

PAHAYAG 2025 THIRD QUARTER

Executive Summary

19 December 2025

PAHAYAG is a *Corporate Social Responsibility* of PUBLiCUS Asia Inc. It is **an independent and non-commissioned survey**, done every quarter.

PAHAYAG 2025 End of the Year or PEOY-2025 had a survey period from **December 7-10, 2025**. It is a nationwide purposive sampling survey comprised of 1,500 respondents, randomly drawn from the market research panel of registered Filipino voters maintained by the Singapore office of **PureSpectrum**, a US-based panel marketplace with a multinational presence.

Seven (7) modules are tracked quarterly: State of Country, National, and Household Economic Outlook; National Issues; Macro and Micro Issues; Scorecard for National Leaders and Institutions (Approval and Trust Ratings); Emotional Quotient of Incumbent Leaders; Performances of Elected Officials in 2022 and Media Consumption Habits.

This quarter features a new module: **"Insights and Perspectives by Generations"** which explores Filipino voters' sentiments and perspectives across different generational cohorts (Baby Boomers, GenX, Millennials, and GenZ) on key issues, including prevailing corruption scandals, calls for resignation, and the involvement of national leaders in illegal drug use.

On State of Country, National and Household Economic Outlook

A significantly larger proportion of Filipinos view the current state of the nation as weak and headed in the wrong direction, with both key indicators reaching their highest points since tracking began. However, this sentiment is not primarily attributable to national economic and household financial prospects, as these two indicators demonstrate a positive recovery this quarter.

The country's present state is now considered strong by 24% of the population (a decline from 27% in Q3) and weak by 49% (an increase from 45%). Concerning the nation's direction, 31% believe it is progressing favorably, a reduction from 33% in Q3. Prospectively, 37% anticipate an improvement in economic conditions for the forthcoming quarter, while 55% expect an improvement in household economic situations.

The prevailing pessimistic sentiment regarding the Philippines' current state and direction is primarily fueled by regions outside of the National Capital Region (NCR). Conversely, Southern Luzon (SL) and Visayas (VIS) exhibit the most optimism concerning the national economic outlook and household prospects for the first quarter of 2026 (Q1 '26).

On National Issues

Public support for proposed policies varies significantly. The strongest backing is observed for measures addressing accountability, rule of law, and immediate public safety, with over 90% support for measures such as the launch of Oplan Kontra-Baha (91%), the filing of tax evasion charges against high-profile contractor spouses (90%), and the mandatory public release of SALNs (90%).

A significant majority also approves of structural and economic reforms, including the Passage of an Anti-Political Dynasty Bill (83%), the removal of VAT and travel taxes (82%), and a one-year national calamity declaration (78%). Support remains high for administrative improvements and

infrastructure, such as decentralizing classroom construction (76%) and implementing a single nationwide RFID system (72%).

More contentious issues emerge in the lower half of the rankings, particularly those affecting agriculture and public works, where opinion is clearly divided: extending the rice importation ban (65%), abolishing DPWH (56%), and suspending road re-blocking projects (55%).

The most varied and contentious responses show the deepest public splits: the ICC decision rejecting the interim release of former President Rodrigo Duterte (47% support vs. 37% opposed) and the suspension of BIR field audits (46% support, with 28% no knowledge). The lowest support is drawn by the appointment of Boying Remulla as Ombudsman (29%), which also draws the highest opposition (42%).

On Macro and Micro Issues

At the national level, the state of corruption and its impact on public trust (25%) emerges as the top concern. Closely linked is the concern that tax revenues may be misused or lost to corruption (15%). High prices of food, fuel, and utilities (13%) highlight the public's sensitivity to inflation and essential costs, while corruption's impact on business confidence (12%) points to fears that governance weaknesses discourage investment, job creation, and long-term growth. Meanwhile, concern over the ₱17.56 trillion national debt (9%) signals awareness of fiscal constraints, though it ranks lower than corruption-related issues.

At the household level, reduced purchasing power due to inflation (26%) is the most immediate and personal concern, reinforcing how rising prices translate directly into daily hardship. This is followed by large income gaps and slow wage growth (17%), underscoring frustrations over inequitable growth and the inability of incomes to keep pace with living costs.

