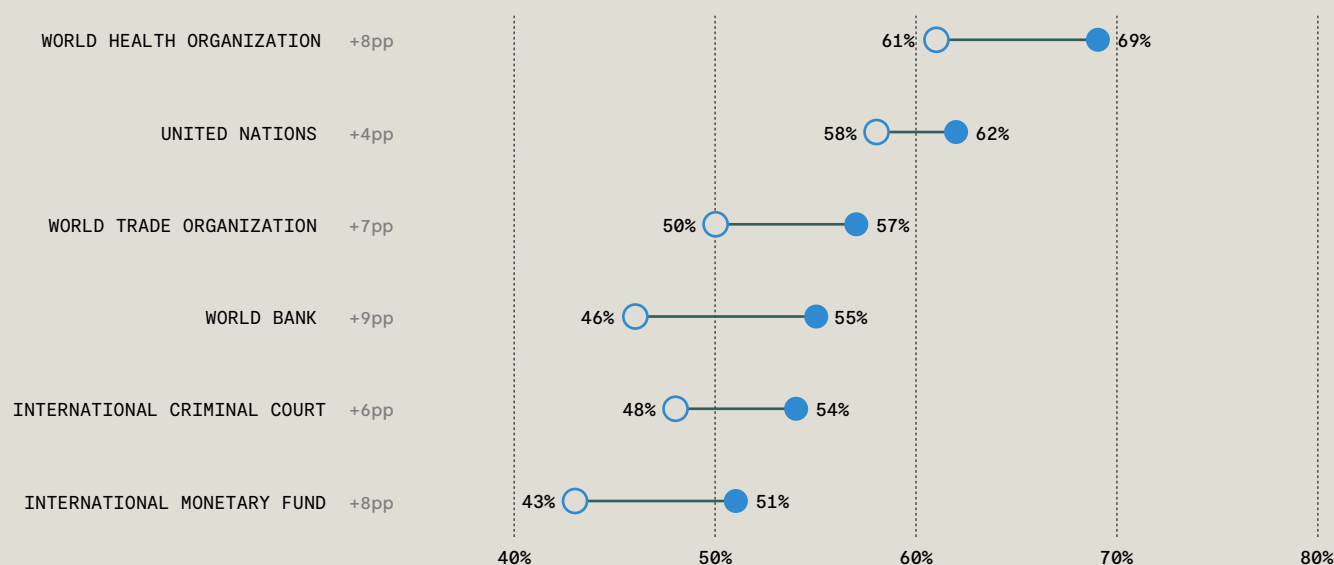
Trust in international institutions has risen over the past year. All six institutions tracked since 2025 gained ground. Each rose in most countries, from 27 of the 34 for the United Nations and the IMF, up to 31 for the World Health Organization. The biggest gains came from the three financial and trade bodies, all of which crossed from minority to majority trust: the World Bank up 9 points to 55%, the World Trade Organization up 7 to 57%, and the International Monetary Fund up 8 to 51%. The International Criminal Court rose 6 points, to 54%.

Taken together, these findings point toward continued support for collective action, but not dependence on any single global power. Trust in international institutions is rising, neither the United States nor China commands majority comfort as a global leader, and 61% support countries working together even without either of them.



GLOBALLY, TRUST IN THE 6 INTERNATIONAL INSTITUTIONS TRACKED WAVE 1 (AUG-SEP 2025) TO WAVE 2 (JUL-AUG 2026)

SHARE SELECTING A GREAT DEAL OF TRUST OR SOME TRUST



“

How much trust do you have in the following regional and international organizations?

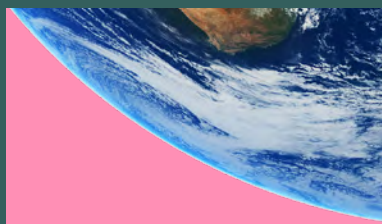
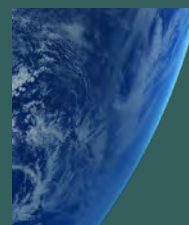
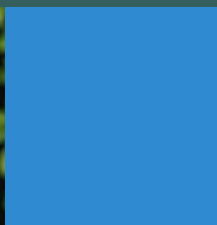
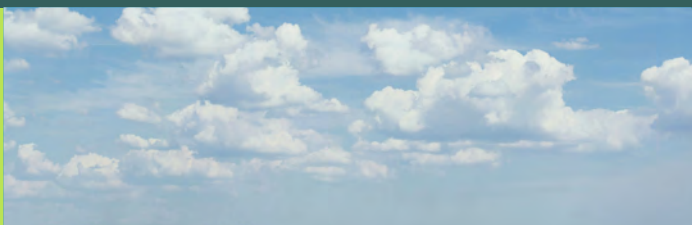
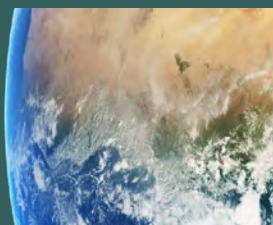
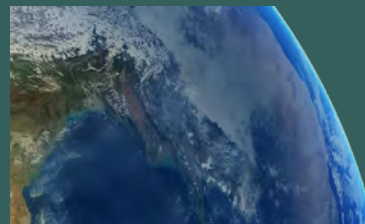
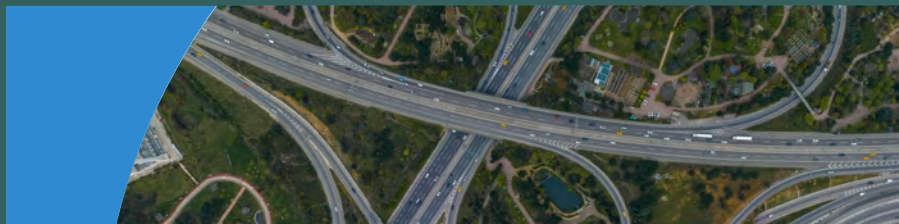
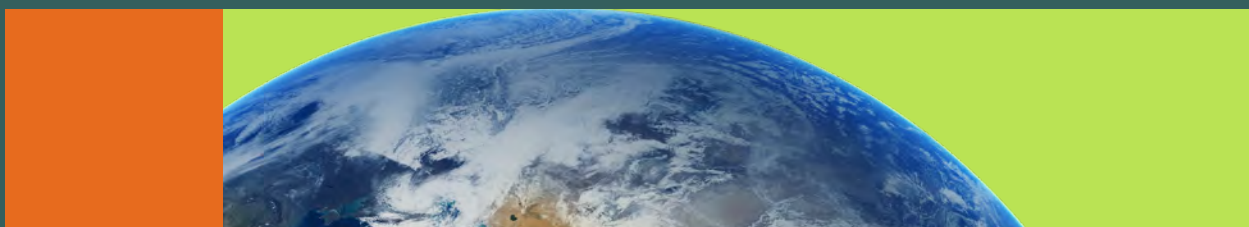
- A GREAT DEAL OF TRUST
- SOME TRUST
- NOT MUCH TRUST
- NO TRUST AT ALL
- DON'T KNOW

○ WAVE 1 (2025)
● WAVE 2 (2026)

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