On Scorecard for National Leaders and Institutions (Approval and Trust Ratings)

President Ferdinand Marcos Jr. shows a slight downward trend, with approval slipping from 24% in Q3 to 22% in Q4, and trust declining from 17% to 15%. His overall performance is weighed down by his perceived inability to deliver justice, particularly regarding the slow investigation of anomalies in flood control projects that he himself exposed (14%), and the apparent lack of accountability for responsible officials. His image is further damaged by Senator Imee Marcos' allegation of cocaine use (11%), compounded by his refusal to undergo a drug test (10%).

Vice President Sara Duterte-Carpio maintains comparatively higher and more stable ratings than the President. Her approval dips marginally from 36% to 34%, while trust eases from 32% to 31%. VP Sara Duterte-Carpio's significant increase in net worth (21%) is seen as detrimental to her overall performance, as the public may perceive it as the result of corruption or abuse of power. Her frequent criticism of, and lack of cooperation with, the Administration—of which she is a part—also negatively affects her performance (10%).

For newly measured figures in PQ4, Senate President Vicente Sotto III registers moderate approval (24%) but low trust (15%). Similarly, House Speaker Faustino "Bojie" Dy III records very low approval (12%) and trust (8%), pointing to weak public visibility or skepticism toward the House of Representatives' leadership.

Chief Justice Alexander Gesmundo is the only figure showing a notable improvement, with approval rising from 16% to 20%, while trust remains steady at 11%.

In Emotional Quotient of Incumbent Leaders

The public perception of President Marcos (eloquent), Vice President Duterte (brave), and Chief Justice Gesmundo (upholds the law) remains relatively stable, with no major shifts in their overall imagery.

For Senate President Tito Sotto, top traits cited include upholding the law, being responsible, fair-minded/just, and showing concern for Filipinos. However, these traits are evenly distributed, meaning no single characteristic strongly defines his public image.

Meanwhile, House Speaker Bojie Dy remains largely unknown to the majority of registered voters, indicating that his visibility and public recognition are still limited.

On Performances of Elected Officials in 2022/2025

The Marcos administration saw its overall performance rating drop to 24% from 27% last quarter, reaching a new low, while disapproval rose to its highest at 51%, up from 47%.

Three opposition senators—Bam Aquino (54% net favorable), Risa Hontiveros (46%), and Kiko Pangilinan (47%)—made it into the top five most favorable senators this quarter. Joining them are two allies of the Dutertes: Bong Go (42%) and Rodante Marcoleta (38%).

As expected, the Senate, House of Representatives, and DPWH remain the least approved and trusted this quarter, amid ongoing controversies surrounding anomalous flood control projects and the ongoing deliberations of the 2026 Proposed National Budget.

The majority of government agencies (20 out of 33) remain stable this quarter, showing no significant changes. However, 11 agencies experienced notable declines, particularly those dealing with flood control, rising prices of goods, transport strikes, corruption in the LTO, agricultural sector challenges, PhilHealth funds, and the overall economic slowdown.

On Media Consumption Habits

No changes in top sources of information on political news and current events – internet search (58%), TV (58%), and Facebook/Meta (56%) are still the platform kings. Meanwhile, daily access to news is mostly through social media for 52%, while TV (39%) and streaming platforms (33%) are part of everyday life.

For the frequency of using media platforms, social media is dominated by Facebook and YouTube, with 8 out of 10 accessing these platforms for more than an hour daily.

Given that 8 of 10 Filipinos dedicate over an hour to Facebook daily, FB Messenger has emerged as their primary messaging platform. While SMS/Text Messaging usage remains highly pervasive, with 9 in ten Filipinos still utilizing it, the time spent on it is less compared to FB Messenger.

General mistrust is also observed across all news outlets this quarter, regardless of platform or channel, indicating that the audience either feels their sentiments are not reflected in the news or is responding negatively to the delivery of predominantly bad news about the country.

Among the top trusted news outlets, GMA7 leads the list with 40% trust. ABS-CBN (Online) follows closely with 35%, showing strong digital engagement despite the network's broadcast challenges.

Among print media, the Philippine Daily Inquirer (31%), Philippine Star (28%), and Manila Bulletin (27%) top the list. In radio, DZMM Radyo Patrol 630 registers 26%, on par with TV5 Interaksyon,

while NewsWatch Plus (formerly CNN Philippines) is just behind at 25. DZBB and DZRH tie at 22, representing the lower end of the top 10.

Insights & Perspectives by Generations (IPG)

On Corruption

Amid recent exposés of government fund misappropriation and corruption, 9 in 10 Filipino registered voters agree that corruption is widespread in the national government

Among officials cited for possible involvement, former Representative Elizaldy Co is considered guilty by 3 in 4 voters, followed by former House Speaker Martin Romualdez (2 in 3). President Marcos and his son, Representative Sandro Marcos, are seen as involved or benefiting by half of the respondents, particularly in Mindanao. Four in 10 hold President Marcos and former Speaker Romualdez most responsible, with stronger sentiment among Gen Z and weaker in NCR.

Of those who view the President as responsible, about half support a criminal case and possible imprisonment if guilty, while the rest are split between voluntary resignation or facing impeachment. Three in 4 would completely lose trust if he remains in office. Similarly, a criminal case or sanctions are expected for former Speaker Martin Romualdez, with 8 in 10 predicting a complete loss of trust should he stay in Congress. Overall, voters believe that officials deemed responsible must face consequences or risk total loss of public trust.

Most voters (3 in 4) accept closed-door sessions in some Independent Commission for Infrastructure (ICI) hearings, but emphasize the need for transparency through livestreams or balanced procedures. Two in 3 are aware of former Public Works Secretary Babes Singson's resignation from ICI, with 56% clearly remembering the news. Among these, about 2 in 3 agree with his decision and rationale for resignation.

On Calls for Resignation

The Iglesia Ni Cristo (INC) rally is the most widely known, with 7 in 10 Filipino registered voters having heard about it, followed by the One Trillion March rally at 5 in 10, both particularly recognized in NCR and among Baby Boomers. INC is also perceived as the most efficient in mobilizing people and expressing public sentiment against corruption, outperforming the Catholic Church and Liberal/Opposition groups. The recent rallies are defined by large attendance and clear messaging on transparency, justice, and integrity.

The top three proposals supported by voters are: (1) swift and active justice in the flood control scandal (54%), (2) filing cases against 15 House members and officials involved in the P545B flood control scandal (53%), and (3) filing cases against 421 alleged ghost projects (51%). Support for these proposals is strongest in NCR and among Baby Boomers.

Amid multiple allegations against President Marcos, 4 in 10 voters support his resignation, particularly in Mindanao, where belief in corruption, anomalous budget insertions in 2025, and alleged illegal drug use are highest. Gen Z voters also tend to believe Rep. Zaldy Co's allegations and support calls for the President's resignation.

Support for President Marcos is concentrated in the NCR, South Luzon, and among Baby Boomers, emphasizing that the Armed Forces of the Philippines (AFP) should support the President while remaining politically neutral.

The country is divided on succession if President Marcos resigns: Luzon regions favor an alternative transition process, while VISMIN supports constitutional succession.

Unlike most Mindanao voters who clearly want Vice President Duterte as President, Baby Boomers and Gen Zs prefer a different method of succession, implying they are anti-Administration (in general, not only against the President).

On Calls for Resignation

About one-third of Filipino registered voters associate slurred speech, unusual eye movements, stiff jaw, or changes in facial appearance with possible substance abuse, an existing medical condition, or simply stress and overwork. Use of illegal drugs is widely seen as highly detrimental to an official's ability to lead and make sound decisions. If allegations of PBBM's drug use are proven true, 6 in 10 of his constituents would completely lose trust in him, while roughly one-third would continue to support him.

For the survey methodology and the main public deck of the **Pahayag 2025 End of the Year Survey (PEOY-2025)**, comprising 87 slides for brevity and conciseness, please visit www.publicusasia.com/pahayag to download.

For access to the complete results (with 120 slides), including detailed tables and demographic breakdowns, please contact:

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